ePACT2 Overview Course

Participants Guide



NHS Business Services Authority

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ePACT2 Essentials

What is ePACT2?

ePACT2 is an online application which gives authorised users access to prescription data. You can access online analyses of prescribing data held by NHS Prescription Services. Data is available six weeks after the dispensing month.

ePACT2 has high level functionality including the ability to:

- interrogate prescription data in ways not been possible before
- easily create data visualisation using interactive reports and dashboards
- look at high level data summaries down to individual prescription item detail
- export the data from reports and dashboards
- access to whole country data
- view patterns of prescribing at patient level

ePACT2 provides easy-to-use analysis, reports and dashboards. You don't need an N3 connection as you can access the system with an internet connection.

Our website contains useful information about understanding ePACT2 data, dashboard specifications and getting more training support and it can be found at <u>https://www.nhsbsa.nhs.uk/epact2</u>

Accessing ePACT2

Many users save a link to the ePACT2 portal in their internet browser but you can also always find an up-to-date link on our website: <u>https://www.nhsbsa.nhs.uk/epact2</u>



ePACT2 Landing Page

When you sign into ePACT2 you will be taken to the Landing page, the landing page enables you to quickly select the part of the system you would like to view:

| ePACT2 | Home Catalog Favorites 🔻 | Dashboards ▼ New ▼ Open ▼ Signed In As ePact2 CCG Prescriber Level ePact2 CCG Prescriber Level ▼ |
|---|--------------------------|--|
| News | Dashboards | Prescribing Reports 6 Quick Search 6 to ePACT2 |
| NEWS FEED 20 September 2018 ► Prescribing Reports We have today released the Prescribing Mc Document. 06 July 2018 ► Francial Reports We have today released the Remuneration ePACT2. | | EPACT2 LATEST DATA 3 Latest prescription data Aug-18 Latest remuneration report Aug-18 |

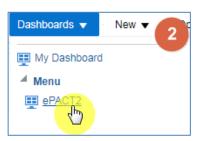
| 1) News feed | The News feed will display the latest news for ePACT2, it will keep you up to date when new reports are released. |
|------------------------|---|
| 2) My Folders | You can navigate to your saved content from the 'My Folders section. |
| 3) ePACT2 Latest Data | This section informs you the latest month's data that is in the system, and the latest month's remuneration report. |
| 4) Dashboards | You can select this tab to view all available dashboards. |
| 5) Prescribing Reports | You can select this tab to view all available prescribing reports. |
| 6) Quick Search | You can select this tab to run a 'Quick Search' analysis. |

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

1. From the 'ePACT2' toolbar select 'Dashboards

| Home Catalog Favorites ▼ | Dashboards New V Open |
|--------------------------|-----------------------|
|--------------------------|-----------------------|

2. From the available list select 'ePACT2'



Understanding the Home Page

If you select the 'Home' icon from the 'ePACT2' toolbar you will be taken to the system homepage:

| Home | Home Catalog Favorites V Dashboards V New V Open V Signed In As ePact2 CCG Prescriber Level ePact2 CCG Prescriber Leve | | | | |
|------|--|--|--|--|--|
| | Recent | | | | |
| | Dashboards ePACT2 - 01News ePACT2 - 02Dashboards ePACT2 - 04PrescribingRe ✓ Open More ▼ ✓ Open More ▼ ✓ | | | | |
| | Image: My Dashboard - page 1 Image: EPS Utilisation - CCGs (GP Image: EPS Utilisation - CCGs (GP Image: Open Edit More ▼ Image: Open More ▼ Image: Open More ▼ More Dashboards √ Image: Open More ▼ Image: Open More ▼ | | | | |
| | Most Popular | | | | |
| | No recommendations are currently available. Most Popular items will be displayed here when results become available. | | | | |

The system home page will display the most recently accessed dashboards.

Using the Catalog

To navigate to the 'Catalog' select the 'Catalog' icon from the toolbar:

You will then navigate to the ePACT2 Catalogue

| Catalog | | Home Catalog Favorites 🔻 Dashboards 👻 New 👻 Open 🕇 |
|---------------|-------|--|
| lia 🔻 🧐 🛅 🛅 🔍 | . 🖮 🔻 | 🗞 🖉 🖨 🔻 🗁 🗶 🏥 🛱 Location /My Folders |
| Folders | E: in | Type All Sort Name A-Z Show More Details 2 |
| My Folders | | Wy Analysis Last Modified 10/31/2018 8:08:38 AM Owner ePact2 CCG Prescrit Open Edit More ▼ |

| 1. Folders | Displays the available folders to open content from |
|--------------------|---|
| 2. Folder contents | When you click on a folder to highlight, the middle pane will show the content of that folder |

There are two folders within the 'Catalog'

My Folders

The My Folder will contain all saved content for your account, this will include analysis, saved filters, saved groups and saved columns. The 'My Folder' works in the same way as the file structures on your PC you can create, delete and amend sub folders.

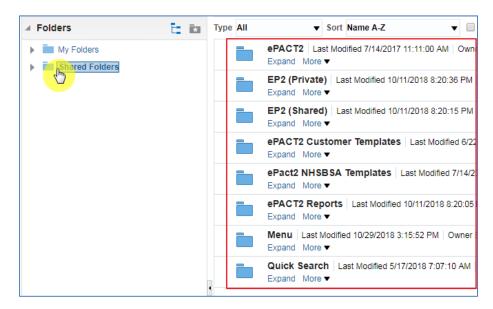
Shared Folders

The Shared Folders contains content created by the NHSBSA such as pre-set filters and prompt these can be found in the following folders:

- ePACT2
- Menu

View folder content

To view the content of a folder, click on the folder to highlight, in the middle pane you will then see the content of that folder, such as analysis, filters and sub folders.



You can expand folders to view the content in two ways:

3. Select the drop down arrow next to the folder title

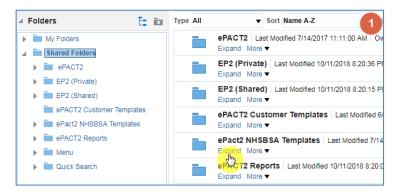


4. This will then display the sub folders available within that folder



You can also open folders within the folder content pane:

1. Select 'Expand' beneath the folder you want to open



2. You will then be displayed with the folder contents:

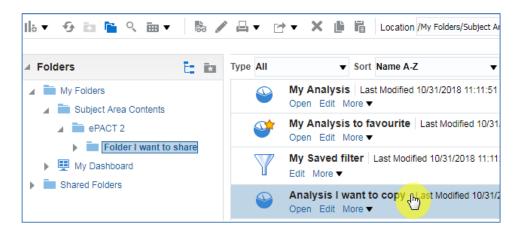
| 🔺 Folders 🔚 🖬 | Type All v Sort Name A-Z |
|---------------------------|---|
| My Folders | Useful Reports Last Modified 12/15/2017 4:16:01 |
| 🔺 🚞 Shared Folders | Expand More |
| ▶ 💼 ePACT2 | |
| EP2 (Private) | |
| EP2 (Shared) | |
| ePACT2 Customer Templates | |
| ePact2 NHSBSA Templates | |

How to copy and paste content

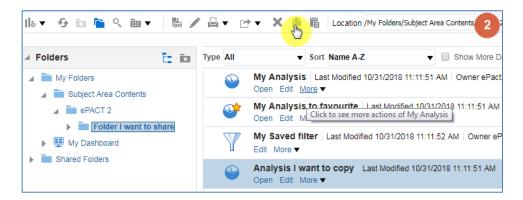
It is possible to copy content from any folder in the 'Catalog' and paste it within your own folder to save/ edit.

If you would like to copy any content, first locate the element you would like to copy, in this example I am copying an analysis, you will use the same function to copy any content, such as filter, save columns etc.

1. Highlight the content you want to copy by clicking on the content box:

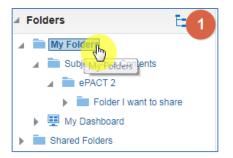


2. Select the copy icon from the 'Catalog' toolbar



The analysis will now be copied, now locate the folder you want to paste the content into, in this example I am selecting 'My Folders'

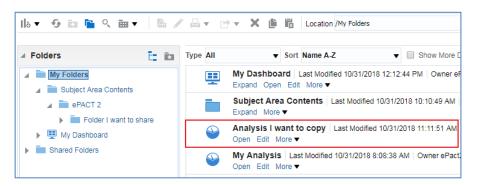
1. Select the folder you want to paste the copied content into



2. Select the paste icon from the 'Catalog' toolbar

| llò 🕶 🖆 🖆 🥆 🖮 🔻 | 6. | | • | |
|---|-----|------|-----|---|
| ✓ Folders | | Туре | All | ▼ Sort Name A-Z ▼ Show More De |
| My Folders Subject Area Contents ePACT 2 | | | - | My Dashboard Last Modified 10/31/2018 12:12:44 PM Owner eP Expand Open Edit More ▼ |
| | | | | Subject Area Contents Last Modified 10/31/2018 10:10:49 AM Expand More ▼ |
| Folder I want to sh My Dashboard | are | | | My Analysis Last Modified 10/31/2018 8:08:38 AM Owner ePact2 Open Edit More ▼ |

The pasted content will now appear in the folder you have selected:



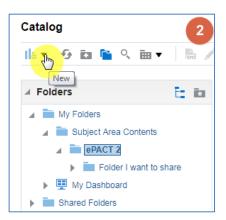
Create a new folder

To create a new folder first select the folder you want the folder to be created in, in this example I am choosing to create a new folder under the 'ePACT2' folder in 'My Folders:

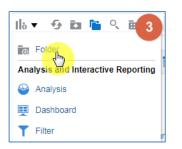
1. Select the location you want the new folder created in, click to highlight



2. Using the 'Catalog' toolbar select the 'New' dropdown:



3. Select 'Folder'



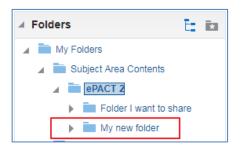
4. Give your new folder a name

| New Folder | 0 > |
|------------|-----------|
| Name | |
| | OK Cancel |

5. Once named select 'OK'

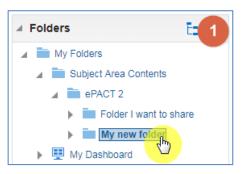
| New F | older | 0 |
|-------|---------------|--------|
| Name | My new folder | |
| | | Cancel |

Your new folder will now be created:

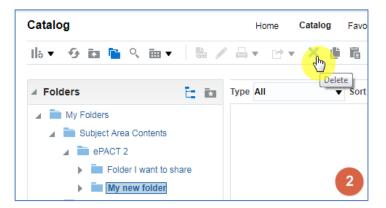


Delete folders/ folder content

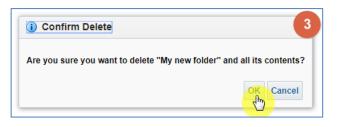
1. To delete a folder first select the folder you want to delete:



2. Using the 'Catalog' toolbar select 'Delete':



3. You will be prompted with the 'Confirm Delete' box, select 'OK' to action deletion:

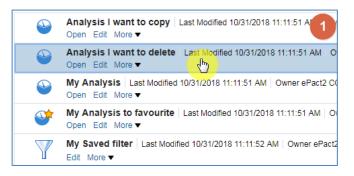




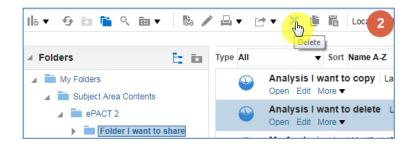
Be aware, when you delete a folder all of the contents will be deleted. It is not possible to retrieve deleted content!

To delete content of the folder:

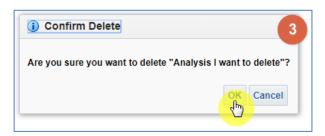
1. Select what you would like to delete:



2. Using the 'Catalog' toolbar select 'Delete'



3. Select OK to action deletion:





Be aware, when you delete content of a folder it is not possible to retrieve deleted content!

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 pre-set 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'

| avorites 👻 🔹 Dashboards 🔹 | ▼ • New ▼ • Open ▼ • • Signed In As ePact2 CCG Prescriber Level ePact2 CCG Pr |
|---------------------------|---|
| shboards | Prescribing Reports Quick Search |
| Welcome t | o ePACT2 |
| MY FOLDERS | EPACT2 LATEST DATA |
| My Folders | Contents Latest prescription data Aug-18 |

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

| Month Aug-18 🗸 | Prescribing Organisation | C BNF - Hierarchy | Q |
|----------------|--------------------------|-------------------|------------|
| 1 | 2 | 3 | OK Reset ▼ |

| 1) Time period | Select the time periods 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 |

2. Leave the 'Month' as this will default to the most recent month in the system.

Other months can be selected by clicking on the drop down, this will display a list of available months

| Month | May 18 | | |
|----------|------------|--|--|
| | 🗆 Dec 17 | | |
| | 🗌 Jan 18 | | |
| dit - Re | EFeb 18 | | |
| | Mar 18 | | |
| | Apr 18 | | |
| | 🕑 May 18 🔍 | | |
| | Search | | |

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



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

| Choose Members | | |
|--------------------------|----------|--|
| Available | ر الس | |
| A Column Values | | |
| Prescribing Organisation | | |

5. Select the drop down in the name box and change from 'Starts' to 'Contains'

| Choose Members | | | |
|----------------|---------------------------------|--|--|
| Availa | ble Q | | |
| Name | Starts Contains | | |
| | Ends is Like (pattern match) | | |
| | Search @ Match Case | | |

6. Type your organisation name into the 'Name' box

| Choose Members | | | | |
|----------------|-------------------------------|---|--|--|
| Available | | ৎ | | |
| Name Contains | newcastle | | | |

7. 'Match Case' will default to be un-ticked.

| Name Contains | ▼ newcastle | |
|---------------|-------------------|---|
| Children of | Root 🔻 🕇 | - |
| At Level | <any></any> | |
| | Search Match Case | e |
| Column Values | 63 | |

8. Select the drop down arrow of the 'At Level' box and select 'Commissioner / Provider', this will ensure your results are returned quicker, as the system is only looking for your organisation in this level.

| Choose Members | | | | |
|-----------------|--|---|--|--|
| Available | | | | |
| Name Contains | ▼ newcastle | | | |
| Children of | Root | • | | |
| At Level | <any></any> | | | |
| | <any> Prescribing Organisation</any> | U | | |
| ▲ Column Values | Local Office Level | | | |
| Prescribing | | | | |
| | Commissioner / Provider Level | | | |
| | Practice Level Prescriber Level | | | |

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

| Name Contains | ▼ newcastle | | | |
|---------------------------|-------------------------------|---|--|--|
| Children of Root v | | T | | |
| At Level | Commissioner / Provider Level | | | |
| Search Match Case | | | | |

- 10. Click on your organisation.
- 11. Select the single arrow icon.
- 12. Select 'OK'.

| Available | | Q | Selected | |
|--|---|------------|----------|--|
| Name Contains | ▼ newcastle | | Selected | |
| Children of | Root | 7 2 | | |
| At Level | Commissioner / Provider Level 🔹 | 1 | | |
| | Search Match C | ase | | |
| NEWCASTI NEWCASTI NEWCASTI NEWCASTI | LE (5D700) (C 01-JAN-14) LE CITY COUNCIL (10700) LE GATESHEAD CCG (12100) LE NORTH AND EAST (2000) LE NORTH AND EAST (2000) (C 01-APR-15) CASTLE UPON TYNE HPL NHS FOUND T | | | |

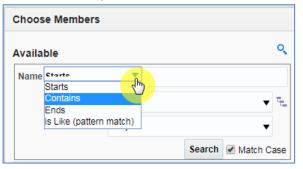
Alternatively you can navigate to your organisation by selecting on the drop down arrow titled 'Prescribing Organisation' and navigate down through the organisation structure

| 0 | Available |
|---|--------------------------|
| | ∡ Column Values |
| | Prescribing Organisation |

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

| | BNF - Hierarchy | Reset |
|---|---|---|
| | You can look through the BNF by BNF' this is similar to the BNF opt | selecting the drop down arrow titled 'All ion in ePACT.net |
| 0 | All BNF • Gastro-Intestinal System (01) • Cardiovascular System (02) • Respiratory System (03) • Central Nervous System (04) • Infections (05) | |

14. Select the drop down in the name box and change from 'Starts' to 'Contains'



15. Type the drug we are looking for (Tramadol) into the 'Name' box

| Name Contains | • | tramadol | |
|---------------|-------------|-------------------|---|
| Children of | Root | ▼ ¹ 5 | - |
| At Level | <any></any> | - | |
| | | Search Match Case | e |

16. Change the 'At Level' to Chemical substance, un-tick 'Match Case' and click 'Search'



If you did not know the level of the product you are searching for, by leaving the 'At Level' box to 'Any' this would bring back every level of the BNF that contained the name your where searching.

- 17. Click on 'Tramadol Hydrochloride (040702040)'
- 18. Select the single arrow, to move the item to 'Selected'
- 19. Click on OK

| Choose Members | | | | | | | 0 | × |
|----------------|-----------|-------------------------|------------|---|----------|----|---------|-----|
| Available | | | ৎ | | Selected | | | |
| Name Contains | • | tramadol | | | | | | |
| Children of | Root | | • 5 | | | | | |
| At Level | BNF Ch | emical Substance | • | | | | | |
| | | Search | Match Case | | | | | |
| | lydrochie | oride (040702040) 20 | | < | 21 | | | |
| ▶ Catalog | | | | | | | | |
| | | | | | | 22 | Hok Can | cel |

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

| Quick Se | arch | | | | | | | | | |
|------------|--------|---|--------------------------|---------------------------------|---|-----------------|------------------------------------|---------|-------|----|
| Month | May 18 | T | Prescribing Organisation | NEWCASTLE GATESHEAD CCG (13T00) | 0 | BNF - Hierarchy | Tramadol Hydrochloride (040702040) | | | O, |
| Edit - Ref | iresh | | | | | | | OK D | Reset | T |

Useful Reports

At the end of 2016 communications went out to all ePACT.net users, from the feedback received the NHSBSA recreated many of the templates that where available in the ePACT.net system in the form of the Useful Reports in ePACT2.

The useful reports similar to the Quick Search allow you to quickly return data for a pre-set selection of fields.

Dashboards

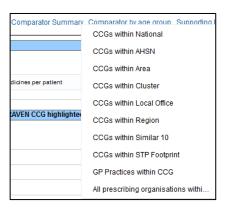
The system provides easy-to-use analysis, reports and dashboards, supporting patient safety, improving patient outcomes and medicines optimisation. Data contained within the system includes dashboards supporting the Medicine Value Programme such as:

- 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-dashboardsspecifications

Accessing and Navigating Exercise

- 1. Click the dashboards menu from the ePACT2 Landing Page and select 'Polypharmacy Prescribing Comparators'. The comparators will open to the first page.
- 2. Dashboards are navigated by means of pages. The various pages can be accessed by using the menu along the top of the dashboard.



3. Dashboards can also include prompts which permit the user to make selections for a number of pre-defined parameters. Selections made in those prompts will determine the data that is displayed. After making a selection, click the 'Apply' button to apply the selections made to the dashboard page.



- Using the prompts on the Polypharmacy Prescribing Comparators: Comparator Summary – (CCG v National) page, find out the average number of unique medicines per patient for the latest month for your CCG (or a selected CCG).
- 5. Using the same page, find the percentage of patients with an anticholinergic burden score of 12 or more aged 85 or over in your CCG in February 2017.
- 6. Open the 'CCGs within Area' page from the 'Comparator by age group' option in the dashboard menu bar.
- 7. View the average number of unique medicines per patient in your CCG in November 2016 for each of the patient age groupings and see how this compares to other CCGs within the same NHS England Area.

Creating Analysis Reports

Analysis Screen

| Untitled | | | |
|--|------------------|------|------|
| Criteria Results Prompts Advance | 1 | | 0 |
| Subject Areas | | (D) | × × |
| Reporting rields Patient | ⊿ Filters 6 | × of | * ** |
| | | | |
| Catalog → B // ≫ List All My Folders Demonstrate Company Shared | Add Filters Here | | |

| 1 | Links to the 'Criteria', 'Results', 'Prompts' and 'Advanced' pages | 4 | 'Save' and 'Save As' options to save any analysis created |
|---|---|---|---|
| 2 | Subject Area containing the columns/fields available to select | 5 | 'Selected Columns' pane displaying any columns included in the analysis |
| 3 | Catalogue pane allowing access to the 'My Folders' and 'Company Shared' folders | 6 | 'Filters' pane displaying any filters attached to the analysis to limit the data returned |

Basic Analysis

Demo 1 – Adding Columns, Filters and Viewing Results

You will learn how to create a basic analysis by adding columns to a report and applying filters to narrow the data down to what is required. You will then view the data the table format.

In this example, we will build an analysis to show the number of antidepressant drug items and the actual cost prescribed in April 2018 by every practice within Newcastle and Gateshead CCG.

Your results should look like this when we have completed the demo:

| teria Results Prompts Advanced | | | | | |
|--------------------------------|--------------|--|----------------------|--------|---------------|
| Subject Areas 🔍 † 🗸 🚿 | ≞• ⊵• | Br B 5 ⊠ 16 + 3 58 B ⊠ Å | 타 바 문 티 | 9.0 | |
| 🖌 🚼 ePACT 2 | Compound Lay | out | | | |
| Time Period | Title | | | | [A] 💉 🗙 |
| Rolling 3 Months Dim | Practice 1 | | | | |
| Organisation | Table | | | [| A 🔤 🖋 🗙 |
| Drug / Appliance | | | | | |
| Various Attributes | Year Month | Practice plus Code | BNF Section | Items | Actual Cost A |
| Reporting Fields | 201804 | OXFORD TCE & RAWLING RD MEDICAL GROUP (A85005) | Antidepressant Drugs | 3,25.5 | 8,884.24 |
| Patient | 201804 | SAVILLE MEDICAL GROUP (A86003) | Antidepressant Drugs | 4,088 | 8,268,07 |
| | 201804 | BIRTLEY MEDICAL GROUP (A85008) | Antidepressant Drugs | 2,077 | 8,288.88 |
| ISP Patient | 201804 | THORNFIELD MEDICAL GROUP (A86029) | Antidepressant Drugs | 2,688 | 4,637.88 |
| Patient Unit Weighted Multip | 201804 | WESTERHOPE MEDICAL GROUP (A86025) | Antidepressant Drugs | 3,010 | 6,279.48 |
| PAR Reports | 201804 | CRUDDAS PARK SURGERY (A86017) | Antidepressant Drugs | 2,646 | 6,282.38 |
| 🕨 🚞 BSA Logo | 201804 | BETTS AVENUE MEDICAL GROUP (A86030) | Antidepressant Drugs | 2,267 | 8,800.80 |
| Pay Drug / Appliance | 201804 | WHICKHAM COTTAGE MEDICAL CENTRE (A85020) | Antidepressant Drugs | 1,007 | 6,662,50 |
| | 201804 | HOLMSIDE MEDICAL GROUP (A86021) | Antidepressant Drugs | 2,210 | 6,608.24 |
| | 201804 | LONGRIGG MEDICAL CENTRE (A85004) | Antidepressant Drugs | 1,617 | 4,040.20 |
| | 201804 | CENTRAL GATESHEAD MEDICAL GROUP (A85019) | Antidepressant Drugs | 1,268 | 4,607,010 |
| " | 201804 | WREKENTON MEDICAL GROUP (A85016) | Antidepressant Drugs | 2,808 | 4,424.76 |
| • | 201804 | PARK MEDICAL GROUP (A86008) | Antidepressant Drugs | 1,508 | 4,558,54 |
| Catalog 🔹 🔶 🐘 🧪 » | 201804 | PROSPECT MEDICAL CENTRE (A86004) | Antidepressant Drugs | 1,492 | 4,259.75 |
| ist All 💌 | 201804 | BENFIELD PARK MEDICAL GROUP (A86023) | Antidepressant Drugs | 1,575 | 4,191,99 |

- 1. From the task bar at the top of any screen, select 'New'
- 2. In the drop down list presented select 'Analysis'

| | Home · Catalog · Favorites ▼ · Dashb | Derds V New Open V Signed In | | Finance ePact2 CCG Prescriber Level RXFinance |
|---|--|------------------------------|---------------------|---|
| | We | | | |
| News | Dashboards | Filter | Prescribing Reports | Quick Search |
| | | Dashboard Prompt | | duck oblich |
| NEWS FEED | | Condition | eP | ACT2 LATEST DATA |
| 10 October 2018 General notice The system will be unavailable on | Sunday 14 October from 8am to 12 noon | Published Reporting | | Prescription Data: Aug-18 |
| 20 September 2018 Prescribing Rep We have today released the Prescrit | orts | 🍅 Report Job | | Remuneration Report: Aug-18 |
| 06 July 2018 Financial Reports | ang Monitoring Bocument. | 🔀 Data Model | | |
| We have today released the Remun | eration report into ePACT2. | Style Template | | |
| 16 October 2018 PMD | be found here. Use this for a hyperlink Homepage . | Sub Template | | |
| | be round here. Goe this for a hypermix homepage . | Actionable Intelligence | | |
| | | Action | | |
| | | | | |
| | | | | |

3. Select the Subject Area 'ePACT 2'

| Pres | Select Subject Area | × |
|------|----------------------------|---|
| v0.8 | Search | Q |
| | Prebuilt Comparators | |
| | Prebuilt Comparators Sim10 | |
| _ | Version Control | |
| - + | epact 2 | |
| Crea | | |

- 4. The analysis editor Oracle BI Answers will open in a new internet tab
- 5. We will add the following columns:
- Time Period Year Month
- Organisation Practice plus Code
- Drug / Appliance BNF Section plus Code
- Reporting Fields Items
- Reporting Fields Actual Cost

| Time Period | Engla | and Prescribing Organisations | Drug / Appliance | Reporting Field | ds |
|----------------|-------|-------------------------------|------------------|-----------------|---------------|
| 🚺 Year Month 🗔 | | Practice plus Code 🛛 🚯 | BNF Section 🔅 | 🚦 Items 🔯 | Actual Cost 💮 |



The quickest way to add columns into your analysis is to double click them from the Subject Area Folder listing

It is possible to re-arrange your columns in the Selected Columns area by dragging and dropping them

We will then apply filters to limit the report to results we want to see. Firstly, we will apply a filter to the Year Month column to so that only data from April 2018 is returned. To do so:

6. Click the Cog icon on the Year Month column

| » | T <i>3.8</i> 232 | | |
|---|-------------------------|--------------------------------|----------|
| * | Selected Col | umns | |
| L | Time Period | 6 nd Prescribing Organisations | Drug / A |
| | Year Month | | BNF |
| | | †↓ Sort ► | |
| L | | fx Edit formula | |
| L | | Column Properties | |
| | ∡ Filters | To Filter | |
| | | X Delete | |
| | | 🔛 Save Column As | |
| | | | |
| | | | |

- 7. Then choose the Filter button.
- 8. Use the New Filter dialog box and click the small magnifying glass icon so that we can search for the time period we want to filter to April 2018.

| Edit Filter | | | @ × |
|-------------|---------------------|-----------|-------------|
| Column | Year Month | fx | |
| Operator | is equal to / is in | | - 8 |
| Value | | | ▼ °, |
| | Add More Options 🔻 | Clear All | ~m |
| Protect F | Filter | | |
| Convert | this filter to SQL | | |
| | | | |
| | | | |
| | | | |
| | | | OK Cancel |

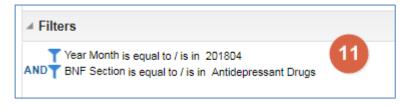
9. The Select Values box will open. You can either use the search boxes or scroll through a list of values to find what you would like to add to the filter. When you do find the value you require, select it by either double clicking or using the chevron arrow.

| Select Values | | @ × |
|---------------|-----------|-----------|
| Available | E Selecte | d 🥒 |
| Between | - 201804 | |
| Search | 9 | |
| 201401 | ^ > | |
| 201402 | | |
| 201403 | (h) | |
| 201404 | < | |
| 201405 | | |
| 201406 | ~ | |
| 201407 | | |
| 201408 | | |
| 201409 | • | |
| | | OK Cancel |

10. Click OK. The filter will be displayed in the Filters area

| When | you have added a filter you can: |
|--------|---|
| • | Edit Filter |
| • | Copy Filter |
| • | Paste Filter |
| • | Delete Filter |
| Using | the buttons displayed next to the filters. |
| | |
| ⊿ Filt | ers |
| 🍸 Yea | r Month <u>is equal to / is in</u> 201804 🧪 🍈 🛱 🗙 |
| | |

11. Apply another filter, this time to the BNF Section plus Code to limit results to only Antidepressant drugs. At this point you filters should look like:

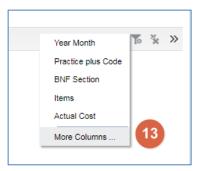


The final filter we will apply in this analysis is to restrict results to just Newcastle and Gateshead CCG. This will be done differently because we don't have the Commissioner / Provider column in our criteria.

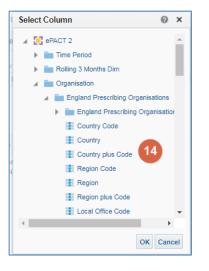
12. Click the Filter icon at the far right of the Filters pane.

| Selected Colum | 15 | | | | | ۲ | 3 |
|----------------|------------------------------|--------|------------------|----------------|------------|------------|---|
| Time Period | England Prescribing Organisa | ations | Drug / Appliance | Reporting Fiel | ds | | |
| Year Month 🎡 | Practice plus Code | Ø | BNF Section 🔅 | 🚪 Items 🔅 | Actual Cos | st 🔃 | |
| | | | | | 6 | 12 | |
| Filtore | | | | | | 12 | |
| Filters | | | | | | 12 To X | > |

13. Choose the More Columns... option



14. The Select Column dialog box will be open. This allows you to choose which columns we would like to filter on. In this example, choose Organisation > England Prescribing Organisation > Commissioner / Provider plus Code.



15. The New Filter dialog box will be displayed. Click the small magnifying glass icon so that we can search for Newcastle and Gateshead CCG.



16. The Select Values box will open. Type the start of value you want to find, in this example Newcastle. Double click or use the arrows to select it. Click OK.

| Select Values | | | | 0 | × |
|---------------|---|-------------------------|---------------------------------|---|---|
| Available | 1 | ∎ ۹ | Selected | | / |
| | | 16 > >> < « | NEWCASTLE GATESHEAD CCG (13T00) | | |



Ensure you haven't ticked the Match Case option. This means you would have to use the correct capital letters when searching.

17. Your analysis should now look like:

| T <i>g.#</i> 2323 | | | | |
|--------------------------|--|------------------|---------------------------|-----|
| Selected Colum | ns | | Œ | * |
| Time Period | England Prescribing Organisations | Drug / Appliance | Reporting Fields | |
| Year Month 🔯 | Practice plus Code | BNF Section 🔯 | 🚦 Items 🔯 🚦 Actual Cost 🔯 | |
| ⊿ Filters | | | হ জ | . » |
| AND Year Month is | s equal to / is in Antidepressant Drug equal to / is in 201804 / / Provider plus Code is equal to / is i | | HEAD CCG (13T00) | |

18. To view the report, click Results. This will display the default table view of the results.

| Subject Ar. 18 ↑↓ • » | ≞• ♂• | ◎ · ◎ • ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● | 몸 맹 문 마 | <i>91</i> | | |
|--------------------------|--------------|--|----------------------|-----------|------------|---|
| ePACT 2 | Compound Lay | out | | | | |
| Time Period | Title | | | | [A] / | × |
| 🕨 🚞 Rolling 3 Months Dim | Practice 1 | | | | | |
| Organisation | Table | | | [A] | 555 / | × |
| Drug / Appliance | Year Month | Practice plus Code | BNF Section | Items | Actual Co: | |
| Various Attributes | 201804 | OXFORD TCE & RAWLING RD MEDICAL GROUP (A85005) | Antidepressant Drugs | 5015 | 6 | ^ |
| Reporting Fields | 201804 | SAVILLE MEDICAL GROUP (A86003) | Antidepressant Drugs | 4,009 | 0 | |
| Patient | 201804 | BIRTLEY MEDICAL GROUP (A85008) | Antidepressant Drugs | 2,877 | 4 | |
| ISP Datient | 201804 | THORNFIELD MEDICAL GROUP (A86029) | Antidepressant Drugs | 5,644 | 6 | |
| Catalon | 201804 | WESTERHOPE MEDICAL GROUP (A86025) | Antidepressant Drugs | 3,010 | | |
| Catalog | 201804 | CRUDDAS PARK SURGERY (A86017) | Antidepressant Drugs | 2)648 | - 6 | |
| st All 🔻 | 201804 | BETTS AVENUE MEDICAL GROUP (A86030) | Antidepressant Drugs | 2247 | 6 | |
| My Folders | 201804 | WHICKHAM COTTAGE MEDICAL CENTRE (A85020) | Antidepressant Drugs | 1,017 | 8 | |
| Company Shared | 201804 | HOLMSIDE MEDICAL GROUP (A86021) | Antidepressant Drugs | 2,210 | 4 | |
| | 201804 | LONGRIGG MEDICAL CENTRE (A85004) | Antidepressant Drugs | 1.917 | 4 | |
| | 201804 | CENTRAL GATESHEAD MEDICAL GROUP (A85019) | Antidepressant Drugs | 1,200 | 4 | |
| •• | 201804 | WREKENTON MEDICAL GROUP (A85016) | Antidepressant Drugs | 2,608 | 4 | |
| | 201804 | PARK MEDICAL GROUP (A86008) | Antidepressant Drugs | 1,505 | 4 | |
| | 201804 | PROSPECT MEDICAL CENTRE (A86004) | Antidepressant Drugs | 1400 | | |

19. We will now tidy up the results using the View Properties xyz button. It is located just above your table of results

| ompound Lay | out | | | | | |
|-------------|--|----------------------|-------|-----|------|------|
| Title | | | | A | | × |
| Practice 1 | | | | | | |
| Table | | | A | XYZ | P | × |
| Year Month | Practice plus Code | BNF Section | Items | 19 | I Co | De: |
| 201804 | OXFORD TCE & RAWLING RD MEDICAL GROUP (A85005) | Antidepressant Drugs | 3,018 | - | 8 | s, 🔶 |
| 201804 | SAVILLE MEDICAL GROUP (A86003) | Antidepressant Drugs | 4,059 | | 8 | 8, |
| 201804 | BIRTLEY MEDICAL GROUP (A85008) | Antidepressant Drugs | 2,877 | | 8 | 8, |
| 201804 | THORNFIELD MEDICAL GROUP (A86029) | Antidepressant Drugs | 3,644 | | 6 | i, |
| 004004 | | Antidoprosent Davas | 2.000 | | c | |

20. The Content paging option will help to ensure we can see all columns and stops too much data being displayed in rows. We could also set Row Styling to make the table easier to read. Once you have set your options, click OK.

| able Properties | @ : |
|----------------------------------|---|
| Style | 20 |
| Data Viewing | Fixed headers with scrolling content Content paging Deging Controls Bottom Rows per Page |
| Display Folder & Column Headings | Only column headings |
| | □ Include rows with only Null values |
| Master-Detail | Listen to Master-Detail Events |
| | Event Channels |
| | |
| | OK Cance |

21. Finally, we will save our report using the Save As button. Save it in your My Folders area and name it Demo 1. You can then close that tab and return to the Home Screen

| eji 📝 | | | ≅ 21 |
|----------|------------|----------|----------------|
| | [A] 🥒 | × | * |
| [A] | 572 🖋 | × | |
| Items Ac | ctual Cost | ~ | |

Demo 2 – Using Time Period Measures and keeping filters after removing columns

In this example, we will continue from our previous analysis but look to see how we can edit, remove filters and use time measures to compare our data to previous time periods. Specifically, we will build an analysis based on antidepressant drug items and actual costs prescribed in April 2018 by every practice within Newcastle and Gateshead CCG and compare that to the previous year's figures.

Your results should look like this when we have completed the demo:

| Criteria Results Prompts Advanced | | | | | | | |
|-----------------------------------|--------------|---|-------|----------|-------|---------------|------|
| 🛛 Subject Areas 🔍 🛝 🔻 🐹 » | A• ♂• | B.▼ B. 5 B Ib ▼ B 18 B B B | 8 | 9 B. 🗗 | 9.ª | | |
| A 🚼 ePACT 2 | Compound Lay | out | | | | | |
| Time Period | Title | | | | | [A] / | × |
| Rolling 3 Months Dim | Practice 2 | | | | | | |
| Organisation | Table | | | | | A 🔤 🧪 | × |
| Drug / Appliance | | | | | | | |
| Various Attributes | | Practice plus Code | | | | Actual Cost - | |
| Reporting Fields | | 108 RAWLING ROAD (RAWLING ROAD PRACTICE) (A85609) | | 202.71 | HT | | 10 |
| Patient | | AVENUE MEDICAL PRACTICE (A86007) | 208 | 20.10 | 204 | | |
| ISP Patient | | BEACON VIEW MEDICAL CENTRE (A85026) | 100 | 1,04423 | 368 | 4,20 | |
| Patient Unit Weighted Multiplier | | BENFIELD PARK MEDICAL GROUP (A86023) | 1,010 | 4,101.00 | 1,386 | 1,16 | |
| | | BENSHAM FAMILY PRACTICE (A85002) | 808 | 1,00.76 | 414 | 4,00 | |
| PAR Reports | | BETTS AVENUE MEDICAL GROUP (A86030) | 2,267 | 0,000.00 | 0.00 | 6,0 | |
| BSA Logo | | BEWICK ROAD SURGERY (A85017) | 889 | 0.001.00 | 662 | | |
| Pay Drug / Appliance | | BIDDLESTONE HEALTH GROUP (A86010) | 1,010 | 2,871.68 | 0.011 | 2,36 | |
| | | BIRTLEY MEDICAL GROUP (A85008) | 2,077 | 1,218.18 | 2,843 | 10,36 | |
| | 201804 | BLAYDON GP LED PRACTICE (Y02658) | 280 | 191.91 | 28 | | 112 |
| | 201804 | BROADWAY MEDICAL CENTRE (A86035) | 288 | 100.0 | 217 | 96 | |
| | 201804 | BRUNTON PARK (A86033) | - 68 | 1,003.21 | 311 | | 1.30 |
| | 201804 | CENTRAL GATESHEAD MEDICAL GROUP (A85019) | 1,218 | 4,493.04 | 1,211 | 4,00 | 194 |
| 🖌 Catalog 📄 🖹 🧳 🐔 | 201804 | CHAINBRIDGE MEDICAL PARTNERSHIP (A85010) | 1,010 | 3,732,88 | 1,286 | 3,43 | 144 |

1. From the Landing Page, expand the 'My Folders' area and select Demo 1

| | Welco | ome to ePACT | 2 | |
|---|------------------------------------|-------------------|---------------------|--|
| News | Dashboards | Financial Reports | Prescribing Reports | Quick Search |
| NEWS FEED 10 October 2018 > General Indice The system will be unavailable on Sunday 1: 20 September 2018 > Prescribing Reports We have today released the Prescribing Monito 06 July 2018 > Financia Reports We have today released the Remuneration report 10 October 2018 > Pruo More information available PMD can be found H Homepage. | ring Document. ort into ePACT2. | MY FOLDERS | Pr | ATEST DATA escription Data: Aug-19 neration Report: Aug-19 |

2. The report will be displayed, select 'Edit' in the bottom right hand corner of the report.

| 201805 | FELL TOWER MEDICAL CENTRE (A85001) | Antidepressant Drugs (0403) | 1,132 | 3,733.12 |
|---------------|---|-----------------------------|-------|----------|
| 201805 | FENHAM HALL SURGERY (A86031) | Antidepressant Drugs (0403) | 1,307 | 2,814.91 |
| 201805 | GATDOC OOH (A85621) | Antidepressant Drugs (0403) | 4 | 2.77 |
| Return - Edit | - Refresh - Print - Export - Add to Briefing Book - Creat | | | |

3. The results page of your report will be displayed. Select Criteria so we can make our changes.

| Practic | e 1 | |
|----------|---------------------------------|---|
| Criteria | Results Prompts Advanced | |
| ⊿ 3 | tt Areas 🔍 ↑↓ 🔹 🖉 🖛 👘 🗸 🖓 | 5 |
| × 3 | ePACT 2 Compound Layout | |
| ► | Time Period Title | |
| ► | Rolling 3 Months Dim Practice 1 | |

4. Remove the BNF Section columns from our report. To do this click the Cog icon and then select Delete.

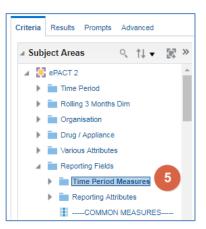
| scribing Organisat | ions | Drug / Appliance | | Reporting Fiel | ds |
|--------------------|---------|------------------|-----|----------------|---------------|
| tice plus Code | Ø | BNF Section | ø | 🚦 Items 🔯 | Actual Cost 🔯 |
| | | | 0 | Sort | Þ |
| | | 4 | fx | Edit formula | |
| | | - | жyz | Column Prope | rties |
| | | | 10 | Filter | |
| n Antidepressant | Drugs | | х | Delete (h) | |
| 201804 | (i= i= | NEWCASTLE GA | H | Save Column | As |

Note that you can remove a column from the criteria but still keep the filter. In this example, the report will still be filtered to show only Antidepressant Drugs.

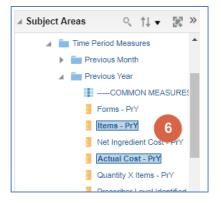
| Time Period | Englan | d Prescribing Organis | ations | Reporting Fie | ds | |
|--------------|--------|-----------------------|----------|---------------|---------------|--|
| Year Month 🔅 | | Practice plus Code | ¢ | 🚪 Items 🔅 | Actual Cost 🔅 | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| ✓ Filters | | | | | | |
| | | o/is in Antidepressar | nt Drugs | | | |

We are now going to add two more columns to the criteria so we can see the Items and Actual cost for the same month last year as well.

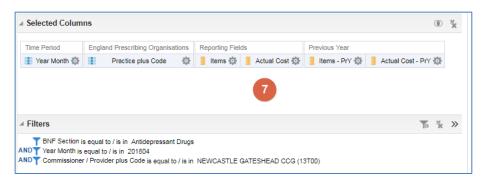
5. Go to the Reporting Fields folder in the Subject Area and select Time Period Measures.



6. Choose the Previous Year folder and select Items – PrY and Actual Cost – PrY



7. Once added to your Selected Columns, your criteria should look like:



- 8. Select Results to view your report.
- 9. Save it in My Folders as Demo 2

| ractice 2 | | | |
|-----------------------------------|---|----------|-----|
| Criteria Results Prompts Advanced | | | |
| 🛛 Subject A 🗴 🔍 👌 🗸 🖉 N | ᆸ▾ ┏▾ ฿▾ ฅ Ⴧ Ⴧ ๒ ๒ ๒ ๒ ๒ ๒ ๒ ๒ ₪ ₪ | | 9 |
| A EPACT 2 | Compound Layout | | |
| Time Period | Tite [A] | x | - |
| Rolling 3 Months Dim | Practice 2 | | - 1 |
| Organisation | Table [A] 🚾 🆉 | ' X | - 1 |
| Drug / Appliance | | | - 1 |
| Various Attributes | Year Mohthy Practice plus Code Items - PrY Actual Cost | - PrY | - 1 |
| Reporting Fields | 201804 108 RAWLING ROAD(RAWLING ROAD PRACTICE) (A85609) | 108.03 | |

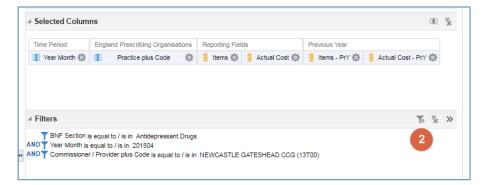
Demo 3 – Adding Patient Filters - Age bands

In this example, we will continue from our previous analysis but look to see how we can include Patient columns such as age band filtering. Specifically, we are going to filter this report to show antidepressant drug items and actual costs prescribed in April 2018 by every practice within Newcastle and Gateshead CCG and compare that to the previous year's figures for under 18's only.

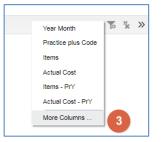
10. If you still have Demo 2 open just return to the Criteria page.

If not go to My Folders and locate the Demo 2 report we made in the previous demo. Once located, open the report and select Edit.

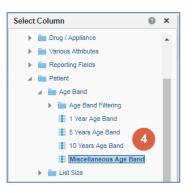
11. We are going to add a filter to limit results to under 18 year olds only. To do so, go to the filter icon in the filters section



12. Choose More Columns...



13. Navigate through the folders Patient > Age Band Filtering > Miscellaneous Age Band



- 14. The New Filter dialog box will be displayed. Click the small magnifying glass icon so that we can search for under 18's patients.
- 15. Add both the 0-11 and the 12-17 age bands into the selected area either by double clicking or using the arrows. Click OK.

You can add more than values at a time by either holding the Ctrl or Shift key when selecting.

| Select Values | | | | 0 | × |
|----------------|-----------|-------|----------|---|---|
| Available | | Q, | Selected | | / |
| Name Starts | | | 0-11 | | |
| Search 🕑 M | atch Case | | 12-17 | | |
| Unknown | | > | 6 | | |
| 18-24 | | | | | |
| 25-29 | | \gg | | | |
| 30-34 | | < | | | |
| 35-44 | | ~ | | | |
| 45-54 55-64 | | " | | | |
| 65-74 | | | | | |
| 75-84 | - | | | | |

16. The criteria showed be shown as below:

| ime Period | Engla | and Prescribing Organisa | tions | Reporting Fiel | ds | Previous Year | | | |
|--------------|-------|--------------------------|-------|----------------|---------------|---------------|---------------------|---|---|
| Year Month 🔅 | | Practice plus Code | -Ö- | Items 🔯 | Actual Cost 🔅 | Items - PrY 🔯 | Actual Cost - PrY 🔯 | | |
| | | | | | | | | | |
| ilters | | | | | | | 10 | * | 2 |
| ilters | | | | | | | To | × | : |

- 17. Select Results to view your report.
- 18. Save it in My Folders as Demo 3

| emo 3 | | | |
|-----------------------------------|--|-----|---|
| Criteria Results Prompts Advanced | | | 0 |
| ∡ Subject Ai 8 | ᆸ▾ ┏▾ ฿▾ ๛ ở ◙ lk▾ ĩ % ฿ ऴ 등 망 등 마 Z | 9 | |
| ▲ 📑 ePACT 2 | Compound Layout | | |
| Time Period | Title 🛛 🚺 🆉 | < . | |
| Rolling 3 Months Dim | Demo 3 | | |
| Organisation | Table 🛛 🔺 🚾 🧪 | < . | |
| Drug / Appliance | | | |
| Various Attributes | Year Month Practice plus Code Items - PrY Actual Cost - Pr | Y | |
| Reporting Fields | 201804 AVENUE MEDICAL PRACTICE (A86007) | 3 | |

Basic Analysis Exercise

Using what you have learned over the demo sessions aim to:

Create a report that shows Actual Cost and Items for the Chemical Substance Trimethoprim for every practice in your CCG / Trust for the latest 3 months available for patients over 70.

Your criteria should look something like this:

Run the results then

- Sort the Actual Cost from High to Low
- Turn on the Content Paging option

Save your report as Exercise 1

Demo 4 – Filtering results for individual columns

In this example, we will continue from our previous analysis but look to see how we can filter columns to return specific results to enable us to compare figures. we are going to include four new columns into our analysis criteria 'Items', Actual Cost', 'Items-PrY' and 'Actual Cost-PrY' we will then filter these columns so they only show the prescribing for the under 18's we will then be able to compare the Items and Actual Cost for the under 18's compared to the total Items and Actual Cost.

1. If you still have Demo 3 open just return to the Criteria page.

If not go to My Folders and locate the Demo 3 report we made in the previous demo. Once located, open and select Edit. The report will open on the Results Tab, click straight on the 'Criteria tab so you can edit the report.

2. Remove the Miscellaneous Age Band filter by hovering over the filter until you see the dark grey box around the filter, four options will then appear, you need to select the X icon to remove the filter.

| Year Month 🄯 🚦 Practice plus Code 🔹 🚦 Item | s 🤯 🚦 Actual Cost 🥸 🚦 Items - PrY 🥸 🚦 Actual Cost - PrY 🕼 |
|---|---|
| | |
| | |
| | |
| | |
| | |
| Filters | |
| | |
| | s (0403) |
| FINF Section plus Code is equal to / is in Antidepressant Drug Commissioner / Provider plus Code is equal to / is in NEWCA | |

Filtering in the filter pane restricts the results for the entire analysis, filtering a specific column restricts the results only for that column.

3. Now include two new columns 'Items' and 'Actual Cost' from the 'Reporting Fields' folder and include two new columns 'Items-PrY' and 'Actual Cost-PrY' from the 'Reporting Fields' > 'Time Period Measure' > 'Previous Year' folder.

Your report should now look like the following image:

| Criteria Results Prompts Advanced | | | | | ≌ k @ |
|-----------------------------------|--|--|---------------------------|----------------------------------|--|
| 🔺 Subject Areas 🔍 📬 🐨 🚱 | T F m | | | | |
| ePACT 2 Time Period | ✓ Selected Columns | | 3 | | ۵ × |
| Organisation | d Prescribing Organisations | Reporting Fields | Previous | us Year | |
| Drug / Appliance | Practice plus Code 🏻 🔅 | 🚪 Items 🍈 🚪 Actual Cost 🏠 🚪 Items | 🔅 🚦 Actual Cost 🎡 🚦 Items | ns - PrY 🏟 🚦 Actual Cost - PrY 🏟 | 🚪 litems - PrY 🏟 🚪 Actual Cost - PrY 🏟 |
| Reporting Fields | | | | | |
| A 🛅 Time Period Measures | | | | | |
| Previous Month | < | | | | > |
| 🖌 🚞 Previous Year | ▲ Filters | | | | |
| COMMON MEASURE | ⊿ Fillers | | | | <u></u> ™ × ≫ |
| Forms - PrY | | de is equal to / is in Antidepressant Drugs (0403 | | | |
| Items - PrY | AND Commissioner / Prov AND Year Month is equal | rider plus Code is equal to / is in NEWCASTLE (to / is in 201804 | ATESHEAD CCG (13T00) | | |
| Net Ingredient Cost - PrY | | | | | |
| Actual Cost - PrY | | | | | |

4. Hover over the cog icon on the first 'Items' column and select 'Edit formula'

| Selected Columner | ins | | | | |
|-------------------|---|-------------|-------|-------------------|-----------|
| Time Period | England Prescribing Organisations | Reporting | Field | s | |
| Year Month 🔯 | Practice plus Code | Items | ø | Actual Cost 🔅 | 🚦 Items 🔯 |
| | | | î↓ | Sort | • |
| | | 4 | fx – | Edit formula | |
| < | | | жуz | Column Properties | |
| ∡ Filters | | | 70 | Filter | |
| T BNF Section | plus Code is equal to / is in Antidepre | ssant Drugs | × | Delete | |
| | er / Provider plus Code is equal to / is i s equal to / is in 201804 | n NEWCAS | | Save Column As | 3T00) |
| | | | | | |

5. This will bring up the Edit Column Formula pane, ensure the column formula is highlighted and select the filter icon

| Edit Column Form | nula | | | | | | | | | | | | | 0 | × |
|---|-----------------------------------|-------|-------|------------------|-----------------|-------------------|-------------------|---|---|---|----|---|---|---|---|
| Column Formula | Bins | | | | | | | | | | | | | | |
| Fo | lder Heading | Repo | rting | Fields | | | | | | | | | | | |
| Colu | umn Heading | Items | | | | | | | | | | | | | |
| A | (T-4-1- D) | _ | | n Headings | | | | | | | | | | | |
| Aggregation Rule | (Totals Row) | Detau | | um) Column Fr | ▼ ormula | | | | | | | | | | |
| Subject Areas | 2 | 0, | | "Reportin | g Fields"."Iten | ^{ns''} 5 | | | | | | | | | |
| Organ | Period nisation / Appliance | | > | | | | | | | | | | | | |
| Repo Patient | rting Fields nt | | " | | | | | | | | | | | | |
| | | | | f() | Filter | Column 🔻 | Variable v | + | - | x | -1 | % | (|) | |
| | | | | Treat | as an attribute | column | | | | | | | | | |

6. This will bring up the 'Insert Filter' pane, navigate through the subject area to the following folder 'Patient' > 'Age Band' and double click on the 'Miscellaneous Age Band' column

| Insert Filter | @ × |
|---|--|
| Subject Areas | Replace the selection with this statement: |
| Patient Age Band | FILTER("Reporting Fields"."Items" USING filter_expressions) Double click a field from the left tree to add a column filter expression to filter_expressions. |
| Age Band Filtering 5 Years Age Band 10 Years Age Band | |
| Miscellaneous Age Ba | 6 |
| ✓ Catalog | |
| My Folders Shared Folders | |
| | OK Cancel |

7. This will bring up the 'New Filter' pane, select the magnifying glass icon

| New Filter | | @ × |
|------------|--|------------|
| Column | Miscellaneous Age Band | 7 |
| Operator | is equal to / is in 🔹 | |
| Value | | ▼ 0 |
| | Select by Miscellaneous Age Band Start | <'') |

8. This will bring up the 'Select Values' box, double click on the 0-11 and 12-17 fields to move these into 'Selected'

| Select Values | @ × | |
|-----------------|------------|---|
| Available | Selected | / |
| Name Starts v | 8 | |
| Search Match Ca | se | |
| Unknown | ^ > | |
| 0-11 | » | |
| 12-17 | | |
| 18-24 | < | |
| 25-29 | | |

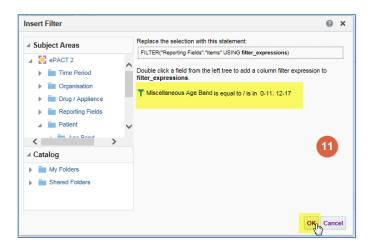
9. Now click OK

| | Ø × |
|----------|-----------|
| Selected | / |
| 0-11 | |
| 12-17 | |
| | |
| | 9 |
| | |
| | |
| | |
| | |
| | |
| | |
| | OK Cancel |

10. Followed by OK

| New Filter | | @ × |
|------------|--|-------------|
| Column | Miscellaneous Age Band | |
| Operator | is equal to / is in | • |
| Value | 0-11;12-17 | ▼ °, |
| | ☐ Select by Miscellaneous Age Band Start ✔ Filter by Miscellaneous Age Band Start | |
| | Add More Options Clear All | 10 |
| Protect | Filter | |
| Convert | this filter to SQL | |
| | | |
| | | OK Cancel |

11. This will update the 'Insert Filter' pane with the filter you are going to apply to the column, select OK to apply the filter to the column formula



12. The column formula will now update in your 'Edit Column Formula' pan, tick the Custom Headings box to enable you to edit the column heading, change the heading to 'Under 18's Items'

| dit Column Formula | | | | | | | | | | | | | G |) ; |
|--|-----------|------|-----------|------------------------|--|-------------------|---|---|---|---|---|----|-------|-----|
| Column Formula Bins | | | | | | | | | | | | | | |
| Folder Heading | Reportin | ng F | Fields | | | | | | | | | | | |
| Column Heading | Under 1 | 18's | Items | | | | | | | | | | | |
| 12 | Cust | tom | Headings | | | | | | | | | | | |
| Aggregation Rule (Totals Row) | Default (| (Su | m) | • | | | | | | | | | | |
| Vailable | | Г | Column Fo | | | | | | | | | | | |
| Subject Areas Part of the epsilon o | 0 | > | Band"."Mi | scellaneous | e <u>lds:","items</u> " USING ("Age Band") IN (0, 12 | bal | | | | | | | | |
| | | | f() | Filter s an attribu | Column 🔻 | Variable v | ÷ | - | x | I | % | (|) | I |
| | | | | is an awribu | ie cournin | | | | | | | 13 | ov ba | |
| | | | | | | | | | | | | 10 | OK Ca | nce |

- 13. Select OK to apply the changes you have made to the column.
- Follow the same Steps on the additional 'Actual Cost', 'Items PrY' and 'Actual Cost PrY' columns so these columns only return results for under 18's

Don't forget to amend the headings so you know what the data relates to when you bring back the results.

- 15. Select the Results Icon to generate your data
- 16. Your results will look similar to below image:

| Year Month | Practice plus Code | Under 18's Items | Under 18's Actual Cost | Under 18's Items - PrY | Under 18's Actual Cost - PrY | Items | Actual Cost | Items - PrY | Actual Cost - PrY |
|---------------|--|---------------------|---------------------------|---------------------------|---------------------------------|-------|----------------|----------------|----------------------|
| 201804 | Name and a subscription of the second se | | | | | 114 | 202.71 | 117 | 252.5 |
| 201804 | A REAL PROPERTY AND A REAL PROPERTY. | 1 | 2.50 | 2 | 2.13 | 209 | 459.15 | 204 | 417.5 |
| 201804 | NAMES OF TAXABLE PARTY. | 4 | 5.23 | 1 | 3.20 | 946 | 1,544.23 | 769 | 1,213.6 |
| 201804 | Printing and the second second | 2 | 1.55 | 1 | 1.14 | 1,878 | 4,191.99 | 1,398 | 3,356.1 |
| 201804 | Minimum Prints Mini 2020 (MINIST | 1 | 0.91 | | | 505 | 1,130.75 | 494 | 1,183.6 |
| 201804 | of the school of Date, driver results | 5 | 2.59 | 1 | 0.75 | 2,247 | 5,500.50 | 1,987 | 5,811.7 |
| 201804 | REMOVERATIVE REPORT | 9 | 136.38 | 7 | 11.41 | 859 | 1,978.50 | 692 | 1,614.6 |
| 201804 | INCLUSIONE HOUSE DROUT (HEREES | 2 | 1.49 | 2 | 1.97 | 1,073 | 2,571.68 | 1,051 | 2,386.8 |
| 201804 | INFLUX HEREA. INCLUMENT | 6 | 3.99 | 5 | 6.49 | 2,877 | 8,219.18 | 2,942 | 10,362.7 |

17. Save as Demo 4

Demo 5 – Calculated Columns

In this example, we will continue from our previous analysis but look to see how we can include new calculated measures, to work out the percentage of under 18 antidepressant items and cost to the overall items and cost for the practice.

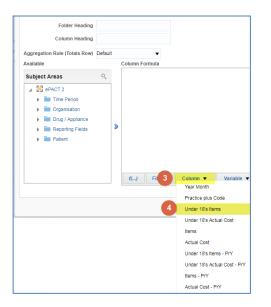
1. If you still have Demo 4 open just return to the Criteria page.

If not go to My Folders and locate the Demo 4 report we made in the previous demo. Once located, open and select Edit. The report will open on the Results Tab

2. Select the 'New Calculated Measure' icon, this will open the 'New Calculated Measure' pane

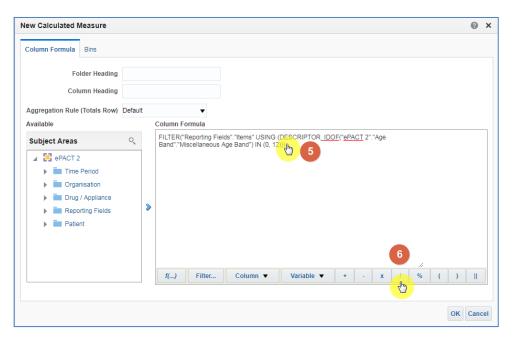
| | V Ga V | B 9 | ₀ ▼ | 1 | | ti B U | | | |
|-----------------|---------------|--------|-----|----------|------------|---------------------------|-------------|--|--|
| Compound Layout | | | | | | | | | |
| Title | | | | 2 | | | | | |
| Demo 4 | 1 | | | | | | | | |
| Table | | | | | | | | | |
| | | | | | | | | | |
| Year Month | Practice plus | s Code | | | Under 18's | Under 18's Actual Cost | Under 18's | | |
| wonth | | | | | Items | Actual Cost | Items - PrY | | |

- 3. Select the 'Column' icon to open up the available columns to select from your analysis.
- 4. From the options available select 'Under 18's Items'



5. The formula for the column will now be included in your 'New Calculated Measure' pane, click at the end of the column formula to ensure it is not highlighted

6. Enter the divide symbol (/) from the task bar to the end of the column formula, the divide symbol will be highlighted, click at the end of the formula again to ensure the divide symbol is not highlighted.



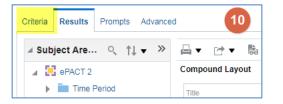
7. Select the 'Column' from task bar, from the available list of columns to select choose the 'Items' column



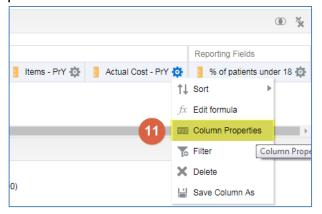
8. Amend the 'Column Heading' to '% of patients under 18', your column should look like this:

| New Calculated Measure | | | | | | | | | | | | | | 0 | × |
|--|--------|------|--------------|------------|---|-----------------------|-----------------------|-----------------------|------|---|---|---|----------|------|-----|
| Column Formula Bins | | | | | | | | | | | | | | | |
| Folder Heading Column Heading | % of p | atie | nts under 18 | | | 8 | | | | | | | | | |
| Aggregation Rule (Totals Row) | | | Column Form | • | | | | | | | | | | | |
| Subject Areas Subject Areas Subject Areas Subject Areas Subject Areas Time Period Subject Areas Time Period Drug / Appliance Reporting Fields Patient | 0 | > | FILTER("Repo | orting Fie | elds"."Items" USING (Age Band") IN (0, 12 | DESCRIPTOR_ <u>IC</u> | OCF("eP# ds"."Item | <u>ACT</u> 2".' S" | "Age | | | | | | |
| | | | f() | Filter | Column 🔻 | Variable v | + | - | x | 1 | % | (|) | Ш | |
| | | | | | | | | | | | | 9 | % | Canc | el: |

- 9. Click 'OK', you will now have a new column in your data.
- 10. Select the 'Criteria' Tab from the top of the page.

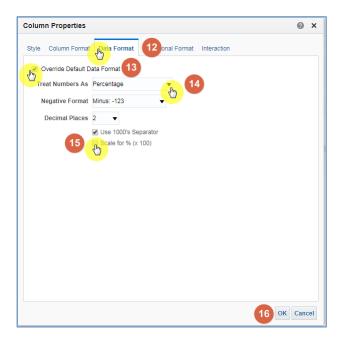


11. Use the scroll bar at the bottom of the 'Selected Columns' pane to scroll to the end of the selected columns. Hover over the Cog icon on your new '% of patients under 18' column and select 'Column Properties'



- 12. The 'Column Properties' box will now open, select the 'Data Format'
- 13. Tick the 'Override Default Data Format' box
- 14. Click on the Drop down arrow on the 'Treat Number As' box and change from Number to Percentage

- 15. Tick the 'Scale for % (x100)' box; this will multiply your column by 100 to give you a percentage.
- 16. Select OK to apply the changes



17. Save as Demo 5

Follow the same process using the 'New Calculated Measure' column to get a percentage figure for the under 18's previous year; calculation will be 'Under 18's – PrY' / 'Items – PrY'. Name the column '% of patients under 18 previous year'

| New Calculated Measure | | | |
|-------------------------------|-----------|--------------------------|--|
| Column Formula Bins | | | |
| Folder Heading | | | |
| Column Heading | f patient | s under 18 previous year | 18 |
| Aggregation Rule (Totals Row) | Default | • | |
| Available | | Column Formula | |
| Subject Areas | 0 | | r"."Items - <u>PrY</u> " USING (DESCRIPTOR <u>IDOE("ePACT</u> 2"."Age Age Band") IN (0, 12)))/"Previous Year"."Items - <u>PrY</u> " |
| 🔺 📜 ePACT 2 | | | |

18. Save analysis and close

Basic Exercise 2

Using what you have learned over the demo sessions aim to:

Create a report that shows Total Items and Items for the BNF Chapter - Infections (05) for every practice in your CCG / Trust for the latest month available.

Your criteria should look something like this:

Filter the 2nd 'Items' column to limit the results to only items for BNF Chapter 05.

| Selected Column | 15 | | | | | |
|-----------------|-------|--|--------|-----------------|------------------|------|
| Time Period | Engla | nd Prescribing Organisa | ations | Reporting Field | ls | |
| Year Month 🎡 | | Practice plus Code | ¢ | 🚪 ltems 🔯 | 🚪 Chapter 05 tem | s 🔯 |
| | | | | | | |
| | | | | | | |
| ∡ Filters | | | | | | |
| | | o/isin 2010 101 derplus Code is equal to |)/isin | NEWCASTLE | GATESHEAD CCS (1 | 0TM) |

Run the results then

Include a 'New Calculated Measure' column (% Chapter 05 items) to show the BNF Chapter – Infections items divided by the total items.

Navigate back to the 'Criteria' tab and amend the data format for the new calculated measures column to

- Treat as a percentage
- Show 2 decimal places
- Scale for % (100)

Your criteria should look something like this:

Run the results then

- Sort the % Chapter 05 items column from High to Low
- Turn on the Content Paging option

Save your report as Exercise 2

Using Patient Unit Measures

In this example, we will build an analysis to show the cost based ASTRO PUs for a selected CCG and then include a calculation to show the cost per 1000 ASTRO PUs for each BNF Section.

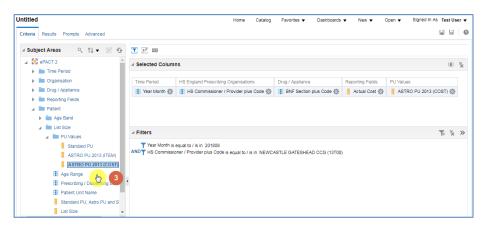
Your results will look like this when completed

| Title | | | | | | / X |
|---------------|---|--|----------------|--------------------------|--------------------------------------|-------|
| Table | | | | | A XX | / X |
| | | | | | | |
| Year Month | HS Commissioner / Provider plus Code | BNF Section plus Code | Actual Cost | A STRO PU 2013 (COST) | Actual Cost per ASTRO 2013 (COST) |) PU |
| 201808 | NEWCASTLE GATESHEAD CCG (13T00) | Dyspep&Gastro-Oesophageal Reflux Disease (0101) | 14,673.68 | 1,744,935 | | 8.41 |
| 201808 | NEWCASTLE GATESHEAD CCG (13T00) | Antispasmod.&Other Drgs Alt.Gut Motility (0102) | 51,442.28 | 1,744,935 | | 29.48 |
| 201808 | NEWCASTLE GATESHEAD CCG (13T00) | Antisecretory Drugs+Mucosal Protectants (0103) | 84,208.95 | 1,744,935 | | 48.26 |
| 201808 | NEWCASTLE GATESHEAD CCG (13T00) | Acute Diarrhoea (0104) | 14,817.41 | 1,744,935 | | 8.49 |
| 201808 | NEWCASTLE GATESHEAD CCG (13T00) | Chronic Bowel Disorders (0105) | 71,287.24 | 1,744,935 | | 40.85 |
| 201808 | NEWCASTLE GATESHEAD CCG (13T00) | Laxatives (0106) | 109,194.72 | 1,744,935 | | 62.58 |

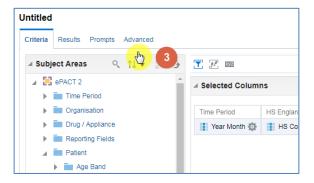
1. Create an analysis including the columns and filters below.

| Untitled | | Home Catalog | Favorites 🔻 🔹 Dashboards | ▼ · New ▼ · C | Open 👻 🔹 Signed In As Test User 👻 |
|-----------------------------------|-------------------|---|----------------------------|------------------|-----------------------------------|
| Criteria Results Prompts Advanced | | | | | |
| 🛛 Subject Areas 🔷 🔍 † 🔻 🔀 😏 | T 5° 100 | | | | |
| ePACT 2 im Time Period | A Selected Column | 15 | | | @ × |
| Organisation | Time Period | HS England Prescribing Organisations | Drug / Appliance | Reporting Fields | |
| Drug / Appliance | Year Month 🔅 | HS Commissioner / Provider plus Code 🔅 | BNF Section plus Code 🔅 | 🚪 Actual Cost 🏟 | |
| Reporting Fields Patient | | | | | |
| | | | | | |
| | ⊿ Filters | | | | ₹. ¥. ≫ |
| | | equal to / is in 201808 ner / Provider plus Code is equal to / is in NEWC/ | ASTLE GATESHEAD CCG (13T00 |) | |

 Expand the subject area to the file path – 'Patient' >> 'List Size' >> 'PU Values' and add the 'ASTRO PU 2013 (COST)' column to the selected columns.



3. Select the 'Advanced' tab from the task bar at the top of the screen



- 4. The 'Advanced' page will be displayed, scroll down this page to the 'Advanced SQL Clauses' section.
- 5. Check the box for 'Show Total value for all measures on unrelated dimensions'

| "ePACT 2"."Re | porting Fields". "Actual Cost" s_8 |
|-------------------|---|
| Important: If you | create a new analysis using this SQL, any hierarchical columns, member selection, groups or formatting will be stripped. |
| | |
| New Analysis | |
| | |
| | |
| Advanced SQL Clau | |
| | ide-te-inch. and ditional clauses in the SQL code for this analysis and to change the Subject Area or FROM clause. To add items to the projection list, use the Criteria tab. |
| Important: You o | cannot use the fields in this section, except for the enabled fields, if the analysis includes hierarchical columns, member selections, or groups. |
| DISTINCT | Sue an explicit Distinct |
| DIMENSIONALITY | Show Total value for all measures on unrelated dimensions. |
| FROM | Enter the of the Subject Area |
| | The Subject Area |
| \ \ | "aPACT > |
| | or Enter a complex from clause for these criteria. |
| | |
| | |
| | |
| | |
| GROUP BY | Enter a comma-separated list of columns to Group By. |
| GROOP DI | |
| | |
| | |

6. Select the Results Icon to generate your data

| Intitled | | Home | Catalog Favorites 🗸 Dashboards 🗸 🕚 | New 🔻 👘 🕻 | Open 🔻 | Signed Ir | n As Te |
|-----------------------------------|----------------|--------------------------------------|---|-------------|-----------|------------|---------|
| Criteria Results Prompts Advanced | | | | | | | 닅 |
| 🔺 Subject Deas 🧕 🔍 † 🗸 😿 🔗 | □ ▼ 🖻 ▼ | ® v R G Ib v B % | r 🗰 🖾 🖶 🙂 🖭 🗹 | | | | |
| ePACT 2 | Compound Lay | out | | | | | |
| Time Period | Title | | | | | [A] | X |
| Organisation Drug / Appliance | Table | | | | [A] | 572 J | × |
| Reporting Fields Patient | Year Month | HS Commissioner / Provider plus Code | BNF Section plus Code | Actual Cost | A STRO PI | J 2013 (Cr | OST) |
| | 201808 | NEWCASTLE GATESHEAD CCG (13T00) | Dyspep&Gastro-Oesophageal Reflux Disease (0101 |) 14,673.68 | | 1,744 | 4,935 |
| | 201808 | NEWCASTLE GATESHEAD CCG (13T00) | Antispasmod.&Other Drgs Alt.Gut Motility (0102) | 51,442.28 | | 1,744 | 1,935 |
| | 201808 | NEWCASTLE GATESHEAD CCG (13T00) | Antisecretory Drugs+Mucosal Protectants (0103) | 84,208.95 | | 1,744 | 1,935 |
| | 201808 | NEWCASTLE GATESHEAD CCG (13T00) | Acute Diarrhoea (0104) | 14.817.41 | | 1,744 | 1 935 |

Following the process learnt in Demo 5 we will now include a 'NEW Calculated Measure' to show the actual cost per 1000 ASTRO PUs

7. Select the 'New Calculated Measure' icon, this will open the 'New Calculated Measure' pane

| a▼ 📴 ▼ | la ▼ la 🤄 la ▼ 🛃 😘 | | | |
|-------------|--------------------------------------|-----------------------|--------------------------|---|
| ompound Lay | rout 👆 | 7 | | |
| Title | | | | |
| | | | | |
| Table | | | | |
| Table | | | | |
| | HS Commissioner / Provider plus Code | BNF Section plus Code | Actual Cost | A |
| | | BNF Section plus Code | Actual Cost 14,673.68 | A |

- 8. Select the 'Column' icon to open up the available columns to select from your analysis.
- 9. From the options available select 'Actual Cost'

| olumn Formula | Bins | | |
|---|---|---------|--|
| olumni romula | DINS | | |
| Fo | lder Heading | | |
| Col | umn Heading | | |
| | | Cor | ntains HTML Markup |
| Aggregation Rule | (Totals Row) | Default | • |
| Available | | | Column Formula |
| Subject Areas | | Q | |
| The organ The organ The organ | Period nisation / Appliance rting Fields | | > |
| | | | f() Fi 8 Column ▼ Variable ▼ + - x / Year Month |
| | | | HS Commissioner / Provider plus Code |
| | | | BNF Section plus Code |
| | | 201000 | 9 Actual Cost |
| | | | ASTRO PU 2013 (COST) |
| | | | NEWCASTLE GATESHEAD CCG (13T0 |

- 10. The formula for the column will now be included in your 'New Calculated Measure' pane
- 11. Enter the divide symbol (/) from the task bar to the end of the column formula
- 12. Select the 'Column' from task bar, from the available list of columns to select choose the 'ASTRO PU 2013 (COST)' column
- 13. Enter the divide symbol (x) from the task bar to the end of the column formula and then manually enter '1000'

Don't forget to remove the highlight each time another element is added to the formula, if not the next element added will overwrite what is there

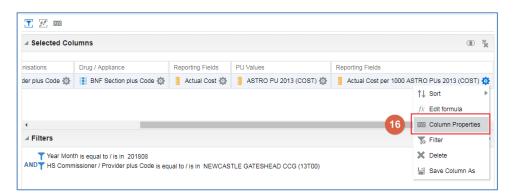
14. Amend the 'Actual Cost per 1000 ASTRO PUs 2013 (COST)', your column should look like this:

| New Calculated M | leasure | | | | | | | | | | | | (| 0 | × |
|---------------------------------------|---|---------|----------|-------------|----------|--------------------|---------------|-----------|----------|-----|---|-----|------|-----|----|
| Column Formula | Bins | | | | | | | | | | | | | | |
| Colu Aggregation Rule Available | lder Heading ımn Heading (Totals Row) | Default | B | Column Form | p ula | ial Cost"/"PU Vali | Jes"."ASTRO P | U 2013 (C | OST)**10 | 000 | | | | | |
| | Period nisation / Appliance rting Fields | Q | > | | 10 | | 12 | b | | | | 1 | | | |
| | | | | f() | Filter | Column 🔻 | Variable | • | • | x | 1 | % (|) | Ш | |
| | | | | | | | | | 13 | Ð | G | 1 | 04 | | |
| | | | | | | | | | | | | | ок с | anc | 81 |

- 15. Click 'OK', you will now have a new column in your data.
- 16. Select the 'Criteria' Tab from the top of the page.



17. Use the scroll bar at the bottom of the 'Selected Columns' pane to scroll to the end of the selected columns. Hover over the Cog icon on your new 'Actual Cost per 1000 ASTRO PUs 2013 (COST)' column and select 'Column Properties'



- 18. The 'Column Properties' box will now open, select the 'Data Format'
- 19. Tick the 'Override Default Data Format' box
- 20. Use the 'Decimal Places' drop down list to set the number of decimal places to '2'
- 21. Select OK to apply the changes

| Column Properties | 0 × |
|--|--------|
| Style Column Format Data Format Conditional Format Interaction Coverride Default Data Format Conditional Format Interaction I Override Default Data Format Conditional Format Interaction I Override Default Data Format I Overide Default Data Format I Override Default Data Format I | |
| 21 | Cancel |

22. Select 'Results' to see the final data

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|-----------------------------------|---------------|---|--|----------------|-------------------------|-----------------------------------|---------|--------|--------|
| Criteria Results Prompts Advanced | | | | | | | | | R |
| 🛛 Subject Areas 22 🔍 † 🔻 🔣 🧐 | | • B• B • Ib• | | 9 B. C) | 9.P | | | | |
| 🖌 💽 ePACT 2 | Compound | Layout | | | | | | | |
| Time Period | Title | | | | | | [A] | 1 | × |
| Organisation Drug / Appliance | Table | | | | | [A |] 32 | / | × |
| Reporting Fields | | | | | | | | | |
| Patient | Year Month | HS Commissioner / Provider plus Code | BNF Section plus Code | Actual Cost | ASTRO PU 2013 (COST) | Actual Cost per 10 2013 (COST) | 00 A ST | RO PU: | 8 |
| | 201808 | NEWCASTLE GATESHEAD CCG (13T00) | Dyspep&Gastro-Oesophageal Reflux Disease (0101) | 14,673.68 | 1,744,935 | | | 8. | 41 |
| | 201808 | NEWCASTLE GATESHEAD CCG (13T00) | Antispasmod.&Other Drgs Alt.Gut Motility (0102) | 51,442.28 | 1,744,935 | | | 29. | 48 |
| | 201808 | NEWCASTLE GATESHEAD CCG (13T00) | Antisecretory Drugs+Mucosal Protectants (0103) | 84,208.95 | 1,744,935 | | | 48. | 26 |

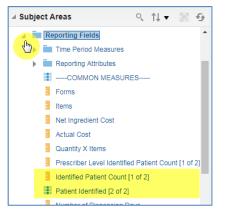
Using Patient Count

In this exercise we will explore how to include patient count fields into your data

1. Set up a basic analysis with the following columns and filters

| Year Month 🏟 🚦 Commissioner / Provider plus Code 🏟 🚦 BNF Chemical Substance plus Code 🏟 🚦 Items |
|---|

2. Apply the Identified Patient Count [1 of 2] and 'Patient Identified [2 of 2], these can be found in the 'Reporting Fields' folder.



3. Select the results tab, your results should look like this:

| Table | | | | | (A) 🚾 🖋 🗙 |
|---------------|--------------------------------------|----------------------------------|-------|-----------------------------------|-----------------------------|
| Year Month | Commissioner / Provider plus Code | BNF Chemical Substance plus Code | Items | Identified Patient Count [1 of 2] | Patient Identified [2 of 2] |
| 201805 | NEWCASTLE GATESHEAD CCG (13T00) | Trimethoprim (0501080W0) | 56 | 0 | Ν |
| 201805 | NEWCASTLE GATESHEAD CCG (13T00) | Trimethoprim (0501080W0) | 1,263 | 1027 | Υ |

Identified Patient Count [1 of 2] – this will give the number of unique identified patients; patients are identified by the NHS number printer on the prescription. This column needs to be used when running data at practice level or above.

Patient Identified [2 of 2] – this will separate the results into identified and unidentified patients, N indicated not identified and Y indicates identified patients and gives the count.

If you are running the analysis at prescriber level and would like to bring the patient count data down you will need to include the Prescriber level Identified Patient Count [1 of 2] column.

Basic Exercise 3

Using what you have learned over the demo sessions aim to:

Create a report that shows Actual Cost and Items for the Chemical Substance Trimethoprim for every practice in your CCG / Trust for the latest 3 months available split by Identified and Non-Identified patients.

Your criteria should look something like this:

| Time Period | England Prescribing Organisations | Reporting Fields | |
|--------------|-----------------------------------|---|--|
| Year Month 🔅 | Practice plus Code | 🚦 Items 🏟 🚦 Actual Cost 🕸 🚦 Identified Patient Count [1 of 2] 🏟 📳 Patient Identified [2 of 2] 🏟 | |
| | | | |

Run the results then

- Sort the Actual Cost from High to Low
- Turn on the Content Paging option

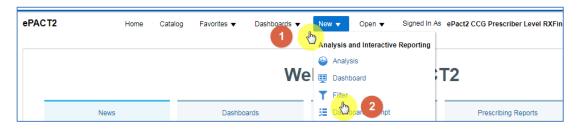
Save your report as Exercise 3

Saved Filters

Creating Saved Filter

In this scenario you will create and save a filter for use in analyses.

- 1. From any page select 'New'
- 2. Select 'Filter'.



- 3. Select the ePACT 2 subject area. The 'Create Filter' window will open.
- 4. In the 'Subject Area' expand the 'Drug/ Appliance folder and double click on the 'BNF Presentation plus Code' column
- 5. You will now be presented with the 'New Filter' pane for the BNF Presentation plus Code' column, Select the magnifying glass icon to search for every presentation that contains 'Tramadol' in the name



- 6. The 'Select Values' pane will now appear, change the operator from 'Starts' to 'Contains'
- 7. Type in Tramadol
- 8. Select the Search button
- 9. Select the double arrow icon to move all presentaions over to the 'Selected box
- 10. Select OK

| Select Values | | 0 × |
|---|--|-----|
| Available | E C Selected | / |
| 6 Contains Search 8 Match Case Tramadol HCL Cap 50mg (040702040AAAAAA) Tramadol HCL Tab 100mg M/R (040702040AAAAAA) Tramadol HCL Tab 100mg M/R (040702040AAAAAA Tramadol HCL Tab 150mg M/R (040702040AAAAAA Tramadol HCL Tab 200mg M/R (040702040AAAAAA Tramadol HCL Tab Solb 50mg S/F (040702040AAAAAA Tramadol HCL Cap 50mg M/R (040702040AAAAAA) Tramadol HCL Cap 100mg M/R (040702040AAAAAA) | C) 9 D) Move All E) « FAF) 3) | |

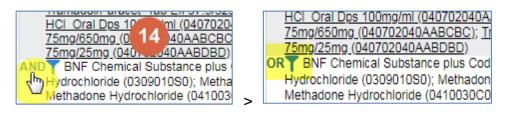
11. Select OK, on the 'New Filter' pane and this will input the presentations into your 'Create Filter' pane

| New Filter | @ × | | | | |
|------------|--|--|--|--|--|
| Column | BNF Presentation plus Cod f_X | | | | |
| Operator | is equal to / is in | | | | |
| Value | Tramadol HCI_Cap 50mg (040702040AAAAAA);Tramε ▼ 0 | | | | |
| | Select by BNF Presentation Code Filter by BNF Presentation Code | | | | |
| | Add More Options Clear All | | | | |
| Protect | Filter | | | | |
| Convert | t this filter to SQL | | | | |
| | | | | | |

- 12. We will now add another BNF level to our filter, follow the same process as above to include the 'BNF Chemical Substance plus Code' column and search for anything that contains 'Methadone' in the name.
- 13. Your filter should now look like this



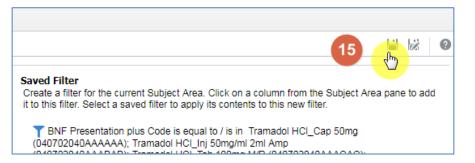
14. Select the Operator to change from 'AND' to 'OR'



If the Operator = AND this will look for presentations that fall under the Chemical substance we have chosen, and will only return results that match both Presentations and Chemical substance

If the Operator = OR this will look for the presentations we have selected or the Chemical substance we have selected , this will return results for all presentations and Chemical substances selected

15. Save your filter by selecting the 'Save Filter' icon in the top right of your 'Create Filter' pane.



- 16. Name your filter 'Tramadol and Methadone' and select the 'OK' icon to save
- 17. Once saved, you will see the following symbol appear

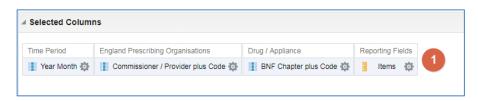
When saving analysis or filters, the folder selected will default to the last folder you have accessed, you may need to select 'My Folder' again to ensure you are saving to your own area.

Your filter is now saved, you can use this filter in any analysis you now create.

Using Saved Filters

In this scenario you will apply a previously saved filter to an analysis

1. Create a basic analysis containing the following columns:



2. Apply the following filters:

| ∡ Filters 2 | |
|--|-----|
| Year Month is equal to / is in 201805 AND Commissioner / Provider plus Code is equal to / is in NEWCASTLE GATESHEAD CCG (1310) | 00) |

3. Expand 'My Folders' from the Catalog pane and navigate to your saved filter, titled 'Tramadol and Methadone'

| 🔺 Subject Areas 🛛 🔍 🏦 🔻 📰 🚭 | T Z 🚥 | |
|--|-------------------|--|
| ePACT 2 im Time Period | 4 Selected Column | ns |
| Organisation | Time Period | England Prescribing Organia |
| in Drug / Appliance in Reporting Fields in Patient | Year Month 🔅 | Commissioner / Provide |
| | ⊿ Filters | |
| | | equal to / is in 201805 / Provider plus Code is equal |
| 🔺 Catalog 🔰 🐘 🖉 🧐 | | |
| List All 🔻 | | |
| My Folders | | |

4. Double click on your filter and you will be presented with the 'Apply Saved Filter' pan

| Apply Saved Filter |
|--|
| Filter Location and Contents |
| Filter Location |
| /My Folders/Subject Area Contents/Tramadol and Methadone |
| Contents of Filter |
| BNF Presentation plus Code is equal to / is in 040702040AAAAAA; 040702040AAABAB; 040702040AAACAC; 040702040AA 040702040AAAIAI; 040702040AAAJAJ; 040702040AAAKAK; 040702040AAALAL; 040702040AAAMAM; 040702040AAANAN; 0 040702040AAATAT; 040702040AAAUAU; 040702040AAAVAV; 040702040AAAWAW; 040702040AAAXAX; 040702040AAAYAY; 040702040AABDBD ORT BNF Chemical Substance plus Code is equal to / is in 0309010S0; 0407020M0; 0410030C0 |
| Filter Options |
| Choose one or more of the following options to control how the filter should be applied to the analysis. |
| Clear all existing filters before applying |
| Apply contents of filter instead of a reference to the filter |
| |

| 1. | Displays the location the filter is saved to, when leaving the 'Apply contents of filter instead of a reference to the filter' un ticked the analysis will reference back to this location |
|----|--|
| 2. | Displays the contents of the filter, when you create a filter using name, the system automatically converts to the code |
| 3. | If you tick this box it will remove any filters you have previously applied to your analysis |
| 4. | If you tick this box it will take the contents of the filter and apply this to your analysis. This will mean if you alter or delete the filter in the future this analysis will not be affected. |
| | If you leave the box un-ticked, your analysis will reference back to where the filter is saved. This means that if you update the filter in the future this analysis will automatically update with the changes. |

- 5. Leave all boxes un-ticked and select 'OK' to apply the filter to your analysis.
- 6. Select 'Results' to run your analysis

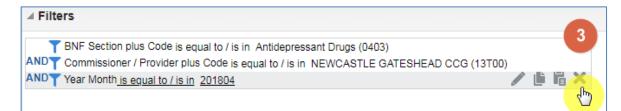


You do not need to select the data to return at the same level the filter has been created at, for example: our filter was created and Presentations and Chemical Substance level, the results have been returned at Chapter level.

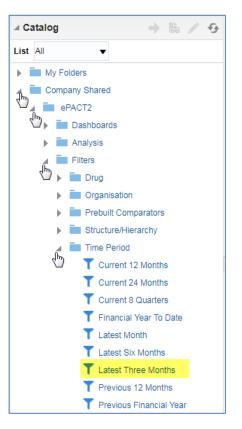
Apply prebuilt filter exercise

The aim of this exercise is to apply one of the NHSBSA prebuilt time period filters, these filters allow you to set up an analysis that will automatically update every time you open it.

- 1. Locate Demo 5 in your 'Catalog', select the edit icon
- 2. Select the Criteria tab
- 3. In the filters pane remove the following filter 'Year Month is equal to / is in 201804' by hovering over the filter and selecting the X icon



4. Using the 'Catalog' pane on the left hand side of the screen navigate to, the time period filters and apply the 'Latest Three Months' filter



5. Once applied save your analysis.

Visual Reports

Demo 6 – Building a Visual Report

In this example, we will continue from our previous analysis created in Demo 2 but look to see how the data can be visualised in different ways to effectively present data. Specifically we are going to add Performance Tiles to show high level figures at a glance, Bar Charts and a Tree map to identify outliers.

Adding a Performance Tile

 Go to My Folders and locate the Demo 2 report we made in the previous demo. Once located, open and select Edit. The report will open on the Results Tab

| Subject Areas 🔍 † 🗸 👻 | ≞▼ ⊵▼ | B ▼ B 9 Ib ▼ 2 % B B | 9 (Å) | 8 5 8 | e]] <i>9,9</i> | |
|-----------------------|--------------|----------------------------|-------|-------------|----------------|------------------|
| 🖌 🕌 ePACT 2 | Compound Lay | rout | | | | |
| Time Period | Table | | | | [| A 102 / > |
| Organisation | | | | | | |
| Drug / Appliance | Year Month | HS Practice plus Code | Items | Actual Cost | Items - PrY | Actual Cost - Pr |
| Reporting Fields | 201805 | ADULT ADHD SERVICE (RX44A) | 104 | 3,660.56 | 85 | 3,529.8 |
| Patient | 201805 | ADULT ADHD SERVICE (RX4DD) | 51 | 1,937.64 | 52 | 2,537.6 |
| | 201805 | ADULT ADHD SERVICE (RX4DF) | 58 | 2,348.19 | | |
| | | | | | | |
| | 201805 | ADULT LD SERVICES (RX41E) | 7 | 12.64 | 4 | 23.9 |

2. Remove the table view from the 'Compound Layout' by selecting the 'Remove view from compound layout' icon.

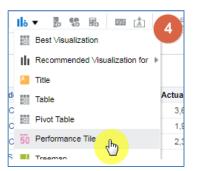
| l∙ r∙ | ᅟᇳ ᇕ ᆴ ▾ 해 안 ゐ ▾ ᇸ | [Å] | e y e | E]] | 2 |
|-------------|----------------------------|-------|-------------|-------------|-------------------|
| ompound Lay | out | | | | |
| Table | | | | | [A] 🔤 🖉 🕌 |
| | | | | | <u> </u> |
| Year Month | HS Practice plus Code | Items | Actual Cost | Items - PrY | Actual Cost - PrY |
| 201805 | ADULT ADHD SERVICE (RX44A) | 104 | 3,660.56 | 85 | 3,529.88 |
| 201805 | ADULT ADHD SERVICE (RX4DD) | 51 | 1,937.64 | 52 | 2,537.61 |
| 201805 | ADULT ADHD SERVICE (RX4DF) | 58 | 2,348.19 | | |
| 201805 | ADULT LD SERVICES (RX41E) | 7 | 12.64 | 4 | 23.91 |
| | ADULT LD SERVICES (RX4DG) | 27 | 1,187.84 | 20 | 441.15 |

Removing views from the compound layout does not delete the view from the analysis. Views can be added back into the compound layout by clicking and dragging the view from the 'Views' pane.

3. Select the 'New View' icon from the task bar to display the views available to include in an analysis.

| Criteria Results Prompts Advanced | | | | | | 3 |
|-----------------------------------|--------------|----------------------------|-------|-------------|-----------------|-------------------|
| 🛛 Subject Areas 🔍 † 🗸 🔹 » | ≞▼ ⊵▼ | ⊠ a a a a a a a | | 6 5 8 | []] <i>[f.f</i> | |
| 🔺 🚼 ePACT 2 | Compound Lay | | | | | |
| Time Period | Table | | | | | [A] 122 🧪 🗙 |
| Organisation | | | | | | |
| Drug / Appliance | Year Month | HS Practice plus Code | Items | Actual Cost | Items - PrY | Actual Cost - PrY |
| Reporting Fields | 201805 | ADULT ADHD SERVICE (RX44A) | 104 | 3,660.56 | 85 | 3,529.88 |
| | 004005 | | | 4 007 04 | 50 | 0.507.04 |

4. Select 'Performance Tile' from the list available.



5. Select the 'Edit View' icon within the Performance Tile.



6. Select the drop down list for the 'Measures' section.



7. From the drop down list select 'Items'.



8. Select the style displayed.



9. To change the colour used in the tile select the 'Performance Tile Properties' button.



10. Within the 'Performance Tile Properties' pane select the 'Colours – Background' drop down option.

| Performance Til | Performance Tile Properties (10) | | | | | | |
|------------------|--|--|--|--|--|--|--|
| Tile Size | Medium 🗸 | | | | | | |
| Height | 100 Pixels | | | | | | |
| Width | 100 Pixels | | | | | | |
| | Increase width to fit value Shrink value to fit width Do not Autofit | | | | | | |
| Value and Labels | Fixed positions Best choice when using multiple performance tiles Utilize available space Abbreviate Values (e.g. 1000 = 1K) | | | | | | |
| Colors | Background Border . | | | | | | |
| | OK Cancel | | | | | | |

11. In the 'Colour Selector' enter the code #FF9933 and select 'Ok' to confirm.

| Colors | Background | Color Selector | × |
|-------------|--------------------|----------------|--------|
| Edit | Conditional Format | | |
| | | | |
| 999M | 999M | | |
| Description | Description | | |
| | | | |
| | | | |
| | | #FF9933 | Clear |
| | | ર | Cancel |

12. Select 'Done' to confirm the changes to the view.



Now repeat the process above to add a Performance Tile to show the 'Actual Cost'.

Adding a Bar Chart

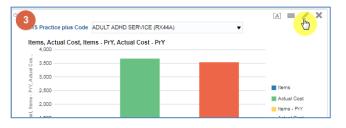
1. Select the 'New View' icon from the task bar to display the views available to include in an analysis.



2. Expand the 'Graph' option followed by the 'Bar' option and select 'Vertical' from the list available.

| | ò | ▼ 3 % Fa III (Å) | | B | y B. | ⊡]j | ę.,0 | 2 |
|----|-------------|-------------------------------|---|----|------------|--------|------|-------------------------|
| | | Best Visualization | | | | | | |
| | ılı | Recommended Visualization for | Þ | | | | | |
| | A | Title | | | | | | |
| 1 | | Table | | | | | | |
| | 00 | Pivot Table | | | | | | |
| | 50 | Performance Tile | | | | | | |
| s | ÷ | Treemap | | | | | | |
| 5 | " }• | Heat Matrix | | | | | | |
| F | | Trellis | Þ | | | | | |
| | ılı | Graph | ۲ | h | Bar | | Þ | III Recommended Subtype |
| e | ፍ | Gauge | Þ | ~ | Line | | | Vertical |
| , | Þ | Funnel | Þ | | Area | | Þ | E Horizontal |
| 4 | | Мар | | ¢ | Pie | | | tacked Vertical |
| F | T | Filters | | ĩì | Line-Bar | | Þ | Stacked Horizontal |
| F | <u>9</u> ,8 | Selection Steps | | ~ | Time Serie | s Line | | 100% Stacked Vertical |
| ľ, | | Other Views | Þ | ĥ. | Pareto | | | 100% Stacked Horizontal |

3. Select the 'Edit View' icon within the Bar Chart.



- 4. Click and drag the 'HS Practice plus Code' column into the 'Bars' area.
- 5. Click and drag the 'Year Month' into the 'Graph Prompts' area.

| Layout | |
|---|------------------------------------|
| rag/drop measures, columns and hierarchies to determi | ne graph layout |
| Graph Prompts | |
| HS Practice plus Code | K |
| Display as Slider | |
| | |
| 4 | Drop here for sectioned view |
| Bar Graph | 5 |
| | |
| Measures | Bars |
| | Bars Group By (Horizontal Axis) |
| Measures | Bars |

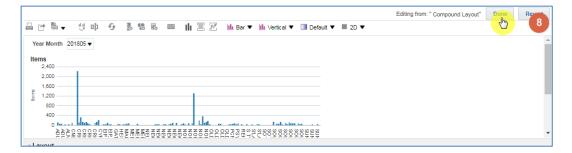
6. Click and drag all columns shown in the 'Measures' section except 'Items' into the 'Excluded' section.

| Bar Graph | |
|----------------------|--|
| Measures | Bars 6 |
| Bars (Vertical Axis) | Group By (Horizontal Axis) |
| I Items | HS Practice plus Code |
| Actual Cost | Vary Color By (Horizontal Axis) |
| Items - PrY | Show In Legend |
| | Measure Labels |
| Actual Cost - PrY | |
| | |
| | |
| | |
| xcluded | |
| • | Drop here to exclude from this view only |

7. Only the 'Items' field should be left in the 'Measures' area.

| Bar Graph | |
|---|---------------------------------|
| Measures | Bars |
| Bars (Vertical Axis) | Group By (Horizontal Axis) |
| Items | HS Practice plus Code |
| | Vary Color By (Horizontal Axis) |
| | Measure Labels |
| Excluded | |
| 🕼 🚪 Actual Cost 📗 🚪 Items - PrY 🕼 🚪 Actual Cost - PrY | |

8. Select 'Done' to confirm the changes.



9. Hover over one of the values shown in the bar chart and right click

| 2,400 | |
|-------|---|
| 2,000 | 9 |
| 1,600 | |
| ,200 | |
| 800 | |
| 400 | |
| 0 | to a different and a second second faith or and a second faith of a second second second second second second s |
| | |
| | |
| | ≥⊑₽₽%#66°m8⊆∃ ≤ ₩????66666669∃∃⋶⋶₩₽₽₽89z;;oo2#dooooo+₽₽₽₽ |
| | |

10. Select 'Sort' from the drop down list displayed.

| ltems 2,400 | 10 |
|----------------|---------------------|
| 2,000 | - |
| 1,600 | |
| L 1,200 | |
| 800 | |
| 400 | ^{Sort} վեղ |
| 0 Incode | Drill 🔽 |
| ADULT | Keep Only |
| AP SX | Remove |
| 14286 1 | |

11. Select the '+' icon to add a sort.

| 11 |
|-----------|
| + ^ Y X % |
| |
| |
| |
| |
| |

12. Select 'Items' from the 'Sort by' drop down list.

| Sort | | | | | 0 | × |
|-------------|-----------------------|-------|-----|--------|---|----|
| Sort I | Prompts | | + ^ | \sim | × | ×. |
| Click Add S | Sort to sort Prompts | | | | | |
| | | | | | | |
| Sort | Groups | | + ^ | ~ | × | ×× |
| | Column | Order | | | | |
| Sort by | Select 🔹 | | | | | |
| | HS Practice plus Code | 1 | | | | |
| | Items _ | | | | | |

13. Select 'Low to High' from the 'Order' drop down list.

| Sort Prompts | | + | \wedge | \sim | × | * |
|--------------------------------|---------------------------------|-----|----------|--------|---|---|
| Click Add Sort to sort Prompts | | | | | | |
| · Sad Carrier | | | | | | ~ |
| Sort Groups | | - + | \wedge | ~ | × | X |
| Column | Order | | | | | |
| Sort by Items | Low to High | | վե | | | |
| | | | | | | |
| | | | | | | |

14. Select 'Ok' to confirm the changes.

| Sort | | | | | 0 | 1 | 4 |
|--------------------------------|-------------|---|--------|--------|----|------|---|
| Sort Prompts | | + | \sim | \sim | × | ** | 1 |
| Click Add Sort to sort Prompts | | | | | | | |
| Sort Groups Column | Order | + | ^ | ~ | x | ×× | |
| Sort by Items 🔻 | Low to High | | • | | | | |
| ㅋ┍┍┆┍╸╴╴╴┆╝╝╣╣╣╣╝╝╱┍┍╒┍ | | | | J.S. | Ca | ncel | |

Your chart will look like this

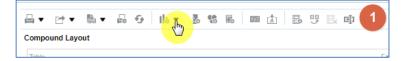
| 1 | | [A] | жуz | I | |
|-------|---------------------|----------|---------------------------------|--|--|
| Ye | ar Month | 201805 🔻 | | | |
| Iter | | | | | |
| | 2,400 | | | | |
| | | | | | |
| 2 | 1,600 | | | | |
| Items | 1,200 | | | | |
| | 800 | | | | |
| | 400 | | - | | |
| | 0 | | | | |
| | MEMORY SERVICE NORT | | ASTLE CMH T NM FERNDENE (RX4 | SOT STEP UP HUB (RX4FL) OLDER PEOPLES CTT (RX | |

Now repeat the process above to add a bar chart to show the 'Items - PrY.

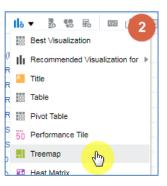
Adding a Tree map

Remove the bar chart views from the 'Compound Layout' by selecting the 'Remove view from compound layout' icon.

1. Select the 'New View' icon from the task bar to display the views available to include in an analysis.



2. Select Tree map



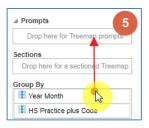
3. Select the 'Edit View' icon within the Tree map.



4. Click and drag HS practice plus code to the 'Group By' section

| Layout |
|-----------------------------------|
| A Prompts |
| HS Practice plus Code |
| Sections |
| Drop here for a sectioned Treemap |
| Group By |
| Year Month |

5. Click and drag the 'Year Month' to 'Prompts' section.



6. Select 'Items' from the 'Size by' options



7. Select 'Actual Cost' from the 'Colour By' options.



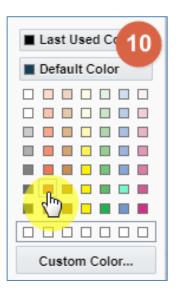
8. Select 'Decile (10)' from the 'Bins' option



9. Click the drop down of the 'Last Tenth' decile to select a difference colour

| Bins Decile (10 |) | 9 |
|--------------------|---------------|-------------------|
| Color | | _ |
| Binning Pr | | ▼↓ |
| 0 % | Label | Color |
| 10 % | First Tenth | |
| 20 % | Second Tenth | • |
| 30 % | Third Tenth | |
| 40 % | Fourth Tenth | • |
| 50 % | Fifth Tenth | |
| 60 % | Sixth Tenth | • |
| 70 % | Seventh Tenth | • |
| 80 % | Eight Tenth | • |
| 90 % | Ninth Tenth | • |
| 100 % | Last Tenth | The second second |
| | | <u> </u> |

10. Choose a colour from the available options, (in this example we have chosen orange)



11. Select 'Done' to action the changes

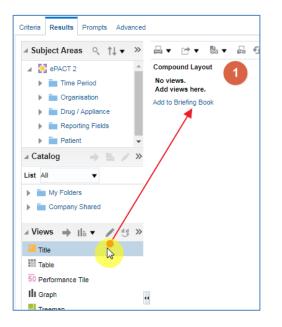


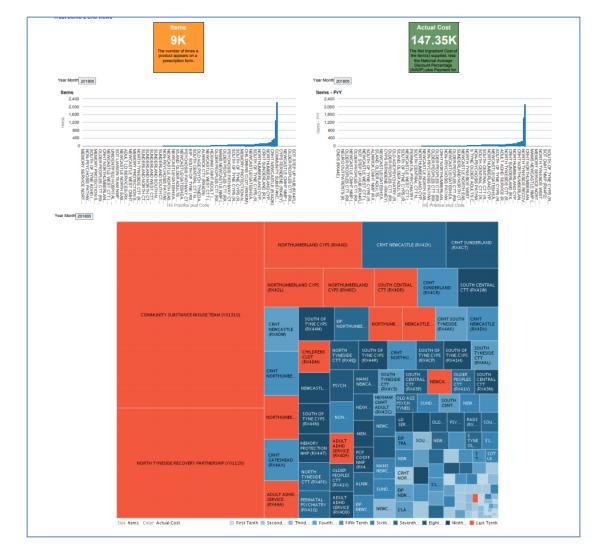
Your view will now look like this:

| Treemap | | | | | | | A | / X |
|---|---------------|----------------------|------|-----------|-------------------|---------------|-------|---------------------|
| Year Month 201805 🔻 | | | | | | | | |
| | | | | | HT NEWCAS 42K) | CRHT SUNDE | RLA | |
| | NORT | NORT | | HT RTH | NORTH | CRH1 GATE | AI | DULT DHD ERVI |
| COMMUNITY SUBSTANCE MISUSE TEAM (Y01310) | | | CHIL | | | | | |
| | NORT | EIP NOR | | PSY | . NON | ADU | | |
| | SOUTH CENT | NOR | CRHT | | | | | |
| | 0017 | NEW | NO | | EIP T | | | S |
| NORTH TYNESIDE RECOVERY PARTNERSHIP (Y01120) | CRHT SUND | CRHT SOUTH TYN | | | | | | |
| | South Cent | CRHT NEW | | EIP N | EIP | | | |
| Size Items Color Actual Cost | | Fi | | Fi. | 🔳 Si 🛛 | E | i 🔳 N | li 📕 |

Adding the views back into the compound layout

1. Click and drag the views from the 'Views' pane into the Compound Layout.





2. The Views should be arranged as below.

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: <u>https://www.nhsbsa.nhs.uk/epact2/epact2-user-guides</u>

WebEx sessions

WebEx will be provided on a number of different topics and features. More information about these can be found here: https://www.nhsbsa.nhs.uk/epact2/epact2-training

Useful Contact Details

ePACT2 Training Team: nhsbsa.epact2training@nhs.net

Information Support Team:

email - nhsbsa.help@nhs.net

Telephone - 0191 2035050