

# ePACT2 user guide

## Accessing and Using Dashboards and Pre-built Reports



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## Accessing a Dashboard

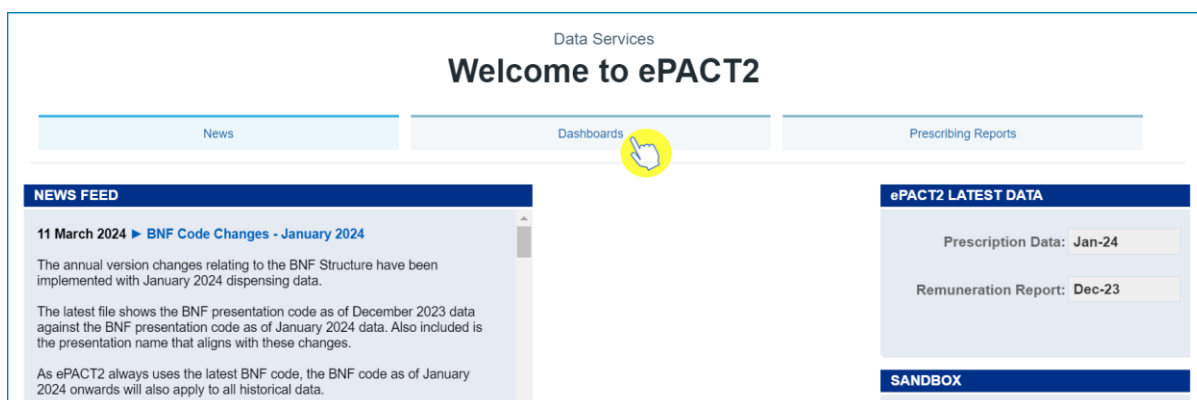
ePACT2 has a multitude of dashboards available for users, with their aim to provide high level information for users to be able to easily benchmark their organisation against others within the different structural levels of the NHS (National/ICB/Commissioner/Provider/PCN/Practice).

In addition to this, these dashboards help users to monitor prescribing within different areas in order to support medicines optimisation, patient safety, improving patient outcomes and prioritising areas you may wish to focus more resources on.

Detailed information and specification documents for the dashboards are available via the NHSBSA website here: <https://www.nhsbsa.nhs.uk/access-our-data-products/epact2/dashboards-and-specifications>

## Dashboard Selection

1. Select the 'Dashboards' link from the ePACT2 Landing page:



2. The dashboard page will open and display all available dashboards. From here click the blue link of the dashboard you want to open:



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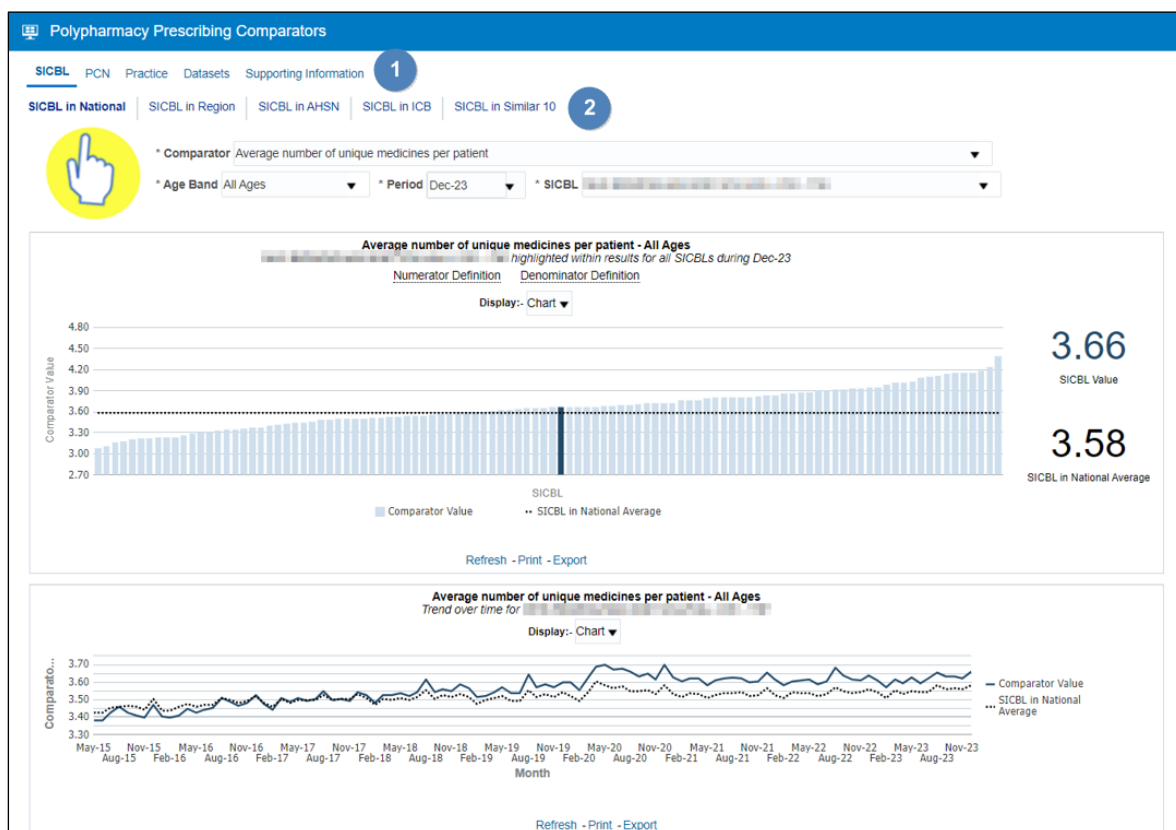
## Navigating the Dashboard

For the purposes of this guide we shall use the 'Polypharmacy' dashboard as an example. With all of the dashboards contained within ePACT2, these dashboards will operate with the same general functionality and ease of use.

### Selecting a Dashboard Page

Dashboards are made up of several different pages which allow you to select different sets of information. For example, you can view information at different organisation levels.

1. To navigate to a different page, click on the tab of the page you would like to view (the Polypharmacy dashboard will default to the SICBL tab when first accessed):



Once the organisation level tab of your choice has been selected, the data displayed on the page will update to reflect the level you have chosen to view it at.

2. You can then choose between the different sub-pages to see, in this case, a chosen SICBL compared Nationally, Regionally, within its AHSN or ICB.

## Dashboard Criteria Selection

Underneath the Pages and Sub-pages you will find the 'Criteria Selection'. It is here you can select the criteria you want, in order to return the data you wish to see:

The screenshot shows the 'Polypharmacy Prescribing Comparators' dashboard. At the top, there are navigation tabs: SICBL, PCN, Practice, Datasets, and Supporting Information. Below these are sub-tabs for different SICBL categories: SICBL in National, SICBL in Region, SICBL in AHSN, SICBL in ICB, and SICBL in Similar 10. The 'Criteria Selection' section is highlighted with a red box and contains four dropdown menus: '\* Comparator' (set to 'Average number of unique medicines per patient'), '\* Age Band' (set to 'All Ages'), '\* Period' (set to 'Jan-24'), and '\* SICBL' (set to 'SICBL in Region').

The dashboard will default to show data for the latest time period available and the organisation you are registered under. As the data in all dashboards is available at practice level and above you will be able to access the data for any organisation.

The options available in the 'Criteria Selection' will change depending on the dashboard you are looking at.

To change the data shown in the dashboard simply select an option from the drop-down boxes in the Criteria Selection

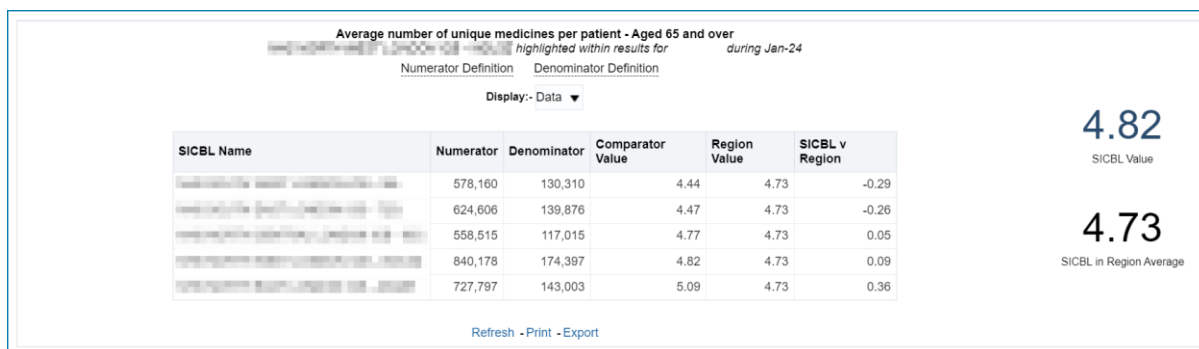
1. Click on the drop-down arrow to the right of the box you would like to update:

The screenshot shows the 'Polypharmacy Prescribing Comparators' dashboard with the 'Criteria Selection' section. The '\* Age Band' dropdown menu is open, showing a list of age groups: 'All Ages' (selected), 'Aged 0 to 17', 'Aged 18 to 24', 'Aged 25 to 34', 'Aged 35 to 44', and 'Aged 45 to 54'. A hand cursor is pointing to the 'All Ages' option. The background shows a preview of a bar chart titled 'Average number of unique medicines per patient - All Ages' for 'Jan-24'. The chart has a y-axis with values 3.45, 3.50, and 3.55. The chart is currently set to 'Display: Chart'.

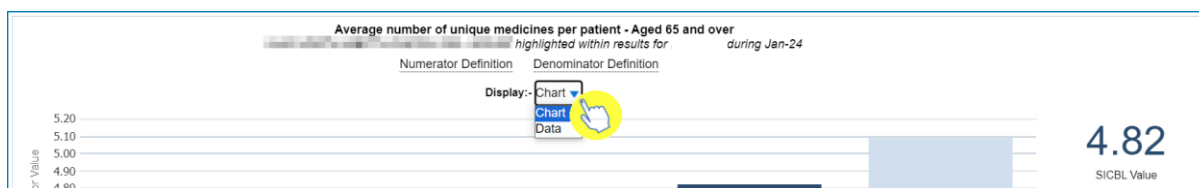
2. Select a change to the criteria by clicking on the option in the drop-down box you want to see:







If a report has both views you can switch between these 'Chart' and 'Data' views by opening the Display drop-down box and selecting between the two options:




## External Request Procedure for Patient Identifiable Information

If the user identifies a patient/group of patients within the results, and they may wish to initiate an investigation/SMR (Structured Medication Review) into them, then there is an external procedure to obtain that patient identifiable information.

Due to patient confidentiality, the actual patient identifiable information cannot be stored within the system itself but can be requested externally using the following process.

Within the Polypharmacy dashboard there is a tab titled 'Supporting Information', when clicked on this tab has various sub-tabs one of them being 'Patient Details'.

Select this 'Patient Details' sub-tab to then bring up the external request procedure needed to request patient identifiable information (patient identifiable information is usually in the form of a patients' NHS Number when requested):

 Polypharmacy Prescribing Comparators

SICBL PCN Practice Datasets **Supporting Information**

Context (SICBL) | Context (Practice) | Supplementary Information | **Patient Details** | Supporting Information

**Overview:**  
To enable patient interactions the NHSBSA can provide the NHS numbers of patients flagged by the polypharmacy comparators.

However, the NHS numbers will only be disclosed to requestors who can claim that they:

- a)** provide direct care for the applicable patients (i.e. GPs, Clinical Pharmacists etc).
- b)** have been commissioned to review the care of the patient (e.g. commissioned to look at care home patients)

Patient details will be returned via email as a list of NHS Numbers for each of the requested polypharmacy comparators.

**Request Procedure:**

- 1) Requests should be submitted via email to [DataServicesSupport@nhsbsa.nhs.uk](mailto:DataServicesSupport@nhsbsa.nhs.uk)
- 2) The registered GP of the practice must be CC'd to the email
- 3) The following declarations should be included within the email:  
*"I have direct clinical care of the patients within the practice."  
 "I will be responsible for the safe guardianship of the data I receive."  
 "The information will not be used beyond the purpose of the request."*
- 4) The following information should be included in the request:  
**Name of requestor:**  
**Role within the practice:**  
**Practice code:**  
**Practice name:**  
**Practice address:**  
**Practice telephone number:**  
**Registered GP name and prescriber code:**  
**Polypharmacy metric(s) requested:**  
**Month(s) requested:**
- 5) Please note, due to the sensitivity of the information the NHSBSA may reply for further information or clarification of your right to ask for the data.

Produced by the NHS Business Services Authority (NHSBSA) Data Services

**Please note:** This request procedure is only in place for the dashboards that have the accompanying Supporting Information - Patient Details page with the request procedure detailed.

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## Exporting and Printing the Data

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Information can be exported from the dashboard in several ways and in a number of different formats, these formats are standard throughout the system.

Print Formats:

- Printable PDF
- Printable HTML

Export Formats:

Formatted -

- PDF

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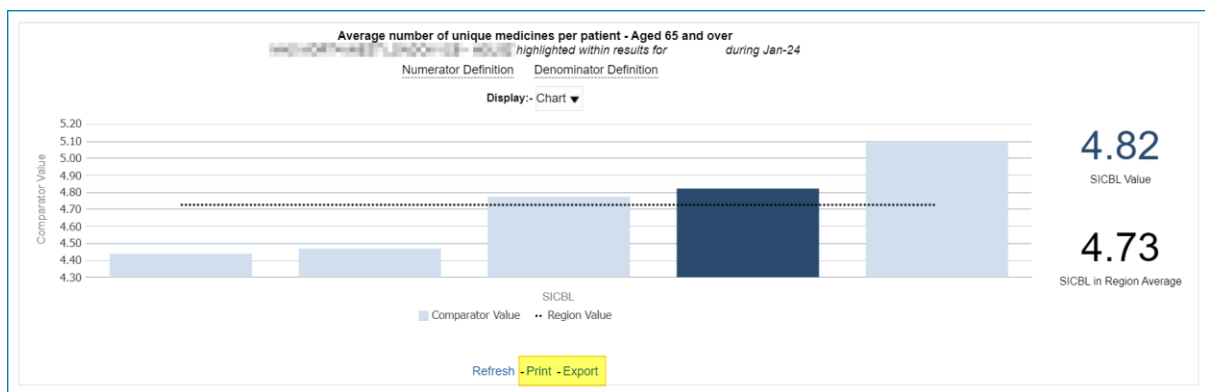
- Excel
- PowerPoint
- Web Archive

Data -

- Excel
- CSV
- Tab Delimited
- XML

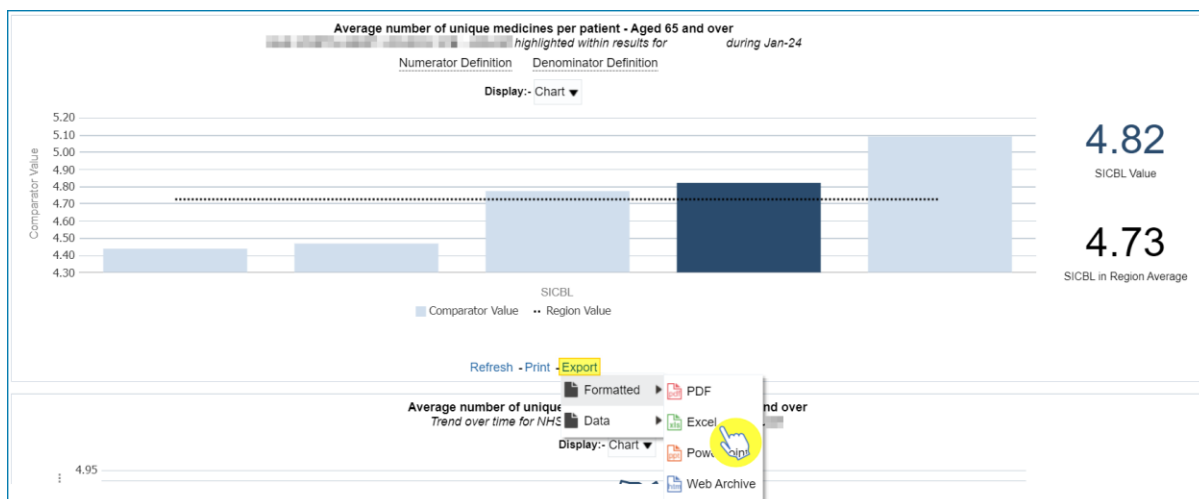
## Exporting and Printing Individual Reports

The reports within the dashboard will have options to 'Print' or 'Export' (highlighted) below each of the reports on the dashboard page:



## Exporting Individual Reports

1. Click on the 'Export' option below the report
2. A drop-down list with the formats available to export in will be displayed
3. Select the export option required from the list presented

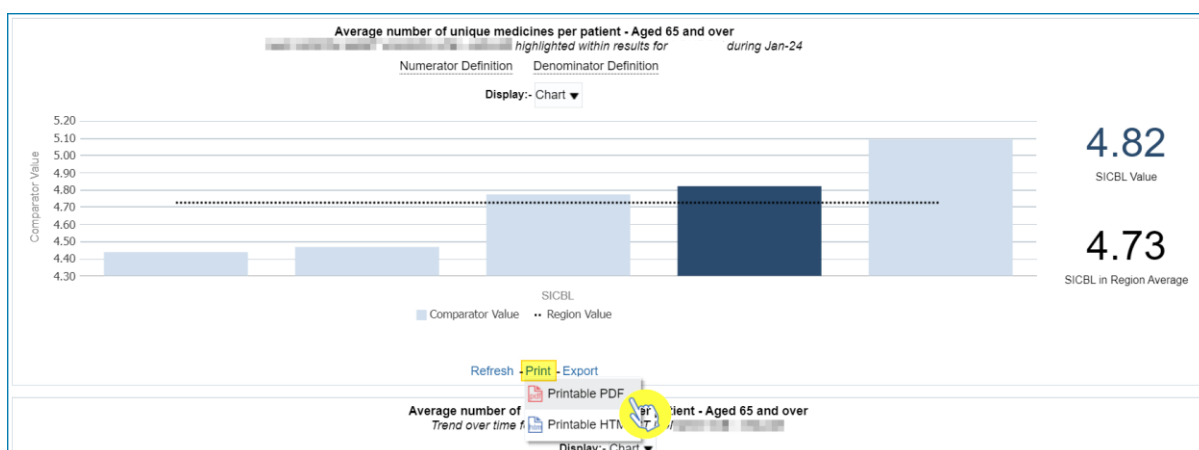


**Please note:** The 'Formatted' export options will keep any formatting when exporting, such as a visual or particular formatting on a table of data (boldness of font etc.)

The 'Data' export options will remove any formatting, exporting just the raw data into the format specified.

## Printing Individual Reports

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



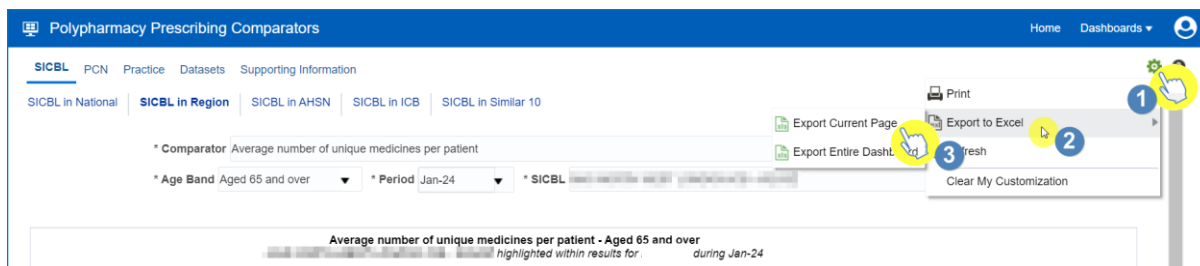
## Exporting and Printing a Dashboard Page

### Exporting a Dashboard Page

1. Select the 'Cog' icon in the upper right-hand corner of the page

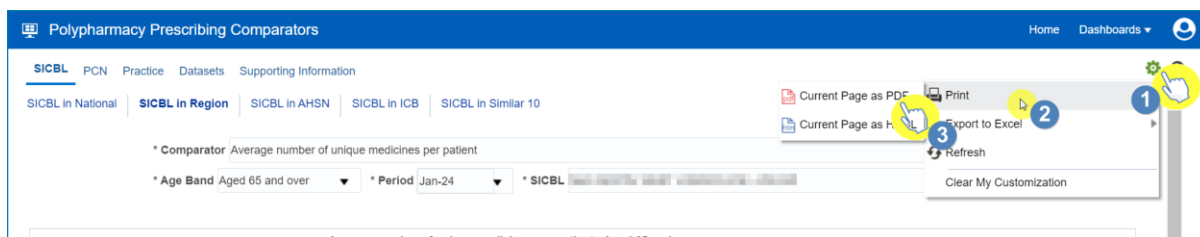
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2. From the drop-down list presented hover over the option 'Export to Excel'
3. Then select 'Export Current Page'



## Printing a Dashboard Page

1. Select the 'Cog' icon in the upper right-hand corner of the page
2. From the drop-down list presented hover over the option to 'Print'
3. Then select the 'Print' format you require



## Accessing a Pre-built Report

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

### Selecting a Pre-built Report

1. To access the 'Prescribing Reports' from the Landing page simply select the 'Prescribing Reports' tab:

The screenshot shows the ePACT2 landing page. At the top, it says 'Data Services' and 'Welcome to ePACT2'. There are three tabs: 'News', 'Dashboards', and 'Prescribing Reports'. The 'Prescribing Reports' tab is highlighted with a yellow hand icon. Below the tabs, there is a 'NEWS FEED' section with a news item dated 11 March 2024 about BNF Code Changes. To the right, there is an 'ePACT2 LATEST DATA' section with dropdown menus for 'Prescription Data: Jan-24' and 'Remuneration Report: Jan-24'. Below that is a 'SANDBOX' section with links to 'Community Pharmacy Demand Dashboard', 'PADM Patient Analysis', and 'SPS Drug Monitoring during Covid-19'.

2. You will be taken to the 'Prescribing Reports' section, all reports are accessed by expanding out the report category (click the triangle icon top left of each section) and then select the link for the report you wish to view:

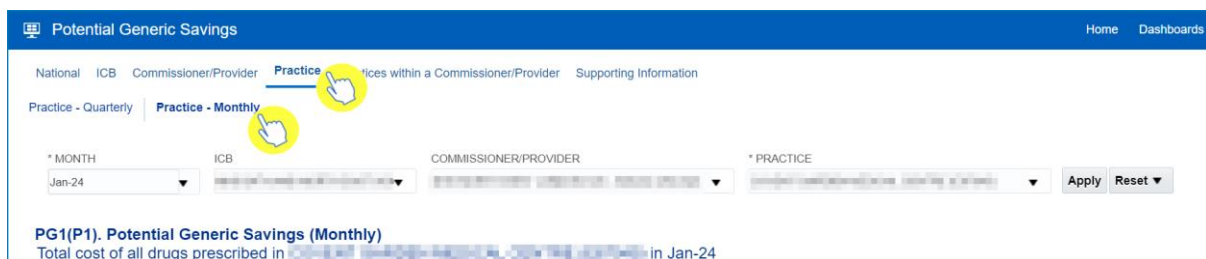
The screenshot shows the 'ePACT2 Prescribing Reports' section. It has three tabs: 'News', 'Dashboards', and 'Prescribing Reports'. The 'Prescribing Reports' tab is selected. Below the tabs, there are several report categories, each with a triangle icon on the left. A yellow hand icon is pointing to the 'Prescribing Comparators' category, which is expanded to show sub-categories: 'Potential Generic Savings (PG1)', 'Specialist Drugs (PC1)', 'Prescribing Information', and 'Volume Comparators'. Other categories include 'Key reports', 'Invoice Reconciliation Reports', 'Cost Comparators', 'Organisation & Demographic Information', 'Prescribing Monitoring', 'Controlled Drug Reports', 'Controlled Drug Comparators', 'Controlled Drug Monitoring', 'Hospital Trust Reports', 'Common Information Reports', 'MOKTT', and 'Advanced Service Flu Report - Pharmacy Contractors'. At the bottom left, there is a footer with the text: 'Produced by the NHS Business Services Authority (NHSBSA) Data Services', 'View our accessibility statement here', 'Copyright NHSBSA 2024 @', and 'Terms & Conditions'. At the bottom right, there is the NHS Business Services Authority logo.

## Using a Standard Report

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

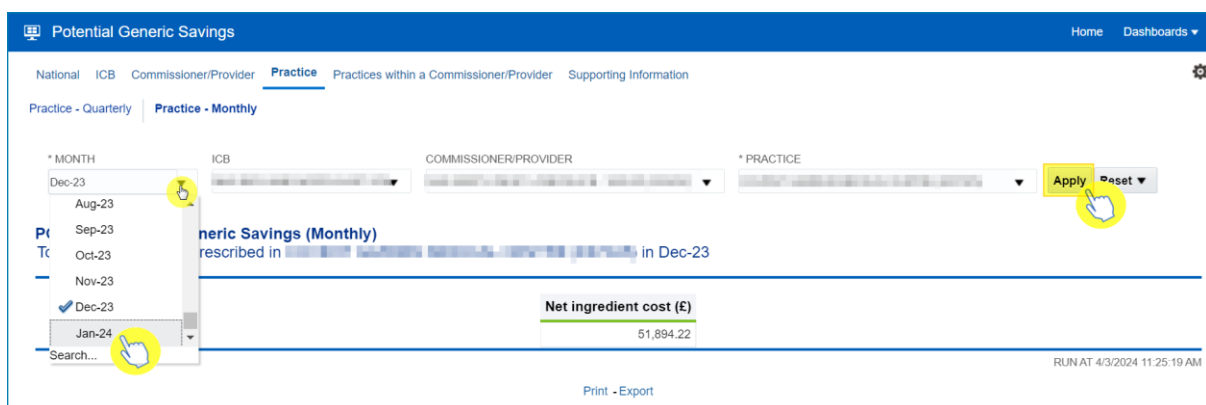
With this 'Standard Reports' example we are using the 'Potential Generic Savings' standard report.

1. Select the main page you wish to view and then the sub-page, in this case looking at Practice level and a monthly breakdown:



2. The 'Criteria Selection' can then be used to restrict the report to your chosen criteria.

**Please note:** - within this Standard Report the selection criteria has an 'Apply' button (highlighted), this means that any change to the selection criteria must be applied by clicking this 'Apply' button to update the report, which in turn will return the data for the relevant changes made:



3. The report will now return the data for the criteria selected, and beneath each of the views in the report there is again the options to 'Export' or 'Print' the data from the report (as detailed in the previous 'Exporting and Printing the Data' section):

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Proprietary drug	Generic equivalent drug	Items	Quantity	Proprietary cost (£)	Generic equivalent cost (£)	Potential saving (£)	Potential saving (%)
Cialis 20mg tablets (0704050R0BBABAB)	Tadalafil 20mg tablets (0704050R0AAABAB)	4.00	28.00	202.16	6.65	195.51	96.71
Vagifem 10microgram vaginal tablets (0702010G0BCABAG)	Estradiol 10microgram pessaries (0702010G0AAAGAG)	3.00	144.00	100.32	51.18	49.14	48.98
Ganfort 0.3mg/ml / 5mg/ml eye drops (1106000A1BBAAAA)	Bimatoprost 300micrograms/ml / Timolol 5mg/ml eye drops (1106000A1AAAAAA)	1.00	9.00	42.48	12.24	30.24	71.19
Sinemet Plus 25mg/100mg tablets (0409010N0BBACAB)	Co-careldopa 25mg/100mg tablets (0409010N0AAABAB)	2.00	436.00	56.16	27.56	28.60	50.93
Circadin 2mg modified-release tablets	Melatonin 2mg modified-release tablets	1.00	60.00	30.78	7.92	22.86	74.27

## Using a Report Template

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

We will select the 'High Cost Drugs (Practice Level) (P5p)' report template (within the Key reports category) as an example:

### ePACT2 Prescribing Reports

News
Dashboards
Prescribing Reports

**Key reports**

- SNF Codes and Names (P2)
- Budget Report (P1)
- Dispensing Doctors (P3)
- High Cost Drugs (Practice Level) (P5p)**
- High Cost Drugs (Prescriber Level) (P3)
- Prescriber - Dispenser (P4)
- Prescribing Itemised (P6)
- Special Order Items (P7)
- Top 50 Paragraphs by Cost Prescriber (P10)
- Top 50 Paragraphs by Items Prescriber (P11)
- Invoice Reconciliation Reports

Prescribing Monitoring

Controlled Drug Reports

Hospital Trust Reports

Prescribing Comparators

Controlled Drug Comparators

Common Information Reports

Prescribing Information

Controlled Drug Monitoring

MOKTT

Volume Comparators

Advanced Service Flu Report - Pharmacy Contractors

1. When you open the report, you will be prompted to enter your criteria within the selection prompts.

**Please note:** if these prompts/drop-down lists have an \* (asterisk) then these will require a selection in order for the report to return the data:

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ePACT2 Home

\* Month Jan-24  
 Aug-23  
 Sep-23  
 Oct-23  
 Nov-23  
 Jan-24  
 Dec-23

\* Commissioner / Provider plus Code [blurred]  
 \* Practice plus Code [blurred]

BNF Chapter plus Code --Select Value--  
 BNF Section plus Code --Select Value--  
 BNF Paragraph plus Code --Select Value--  
 BNF Sub Paragraph plus Code --Select Value--  
 BNF Chemical Substance plus Code --Select Value--  
 BNF Product plus Code --Select Value--  
 BNF Presentation plus Code --Select Value--

OK Reset

Edit - Refresh

- Once the criteria has been selected then click the 'OK' button (beneath the BNF prompts) to generate the report:

ePACT2 Home

\* Month Jan-24  
 \* Commissioner / Provider plus Code [blurred]  
 \* Practice plus Code [blurred]

BNF Chapter plus Code --Select Value--  
 BNF Section plus Code --Select Value--  
 BNF Paragraph plus Code --Select Value--  
 BNF Sub Paragraph plus Code --Select Value--  
 BNF Chemical Substance plus Code --Select Value--  
 BNF Product plus Code --Select Value--  
 BNF Presentation plus Code --Select Value--

OK Reset

Edit - Refresh

- After the report has been run with the selected criteria, then a table of data will be returned to show the 'High Cost Drugs' report.

Essentially, this report will show an itemised view of dispensed drugs within the criteria selected, with the highest cost drugs ordered high to low within the data table:

ePACT2 Home Dashboards

### High Cost Drugs Report

Month is equal to Jan-24  
 and Commissioner / Provider plus Code is equal to [blurred]  
 and Practice plus Code is equal to [blurred]

Practice	Practice Code	BNF Presentation	BNF Presentation Code	Actual Cost (£) per Item	Actual Cost (£) Items	Quantity X Items
[blurred]	[blurred]	Exception Handler Unspecified Item	190201000AABLBL		0.00	0
[blurred]	[blurred]	Sumatriptan 6mg/0.5ml inj pre-filled disposable devices	0407041T0AAAIAI	1,272.60	1,272.60	1
[blurred]	[blurred]	Sucralfate 1g/5ml oral suspension sugar free	0103030S0AAADAD	528.73	1,057.45	2
[blurred]	[blurred]	Bromocriptine 2.5mg tablets	0607010B0AAADAD	424.15	424.15	1
[blurred]	[blurred]	Decapeptyl SR 22.5mg inj vials	0803042S0BAAAAB	390.29	390.29	1
[blurred]	[blurred]	Sucralfate 1g tablets	0103030S0AAAAAA	363.88	363.88	1
[blurred]	[blurred]	Rupatadine 10mg tablets	0304010AEAAAAAA	309.23	618.45	2

- Once generated, the report results can be exported or printed using the 'Export' or 'Print' options (highlighted) underneath the report results:

		vitamins capsules	050007010000000	0.40	1.50	0	00.0
		Ramipril 5mg tablets	0205051R0AAAMAM	0.38	4.52	12	84.0
		Quetiapine 200mg tablets	0402010ABAAADAD	0.37	15.25	41	256.0
		Olanzapine 15mg tablets	040201060AALAL	0.37	1.47	4	28.0
		Ferrous fumarate 322mg tablets	0901011F0AALAL	0.35	1.39	4	28.0
		Diazepam 10mg tablets	0401020K0AAAJAJ	0.34	15.70	46	394.0
		Simvastatin 10mg tablets	0212000Y0AAAAAA	0.27	1.09	4	28.0
		Folic acid 400microgram tablets	0901020G0AABFBF	0.22	8.61	40	112.0

Return - Edit - Refresh - Print - Export

ePACT2: 01News > ePACT2: 04PrescribingReports > High Cost Drugs Report (Practice Level)

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## Getting more help

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### **Additional training material and user guides**

The ePACT2 training team has developed several how to guides to help you get the best out of ePACT2. These can be found on our [ePACT2 user guides page](#).

### **Webinar sessions**

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

You can let us know if you have any specific topics or reports you'd like to cover or if you would prefer an introductory tour. You can take part wherever you are as long as you can get online.

You can find our more and book your webinar by going to our [ePACT2 training page](#).