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Whittington Health NHS

SmokeFree Hackney QuitManager User Guide V5

April 2019

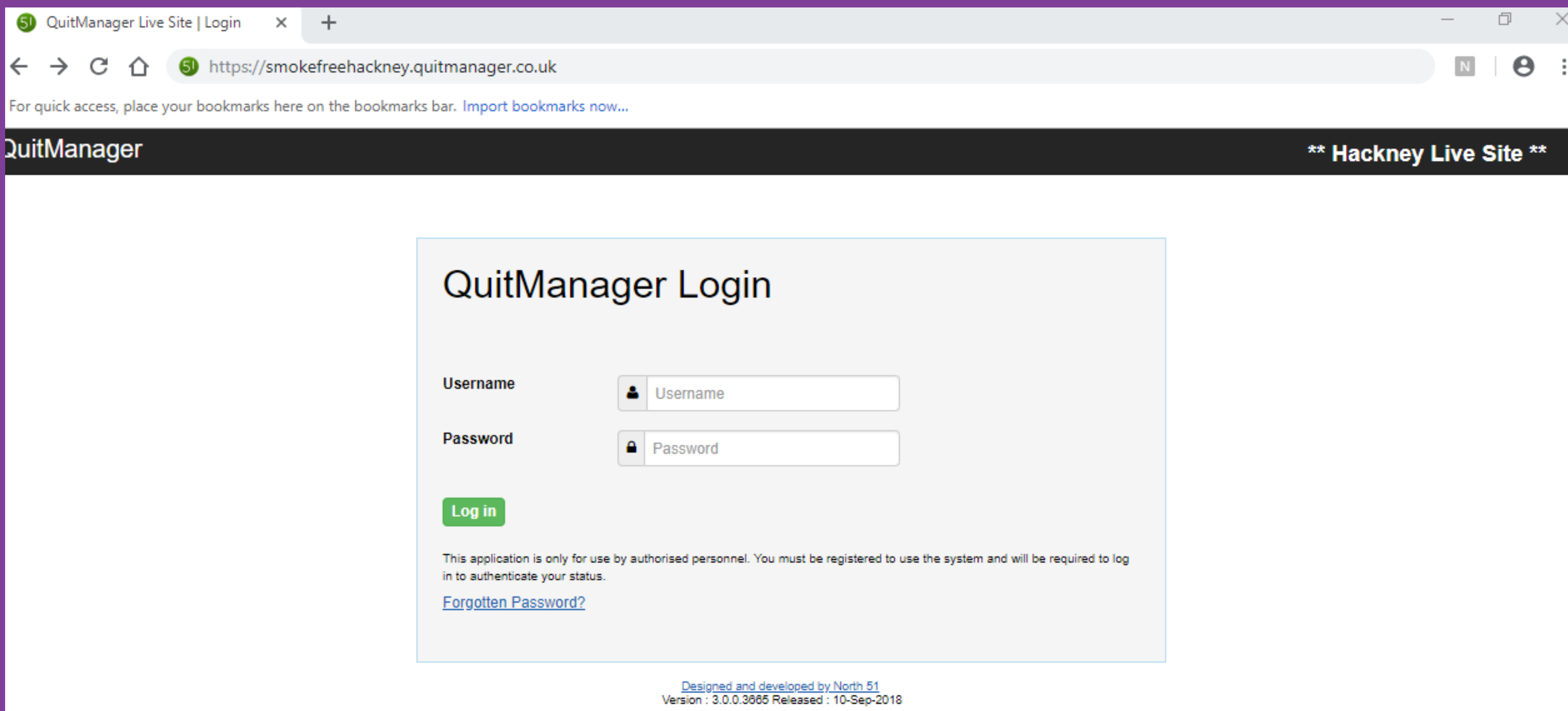
Index

SMOKEFREE Hackney

provided by

Whittington Health NHS

1. Data management system for Hackney Stop Smoking Service – Quit Manager



https://smokefreehackney.quitmanager.co.uk/

New data management system for stop smoking service – Quit Manager

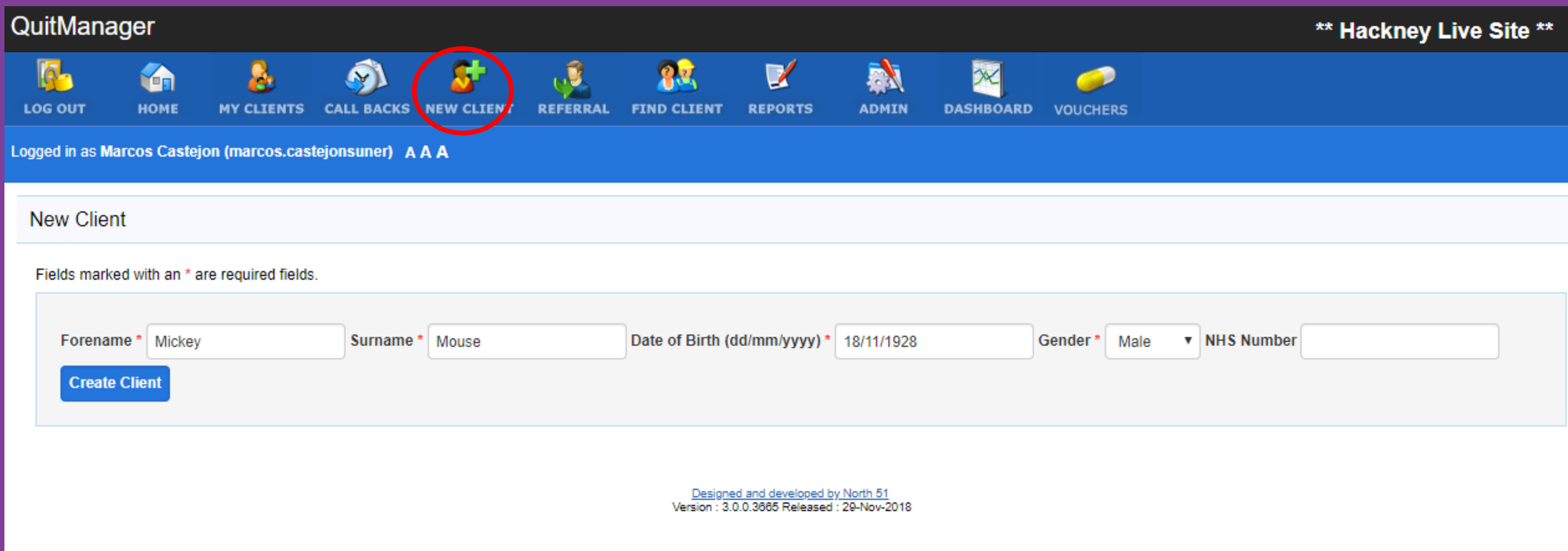
Default logins are always in the same format:

Username: forename.surname
Password: abcd.1234
The system will prompt you to change your password on first log-in

The Smokefree Hackney team is available every weekday to sort out any Quit Manager issues, call 020 3074 2282 or email smokefreehackney@nhs.net

2. Creating a new Client and accurate reporting

Adding a New Client



When adding a new client, QM will look for duplicates

You will have the option to select the existing client if you see that it is the same person, or create a new one if they just have similar info

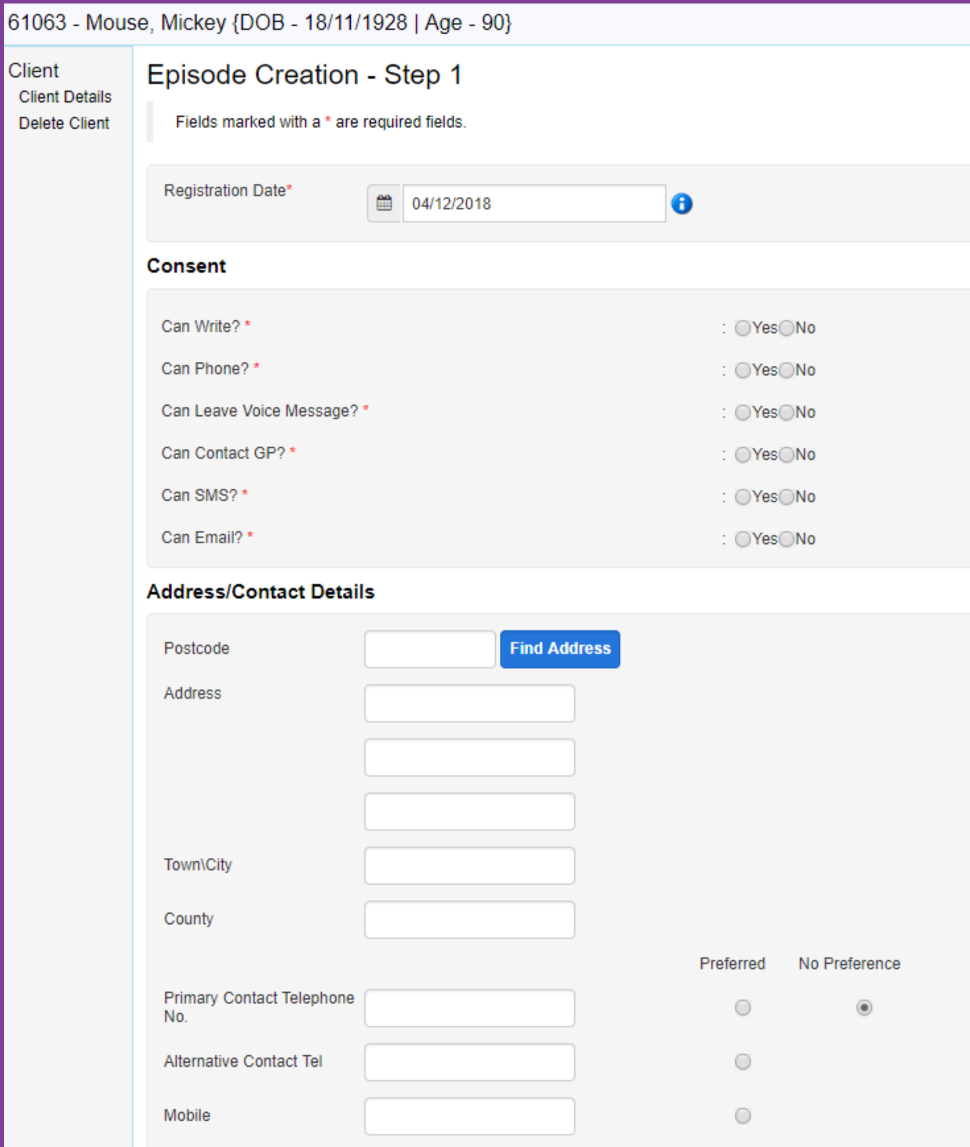
3. Creating an episode of care

The first step after adding a client is creating an episode of care

Make sure to select all the appropriate consent options

Accurately record the client's address and postcode

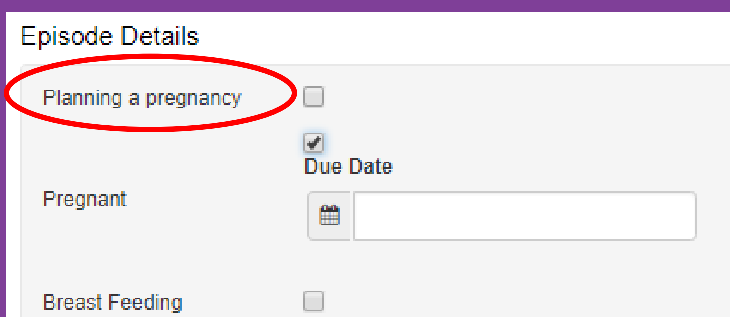
If you want to send SMS (and the client has expressed consent), make sure to add a Mobile number!

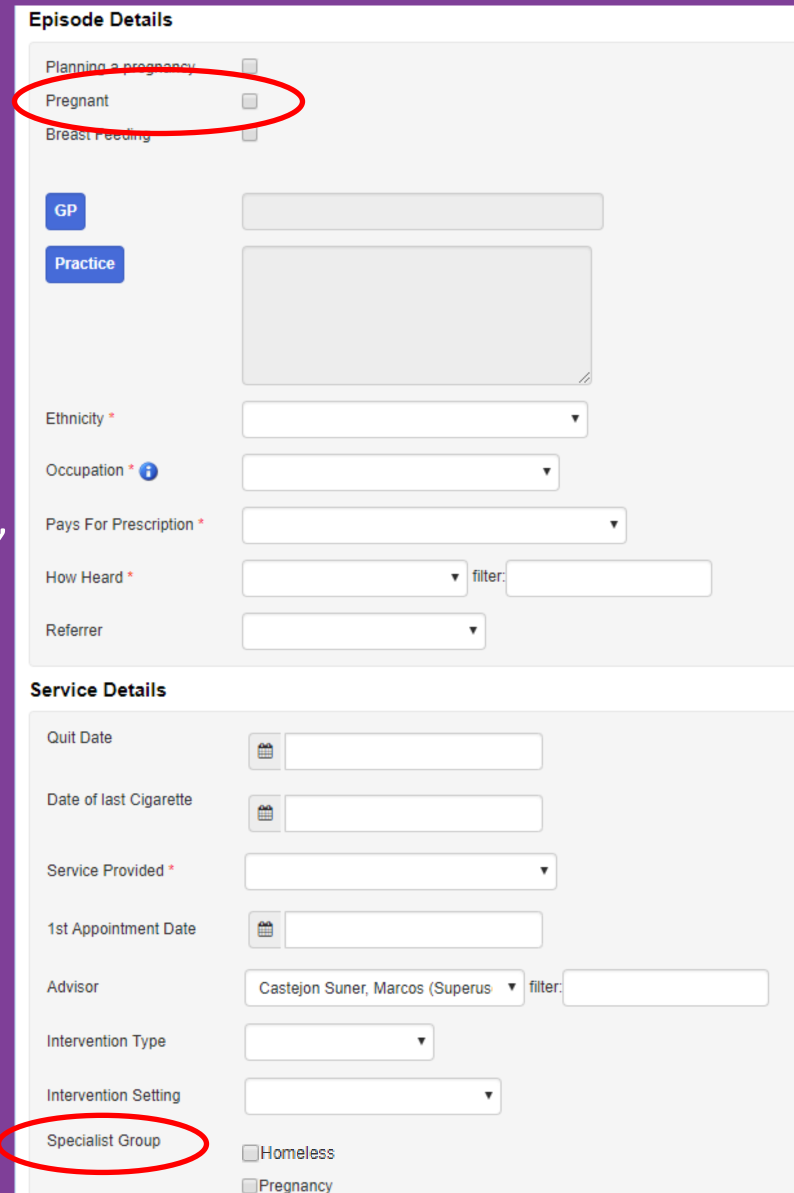


Recording client data

When creating a client, make sure to fill every field you can, and tick the relevant Specialist Groups

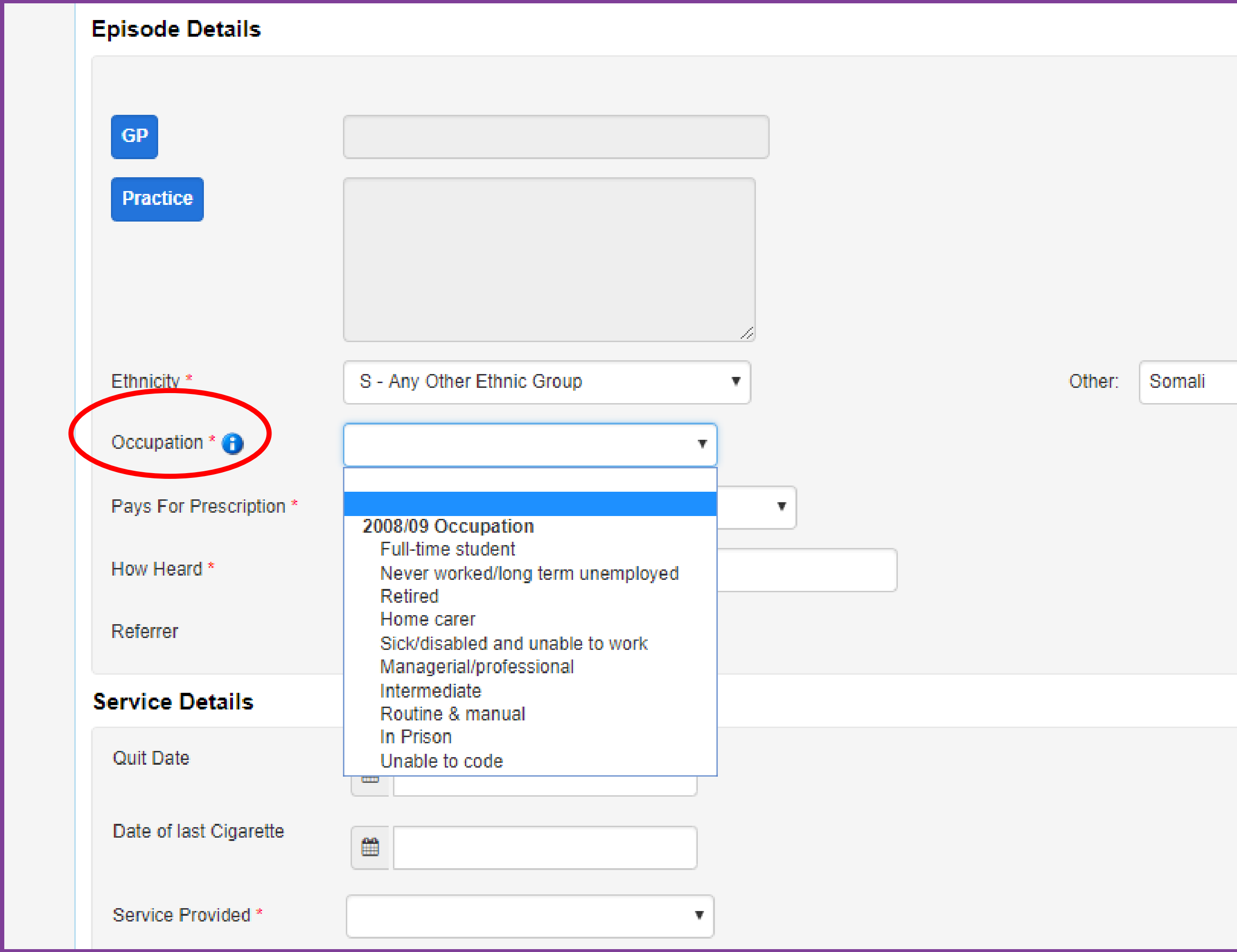
For female clients, note that you are prompted twice to record if they are **pregnant**. Tick either or both, but please ensure at least one is ticked, and Due date is entered





Recording occupation -

When recording occupation, you can click on the blue "i" button for more information on how to classify different jobs.



Recording occupation – Know the codes

How to code occupational group

Occupation Code	Note
Full-time student	
Home carer	Home carer – i.e. looking after children, family or home.
Retired	
Never worked / long-term unemployed	A client is classified as long-term unemployed if they have currently been unemployed for one year or more. If unemployed for less than a year, last known occupation should be used for classification.
Sick / disabled and unable to work	
Managerial / professional	Managerial and professional occupations include: accountant, artist, civil / mechanical engineer, medical practitioner, musician, nurse, police officer (sergeant or above), physiotherapist, scientist, social worker, software engineer, solicitor, teacher, welfare officer; those usually responsible for planning, organizing, and co-ordinating work or finance; self-employed professionals (occupations listed as above) or self-employed and employing more than 25 people.
Intermediate	Intermediate occupations include: call centre agent, clerical worker, nursing auxiliary, nursery nurse, office clerk, secretary; non-professional self-employed individuals, or self-employed and employing less than 25 people.
Routine manual	Routine and manual occupations include: electrician, fitter, gardener, inspector, plumber, printer, train driver, tool maker, bar staff, caretaker, catering assistant, cleaner, farm worker, HGV driver, labourer, machine operative, mechanic, messenger, packer, porter, postal worker, receptionist, sales assistant, security guard, sewing machinist, van driver, waiter/waitress.
Prisoner	The 'prisoner' occupation category has been introduced for collections from 2009/10 onwards in an effort to reduce the number of clients recorded under 'unable to code'. With the exception of prison staff, clients treated in prisons should all be recorded as prisoners.
Unable to code	

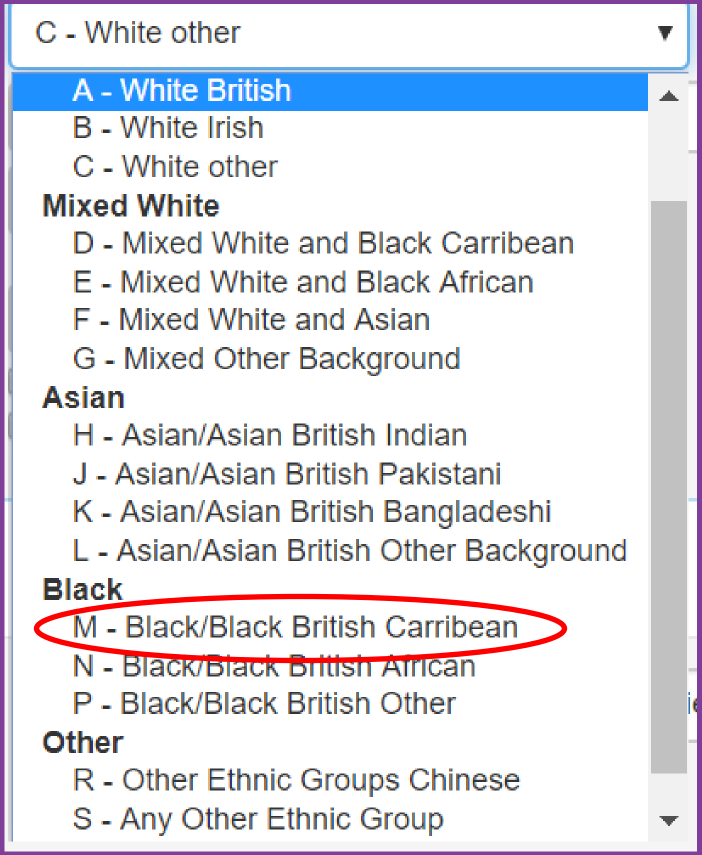
Recording ethnicities

IMPORTANT: Remember to ask and update the client's ethnicity (this is particularly important for ensuring we hit our targets for Priority Groups!)

If the client was already created by the referral team, go back to 'Client Details' and update ethnicity after your first session

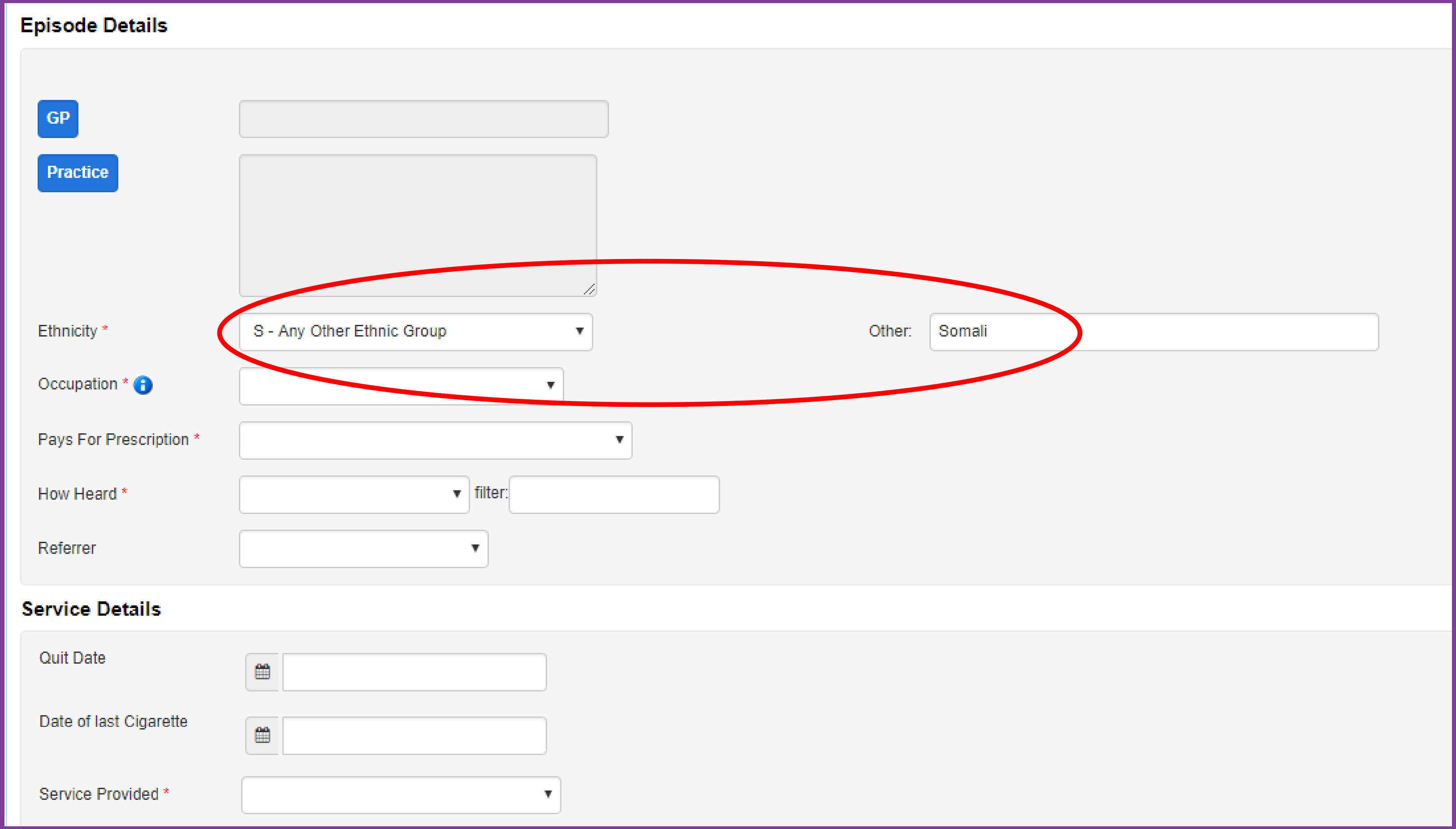
When selecting any of the "Other" options, make sure to accurately specify the ethnicity in the free text box below.

Important: The next slide covers recording our key **target** groups which are *not* included in the standard QM list. ->



Of our Priority groups for Hackney, only Black Caribbean is in this list!

Recording target <u>ethnicities</u> – select ‘S’ Any Other Group, then specify in free text



Recording target ethnicities – select ‘S’ Any Other Group, then specify in free text

There are certain priority groups which we can only record by entering free text – it’s very important that we record this to show we are meeting Priority Group targets.

When entering free text, ALWAYS make sure to spell it correctly to avoid confusing reports. Here are a few examples of our target groups, and how they should be input:

Turkish
Kurdish
Orthodox Jewish
Somali
Vietnamese
Irish Traveller
Eastern European
(Black Caribbean is also priority, but they can be recorded as normal, see previous slide)

Recording Eastern European clients

Eastern European smokers are one of our priority groups.

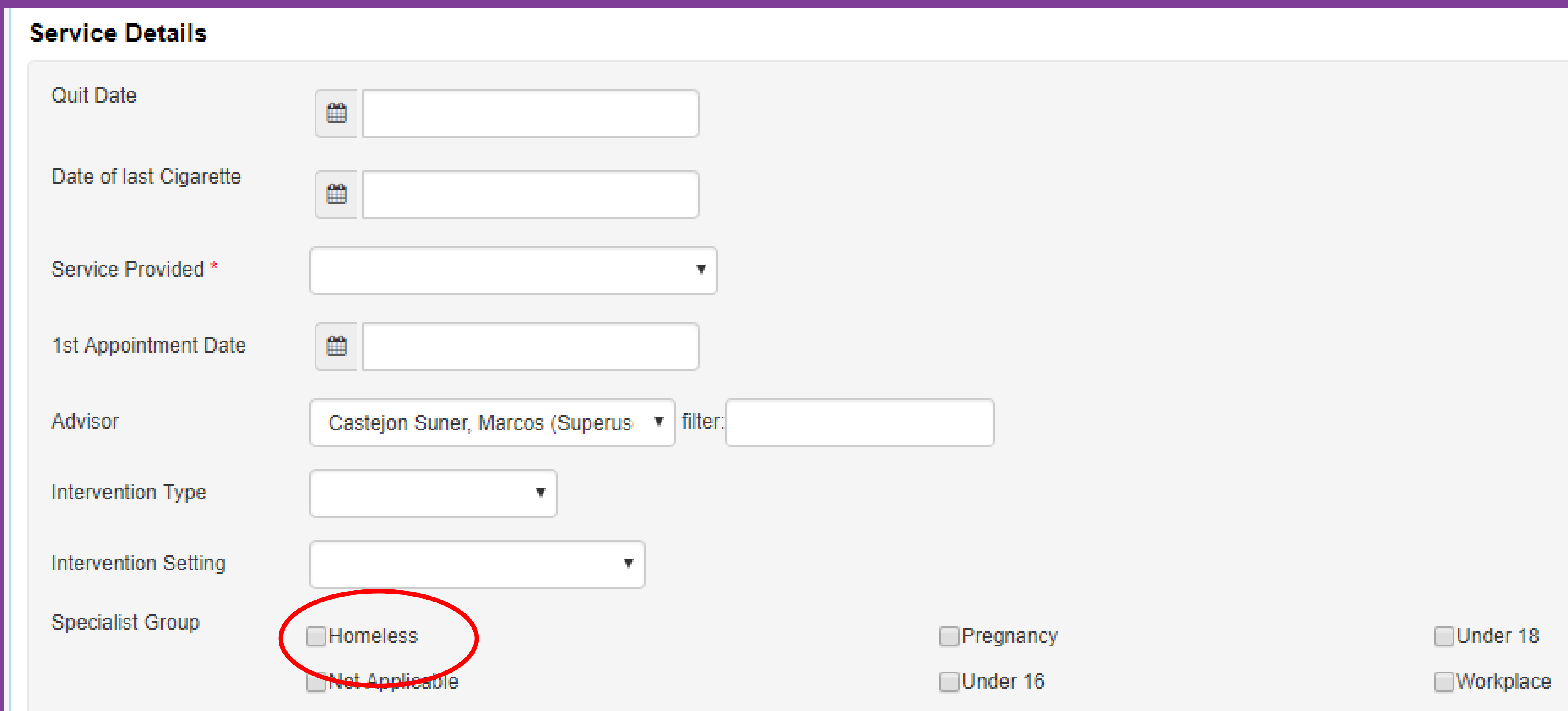
To accurately report them, select White Other, and then type Eastern European in the free text box

The following countries are considered Eastern European:

Bulgaria, Hungary, Czech Republic, Ukraine, Moldova, Belarus, Slovakia, Romania, Poland, Montenegro, Serbia, Albania, Croatia & Bosnia

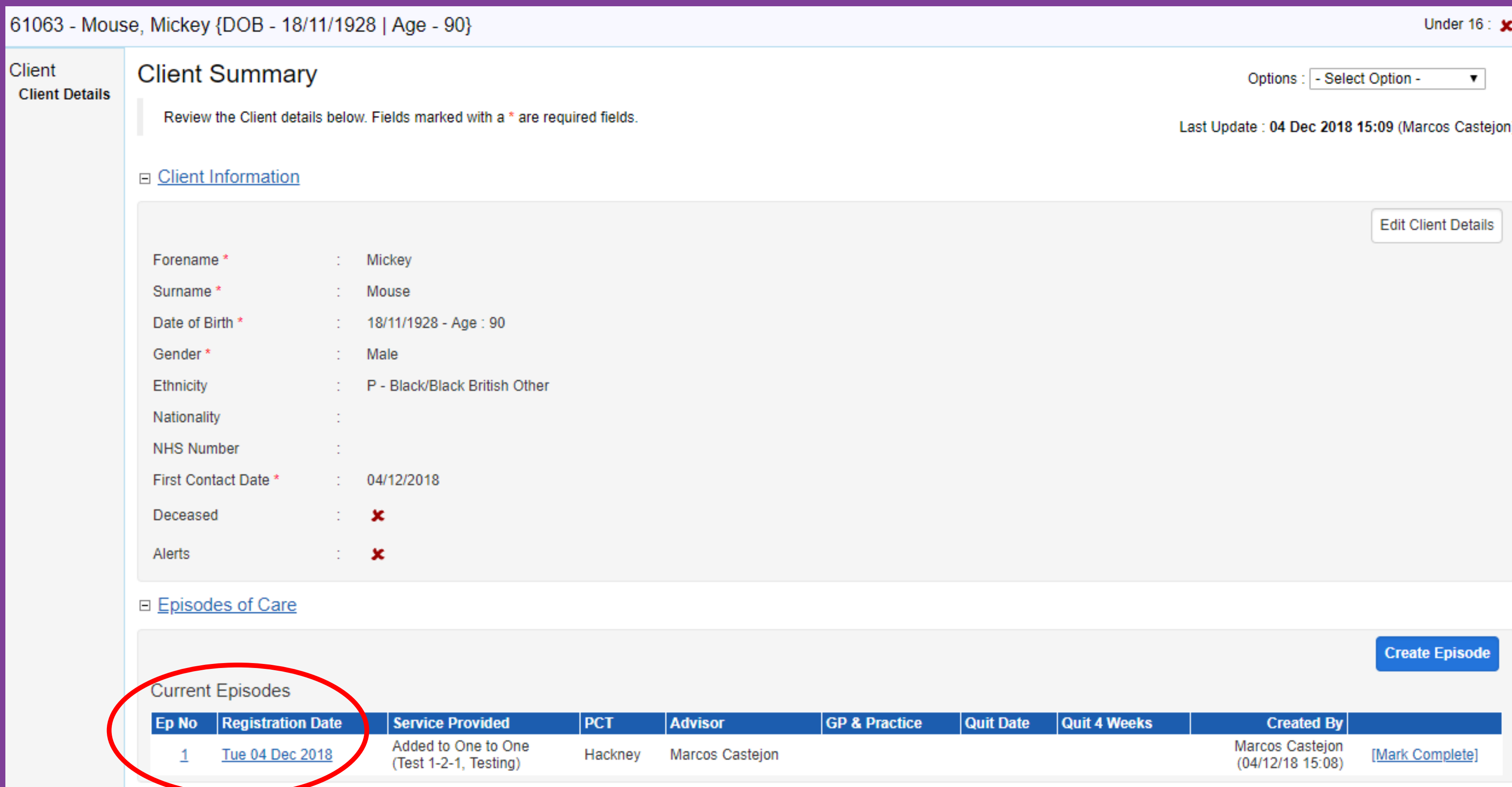
Recording Homeless clients

Instead of putting an address, make sure to tick homeless



Client screen – Viewing episodes

When clicking into a client, you can see their details and episode summary.



If you want to see the sessions and episode details, click on the Episode Number or Registration date

4. Episode Summary & Sessions

Right after creating a client, you will see the Episode Details

The navigation panel on the left is used to go to different pages, you will use the highlighted ones the most:

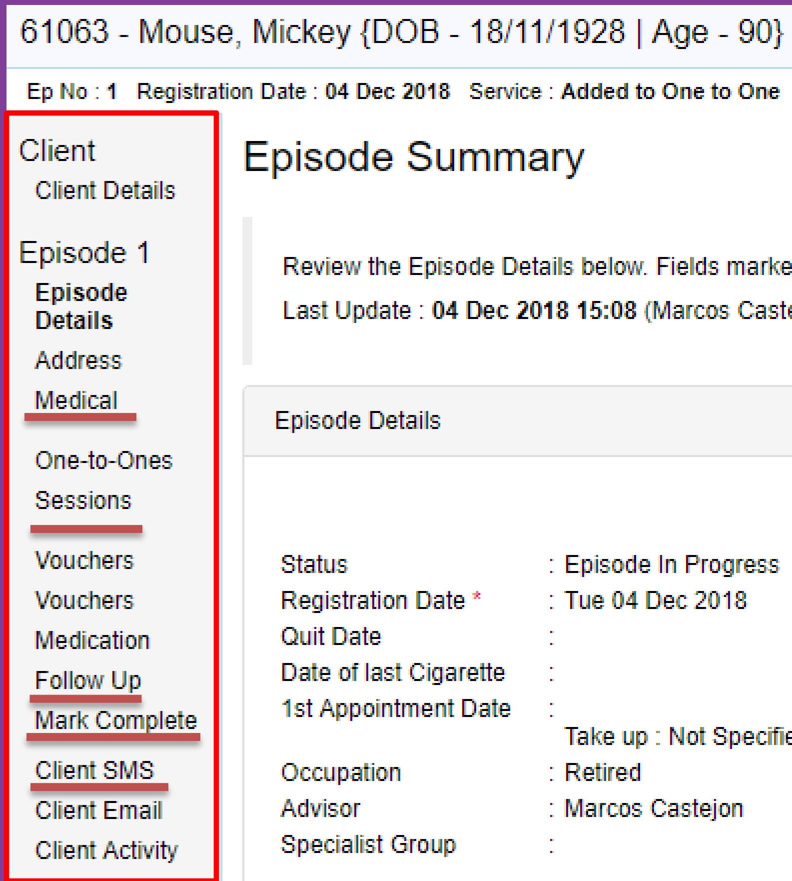
Medical – Recording Smoking Habits and Long Term Conditions

Sessions – View and add sessions

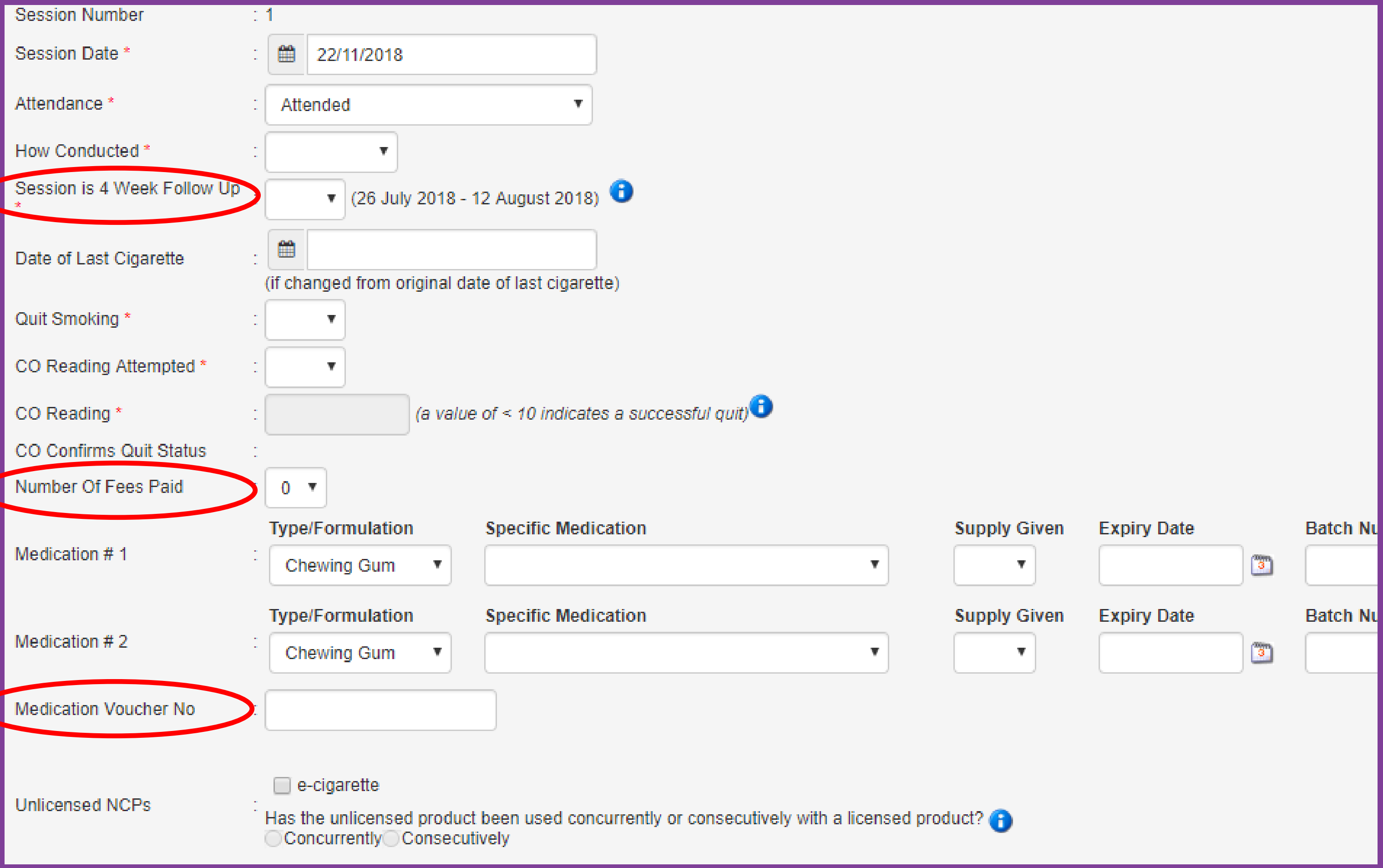
Follow-up – Record 4, 12 24 & 56wk Fw-up

Mark Complete – To complete the episode, make sure to have at least a 4-week follow-up!

Client SMS – Used to send SMS



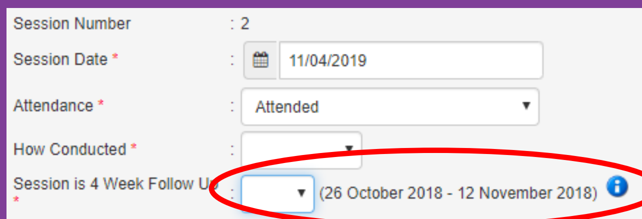
Recording important session data



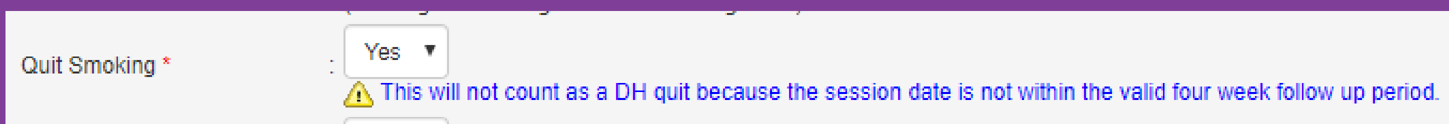
*This button is for Pharmacy advisors who dispense in the session. Select the amount of prescription fees paid by the client

Recording important session data: 4 Week

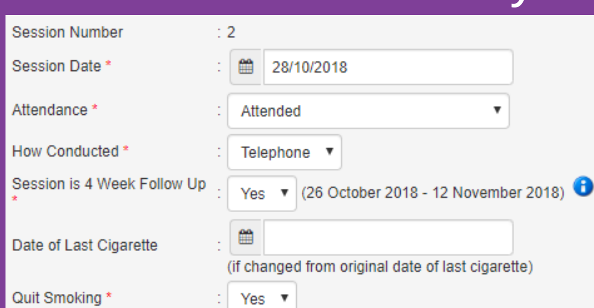
- When selecting Yes or No on the 4 Week Follow-up, make sure that the session date fits within the date range given:



- You will be warned below if this is not the case:



- Go back and select 4 Week Follow up in any session that falls within the date range. If there are none, consider adding one with the information that the client gives you. You should always try to contact clients if they DNA a session on their date range!



As you can see, there is no warning now!

5. Why accurate inputting is important

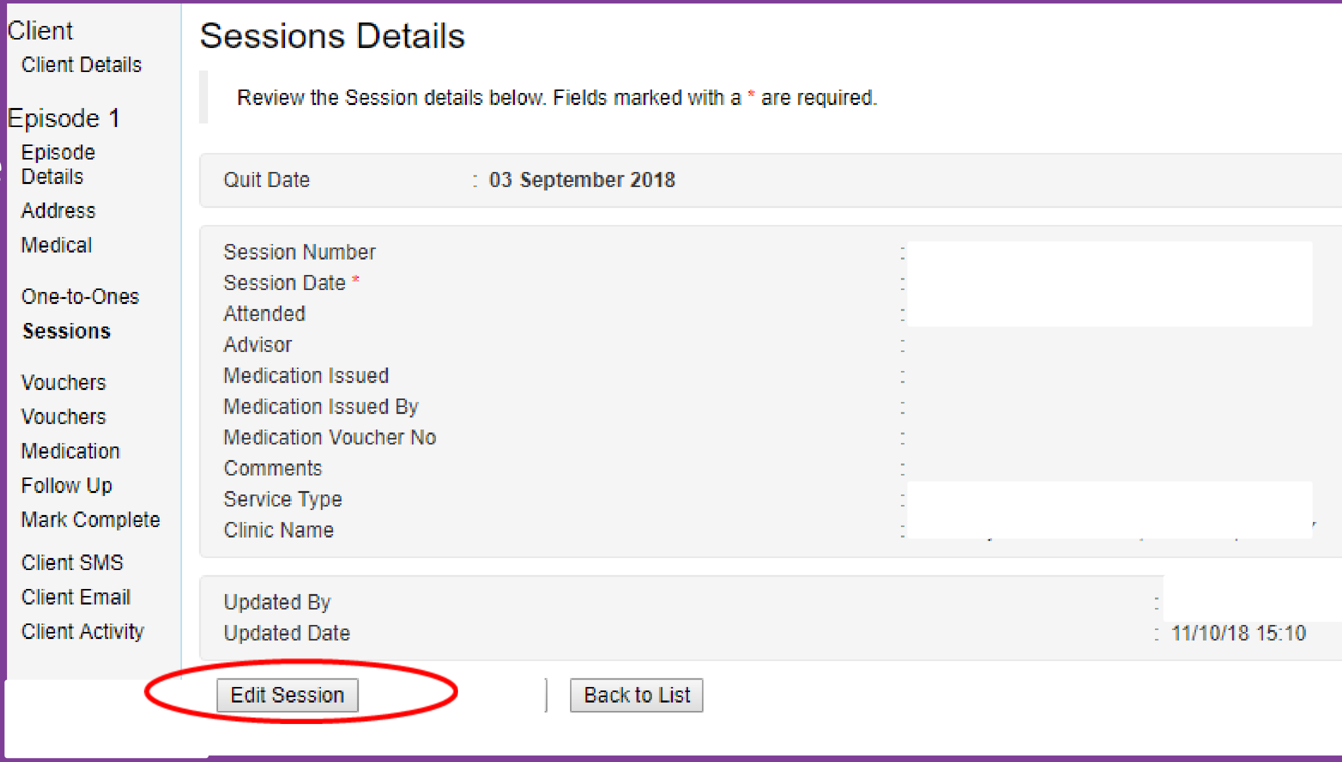
- 4-Week Quit status
  - It’s what counts as a Department of Health valid quit
  - Forgetting it or marking it inaccurately may result in the client not being recorded as a quitter
  - In the case of pharmacies, this will trigger the payment for the client in the month that it is marked
  - A valid CO measure will verify the quit status. Make sure to record this on 4-week and 12-week follow-up

- Assigning the correct Voucher Number (LoR’s)
  - i.e. H08001/18-19✓ , NOT 8001 X , h08001 X, H080011819 X
  - Allows QM to find the voucher on the system, link to the client and prefill them quickly and accurately
  - Minimise the amount of data correction needed from Superusers
  - Helps get your invoices paid quickly and accurately

(Note: CHYPS+ Voucher Numbers follow a slightly different format. Please see 8. LOR / Voucher Management.)

Editing session details

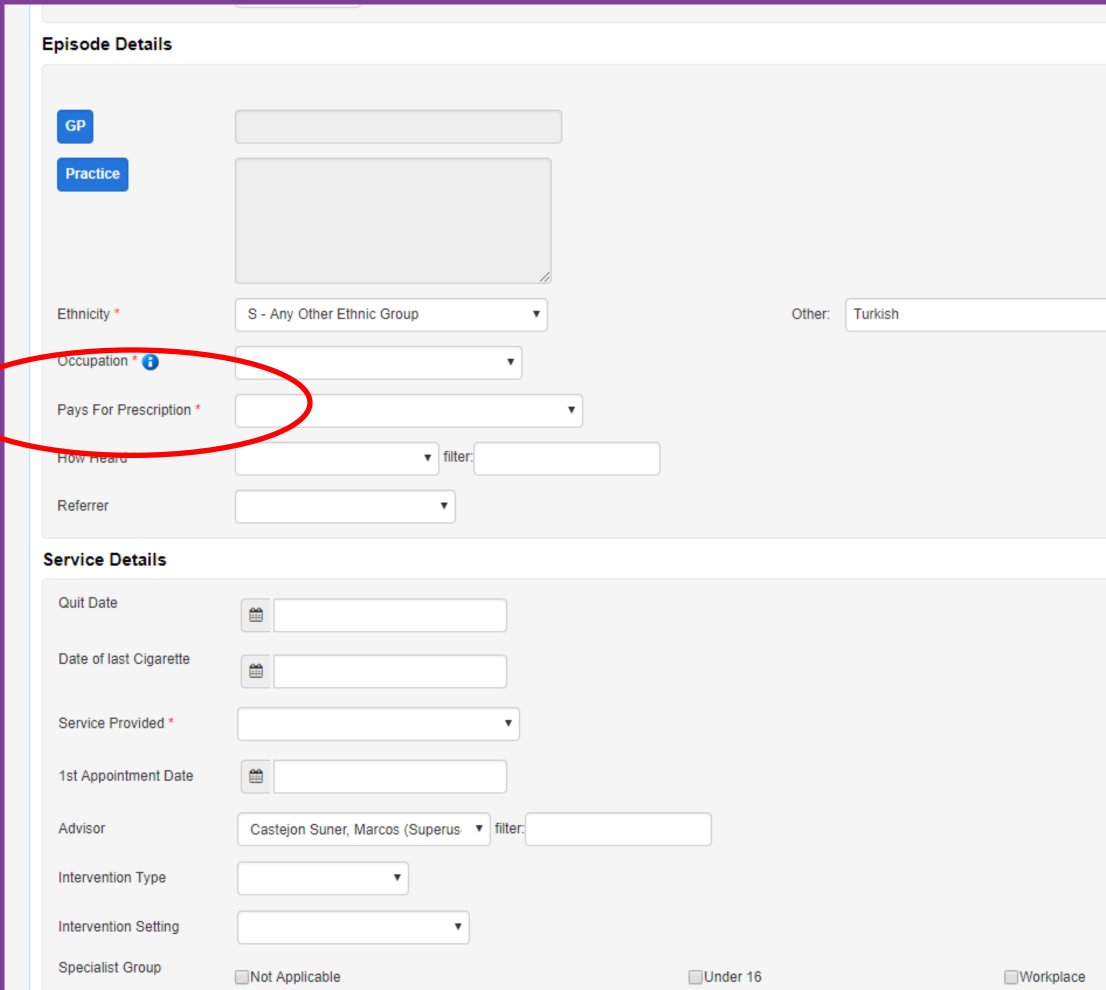
When viewing a Session, you can click Edit Session to include more details to it, or correct any inputting mistakes



Recording exemption status Episode creation

This first step to record exemption status is available for anyone creating an episode of care.

Pharmacies are able to select whether or not the client paid for each prescription during sessions, or when dispensing vouchers.



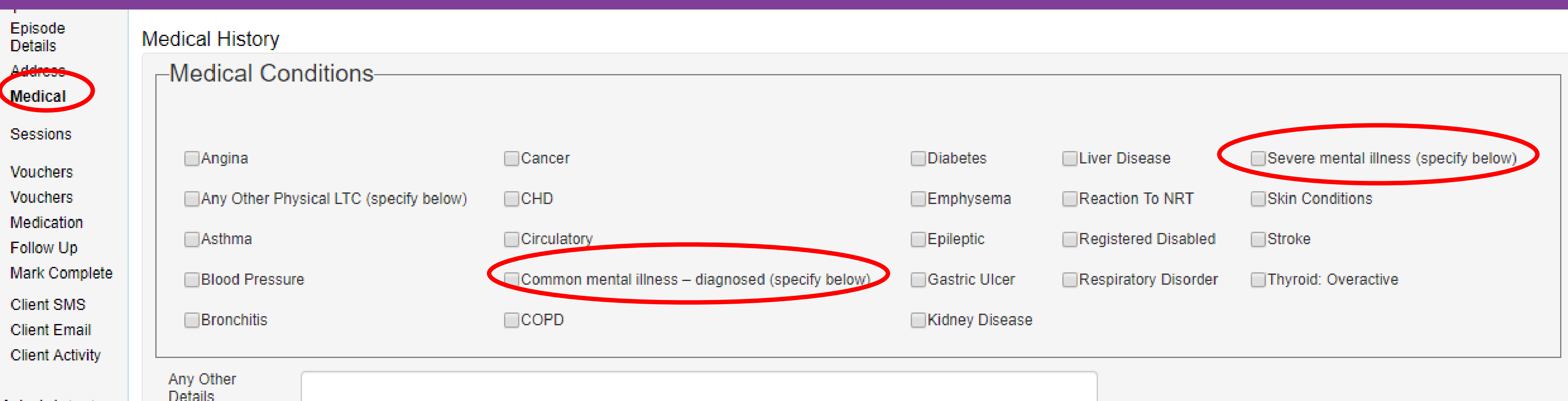
Recording exemption status - Pharmacy

- When creating an Episode of care, make sure to ask the client and record whether or not the client pays for prescription in the most accurate way possible
- When recording a session, if any medication has been issued, make sure to accurately select the amount of fees paid* by the client

- You can also record exemption status when issuing a Voucher*. A full walkthrough for dispensing pharmacies is included in this guidance presentation

Medical: Recording Mental Health issues

Important: Remember to <u>ask your client about Mental Health issues,</u> one of our key Priority Groups.
Please ask your client if they have been diagnosed with any CMI or SMI.
We need this information to support them and reach them.
If the client discloses any, record them here:



Make sure to tick either "Common mental illness – diagnosed" or "Severe mental illness" ***and specify in "Any Other Details"*** below when possible – see next slide for guidance ->

Medical: Recording Mental Health issues

Remember to ask your client about Mental Health issues. It is important for their advisor to be aware of any MH issues and these are one of our Priority Groups.

Common mental illness*

-Depression

-All anxiety disorders

Generalised Anxiety Disorder

Social Anxiety

Phobias

Panic Disorder

Obsessive Compulsive Disorder

Post Traumatic Stress Disorder (PTSD)

Severe mental illness*

-Psychosis

-Any Psychotic Disorder

-Bipolar Disorder

-Personality Disorders

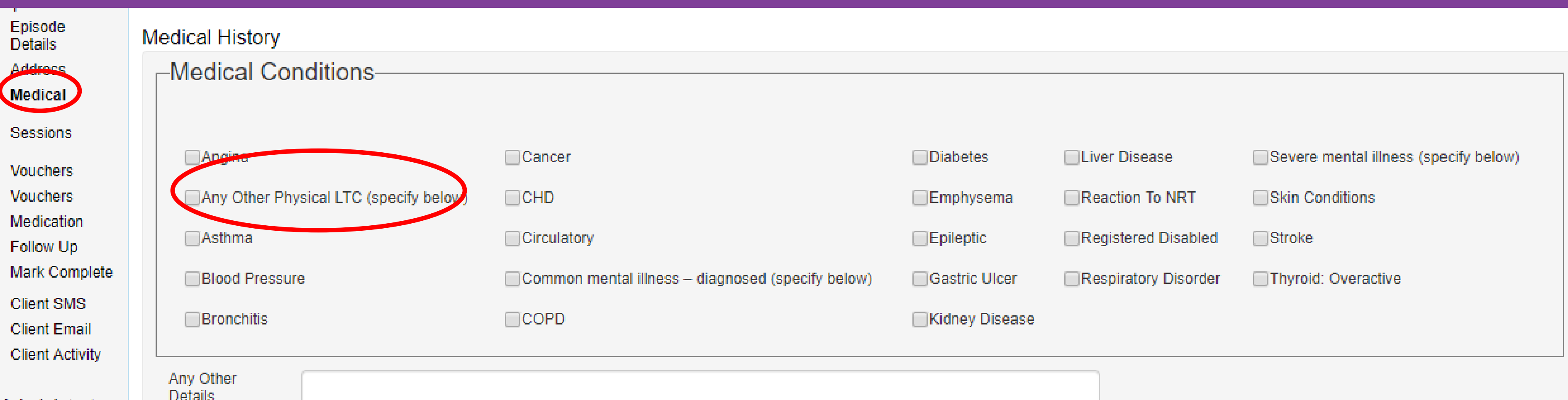
-Eating Disorders

*These need to have been diagnosed by a healthcare professional (not self-diagnosed)

Medical: Recording Long Term Conditions

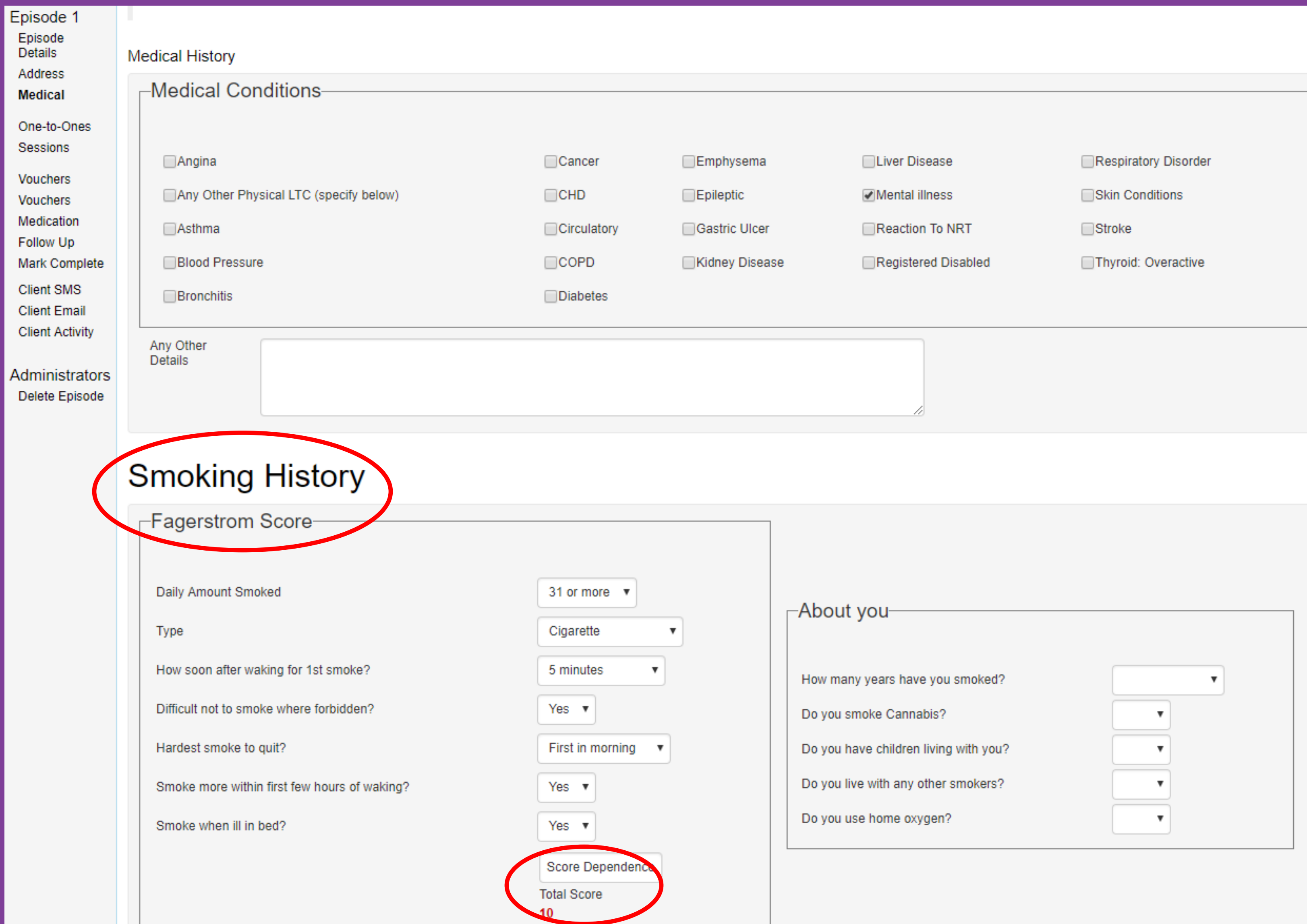
Remember to ask your client about Long Term Conditions – It is important for their advisor to be aware of any LTC's and these are one of our key Priority Groups.

If the client discloses any, record them here:



Make sure to tick one of the LTCs already listed, OR if the LTC isn't there, then tick the "Any other physical LTC (please specify below)" and **enter the name of the LTC** in the free text box below.

Medical: Fagerström Dependency test



Episode 1
Episode Details
Address
Medical
One-to-Ones
Sessions
Vouchers
Vouchers
Medication
Follow Up
Mark Complete
Client SMS
Client Email
Client Activity

Administrators
Delete Episode

Medical History

Medical Conditions

- [ ] Angina
- [ ] Any Other Physical LTC (specify below)
- [ ] Asthma
- [ ] Blood Pressure
- [ ] Bronchitis
- [ ] Cancer
- [ ] CHD
- [ ] Circulatory
- [ ] COPD
- [ ] Diabetes
- [ ] Emphysema
- [ ] Epileptic
- [ ] Gastric Ulcer
- [ ] Kidney Disease
- [ ] Liver Disease
- [x] Mental illness
- [ ] Reaction To NRT
- [ ] Registered Disabled
- [ ] Respiratory Disorder
- [ ] Skin Conditions
- [ ] Stroke
- [ ] Thyroid: Overactive

Any Other Details

Smoking History

Fagerstrom Score

Daily Amount Smoked	31 or more
Type	Cigarette
How soon after waking for 1st smoke?	5 minutes
Difficult not to smoke where forbidden?	Yes
Hardest smoke to quit?	First in morning
Smoke more within first few hours of waking?	Yes
Smoke when ill in bed?	Yes

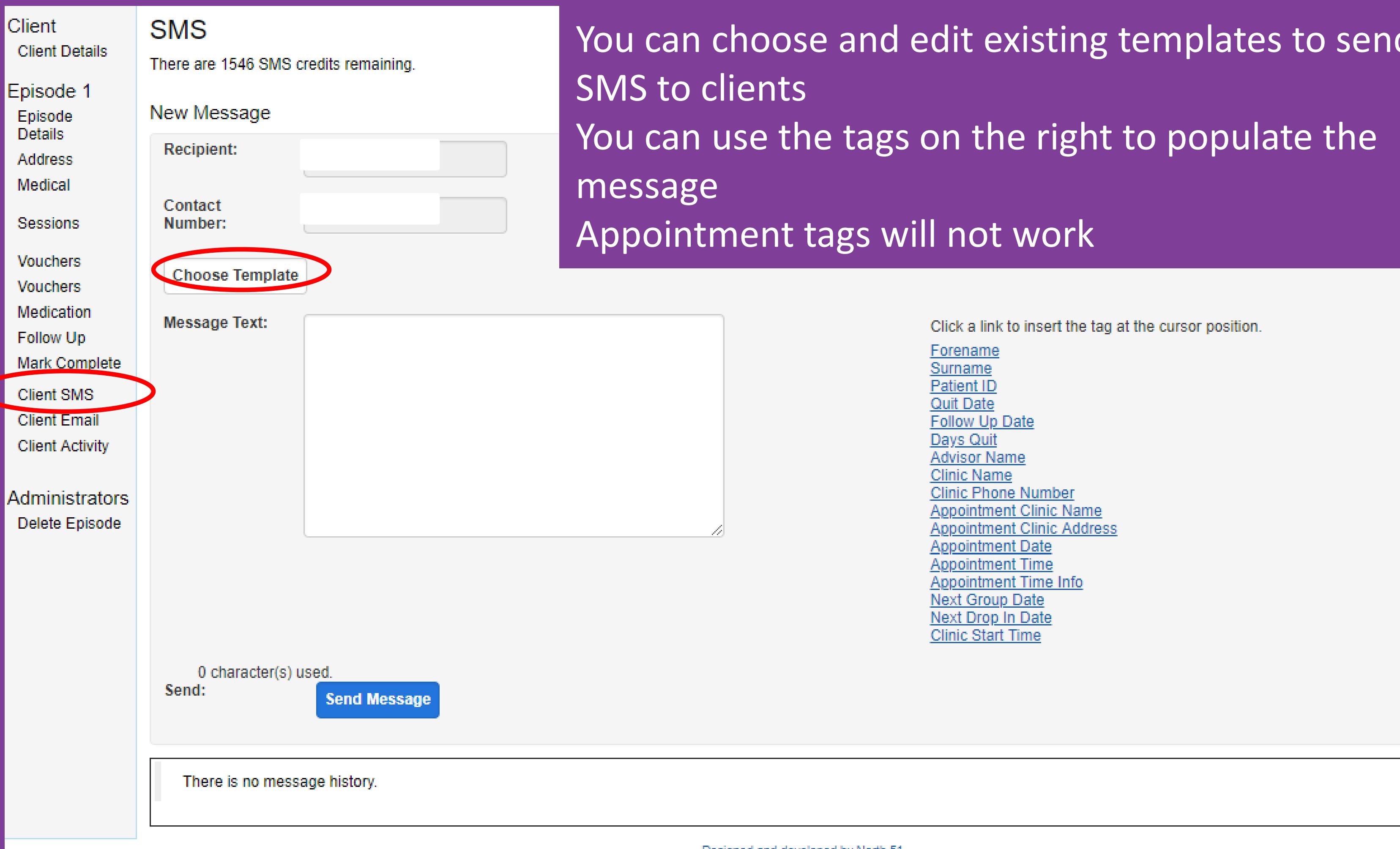
Score Dependence
Total Score
10

About you

How many years have you smoked?
Do you smoke Cannabis?
Do you have children living with you?
Do you live with any other smokers?
Do you use home oxygen?

6. Client SMS - Sending SMS to clients

You can choose and edit existing templates to send SMS to clients
You can use the tags on the right to populate the message
Appointment tags will not work



Sending SMS to clients - Templates

Select a template, and then edit the resulting message before sending. The template will use your names and number. See an example below

Template example:

Pay special attention to appointment times and dates, as these will have to be filled manually.

Choose Template

Template Group: Ungrouped

Template ID	Title	Description	Template Text	Actions
1	Appointment Reminder (1 Credit)	A short reminder for the client to attend an appointment	Hi Sandra, this is Marcos Castejon Suner! Just a reminder of your appointment at Homerton University Hospital (Sun), Room 15, E9 6SR. Any issues, call 08000469946	Select
2	Missed appointment (1 credit)	A short SMS for clients who missed their appointment	Dear Sandra, you missed your appointment with Marcos Castejon Suner at Homerton University Hospital (Sun), Room 15, E9 6SR this APPOINTMENT DATE. Call us on 08000469946 to rearrange.	Select
3	Non-Engaged Client/Referral	For clients not yet seen/contacted	Hi, this is the Hackney Stop Smoking Service. We received your details when you expressed interest in quitting smoking. We haven't been able to reach you. If you are interested in quitting smoking, call us on 08000469946 or reply to this text giving the best time to call you.	Select
4	2- Credit reminder	A longer version of the reminder	Hi Sandra, this is Marcos Castejon Suner. Just a reminder of your appointment at Homerton University Hospital (Sun), Room 15, E9 6SR, on DATE at TIME. If you have any questions or need to rearrange, please reply to this text or call us on 08000469946	Select

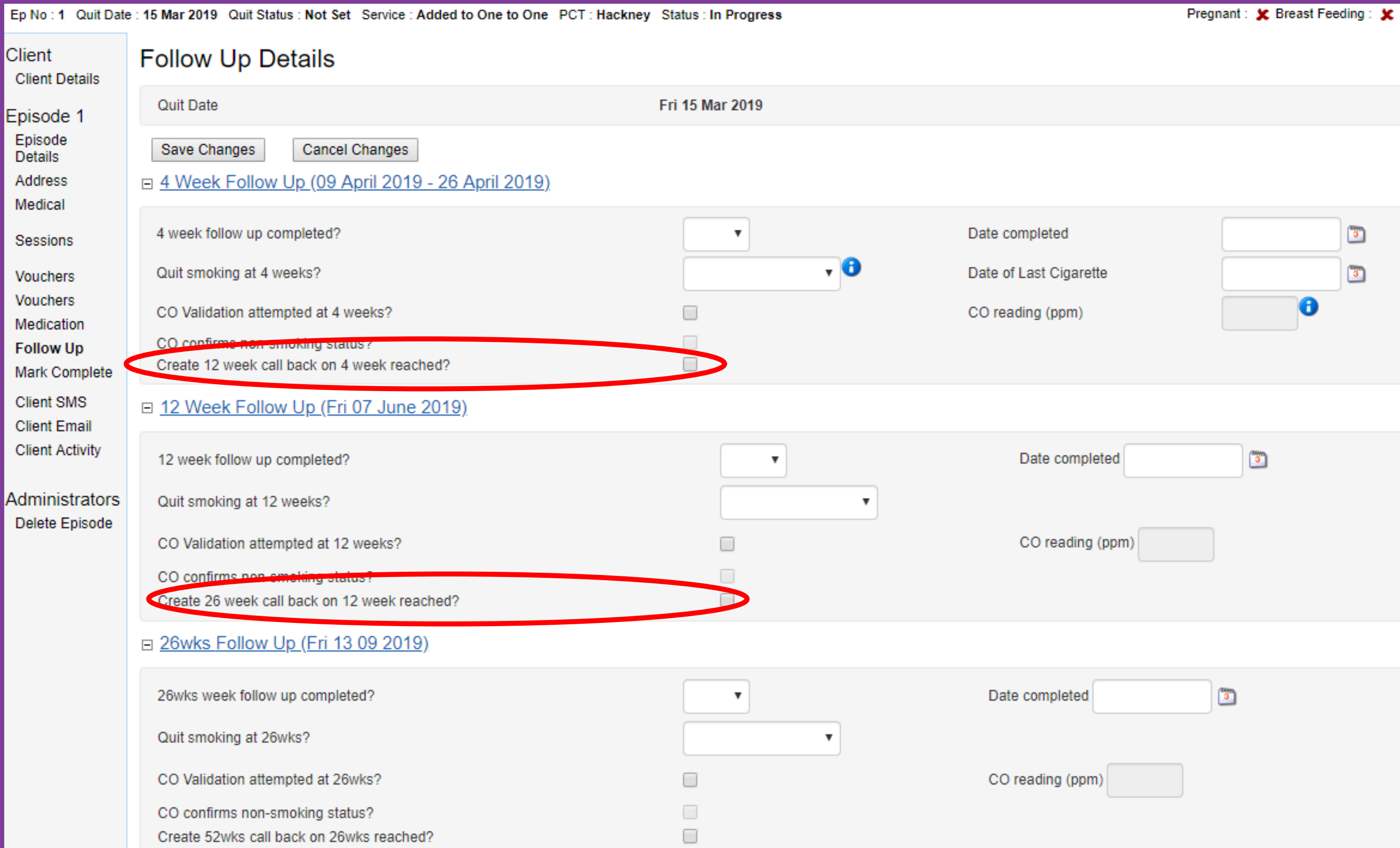
7. Follow-up – 4 week and 12 week

- Before you complete any episode, make sure to give the client a 4-week Follow-up status and set the reminder:

We don't expect you to remember every single client…

Set reminders to add the follow-up details! ->

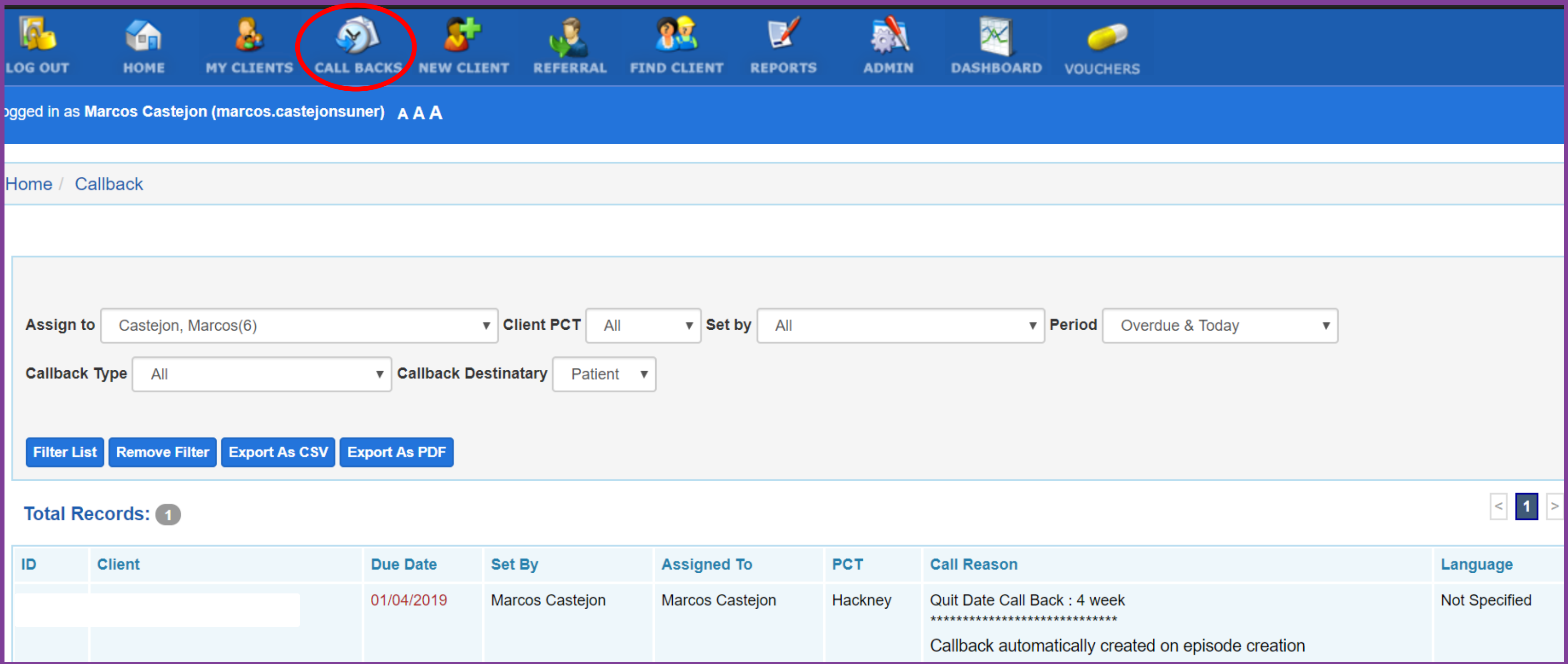
For more info on Call Backs, see the next slide:



Call Backs

This is a notifications page with reminders that are either set automatically by QM, or by using the Follow-up screen.

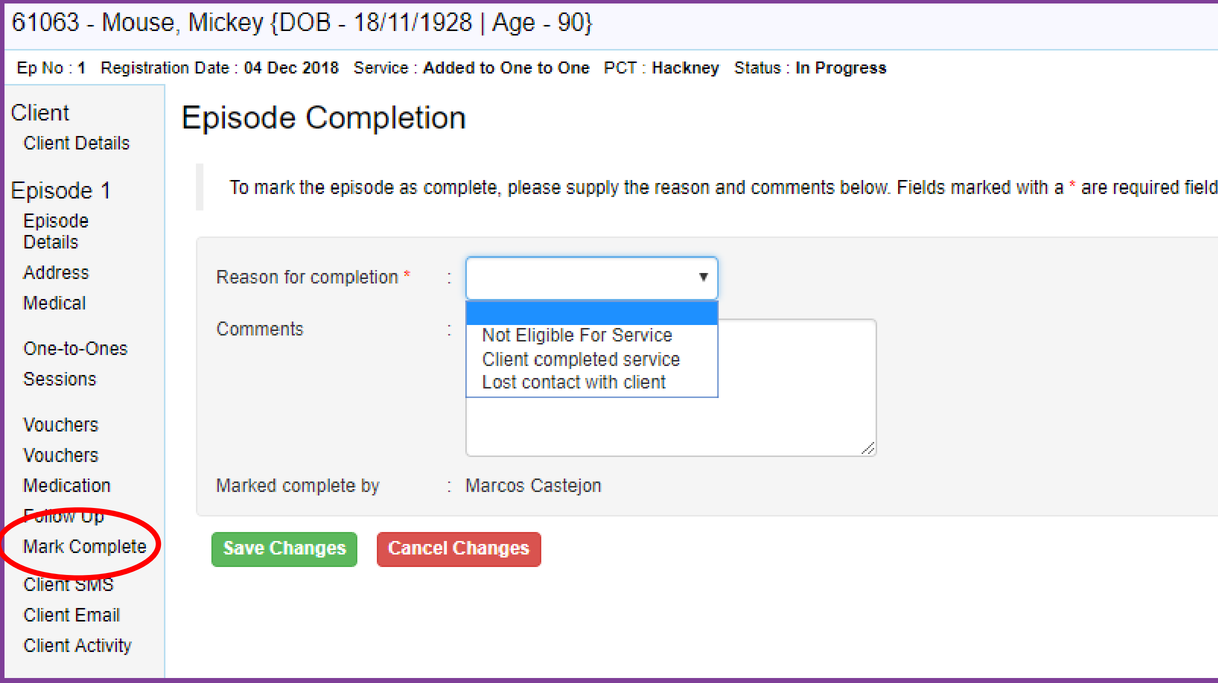
For example, this reminder to set a 4-Week Follow-up:



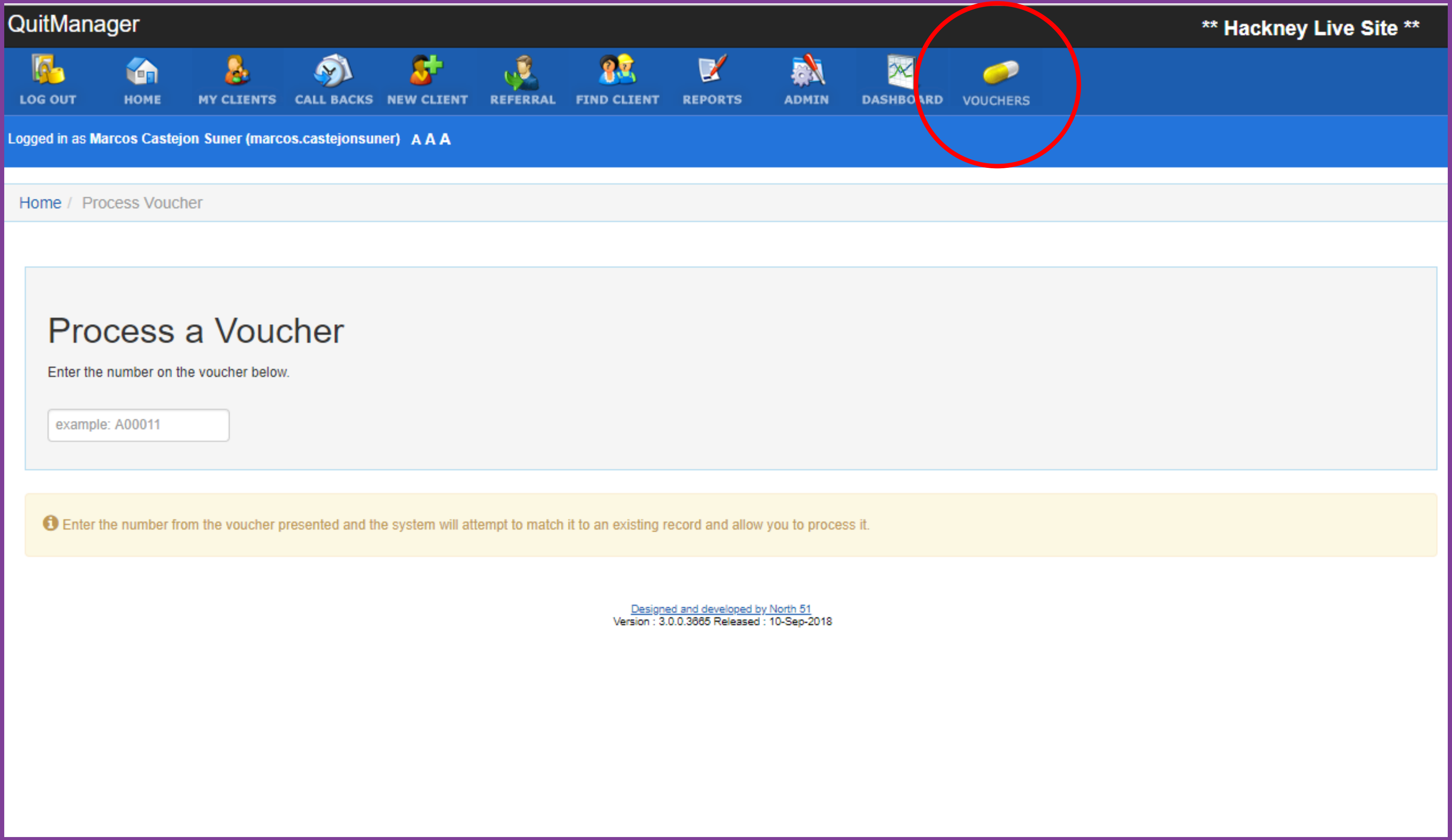
Mark Complete

Make sure to click on ‘Mark Complete’ to close an episode once it’s finished.
IMPORTANT: Give the client a 4-week Follow-up outcome before completing any episode.

Add a reason for completion, and any comments:



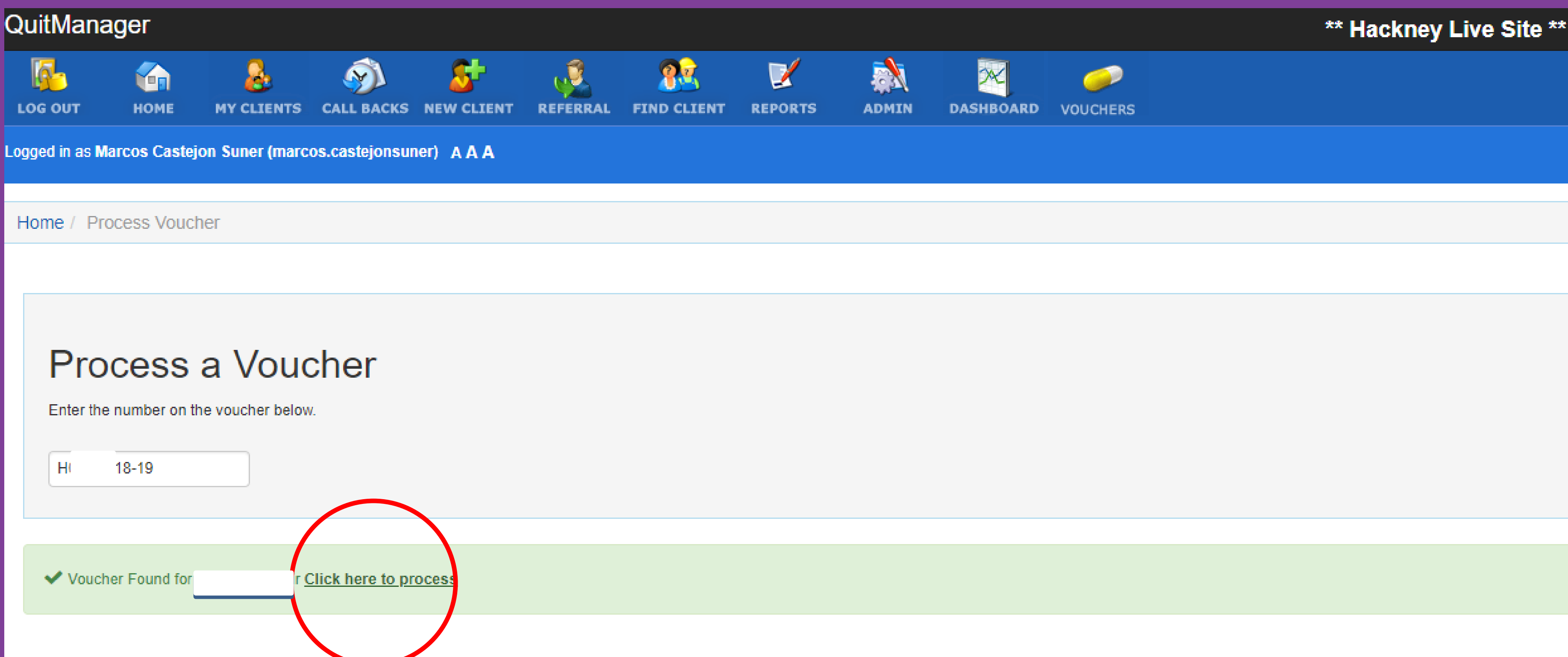
8. LoR / Voucher management in Pharmacy



LoR / Voucher management in Pharmacy

Enter the unique number on the back of the LoR

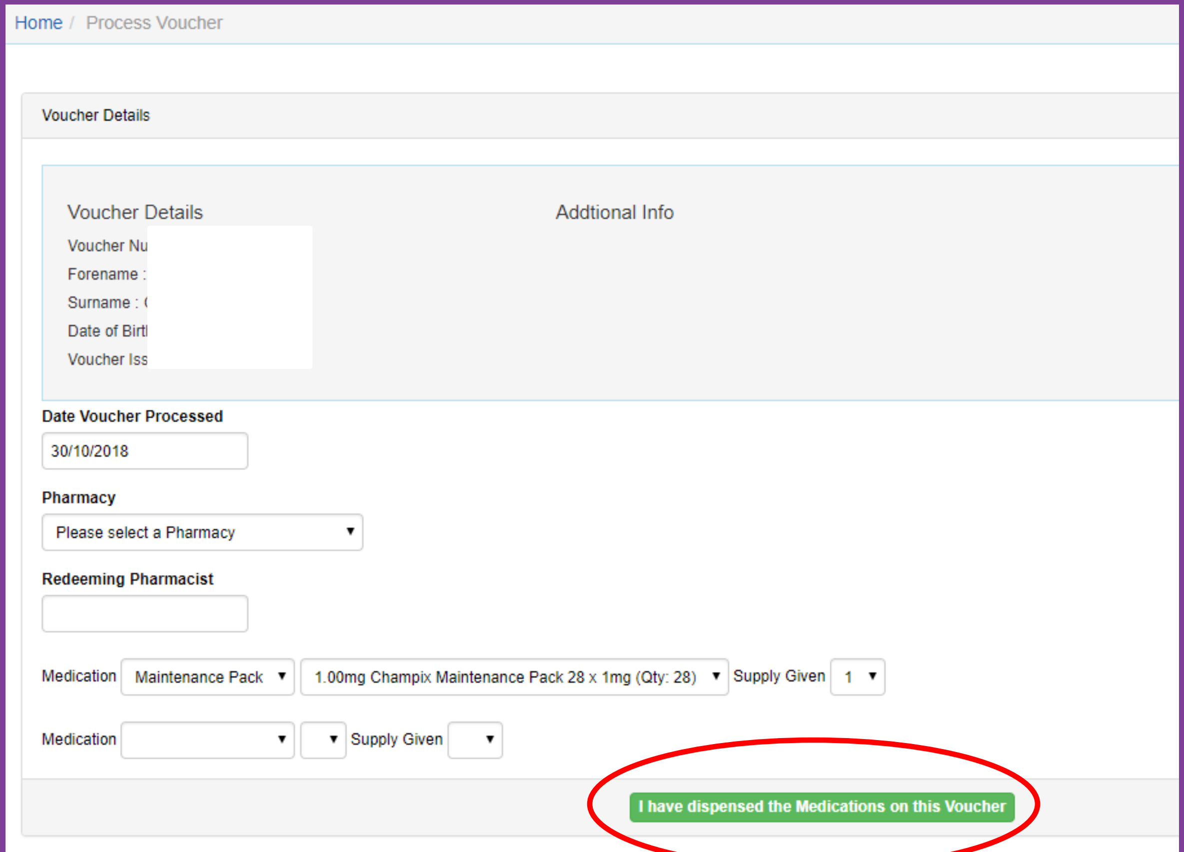
Usually formatted like this: H01234/18-19



LoR / Voucher management in Pharmacy

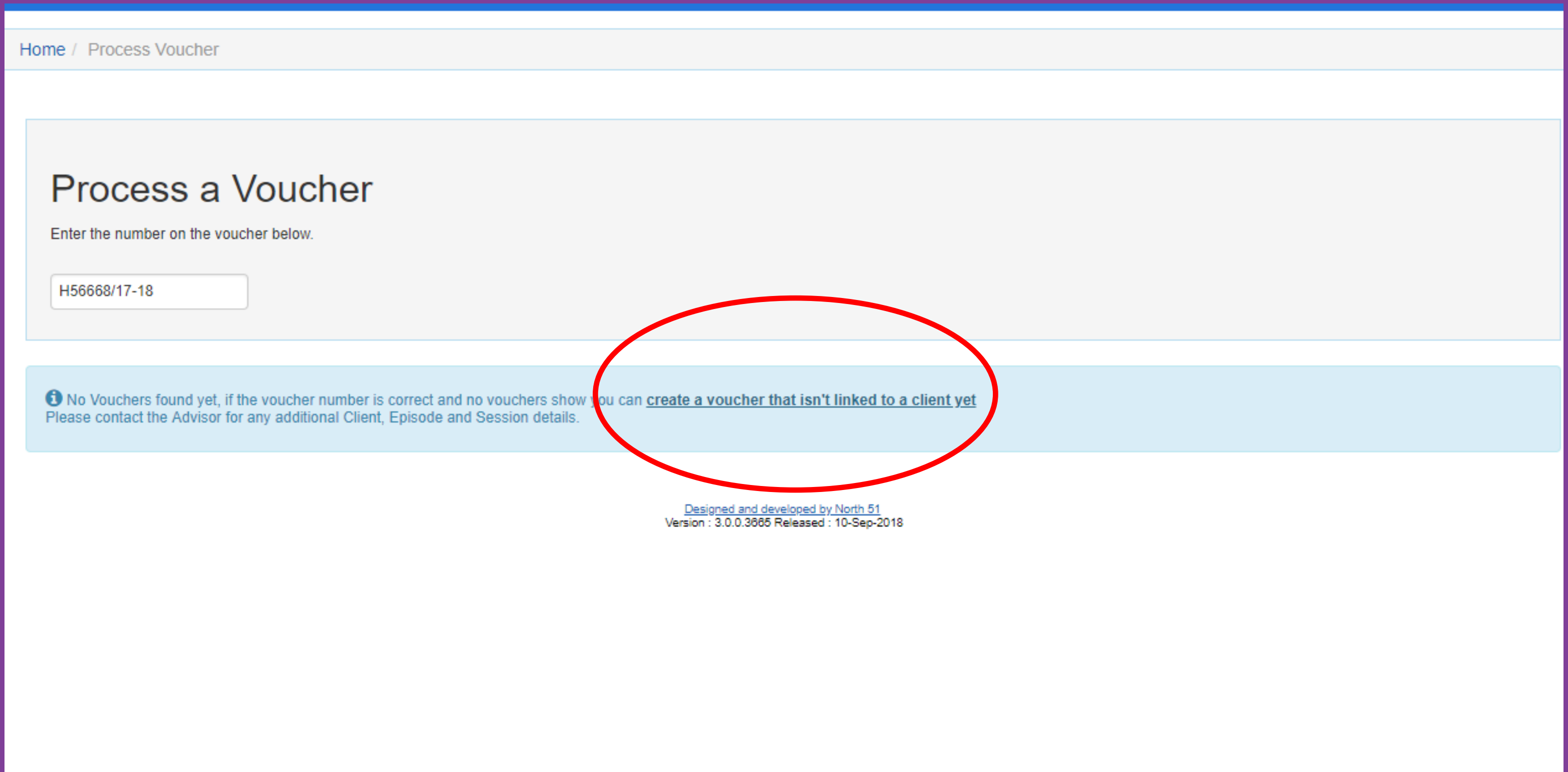
Client details will be pre-filled for you. Make sure you dispense the right medication and click on the green button.

If you do not have the requested medication, or the client wants a different version (e.g. mint gum instead of fruit), you can simply edit the Medication dropdowns and input the medication you dispense.



Unlinked LoR / Voucher Processing

If the voucher has not yet been input into QM by the advisor, you will get this message. Click on "Create a voucher that isn´t linked to a client yet".
You will then see a Create Voucher page.

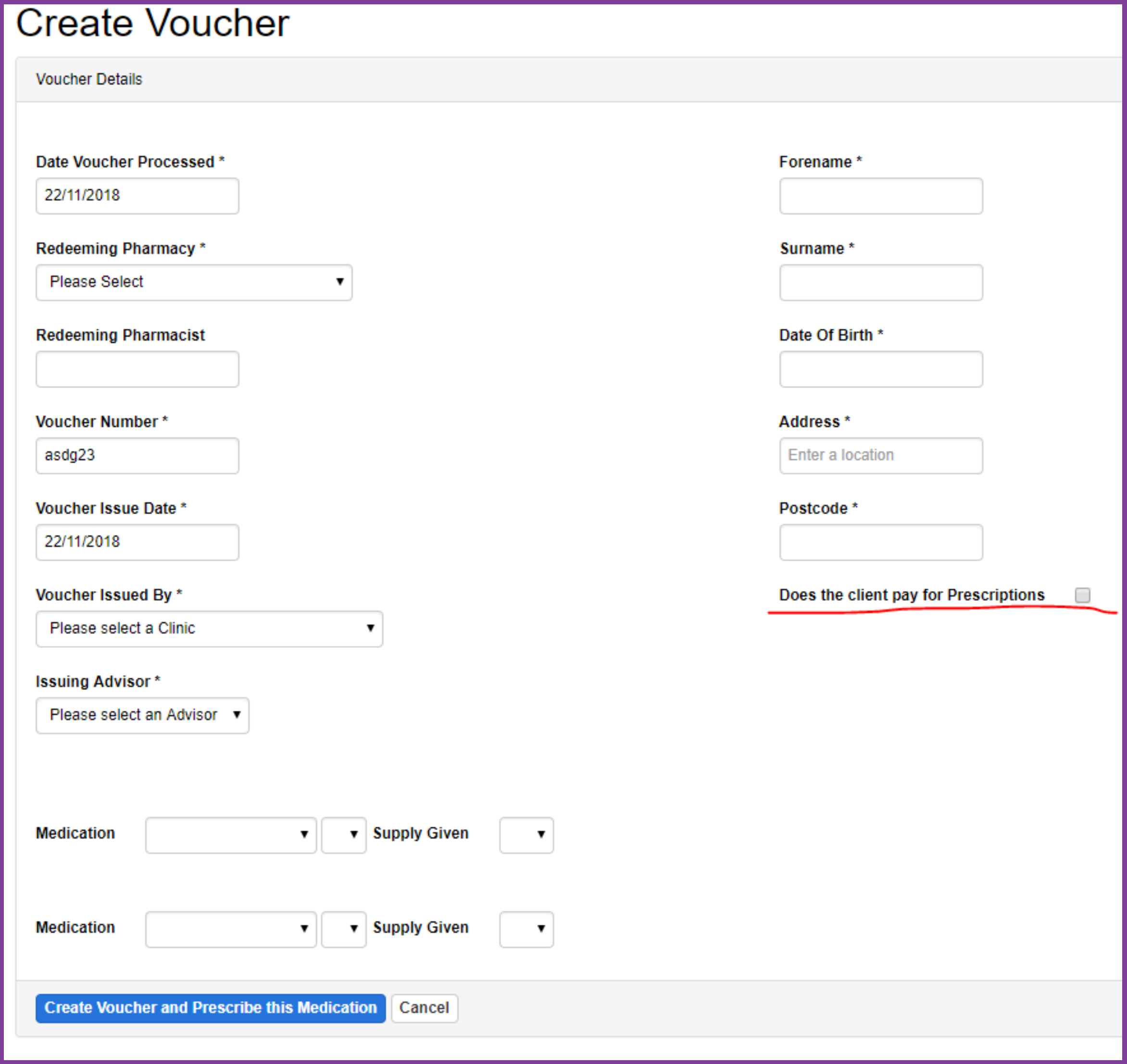


LoR / Voucher management in Pharmacy

Make sure to input all the data as accurately as possible for two reasons:

When the advisor inputs the session, if everything is done correctly, voucher and client will automatically link.

If it doesn´t automatically link, our team can link them manually, which is very easy as long as the details are accurate.



LORs – Letters of Recommendation

Advisors have been taught to make sure to include the CLINIC NAME (i.e. The Lawson Practice) when issuing a voucher.

The next batch of vouchers will have the wording changed to address this

Hackney

SMOKEFREE Hackney

Stop Smoking Service Letter of Recommendation to Supply Smoking Cessation Medication

Date:______________
This LOR is valid for two weeks only and expires on: ________________

Dear Pharmacist,

I am a registered Stop Smoking Advisor with Hackney Council and my provider organisation is:

____

The client named below has attended my clinic and received smoking cessation advice. I have discussed smoking cessation medications and checked exclusions with this client and I would be grateful if you could supply the treatment as detailed below. I shall be supporting the client throughout the quit programme.

Client Name: ____ D.O.B: ___________________

First Line Address: ____

Postcode: ____ Eligible for free NHS prescriptions? Yes ☐ No ☐
(Please advise client that proof of exemption may be required)

LORs – CHYPS+

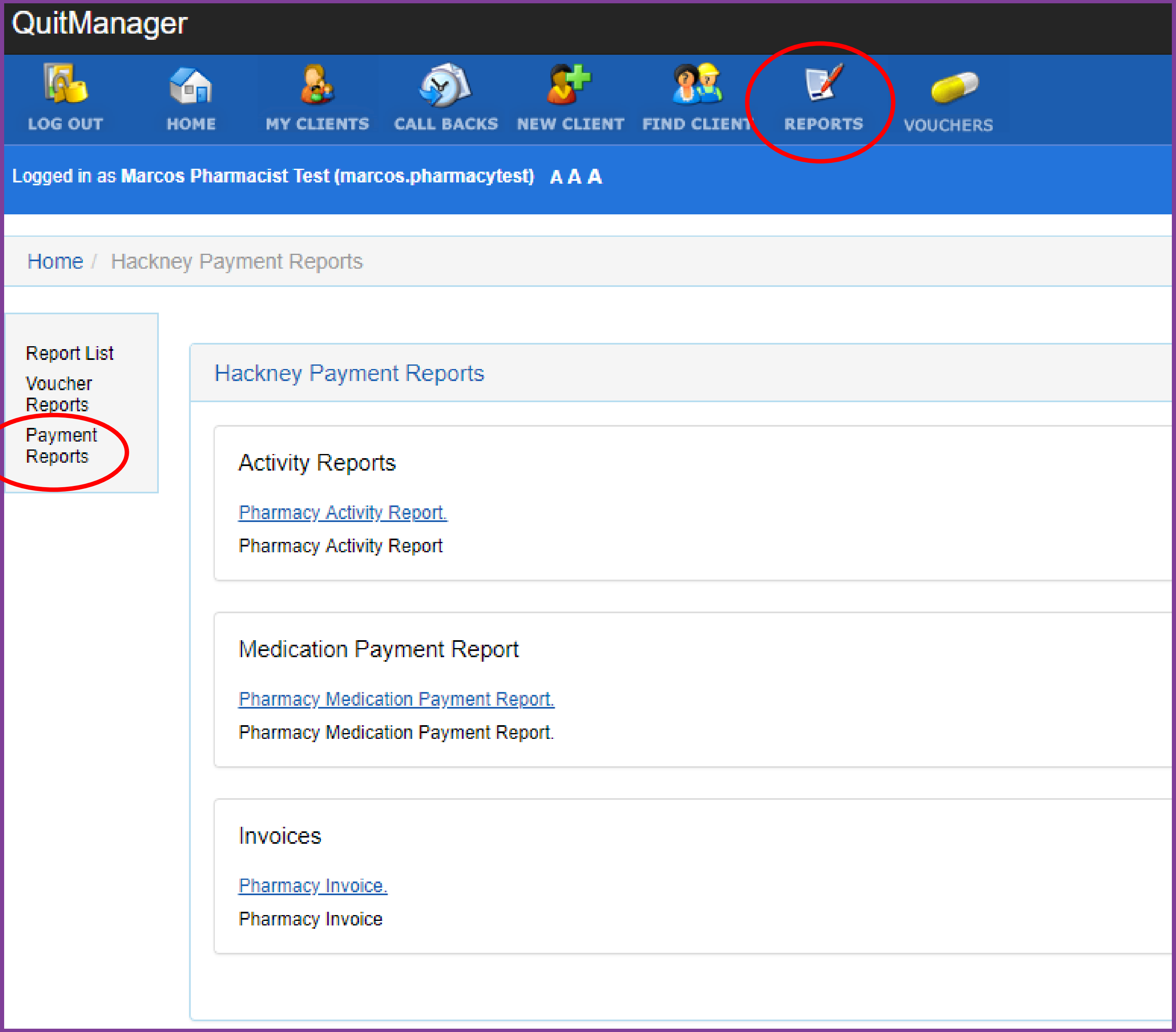
CHYPS + is the Children and Young People's Stop Smoking Service in Hackney
We have agreed with CHYPS+ that their LoRs (AKA Vouchers/Prescriptions) are to be included in Quit Manager, as you would with any other LoR. We have agreed with them that their voucher numbers will follow a certain format:

CYP
Initials of the CHYPS+ giving the voucher
00001 and sequentially upwards
e.g….CYPMC0001

This number will be visible in every LOR, and is the one you have to use when typing in the Voucher Number.

Please make sure to put this number in when handling their LORS, as it will help us identify and differentiate their LoRs. Your payment will not be affected, and you will get reimbursed for all the NRT & Champix as long as you input these LoRs into QM in this format.

Payment Reports & Invoices



Pharmacy Activity Report

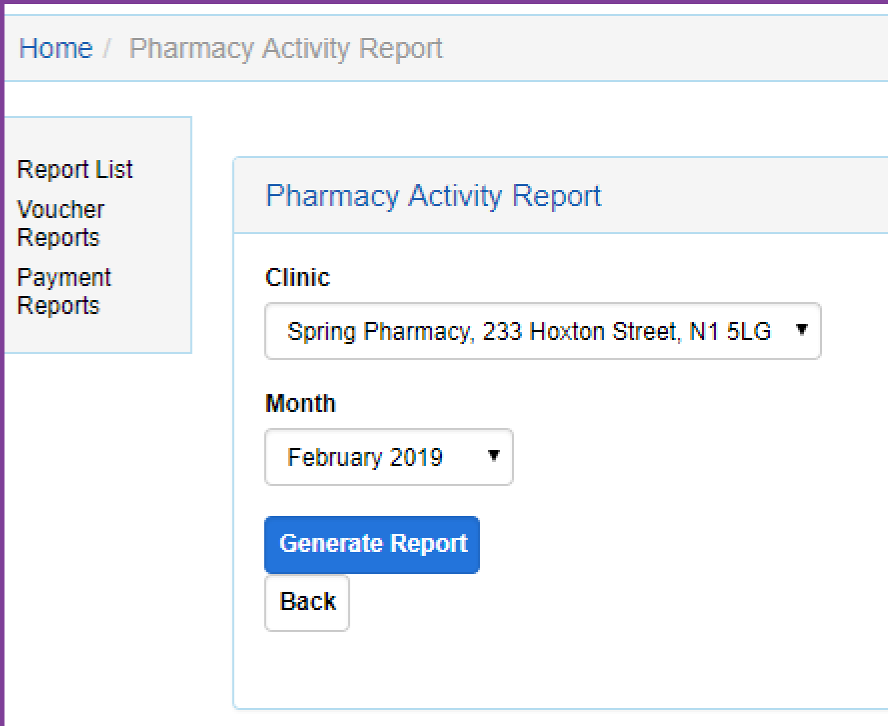
This report will generate an Excel file will all the payments for delivering stop smoking advice. It will show every client you have seen in the selected month, and it will break down every payment you will receive.

This includes:

Setting a quit date

Payment for Quit

Bonus for CO Validated Quit



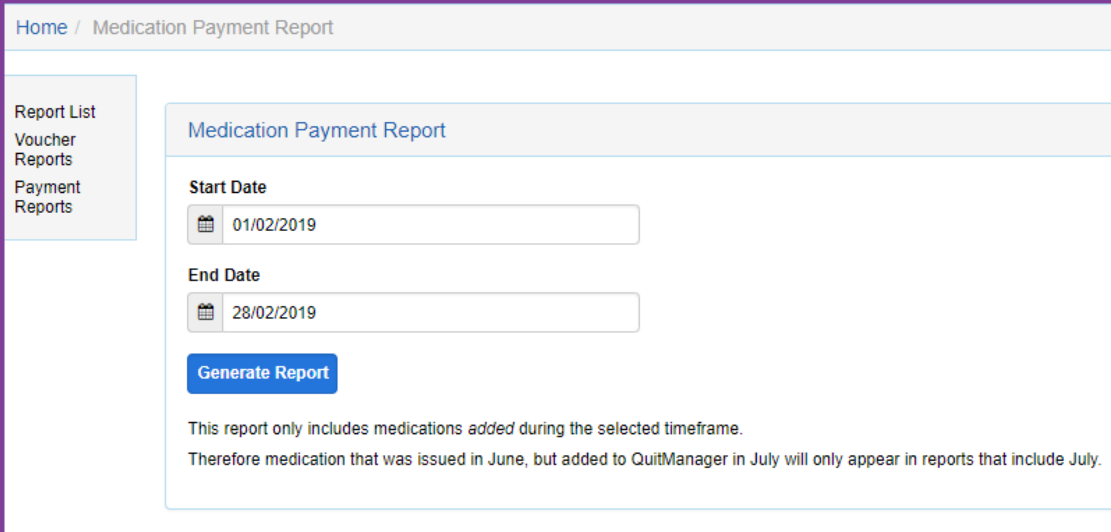
Medication Payment Report

This report will generate an Excel file will all the payments regarding NRT & Varenicline reimbursements, and dispensing fees added that month.

It will break down every client and medication dispensed to them, and will show the relevant fee under each payment

The report includes:

NRT & Varenicline reimbursement
Session dispensing fees
Voucher dispensing fees
And prescription fees



Pharmacy Invoices

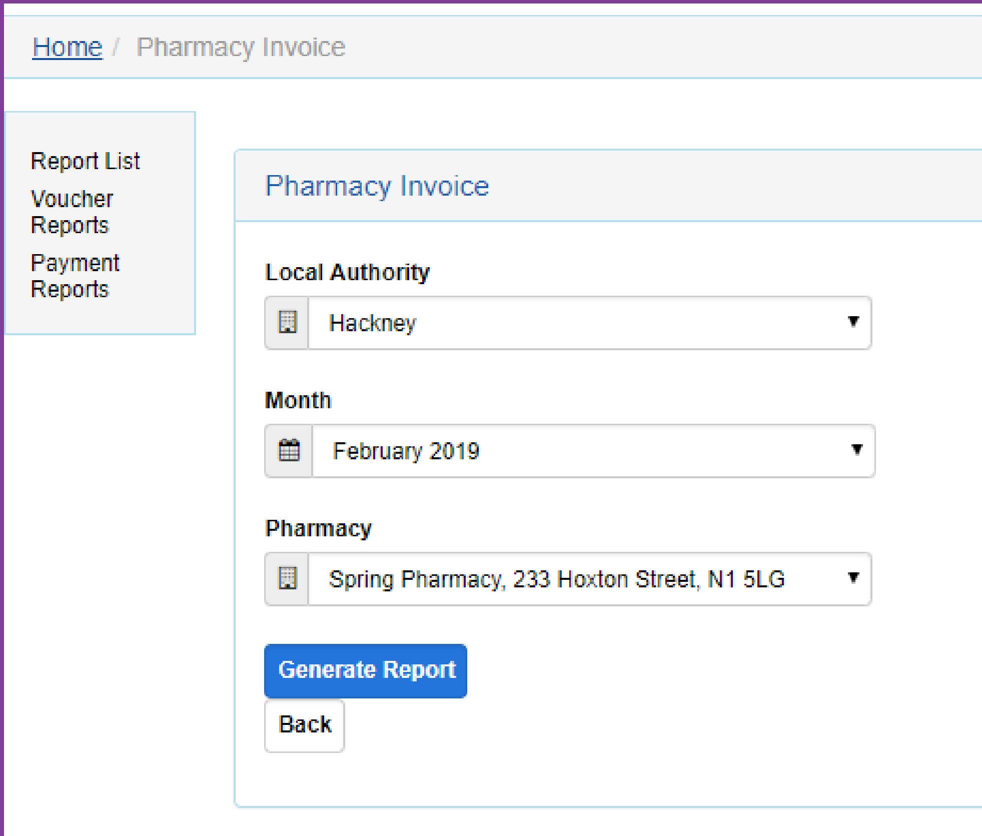
This will generate a .pdf file that will include all of the payments for your pharmacy for the selected month.

This includes:

All payments as seen in the Pharmacy Activity Report

All NRT & Varenicline reimbursement as seen in the Medication Payment Report

The total payment to be issued, in an invoice format



Thank you. Please contact Smokefree Hackney if you have any questions:

020 3074 2282

Smokefreehackney@nhs.net