

Electronic Palliative Care Summary (ePCS) Guideline

Administration Guide

INPS



INPS

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Electronic Palliative Care Summary (ePCS) Guideline – Administration Guide

Introduction

Initially introduced as Gold Standard Framework Scotland (GSFS) – Palliative Care, this project has now been renamed the **Electronic Palliative Care Summary Scheme (ePCS)**. ePCS is a practice based system to improve and optimise the organisation of palliative care for cancer patients.

The Scheme consists of:

- **Palliative Care Guideline** – The recommended method of recording palliative care data.
- **Palliative Care Plan.**
- **Palliative Care Reporting.**

The Scheme was initially delivered in DLM 260, updates to the details were made in DLM 280. User guides for these DLM's can be accessed at www.inps.co.uk/my_vision/vua/dlm/index.

What is covered in this guide

This Guide has been designed to be read in conjunction with the [ePCS - Data Entry Guide](#) and a [ePCS Guideline PowerPoint Presentation](#), both of which can be found on the INPS website.

This User Guide covers:

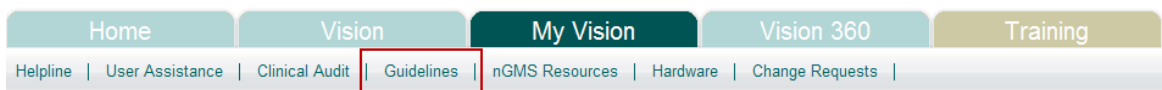
- How to download the Guideline. See [Installing the ePCS Guideline](#) on page 3.
- How to import the Guideline into Consultation Manager. See [Importing the ePCS Guideline into Vision](#) on page 5.
- How to place the Guideline in the local Guideline index. See [Adding the ePCS Guideline to the Local Guideline Index](#) on page 8.
- How to attach the Guideline to a tab. See [Adding the Palliative Care Guideline to a tab](#) on page 10.

- How to add a facility to enable relevant diagnoses and surgery to be sent to Out of Hours. See [Selecting relevant diagnoses and surgery for inclusion with the ePCS data](#) on page 13.
- Frequently Asked Questions. See [ePCS FAQs](#) on page 17.

Installing the ePCS Guideline

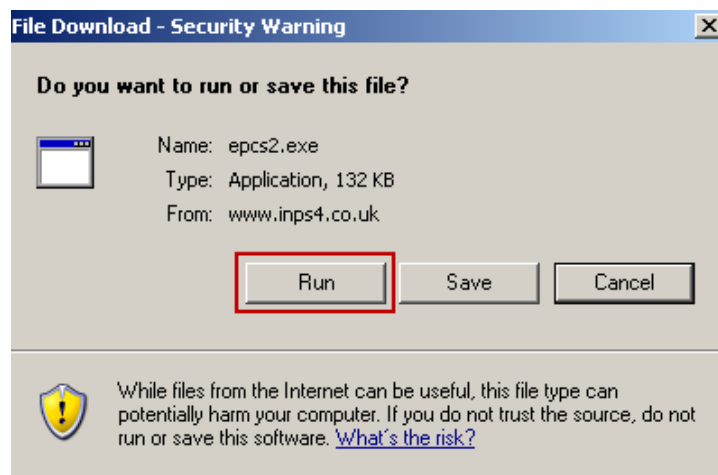
Downloading the ePCS Guideline from the INPS Website

1. Go to the INPS website www.inps.co.uk, then to My Vision – Guidelines. Or click this link: www.inps4.co.uk/my_vision/guidelines.



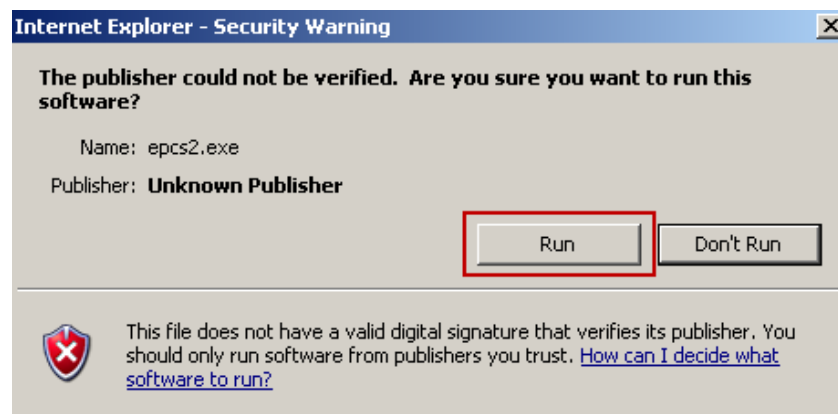
INPS website – My Vision – Guidelines

2. Scroll down to ePCS guideline for Scotland, click Download Guideline.
3. The File Download –Security Warning screen displays, click **Run**.



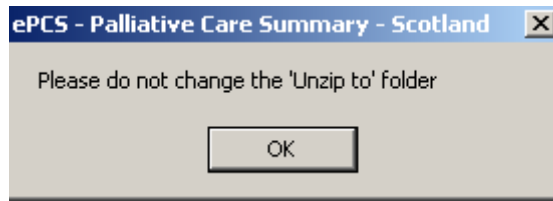
File Download screen

4. Depending on your setup, you may see the following prompt, click **Run** to continue.



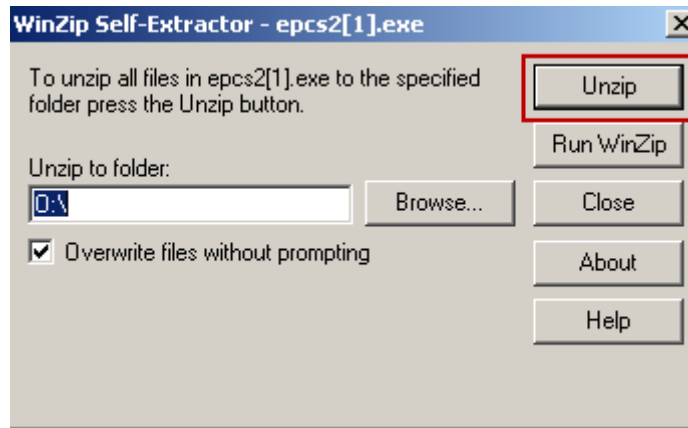
Internet Explorer – Security Warning

5. A *Please do not change the 'Unzip to' folder* message is displayed, click **OK**.



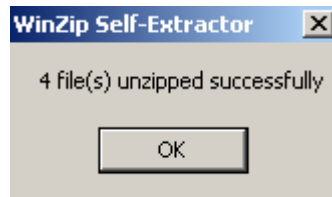
Please do not change the 'Unzip to' folder message

6. The **WinZip Self-Extractor** screen is displayed, click **Unzip**.



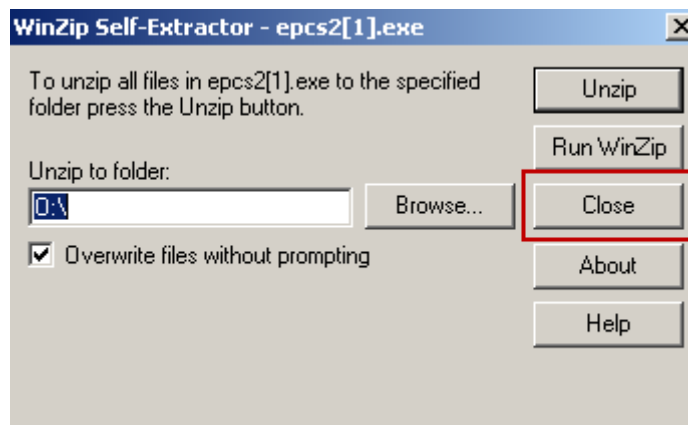
WinZip Self Extractor screen

7. The screen is overlaid with the WinZip Self-Extractor dialog box confirming that files have been successfully unzipped, click **OK**.



Unzipped files

8. You are returned to the **WinZip Self-Extractor** screen, click **Close**.

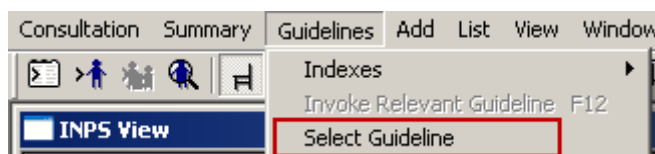


Closing WinZip Self-Extractor screen

9. The ePCS Guideline must now be imported into Vision.

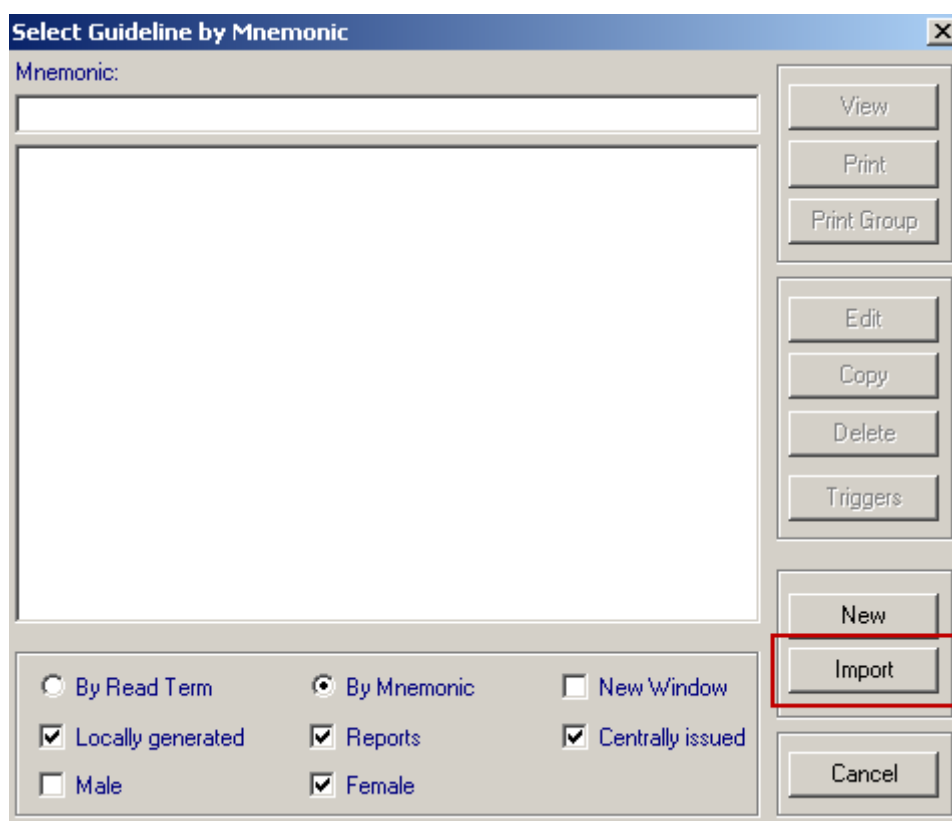
Importing the ePCS Guideline into Vision

1. From **Vision – Consultation Manager**, click **Guidelines - Select Guideline**.



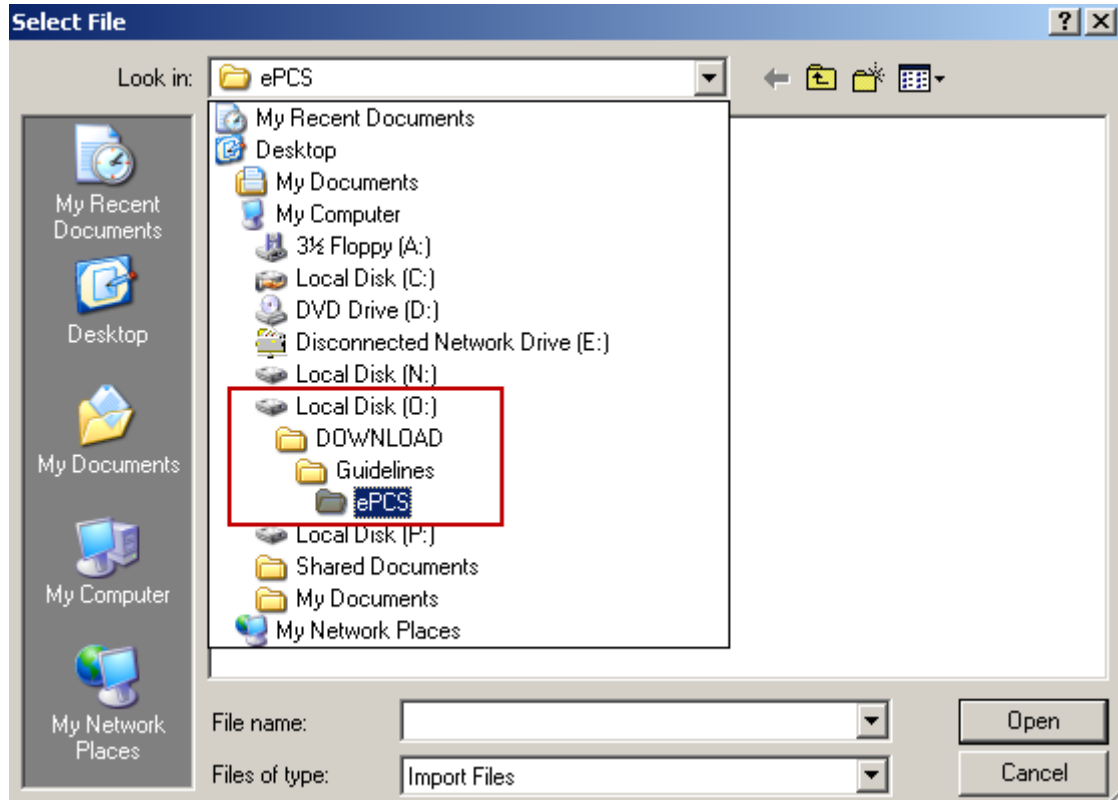
Consultation Manger – Guidelines – Select Guidelines

2. From the **Select Guideline Mnemonic** screen, click **Import**.



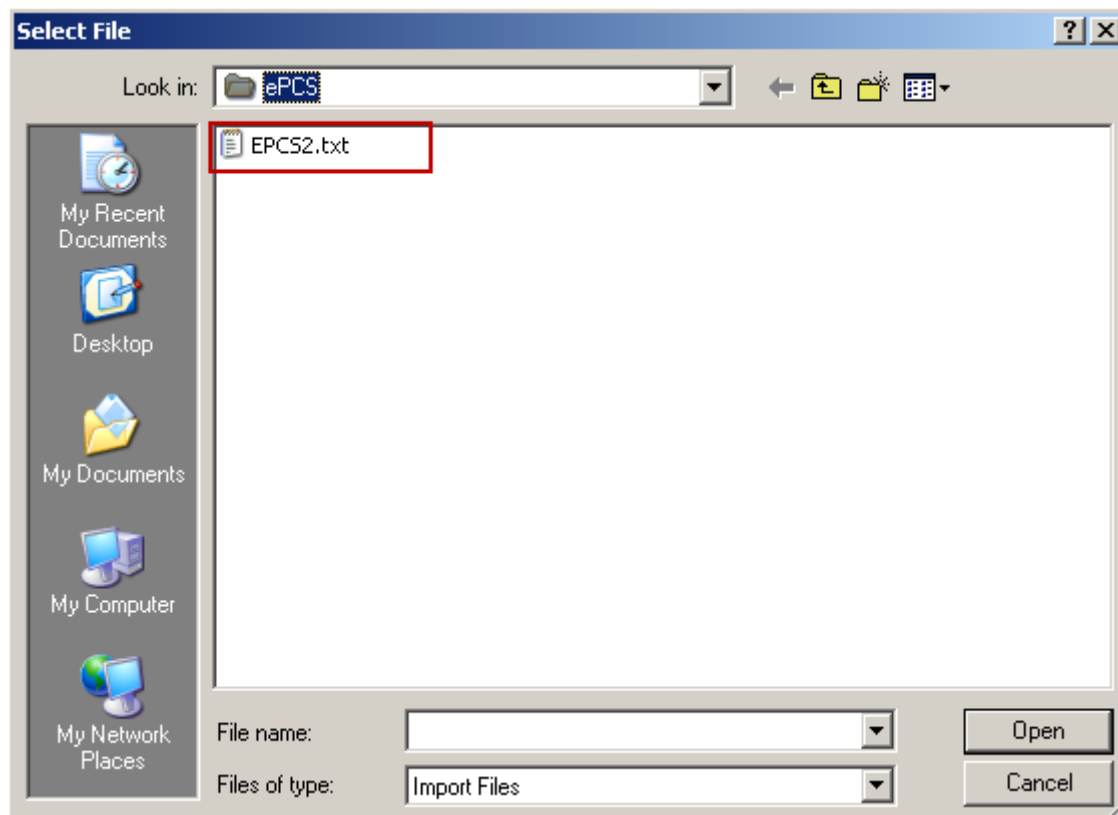
Select Guideline by Mnemonic screen

3. From the **Select File** screen, click into **Look in** and select **O:\Download\Guidelines\ePCS**.



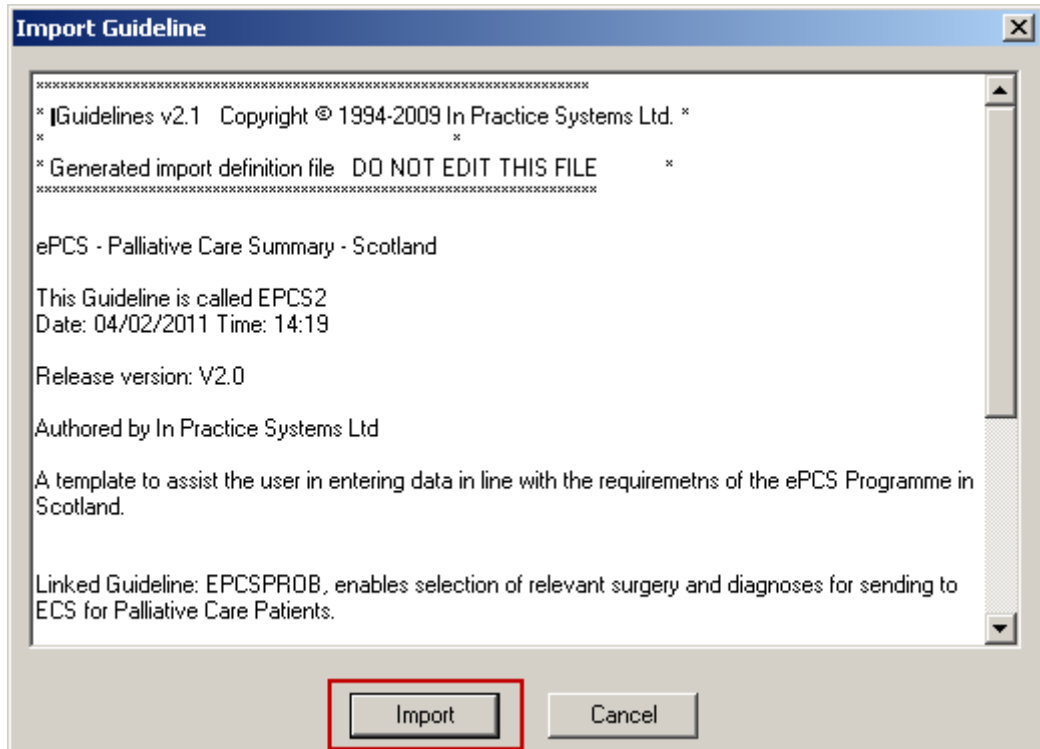
Select File – O:\Download\Guidelines\ePCS

4. Highlight the **EPCS2.txt** file and click **Open**.



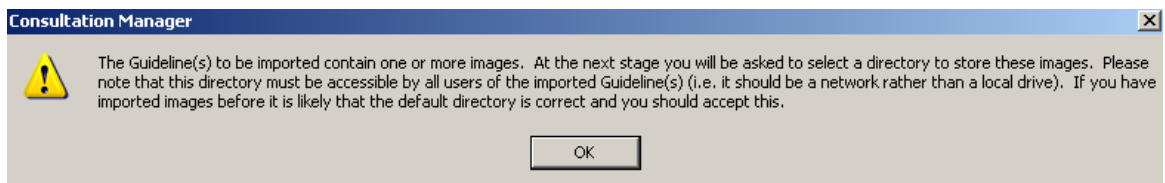
Select File – EPCS2.txt

5. From the **Import Guideline** screen, click **Import**. This will start the transfer of the Guideline into Vision.



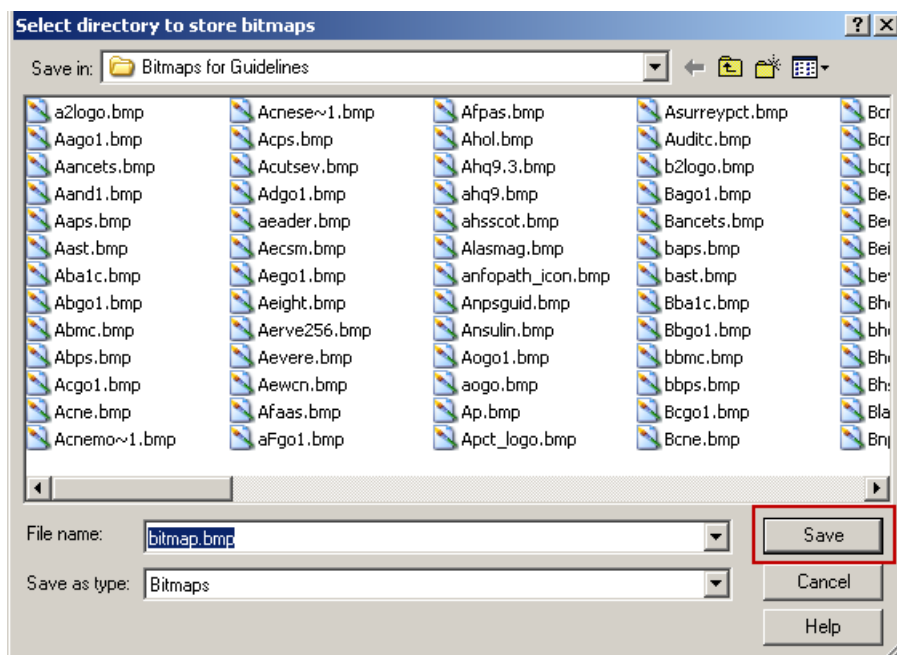
Import Guideline screen

- Click **OK** to the Consultation Manager warning message.



Consultation Manager warning message

- At the **Select directory to store bitmaps** screen, click **Save**.



Select directory to store bitmaps screen

8. The Guideline starts importing. Once the import process is complete the Palliative Care Guideline is displayed.



Palliative Care Summary for Scotland February 2011 - v2.0

This guideline was written to support the ePCS programme, an extension to ECS.
It assists the user in capturing Palliative Care data which, for consenting patients, can be shared with OOH.

Patient Details

Iva Elizabeth Smith 20/09/1914 Female NHS: 459 063 7200
15 Sunningdale Close Leeds Z99 9ZZ
No data recorded.
No data recorded.

Carer/Next of Kin Details

Important information about the use of this guideline

There are 3 steps required to send palliative care information to OOH

Step 1 - Add the patient to the Palliative Care Register...

Step 2 - Add a Palliative Care Plan with a Review Date ...

Step 3 - Record Patient Consent...

Relevant Diagnoses and Surgery

Key Professionals

Access Information

Palliative Care Issues, Awareness and Understanding

Terminal Phase

Preferred Place of Care

Treatment

OOH Information

Care At Home

Palliative Care Reports

Palliative Care Guideline

9. Close the Guideline using the Close  icon.



Set up Options for the ePCS Guideline

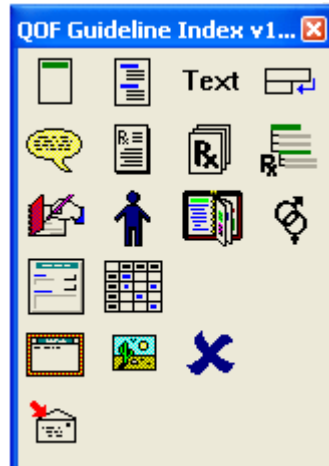
Accessing the ePCS Guideline

There are three main ways the ePCS Guideline can be accessed:

- From the Main Guideline Menu – No set up required, see [ePCS - Data Entry Guide](#).
- From the Local Guideline Index – See [Adding the ePCS Guideline to the Local Guideline Index](#) page 8.
- From a specified tab – See [Adding the Palliative Care Guideline to a tab](#) page 10.

Adding the ePCS Guideline to the Local Guideline Index

1. In Consultation Manager, click on the Local Guideline Index  icon.
2. Click on the Maintain  icon. A Floating Toolbar appears at the right hand side of the screen.



Floating Toolbar

3. Click just above where you want the ePCS Guideline to appear.

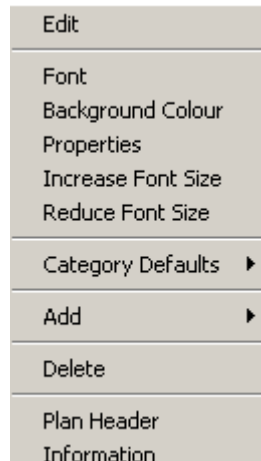


4. Click on the Guideline icon.
5. Type in the mnemonic **EPCS2** and press enter.
6. Highlight **EPCS2: ePCS – Palliative Care Summary – Scotland** Guideline, click **OK**.




Select Guideline by Mnemonic – Palliative Care Summary Guideline

7. Right click on **ePCS – Palliative Care Summary – Scotland** and select from the following to format its appearance on the Local Guideline Index:
 - **Font** – Change the Font, Style and size of the text.
 - **Background Colour** – Change the colour behind the text.
 - **Properties** – Change the indent of the text and whether it displays expanded.
 - **Increase Font Size** – Increases the text size on the Local Guideline Index.
 - **Reduce Font Size** – Reduces the text size on the Local Guideline Index.

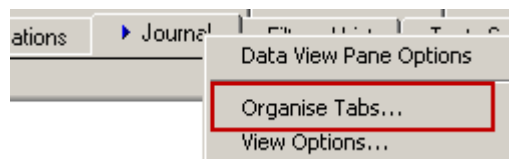


Right click menu

8. Close maintenance mode by clicking on the Maintain  icon. Vision automatically saves the changes.
9. The ePCS – Palliative Care Summary Guideline is now available from the Local Guideline Index.

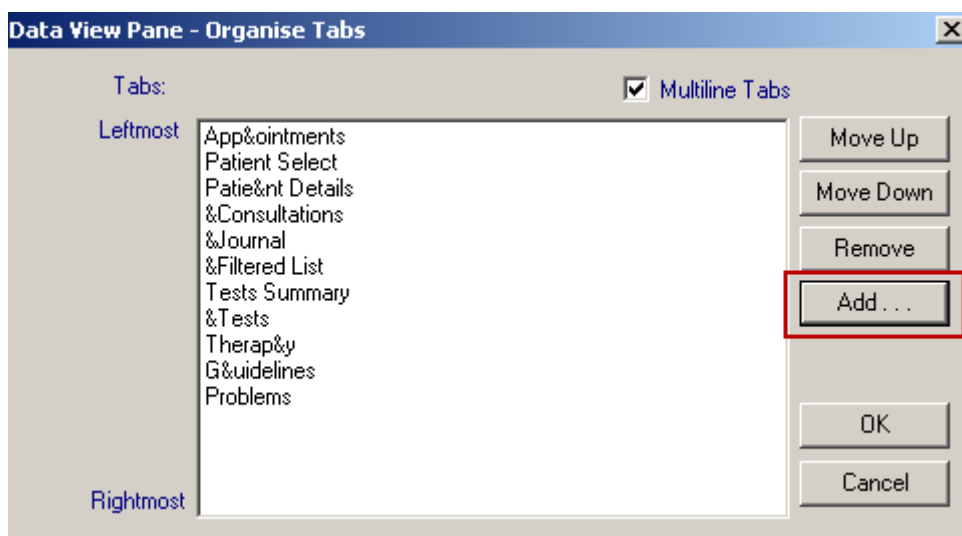
Adding the Palliative Care Guideline to a tab

1. From Consultation Manager, select a patient.
2. Right click on one of the tabs i.e. Journal and select **Organise Tabs**.



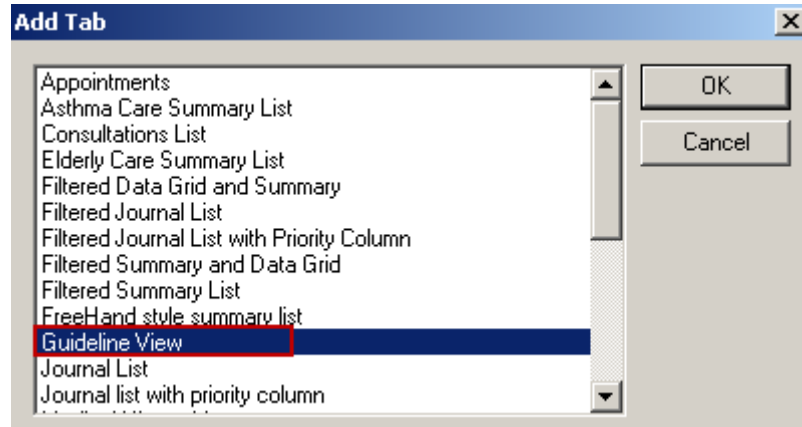
Data View Pane Options – Organise Tabs

3. Click **Add** to display a list of available tabs.



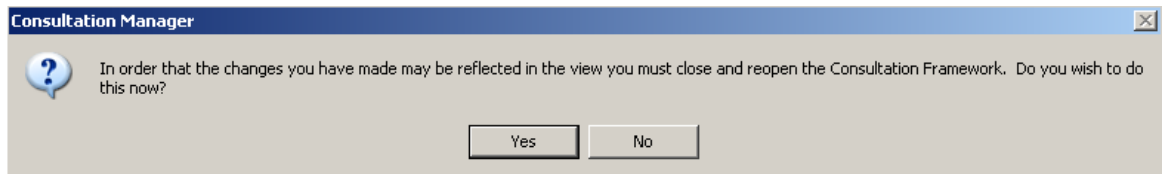
Data View Pane - Organise Tabs

4. From the **Add – Tab** screen, highlight the **Guideline View** and click **OK**.



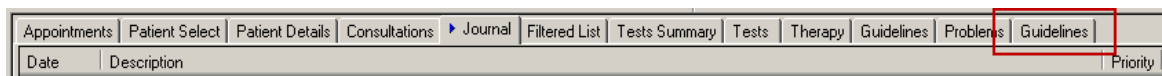
Adding a Tab

5. You are returned to the **Data View Pane – Organise Tabs** screen, click **OK** to exit.
6. A Consultation Manager refresh message is displayed, click **Yes** to continue.



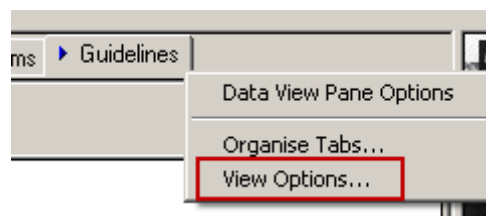
Consultation Manager refresh message

7. The screen is refreshed with a new Guideline tab.



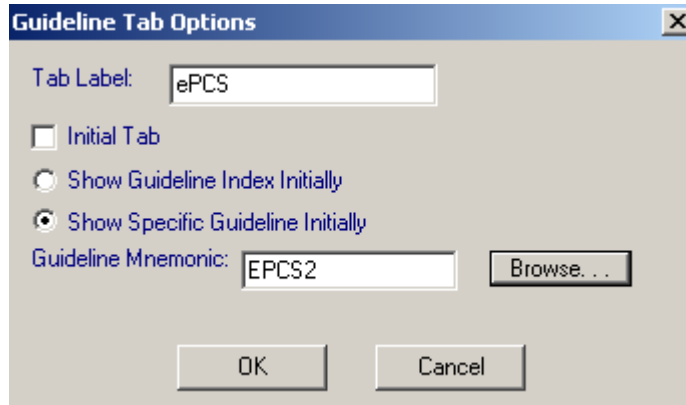
New Guideline tab

8. To rename the Guideline tab, right click and choose **View Options**.



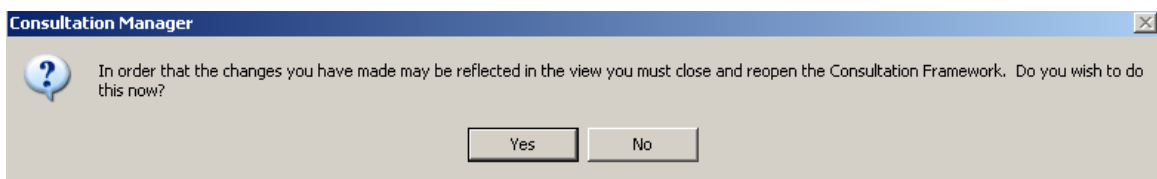
Data View Pane Options – View Options

9. Complete the Guideline Tab Option by:
 - **Tab Label** - Type **ePCS**.
 - Click **Show Specific Guideline Initially**.
 - Type **EPCS2** in **Guideline Mnemonic**.
 - Click **OK** to save and close.



Completed Guideline Tab Options

10. A Consultation Manager refresh message is displayed, click **Yes** to continue.



Consultation Manager refresh message

11. The new ePCS tab is now available for use.

Selecting relevant diagnoses and surgery for inclusion with the ePCS data

When sending data to ECS for patients on the Palliative Care register, in addition to the data you can record using the ePCS Guideline, OOH need to know about the patient's current relevant diagnoses and/or surgery. For ePCS, this is done by including the relevant items in a Problem called ***GSFS1**.

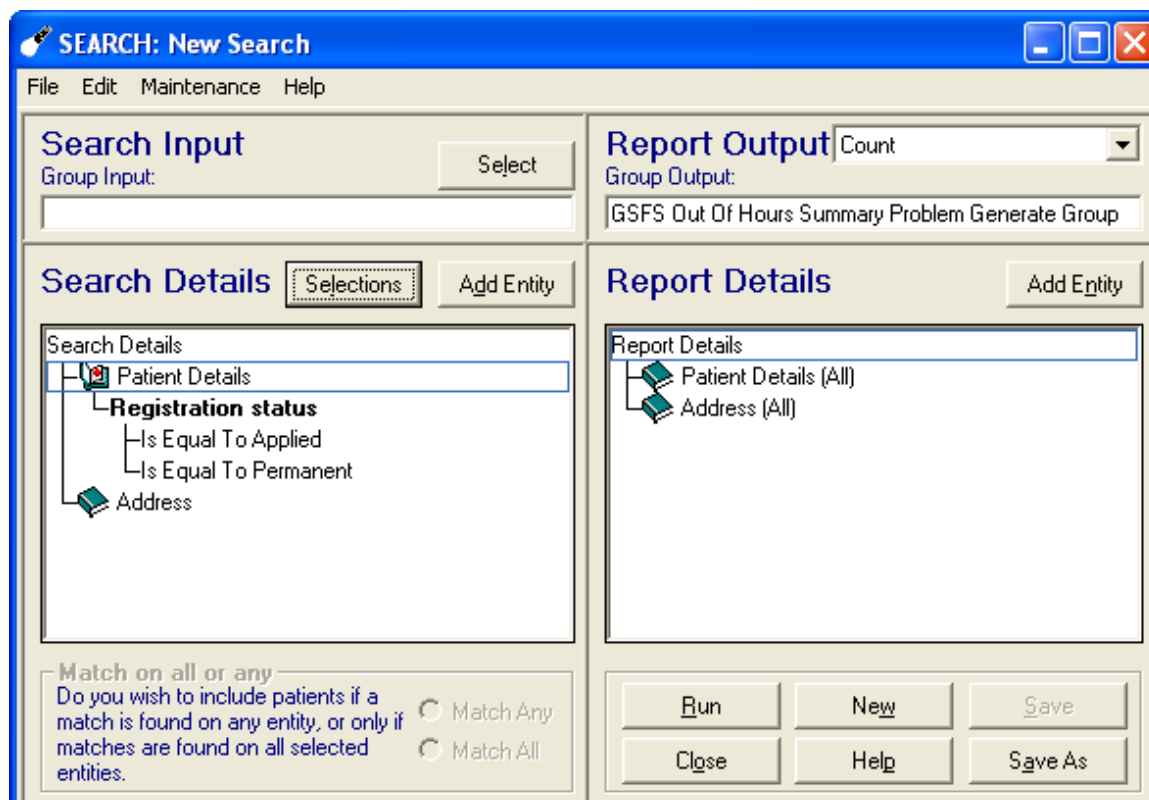
There are two ways to create this Problem:

- For individual patients, the *GSFS1 Problem can be added within the ePCS Guideline, see [ePCS Data Entry Guide](#).
- Using the instructions below, you can automatically create the *GSFS1 Problem for all active patients. This step is optional but may be useful in practices where Problems are not in normal use as the clinician will not have to add the Problem for individual patients.

Note - Instructions on how to select the relevant diagnoses and surgery for inclusion in the *GSFS1 Problem are provided in the [ePCS Data Entry Guide](#).

Creating the *GSFS1 Problem for all active patients.

1. From **Search and Reports – New Ad-hoc Search**, create a search for all active patients with a **Group Output**.



Example of an OOH Summary Problem Generate search

- **Search details** - set to Active patients and address.
 - **Group Output** - choose a suitable name and description as shown above.
 - **Save As** – so this can be run as a regular task (this could be automated using the scheduler).
2. Exit the search.

Note – The following step may be better to be run when no other users are logged in as it won't be able to create the Problem for a patient if their record is already Open and thus locked for data entry.

3. From the **Vision** main menu, select **Utilities** and then **Populate Problems**.
4. From the Populate Problems screen, click **Select**.
5. Select the group created earlier.
6. Click **OK**.
7. Remove the tick from **Currently Relevant**.
8. Click **Define**.

The screenshot shows the 'Populate Problems' dialog box with the following details:

- Source Group:**
 - Name: GSFS (with a 'Select' button)
 - Description: Out Of Hours Summary Problem Generate Group (with a 'View' button)
- Problem to Create:**
 - Currently Relevant
 - Make Problem Currently Relevant
 - Event Date:
 - Clinician:
 - Read Code:
 - Short Name:
 - Description:
 - End Date:
- Options:**
 - Overwrite Existing Problem if Present or create if not Present
 - Add To Existing Problem or create if not Present
- Buttons:** 'Create', 'Close', 'Help', and a highlighted 'Define' button.

Populate Problems with Define highlighted

9. On the **Problem** screen complete the following:
 - Enter Read code **#9e**.
 - Enter Short Name ***GSFS1**.
 - Enter Description **OOH Summary Information**.

10. Click **OK**.

Problem

Start Date: 22 February 2011
 Consultation date
 Event date
 Today's date

Clinician:

Read Code: 9e...00 GP out of hours service administration

Short Name: *GSFS1 End Date:

Description: OOH Summary Information

OK
Cancel
Help

Completed Problem screen

11. You are returned to the Populate Problem screen; select **Add to Existing Problem or Create if not present**.

12. Click **Create**.

Populate Problems

Source Group

Name: GSFS Select
Description: Out Of Hours Summary Problem Generate Group View

Problem to Create

Currently Relevant Define
 Make Problem Currently Relevant

Event Date: 22/02/2011
Clinician:
Read Code: GP out of hours service administration
Short Name: *GSFS1
Description: OOH Summary Information
End Date:

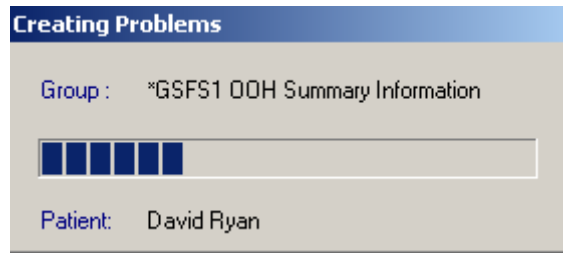
Options

Overwrite Existing Problem if Present or create if not Present
 Add To Existing Problem or create if not Present

Create Close Help

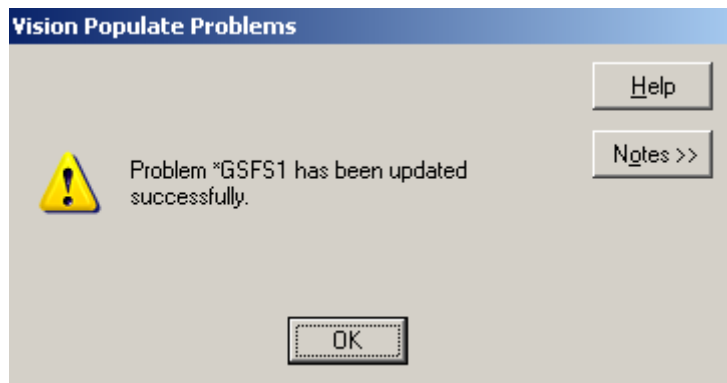
*Completed Populate Problems for *GSFS1 problem, Create highlighted*

13. A **Creating Problems** screen is displayed during the creating process.



Creating Problems screen

14. A Vision Populate Problems screen is displayed when the process has finished, click **OK**.



Vision Populate Problems

15. A *GSFS1 Problem is now available for use on every patient if required.

Note – For information on using the *GSFS1 Problem please refer to the [ePCS - Data Entry Guide](#).

ePCS FAQs

How is the information sent?

Palliative care information is sent automatically from the GP practice, via Mail Gateway to the Emergency Care Record in the form of an Emergency Care Summary message (ECS); the information required for OOH services is extracted from this message.

How is the information entered?

Palliative care information is entered in Consultation Manager with the aid of the ePCS –Palliative Care Summary - Scotland guideline. In practical use, data may be entered by different members of the Primary Care Team at different stages of a patient's care. See [ePCS Data Entry Guide](#) for details.



Palliative Care Summary for Scotland February 2011 - v2.0

This guideline was written to support the ePCS programme, an extension to ECS. It assists the user in capturing Palliative Care data which, for consenting patients, can be shared with OOH.

Patient Details

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15 Sunningdale Close Leeds Z99 9ZZ
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Important information about the use of this guideline

There are 3 steps required to send palliative care information to OOH

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Step 2 - Add a Palliative Care Plan with a Review Date ...

Step 3 - Record Patient Consent...

Relevant Diagnoses and Surgery

Key Professionals

Access Information

Palliative Care Issues, Awareness and Understanding

Terminal Phase

Preferred Place of Care

Treatment

OOH Information

Care At Home

Palliative Care Reports

Palliative Care Guideline

What do I have to do before ePCS data is sent to ECS?

There are three steps required to send palliative care information to OOH:

- The patient must be on the Palliative Care register. This is done by adding a Read code from the list contained in the ePCS Guideline.
- The patient must have a Palliative Care Plan with a Review date. See section whatever
- The patient must have given consent and this has been recorded in Registration, Consent.

Note - Information can only be sent to ECS for Permanently registered patients, who have a CHI number recorded.

Where can I run a report of patient information recorded for Out of Hours?

An **Out of Hours Summary** report can be produced for an individual or group of patients and is available from **Vision – Reporting – Palliative care Reports**.

Note - The Out of Hours summary report can be produced for any patient who has a Palliative Care Plan even if they have not consented to share the data.

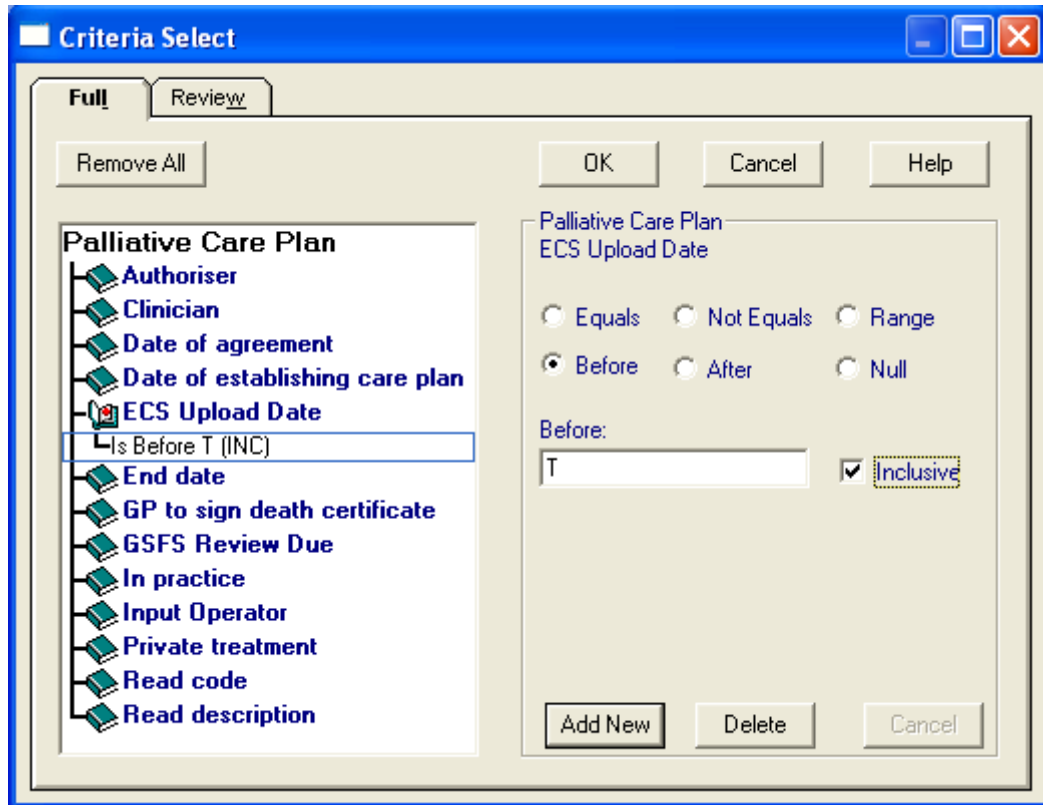
The Out of Hours Summary Report includes a section Main Diagnosis, how is this populated?

This section will include any relevant diagnoses which have been selected for inclusion in the *GSFS1 Problem. See the [ePCS - Data Entry Guide](#).

How do I know whether a patient's data has been sent?

Once a Palliative record has been uploaded to ECS, the date uploaded will be written back to the patient's record:

- You can view this on the Palliative Care Plan – the date uploaded to ECS will be present on this form if it has been sent.
- You can run an Out of Hours Summary Report, the date last uploaded will be shown at the top of the form
- You can run an Ad Hoc search on the Palliative Care Plan SDA which includes the ECS Upload Date



Criteria Select – Palliative Care Plan – ECS Upload Date

Authorised staff can check the ECS record to check that a Palliative Care Summary now exists and view the information uploaded, however this is subject to access control.

What other Reports are available?

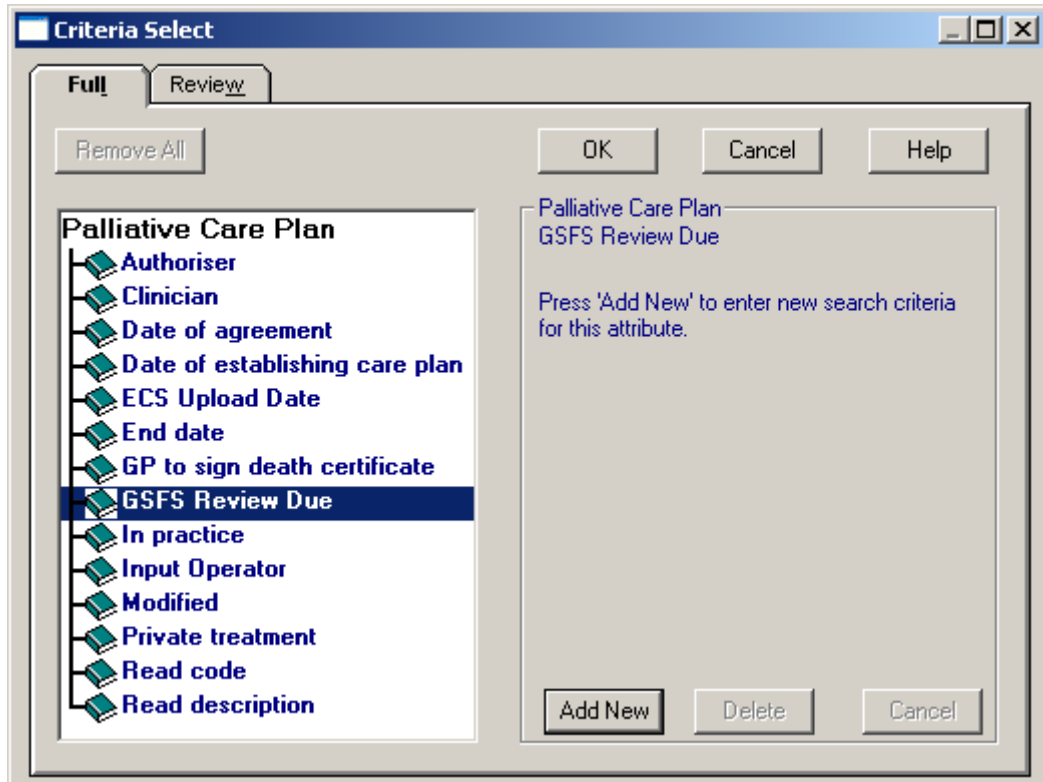
In the **Reporting** section of Vision there are **Palliative Care Reports**. In addition to the **Out of Hours Report**, there is a **MDT Meeting Report** which lists all the palliative care patients and reports on their carer details, diagnosis, referral to Macmillan nurse, preferred place of care and consent details.

A **Palliative Care Review** report is also available which finds patients near to or overdue their palliative care review.

Details on all the available reports are available in the Palliative Care Reports section of the [ePCS - Data Entry Guide](#).

How do I search for patients due for review?

The **Palliative Care Review** report (see above) can be used. You can also create an Ad Hoc search – the GSFS Review Date is entered via the Palliative Care Plan SDA and you can search the details there.



Criteria Select – Palliative Care Plan - GSFS Review Due highlighted