TRUST USER EDITION

QUICK NOTES FOR TRUST USERS – CDF

1. LOGGING ONTO THE SYSTEM

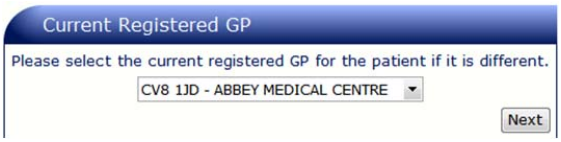
- Open your web browser and go to the following address: https://www.blueteq-secure.co.uk/trust
- Enter your name (first name [space] last name) and password, Click the 'Login' button
- If you are associated to more than one trust then you will need to choose the trust to which the patient relates from in the top left corner.
- You are now logged in

2. TO FIND A PATIENT

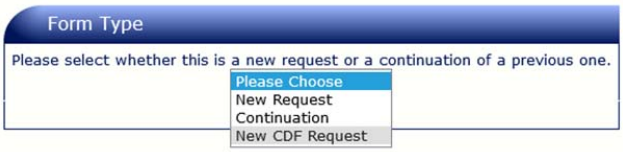
- In the top right hand corner of the screen you can search by:
  - **Patient** - Enter the surname followed by initial/first name, or the Date of Birth. You can also enter the first name by itself. The search box will allow part of a surname as well.
  - **NHS number** - type the NHS Number in the box with/without spaces.
  - **Hospital Number**- Choose hospital number from the adjacent drop down list and enter the number in the box.
- Press return or click on 'Go'
- You will be offered a list of patients, click on 'Go' on whichever is the relevant patient.
- You will be taken to the patient's notes screen.
- Wherever you are you can always return to this screen by clicking on 'Notes' and then the 'View menu' option.

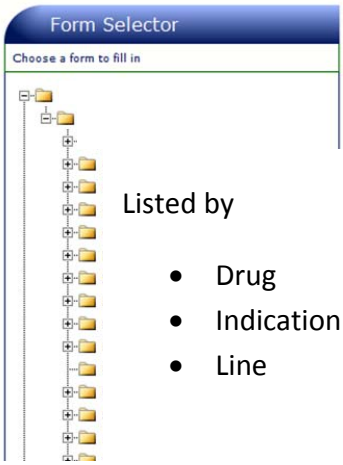
3. UPLOADING A REQUEST

- Click on the 'Requests menu' option (do not use 'Add Patient').
- Enter the patient's details (note: to find a GP practice you enter the practice's postcode)
- Click on 'Add Patient'.
- If the patient already exists, you will be offered a choice of choosing to add to an existing patient record or add a new one.
- Click on 'Save'.
- You will be shown the current registered practice for the patient, which you have just set in 'Add Patient' so leave this as is and click on 'Next'.



- You will be asked which form type you need to add. Choose 'New CDF Request'





Listed by

- Drug
- Indication
- Line

- You will be shown the 'Form Selector' Tree View. Find the relevant form by clicking on the "+" signs beside each folder. Select the drug required, then indication and then line of treatment (if applicable).
- Click on the form and it will open.
- Fill in the form.
- If it is incomplete, check the 'Incomplete' box at the bottom and click on 'Save'. If you are ready to submit the request, click on 'Submit'. You will receive an automatic response. If approved, treatment can commence.
- If the criteria for us of the drug aren't met, or there is no cohort policy for the drug, please read the NHS CB Guidance and Standard Operating Procedures for the CDF (www.commissioningboard.nhs.uk/cdf) to decide your next steps. If a request to the CDF is appropriate, download a blank Individual CDF Request (ICDFR) form from the 'Form selector' tree. Once fully completed submit the case for consideration by the regional CDF Panel to nhscb.cdfme@nhs.net.

4. NOTES SCREEN

- **Add Request** - you can add a request using this option if the patient already exists on the system. Click this option and follow the instructions under section 3 above.
- **Comment** - To add a comment to the patient's record (e.g. to note a telephone conversation) click on the 'Comment' menu option. Click on 'Send to Admin' checkbox to add this comment to the 'Messages to Admin' list where action is required.
- **Upload Docs** - this option can be used for uploading a scanned supporting document into the notes. Clicking on 'Upload' will add a line to the notes. Click on the icon to view the document.

5. REQUEST HISTORY

To view the request history for your trust, including the request's current status, click on 'Administration' then 'Request History'. By default you will be shown the incomplete requests but you can change this by choosing 'Ail' or 'Pending' from the drop down list.

6. MESSAGES TO ADMIN

To view a list of all the comments that have been marked 'Sent to Admin' and haven't been dealt click on 'Administration' then 'Messages to Admin'.

- To action a message, click on the icon in the 'Done' column.
- To go to the patients notes, click on the icon in the 'Notes' column.

7. FOLLOW UP LIST

To view a list of the request that have a current status of 'Follow Up' and need attention click on 'Administration' then 'Follow Up List'.

8. REVIEW LIST

To view a list of patients with a request that has a review date click on 'Administration' then 'Review List'.

- To alter the date criteria click on the next to the date that you want to change.
- To sort the list click on the any of the underlined column headers.
- To go to the patients note click on the 'Notes' link in the 'Notes' column.

9. REPORTS

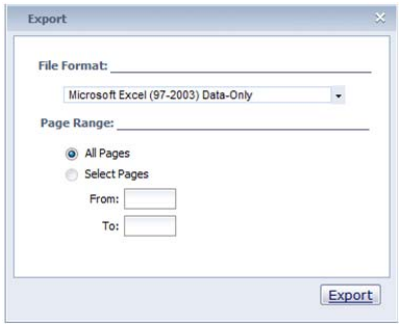
To run reports click on 'Administration' then 'Reports'. These reports can be filtered by date range. Click on the 'Run' button for the required report and it will open in a new window.

10. EXPORTING DATA

All of the reports and some of the lists can be exported in to MSExcel. If a list is exportable then it will have a 'Exportable Version' button next to the title.

When either the report 'Run' button or a list 'Exportable Version' button is clicked it will open a new window displaying the data from the list or report.

- Click on the icon and an Export window will open.
- Change the File Format to Microsoft Excel (97-2003) Data-Only
- Click on the 'Export' button.
- Save the file to the desired location.



To print the data click on the icon.

To move forward a page in the report/list click on the icon
To go back a page click on the icon.

11. USER PROFILES

To edit your user profile click on 'Options' then 'Configuration'.
Users are only able to edit their own profiles.