



### Community Pharmacist Consultation Service

London DMIRS is now Minor Illness and is merged with the Emergency Supply Service (previously NUMSAS), together they are the CPCS.

# SONAR INFORMATICS CPCS

User Guide 2019/20

## Sonar Informatics CPCS User Guide 2019/20 – Table of Contents

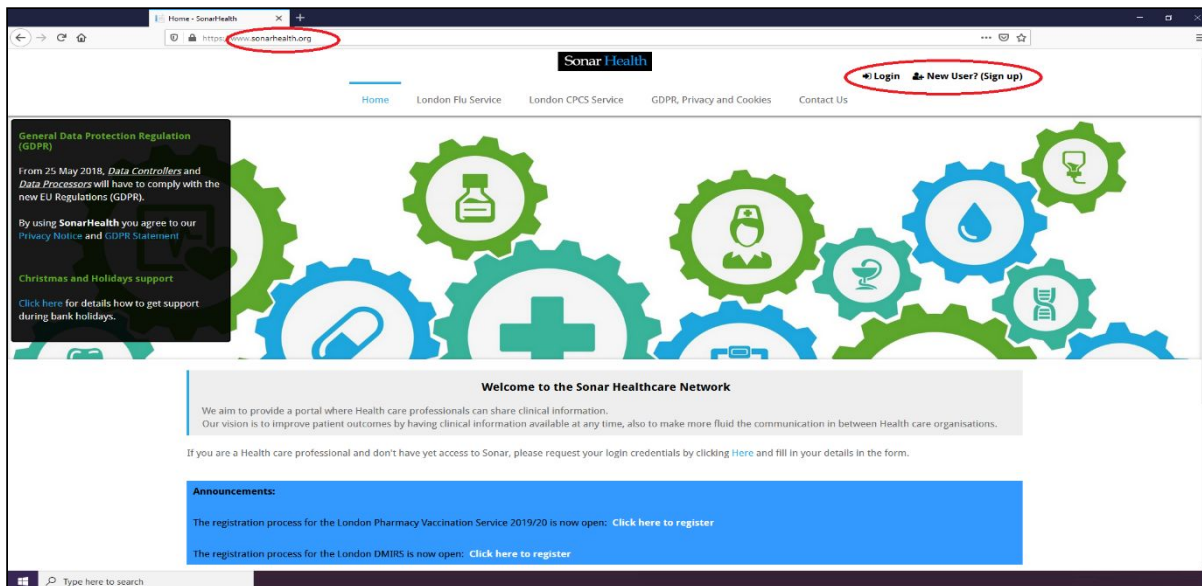
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# Requesting Access & Logging into Sonar

## The Website

On our website **www.sonarhealth.org** you will can 1) Login by selecting the 'Login' link & 2) Register for a new account by selecting the 'New User? (Sign Up)' link. Each link (located on the top right of the page) will take you to its corresponding page.



## Registering for an account

You can request an account by filling in the 'New User? (Sign Up)' form below. This is a manual not automate process. We will send you a confirmation email within a few working days with a form to be filled in and returned to us (including your personal details, details of the pharmacy you require access to & details of the person who is authorising to access that pharmacy). Once we have this completed information we will be able to send you your login details.

A screenshot of the 'Sign Up' form on the Sonar Health website. The top navigation bar is identical to the homepage screenshot, with 'Login' and 'New User? (Sign up)' circled in red. The 'Sign Up' section includes a welcome message and a 'Your Contact Details' section. A red circle highlights the text 'Click here and free type your location name or postcode' above a text input field. Below this are fields for 'First Name:', 'Surname:', 'Email:', 'Mobile:', and 'Phone:'. A red circle highlights the 'Surname' field. To the right is a 'GDPR Consent' section with a list of services to subscribe to. At the bottom, a CAPTCHA challenge asks the user to 'Please enter the text' followed by the letters 'A Y F Q A' in a box, with a 'Submit' button next to it.

## How to Login to Sonar

Enter your Username, Password and PIN number on the login page.

- Unless otherwise stated, **all details are lowercase with no spaces**
- Login Method- make sure it is set at '**Pin Number**' as you have been issued a PIN
- **PIN**- you will be asked for a different set of 3 parts of your 6-digit PIN each time you login
- If you have '**Multi-Access**' to multiple stores be sure to choose the relevant borough and specific store postcode after you have entered your login details and are prompted to select the site access you require.
- If you have any questions or issues please reply giving details of your issue, your Sonar username & how to contact you (email & tel /mobile).
- A User Guide for logging in can also be found on this page under the 'User guide' heading.

The screenshot shows the Sonar login page. At the top, there is a navigation bar with links: Home, About us, Contact us, and Cookie policy. On the right, there are links for 'Login' and 'New user? (Sign up)'. Below this is the NHS First PCT logo and a row of five images showing medical equipment and a person using a device. A secondary navigation bar contains 'Home' and 'Contact' buttons. The main content area includes contact information: 'Please call 0208 743 6924 or email to info@sonarinformatics.com if you are unable to login. Or you can use the Help /Login support link below and fill in your details and somebody from our team will contact you shortly.' It also lists 'Required browsers: Internet Explorer 8 or Above, FireFox, Google Chrome, Safari, Opera' and a note about a '1 hour of inactivity' timeout. The login form is highlighted with a red circle and contains fields for 'User name', 'Password', and 'Login Method' (set to 'PIN Number'). Below these are three dropdown menus for '5th', '3rd', and '4th' digits of the PIN, followed by a 'Login' button and a 'Forgotten password?' link. At the bottom, a 'User guides:' section is highlighted with a red circle and lists several guides: 'How to login to Sonar', 'Seasonal Flu - Pharmacy User Guide', 'Seasonal Flu - GPs User Guide', 'London DMIRS - SCR 1Click', and 'SCR 1Click - Setup'.

Home About us Contact us Cookie policy Login New user? (Sign up)

**NHS**  
First PCT

Home Contact

Please call **0208 743 6924** or email to [info@sonarinformatics.com](mailto:info@sonarinformatics.com) if you are unable to login.  
Or you can use the [Help /Login support](#) link below and fill in your details and somebody from our team will contact you shortly.

**Required browsers:** Internet Explorer 8 or Above, FireFox, Google Chrome, Safari, Opera

There is a period of **1 hour of inactivity** before the web site logs you out.

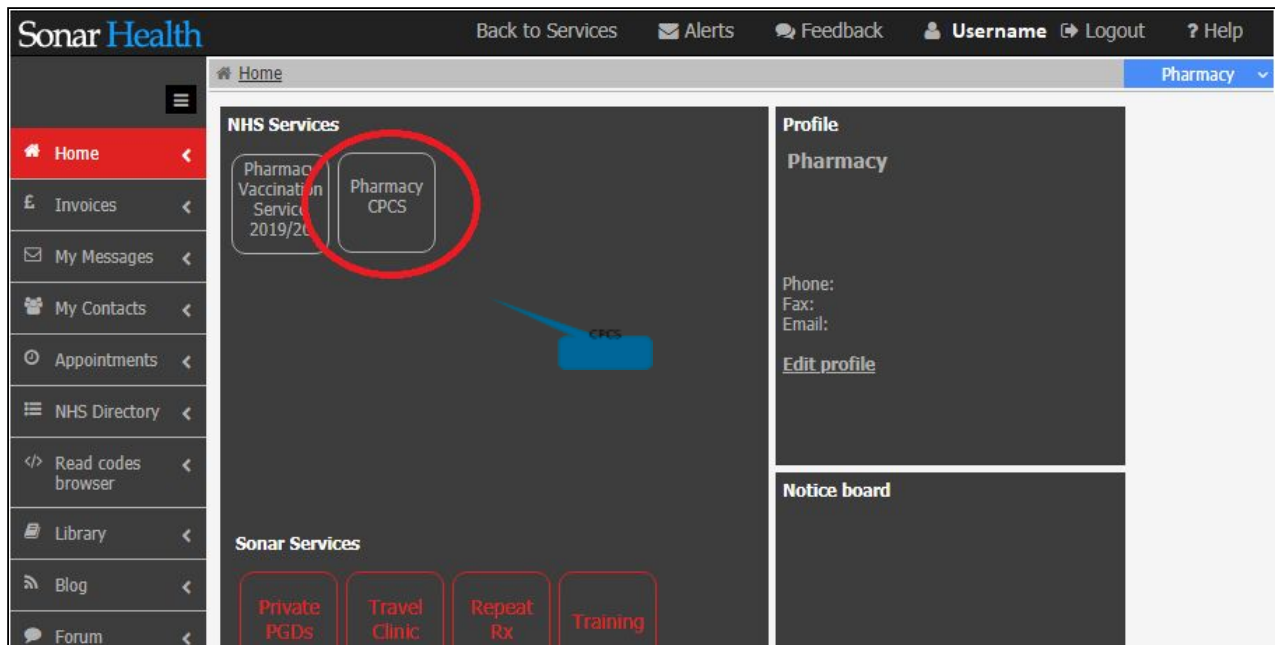
User name   
Password   
Login Method **PIN Number** ▼  
Please provide the following digits of your PIN Number  
5th 3rd 4th  
▼ ▼ ▼  
  
[Forgotten password?](#)

**User guides:**

- [How to login to Sonar](#)
- [Seasonal Flu - Pharmacy User Guide](#)
- [Seasonal Flu - GPs User Guide](#)
- [London DMIRS - SCR 1Click](#)
- [SCR 1Click - Setup](#)

## Access your CPCS Service

Login onto your Sonar account and select CPSC on your main Sonar homepage to access the service.

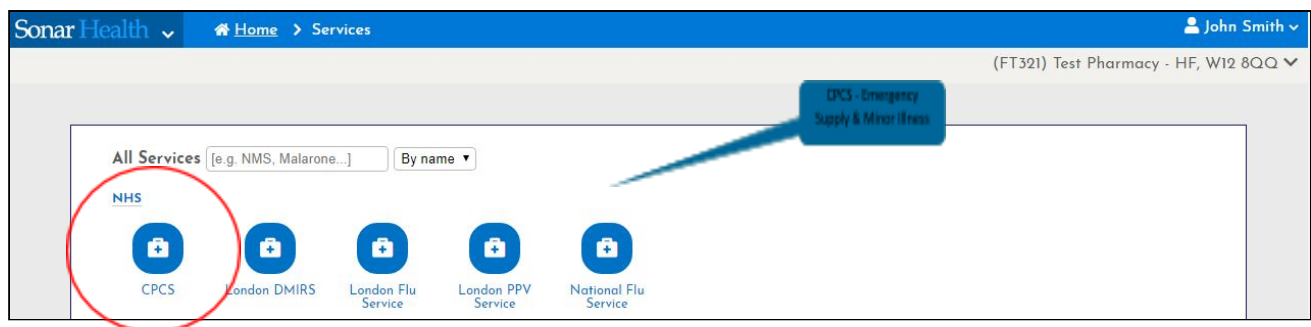


## Selecting the Service

CPCS is short for **Community Pharmacist Consultation Service**. London DMIRS is now called **Minor Illness** and is merged with the **Emergency Supply** Service (previously NUMSAS), together they are the current CPCS service.

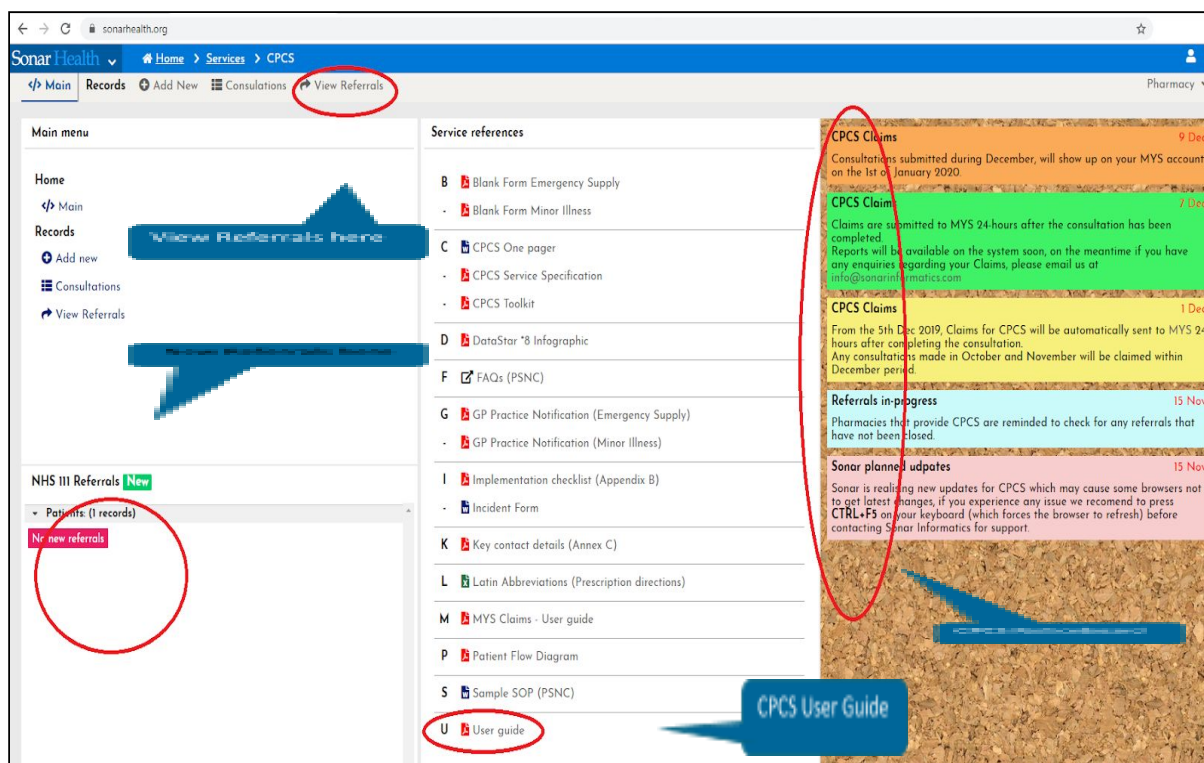
Select Emergency Supply.

You will need to have an entry line to access service, including a smart card to access the SCR.

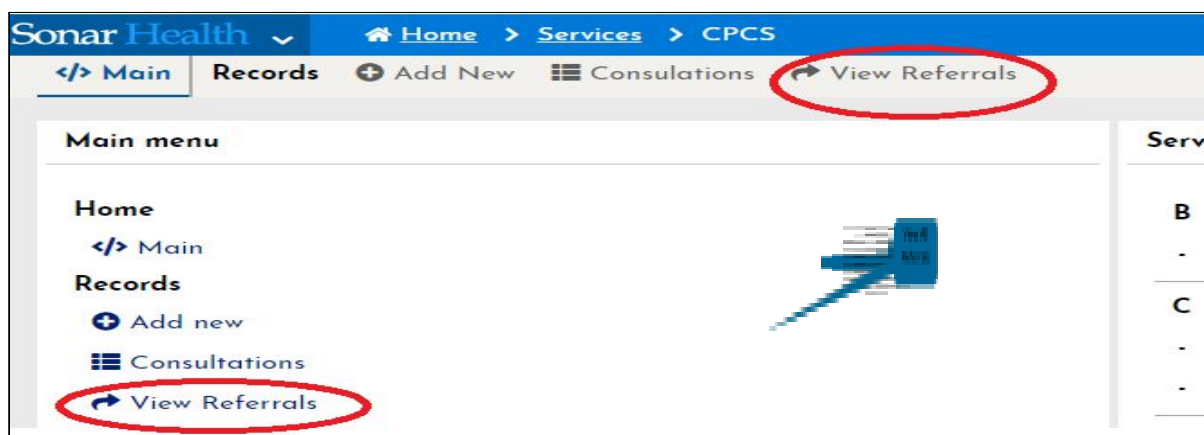


## Creating a New Consultation using the referral list

On the main page, you can view NEW REFERRALS. If there is nothing there, it means a member of your pharmacy team already clicked on the referral and it will be automatically labelled as “ACKNOWLEDGED”.



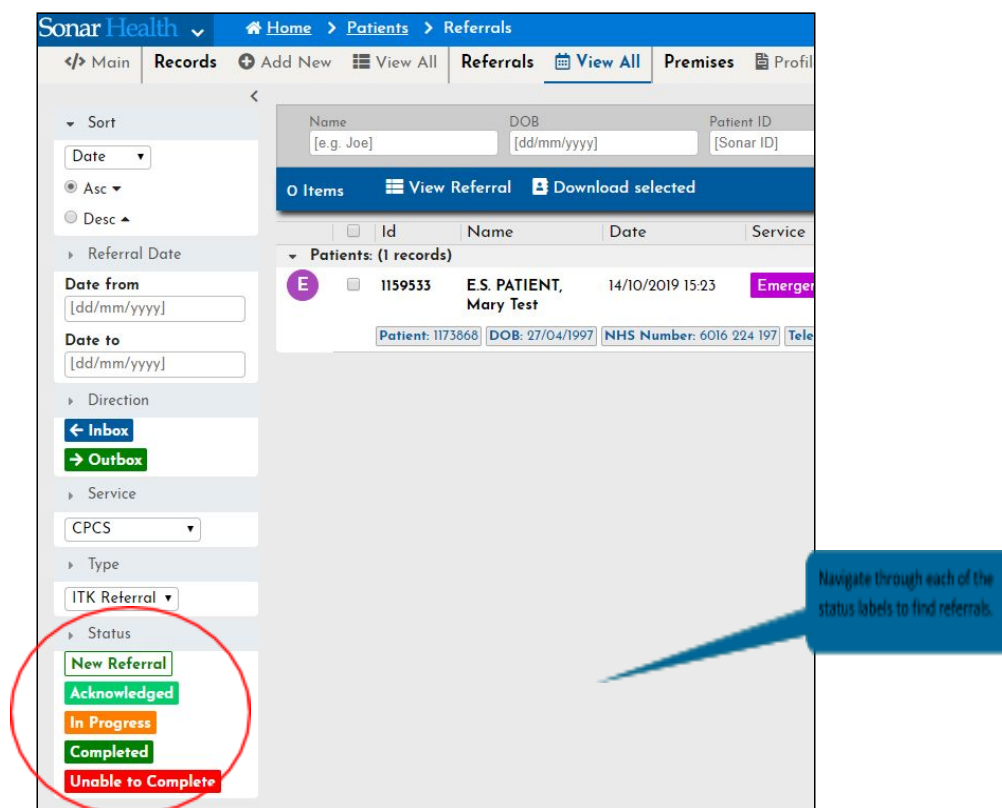
If there are no referrals on the main page, select VIEW REFERRALS to see the list of referrals.





## Starting a New Consultation

If you can't see the referral on the View Referrals list, navigate through the status labels on the bottom left hand side of the screen. New Referrals will be on the NEW REFERRAL label. Once it has been clicked on, the status will change to ACKNOWLEDGED. When a consultation has been started and left unfinished, it will move to the label IN PROGRESS. Finished consultations will be labelled as COMPLETED when a consultation is finished or completed or labelled as UNABLE TO COMPLETE if no intervention has been made with the referral.

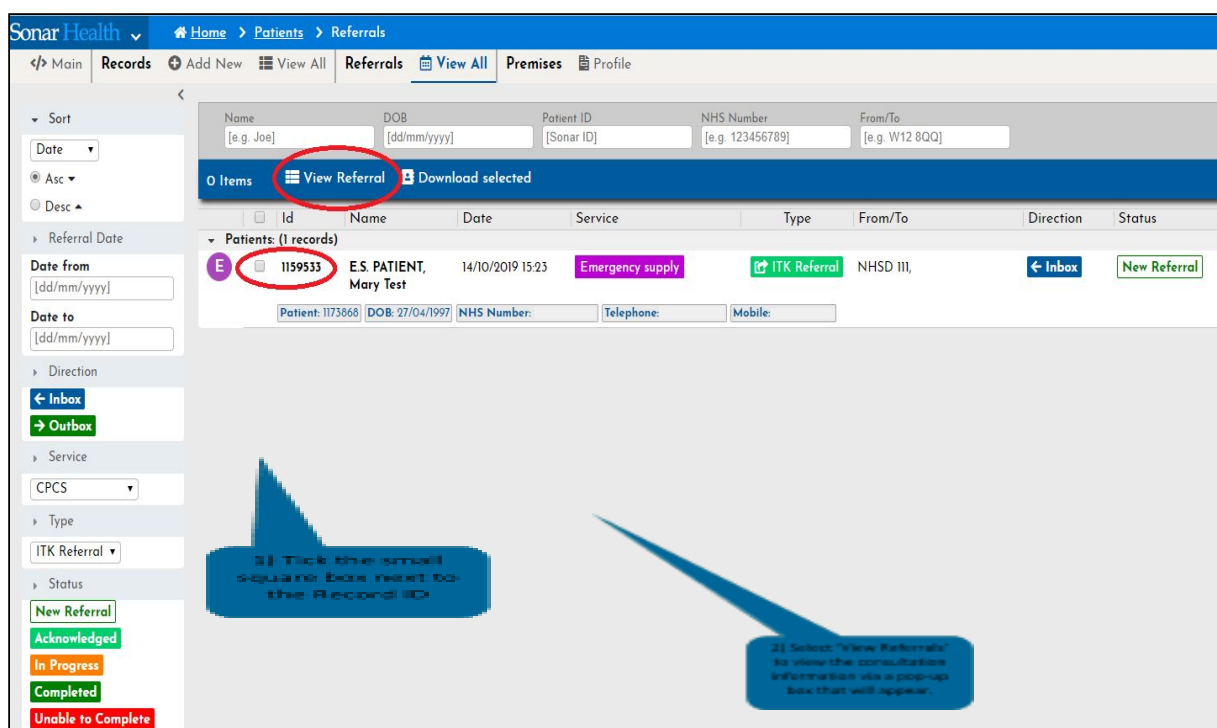


### Status Explanations:

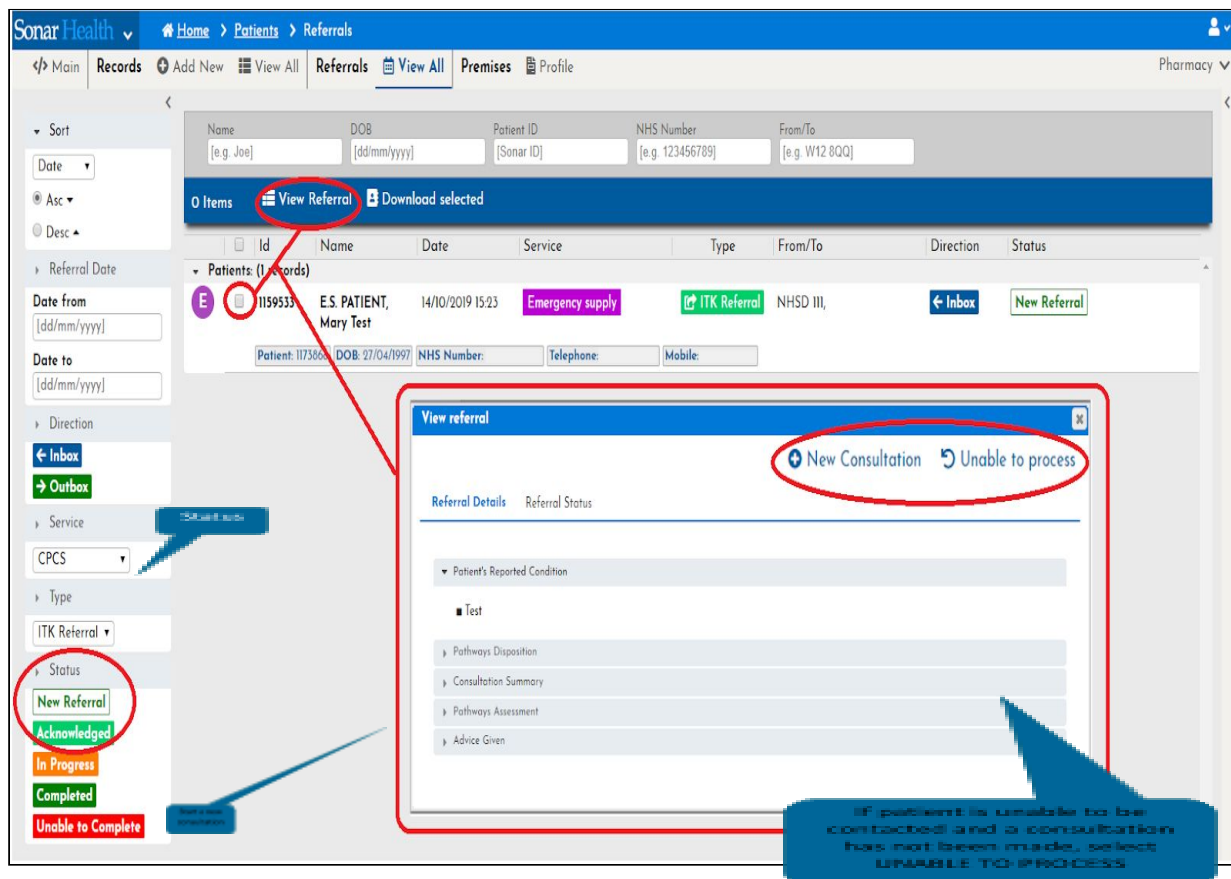
- **New Referral** – This is a new referral that has come into the pharmacy. It's pending to be looked at.
- **Acknowledged** – This is a referral that has been identified as incoming, but it has yet to be actioned.
- **In Progress** – This is a referral that has been opened and is still in the process of being completed.
- **Completed** – This is a successfully finished referral and will be paid for.
- **Unable to Complete** – This is a referral that could not be completed. When you mark the referral status to 'Unable to complete' you will be asked to choose the reason from a drop-down menu, due to reasons such as the patient not being in contact or attending, the patient no longer needs the service etc.



Select the Emergency Supply/Minor Illness patient by ticking the square box next to the ID of the patient. Then click VIEW REFERRAL. (Ensure the PC you are working on has not disabled the pop-up blockers).



A pop-up box will appear with the details of the referral and steps on how to finish.



## If a consultation is IN PROGRESS

When the consultation has started and left unfinished, it will be labelled as IN PROGRESS. To continue with that consultation, tick the square box next to the ID of the patient, then select VIEW REFERRAL and a new pop up will appear.

The screenshot shows the Sonar Health interface for Referrals. The top navigation bar includes 'Home', 'Patients', and 'Referrals'. The 'Referrals' tab is active, showing a list of referrals. A red circle highlights the 'View Referral' button in the top navigation bar. Another red circle highlights the small square box next to the patient ID '1159533' in the referral list. A blue callout box points to the 'View Referral' button with the text: '1) Tick the small square box next to the Record ID'. Another blue callout box points to the 'View Referral' button with the text: '2) Select 'View Referrals' to view the consultation information via a pop-up box that will appear.'

A new pop up will appear. Select VIEW CONSULTATION and you will be redirected to where the consultation was left.

The screenshot shows the 'View referral' pop-up window. The top right corner has a red circle around the 'View Consultation' button. A blue callout box points to the 'View Consultation' button with the text: 'Click on VIEW CONSULTATION'.

## If there is an INCIDENT

If an incident occurs during your consultation or you feel you need to report something, select the INCIDENT REPORT button on the top right-hand corner of the screen. An incident form will be created and sent to the London Region NHSE/ I team to follow up.

The screenshot shows the 'Incident Report' form. The top right corner has a red circle around the 'Incident report' button. A blue callout box points to the 'Incident report' button with the text: 'INCIDENT REPORT'.

## Starting a NEW CONSULTATION – EMERGENCY SUPPLY

When you select NEW CONSULTATION, you will have to confirm the service selected by clicking the SUBMIT button.

The screenshot shows the Sonar Health interface for a patient named Peter Humphreys (Sonar ID: 1172885). The patient's details include Gender: Male, DOB: 10/09/1991, NHS Number: Not recorded, GP Practice: Not recorded, and Address: 168 Ilbert Street, London, London, W10 4QD. The interface has a top navigation bar with 'Main', 'Records', 'Add New', 'View All', and 'Referrals'. A left sidebar shows 'Progress' with 'Process referral' selected. The main content area is titled 'New consultation' and 'No Intervention Made'. It contains a text box with instructions: 'Please review the III (ITK) Referral at the right-hand side panel, and select the appropriate service:'. Below this are two options: 'Minor Illness: if you are treating a condition, e.g. Constipation' and 'Emergency Supply: if you are supplying prescription only medications (POMs) or devices, without the patient having a prescription'. A note states: 'NOTE: If the patient is uncontactable or you are not able to complete this consultation please use the <No Intervention Made> Tab'. Under 'Available service', 'Emergency Supply' is selected. At the bottom, there is a 'SUBMIT' button and a 'Cancel' button. A footer note says: 'Click on <SUBMIT> to confirm details'.

## Filling the NEW CONSULTATION

Once the service is confirmed, start the consultation and fill in the form as you go.

The screenshot shows the Sonar Health interface for the same patient, Peter Humphreys. The patient's details are the same. The interface has a top navigation bar with 'Main', 'Records', 'Add New', 'View All', and 'Referrals'. A left sidebar shows 'Progress' with 'Consent' selected. The main content area is titled 'Consent for service delivery (Emergency Supply - NUMSAS)'. It contains a text box with instructions: 'The pharmacist to read following statement to patient:'. Below this is a section titled 'Consent is required for the service provision and to share information about this consultation:'. It contains three checkboxes: 'Consent for the pharmacy sharing information with the patient's GP practice, NHS England and the NHSBSA', 'Consent to a third person other than patient & pharmacist being present in consultation room (if applicable)', and 'Consent to forward referral to another community pharmacy (if applicable)'. Below these are two dropdown menus: '\* Consent given?' and '\* Is the patient accompanied?'. There is a 'Patient's signature (optional)' field with a 'Clear' button. At the bottom, there is a 'SUBMIT' button and a 'Cancel' button. A footer note says: 'Click on <SUBMIT> to confirm details'. On the right side, there is a section titled 'NHS III Referral' with a list of items: 'Patient's Reported Condition', 'Test', 'Pathways Disposition', 'Consultation Summary', 'Pathways Assessment', and 'Advice Given'. A top right corner shows 'John Smith' and '(FT321) Test Pharmacy - HF, W12 8QG'. A bottom right corner shows 'Useful links: MiDoS, EPS Tracker, NICE CKS, NHS UK, PATIENT.CO.UK, BNE, EMC, GILLICK COMPETENCY'.

To add allergies, type and select the relevant allergies listed in the drop down menu. If the allergy is not listed, it can be added in the patient notes.

The screenshot shows the Sonar Health interface for a patient named Peter Humphreys. The form is titled 'Emergency Supply'. The 'Allergies' field is highlighted with a red circle. A blue arrow points from the 'Allergies' field to the 'Patient Notes' button in the top right corner. The form includes fields for Service Name, Date & Time, Consultation Type, Reason for request, and Allergies. The 'Allergies' field has a dropdown menu with options like 'Dust allergy', 'Dusting powders allergy', 'House dust allergy', 'Allergy to house dust mite', 'Allergic reaction to flour dust', and 'Allergic rhinitis due to house dust mite'. The 'Reason for request' field has a dropdown menu with options like 'In Person', 'Over the phone', and 'Other'. The 'Allergies' field is also highlighted with a red circle. A blue arrow points from the 'Allergies' field to the 'Patient Notes' button in the top right corner.

## Checking EPS and SCR

You can verify if the patient has an electronic prescription already by selecting the EPS Tracker. You will need to have access to a Smart Card enabled computer. Make sure you check the patient's SCR. To do so, the link is located on the top right-hand corner of the page. If the patient's Summary Care Record has not been accessed, please provide reasons why by selecting the options on the drop down box.

The screenshot shows the Sonar Health interface for a patient named Peter Humphreys. The form is titled 'Emergency Supply'. The 'EPS Tracker' button is highlighted with a red circle. A blue arrow points from the 'EPS Tracker' button to the 'Patient Notes' button in the top right corner. The form includes fields for Service Name, Date & Time, Consultation Type, Reason for request, and Allergies. The 'Allergies' field has a dropdown menu with options like 'Dust allergy', 'Dusting powders allergy', 'House dust allergy', 'Allergy to house dust mite', 'Allergic reaction to flour dust', and 'Allergic rhinitis due to house dust mite'. The 'Reason for request' field has a dropdown menu with options like 'In Person', 'Over the phone', and 'Other'. The 'Allergies' field is also highlighted with a red circle. A blue arrow points from the 'Allergies' field to the 'Patient Notes' button in the top right corner.



## Adding the supply

Select “Add medicine/device”.

The screenshot shows the 'Add New' page in the Sonar Health system for patient PETER HUMPHREYS (Sonar ID: 1172885). The page has a sidebar with navigation options like Progress, Consent, Assessment, Supply details, Outcomes, Pharmacy Feedback, and Actions. The main content area has a header 'Fields marked with (\*) are mandatory' and a button 'Add medicine/device' which is circled in red. Below this button, it says 'No medicines or devices selected'. A blue arrow points to the 'Add medicine/device' button with the text 'Select to add supply'.

Type the supply and click to select from the drop down list.

The screenshot shows the 'Add New' page with the 'Drug picker' dropdown menu open. The dropdown list shows various morphine products, including 'Ipecacuanha and Morphine mixture BP 1980', 'Morphine sulfate 15mg suppositories', 'Morphine sulfate 10mg suppositories', 'Morphine sulfate 20mg suppositories', 'Morphine sulfate 10mg/5ml oral solution', 'Morphine hydrochloride 15mg suppositories', 'Morphine hydrochloride 30mg suppositories', and 'Morphine hydrochloride powder'. A blue arrow points to the dropdown list with the text 'Select the supply'.

Fill in all the sections in the Drug Picker box and submit.

The screenshot shows the 'Add New' page with the 'Drug picker' form filled out. The form includes fields for 'Selected drug' (Morphine sulfate 10mg/5ml oral solution), 'EMC' (Review Product SPC & PIL), 'CD status' (Schedule 4 and 5), 'Supplied to patient', 'Supplier', 'Pack size', 'Qty', 'Dose', 'Medication Start', 'End Date', and 'Duration'. A blue arrow points to the 'SUBMIT' button with the text 'Fill in and submit'.

Fill in the prescription payment options and supply collection as below.

**PETER HUMPHREYS (Sonar ID: 1172885)**

Gender: Male | DOB: 10/09/1991 | NHS Number: Not recorded | GP Practice: [X26] Test GP (HF) | Address: 168 Ilbert Street, London, London, W10 4QD | Telephone: 07387278089 | Mobile: Not recorded | Email: Not recorded

Useful links: MiDaS | EPS Tracker | NICE.CKS | NHS.UK | PATIENT.CO.UK | BNE | EMC | GILLICK COMPETENCY

**Fields marked with (\*) are mandatory**

**Add medicine/device**

Morphine sulfate 10mg/5ml oral solution (A A H Pharmaceuticals Ltd) 100 ml

Supplied: Yes | Dose: Twice a day | Qty: 100 ml | Days of supply: 3 days

\* Does the patient pay for prescriptions? ☐ Yes ☒ No

\* Select exemption category

\* Person collecting supply

A) Under 16 years of age  
B) 16, 17 or 18 in full-time education  
C) 60 years of age or over  
D) Valid maternity exemption certificate  
E) Valid medical exemption certificate  
F) Valid prescription pre-payment certificate  
G) Valid war pension exemption certificate  
H) Named on a current HC2 charges certificate  
I) Was prescribed free-of-charge contraceptives  
J) Income support or income-related employment and support allowance  
K) Income-based partner's allowance  
L) Entitled to, or named on, a valid NHS Tax credit exemption certificate  
M) Has a partner who gets pension credit guarantee credit (PCGC)

Click on <SUBMIT> to confirm details

**Add medicine/device**

To add a new medicine or device click on Add medicine/device link

**Exemption options**

In the last part of the consultation, you can add GP notes if you feel it is necessary. The PATIENT NOTES will not be visible to the GP, only the pharmacists involved in the consultation.

**PETER HUMPHREYS (Sonar ID: 1172885)**

Gender: Male | DOB: 10/09/1991 | NHS Number: Not recorded | GP Practice: [X26] Test GP (HF) | Address: 168 Ilbert Street, London, London, W10 4QD | Telephone: 07387278089 | Mobile: Not recorded | Email: Not recorded

Useful links: MiDaS | EPS Tracker | NICE.CKS | NHS.UK | PATIENT.CO.UK | BNE | EMC | GILLICK COMPETENCY

**Fields marked with (\*) are mandatory**

\* Consultation outcome

Medicine(s) supplied ☒  
Medicine(s) not supplied ☐  
Other ☐

\* Is Sign-posting required?

No: Not required ☐  
Yes: Patient signposted to GP in hours ☐  
Yes: Patient signposted to GP OOH/integrated urgent care ☐  
Yes: Other ☐

Clinical narrative/comments

(Results of any examination, additional comments or relevant notes including any details as a consequence of checking the SCR or other resource)

\* Is GP Notification Required? **Yes**

Notes/Comments to GP

(Optional notes or comments to be shared with GP)

**Time taken to complete consultation**

Patient facing time: 5 (minutes)

Non-patient facing time: 5 (minutes)

**Total time taken: 10 (minutes)**

Click on <SUBMIT> to confirm details

**SUBMIT**

**Notes to the GP**

## Pharmacy Feedback

Please give us your feedback regarding your experience using the system so we can refine it.

The screenshot shows the 'Pharmacy Feedback' form in the Sonar Health system. The form is titled 'Pharmacy Feedback' and includes a message: 'It's important that you share your feedback and comments. Please let us know how the system performed today or if you have any comments or suggestions to improve the CPCS - Emergency Supply Service. Information submitted on this form will be treated confidentially!'. Below this, there is a section for 'How satisfied are you with the service?' with radio button options: 'Very satisfied', 'Satisfied', 'OK', 'Dissatisfied', and 'Very dissatisfied'. A text box prompts the user to 'Please enter any feedback in the box below so that the CPCS - Emergency Supply Service can continue to be improved (Provide details here)'. At the bottom of the form, there is a 'SUBMIT' button. A red circle highlights the 'SUBMIT' button, and a blue callout box points to it with the text 'Submit to finish the consultation'. On the left-hand side menu, the 'Pharmacy Feedback' option is highlighted. The top navigation bar shows the user's name 'John Smith' and the location '(FT321) Test Pharmacy - HF, W12 8QQ'.

Once you have submitted your feedback and the consultation is completed, you can download the Token on the left-hand side menu.

The screenshot shows the 'Pharmacy Feedback' form after submission. A green 'Service completed' message box is displayed in the center of the form, stating: 'The CPCS Service was completed successfully! You can use the <Actions Panels> at the left-hand side to print the Token.' A red circle highlights this message box. On the left-hand side menu, the 'View Referral', 'Print Record', 'Print Token', and 'Print GP Notification' options are highlighted. A blue callout box points to the 'Print Token' option with the text 'Download documents from the consultation form'. The top navigation bar shows the user's name 'John Smith' and the location '(FT321) Test Pharmacy - HF, W12 8QQ'.



## Starting a NEW CONSULTATION – MINOR ILLNESS

When you click NEW CONSULTATION, you will have to confirm the service selected by clicking the SUBMIT button.

**Sonar Health** Home >

Main Records **Add New** Consultations View Referrals

**BEN WARREN (Sonar ID: 1181896)** Edit Profile

Gender: Male | DOB: 21/06/1995 | NHS Number: 428 094 9085 | GP Practice: (X26) Test GP (HF) | Address: [redacted] | Telephone: 01992574305 | Mobile: Not recorded

Useful links: MiDoS EPS Tracker

Fields marked with (\*) are mandatory

New consultation No Intervention Made

Please review the III (ITK) Referral at the right-hand side panel, and select the appropriate service:

- **Minor Illness:** if you are treating a condition, e.g. Constipation
- **Emergency Supply:** if you are supplying prescription only medications (POMs) or devices, without the patient having a prescription

NOTE: If the patient is uncontactable or you are not able to complete this consultation please use the <No Intervention Made> Tab

Selected service

● Minor Illness

Click on <SUBMIT> to confirm details **SUBMIT** Cancel

If you were unable to contact the patient or for any other reason the consultation was unable to be completed, select NO INTERVENTION MADE and select the reason why the consultation was unable to be finished.

**Sonar Health** Home >

Main Records **Add New** Consultations View Referrals

**BEN WARREN (Sonar ID: 1181896)** Edit Profile View History Patient Notes View SCR Incident report

Gender: Male | DOB: 21/06/1995 | NHS Number: 428 094 9085 | GP Practice: (X26) Test GP (HF) | Address: [redacted] | Telephone: 01992574305 | Mobile: Not recorded | Email: Not recorded

Useful links: MiDoS EPS Tracker NICE CKS NHS UK PATIENT.CO.UK BNE EMC GILICK COMPETENCY

Fields marked with (\*) are mandatory

New consultation **No Intervention Made**

Please use this option if you are not able to process the III (ITK) Referral:

- Provide a reason as why you are not able complete a consultation
- This action will close the episode

\* Reason

Details/Comments  
[Provide details here]

Click on <SUBMIT> to confirm details **SUBMIT** Cancel

**NHS III Referral**

▼ Patient's Reported Condition

- hit nose 9 days ago on a piece of wood c/o still pain

► Pathways Disposition

► Consultation Summary

► Pathways Assessment

► Advice Given

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\*SonarHealth is a registered trade mark of Sonar Informatics LTD.

Select if you were unable to complete the consultation

## Filling the NEW CONSULTATION

Once the service has been confirmed, start the consultation and fill in the form as you go.

**Consent for service delivery (CPCS - Minor Illness)**

The pharmacist to read following statement to patient:  
 "Consent is required for the service provision and to share information about this consultation".  
 ■ Consent for the pharmacy sharing information with the patient's GP practice, NHS England and the NHSBSA

\* Consent given? ☐ Yes ☐ No

\* Is the patient accompanied? ☐ Yes ☐ No

Patient's signature (optional)

Click on «SUBMIT» to confirm details **SUBMIT** Cancel

**NHS 111 Referral**

■ Patient's Reported Condition  
 ■ hit nose 9 days ago on a piece of wood c/o still pain

■ Pathways Disposition  
 ■ Consultation Summary  
 ■ Pathways Assessment  
 ■ Advice Given

Type the symptoms in the text box. To add PRESENTING COMPLAINTS, select ADD PRESENTING COMPLAINTS on the bottom right-hand side of the box.

**Assessment**

Service Name: Minor Illness

\* Date & Time: 08/11/2019 15:09

\* Contact Method: Select...

\* Symptoms: [Text box] **Add presenting complaint(s)**

\* How long had symptoms?: [Dropdown]

\* Presenting Complaint: None selected

\* Allergies: [e.g. Nuts] ☒ No allergies declared (Tick if no allergies declared)

Existing medical conditions: [e.g. Asthma]

Actions taken to date: [Describe action taken by patient or carer]

Medication been taken: [e.g. Paracetamol 500mg tablets]

\* Have any red flags been identified?: [Dropdown]

confirm details **SUBMIT**

**Date & Time**  
 By default the current date and time is displayed.  
 Use the date and time when the consultation with the patient took place.  
 System does not allow future dates.

**Contact method**  
 This should reflect how the consultation was completed.  
 ■ In Person: if the consultation was completed as 1-2-1.  
 ■ Over the phone: if the consultation was completed over the phone. Note that patient still has to collect their medication

**Allergies**  
 This should indicate why the patient is requesting an emergency supply.  
 If no allergies declared, please tick the box No allergies declared

**Red flags**  
 (i.e. symptoms that suggest a serious illness) been identified through information in the NICE Clinical Knowledge Summary.  
 Or is there another reason for concern?

Select here to add the presenting complaints

Tick the complaints and select SUBMIT to continue.

To add ALLERGIES, type in and select the relevant allergies in the drop down menu. If the allergy is not listed, this can be added in the patient notes.

Fill in the outcome section with the information you have from the patient and the outcome from the consultation. Please note that under ADVICE/ SUPPORT PROVIDED, the 1st and 2nd boxes are mandatory.

If the outcome was the sale of medicine to the patient (even if patient is exempt of paying), select the outcome **ADVICE & SALE OF MEDICINE** and add medicine/device by clicking the button below the box.

Fields marked with (\*) are mandatory

**BEN WARREN (Sonar ID: 1181896)**

Gender: Male | DOB: 21/06/1995 | NHS Number: 428 094 9085 | GP Practice: [X26] Test GP (HF) | Address: ... | Telephone: 01992574305 | Mobile: Not recorded | Email: Not recorded

Useful links: MiDaS | EPS Tracker | NICE CKS | NHS UK | PATIENT.CO.UK | BNF | EMC | GILLICK COMPETENCY

Progress: Consent, Assessment, Outcomes, Pharmacy Feedback, Actions

Clinical narrative: [Results of any examination, tests and relevant notes including any actions as a consequence of checking the SCR or other resource.]

\* Outcome: **Advice & sale of medicine**

Medicine(s) given: **Add medicine/device**

\* Advice/Support provided: [How to best manage their condition \*  
☐ Advise an action to take if symptoms get worse \*  
☐ Printed leaflets supplied  
☐ Patient referred to electronic information resource  
☐ Managing future minor illnesses (it is not always necessary to call NHS 111)  
 (Describe other advice/support provided)]

\* Is GP Notification Required? Yes

Notes/Comments to GP: [notes to GP here]

Patient facing time: 5 (minutes)  
 Non-patient facing time: 5 (minutes)  
 Total time taken: 10 (minutes)

Click on <SUBMIT> to confirm details **SUBMIT**

**Narrative**  
 Results of any examination, tests and relevant notes including any actions as a consequence of checking the SCR or other resource.

Type the supply and click to select from the drop-down list.

Fields marked with (\*) are mandatory

**BEN WARREN (Sonar ID: 1181896)**

Gender: Male | DOB: 21/06/1995 | NHS Number: 428 094 9085 | GP Practice: [X26] Test GP (HF) | Address: ... | Telephone: 01992574305 | Mobile: Not recorded | Email: Not recorded

Useful links: MiDaS | EPS Tracker | NICE CKS | NHS UK | PATIENT.CO.UK | BNF | EMC | GILLICK COMPETENCY

Progress: Consent, Assessment, Outcomes, Pharmacy Feedback, Actions

Clinical narrative: [Results of any examination, tests and relevant notes including any actions as a consequence of checking the SCR or other resource.]

\* Outcome: [Outcome]

Medicine(s) given: [Medicine(s) given]

\* Advice/Support provided: [Advice/Support provided]

\* Is GP Notification Required? [Is GP Notification Required?]

Notes/Comments to GP: [Notes/Comments to GP]

Patient facing time: [Patient facing time]

Non-patient facing time: [Non-patient facing time]

**Drug picker**

paracetamol

- Paracetamol 500mg tablets
- Paracetamol 500mg soluble tablets
- Paracetamol 120mg/5ml oral solution paediatric
- Paracetamol 250mg/5ml oral suspension
- Paracetamol 1000mg/ml oral solution sugar free
- Paracetamol 500mg suppositories
- Paracetamol 240mg suppositories
- Paracetamol 120mg suppositories
- Paracetamol 250mg suppositories
- Paracetamol 60mg suppositories
- Paracetamol 120mg/5ml oral suspension paediatric

Select supply

Fill in all the sections in the drug picker box and submit.

Fields marked with (\*) are mandatory

**BEN WARREN (Sonar ID: 1181896)**

Gender: Male | DOB: 21/06/1995 | NHS Number: 428 094 9085 | GP Practice: [X26] Test GP (HF) | Address: ... | Telephone: 01992574305 | Mobile: Not recorded | Email: Not recorded

Useful links: MiDaS | EPS Tracker | NICE CKS | NHS UK | PATIENT.CO.UK | BNF | EMC | GILLICK COMPETENCY

Progress: Consent, Assessment, Outcomes, Pharmacy Feedback, Actions

Clinical narrative: [Results of any examination, tests and relevant notes including any actions as a consequence of checking the SCR or other resource.]

\* Outcome: [Outcome]

Medicine(s) given: [Medicine(s) given]

\* Advice/Support provided: [Advice/Support provided]

\* Is GP Notification Required? [Is GP Notification Required?]

Notes/Comments to GP: [Notes/Comments to GP]

Patient facing time: [Patient facing time]

Non-patient facing time: [Non-patient facing time]

**Drug picker**

Selected drug: Paracetamol 500mg soluble tablets

EMC: [EMC]

CD status: [CD status]

\* Supplier: [Supplier]

\* Pack size: [Pack size]

\* Qty: [Qty]

\* Dose: [Dose]

\* Medication Start: [Medication Start]

End Date: [End Date]

Duration: [Duration]

Click on <SUBMIT> to confirm details **SUBMIT** Cancel

Total time taken: 10 (minutes)

Click on <SUBMIT> to confirm details **SUBMIT**

Fill in all sections and submit

## Pharmacy Feedback

Please give us your feedback regarding your experience using the system so we can refine it.

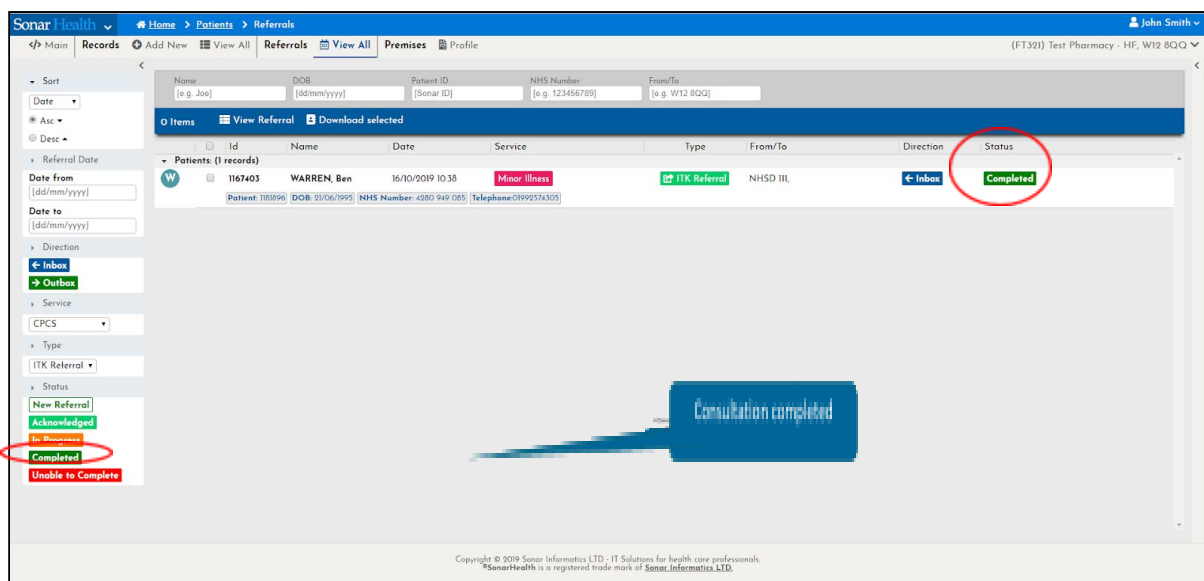
The screenshot shows the 'Pharmacy Feedback' form in the Sonar Health system. The patient is BEN WARREN (Sonar ID: 1181896). The form includes a progress bar with 'Consent', 'Assessment', 'Outcomes', and 'Pharmacy Feedback' (highlighted). The feedback section asks for satisfaction levels and a comment. A blue callout bubble points to the 'SUBMIT' button with the text 'Submit to finish the consultation'. The left-hand side menu is visible, showing 'View Referral', 'Print Record', and 'Print GP Notification'.

Once you have submitted your feedback, and the consultation is completed, you can download the Token on the left-hand side menu.

The screenshot shows the 'Pharmacy Feedback' form after submission. A green 'Service completed' message box is displayed, stating 'The CPCS Service was completed successfully. You can use the «Actions Panel» at the left-hand side to print the Token.' The left-hand side menu is highlighted, showing 'View Referral', 'Print Record', and 'Print GP Notification'. A blue callout bubble points to the 'Print Record' option with the text 'Download documents from consultation here'.

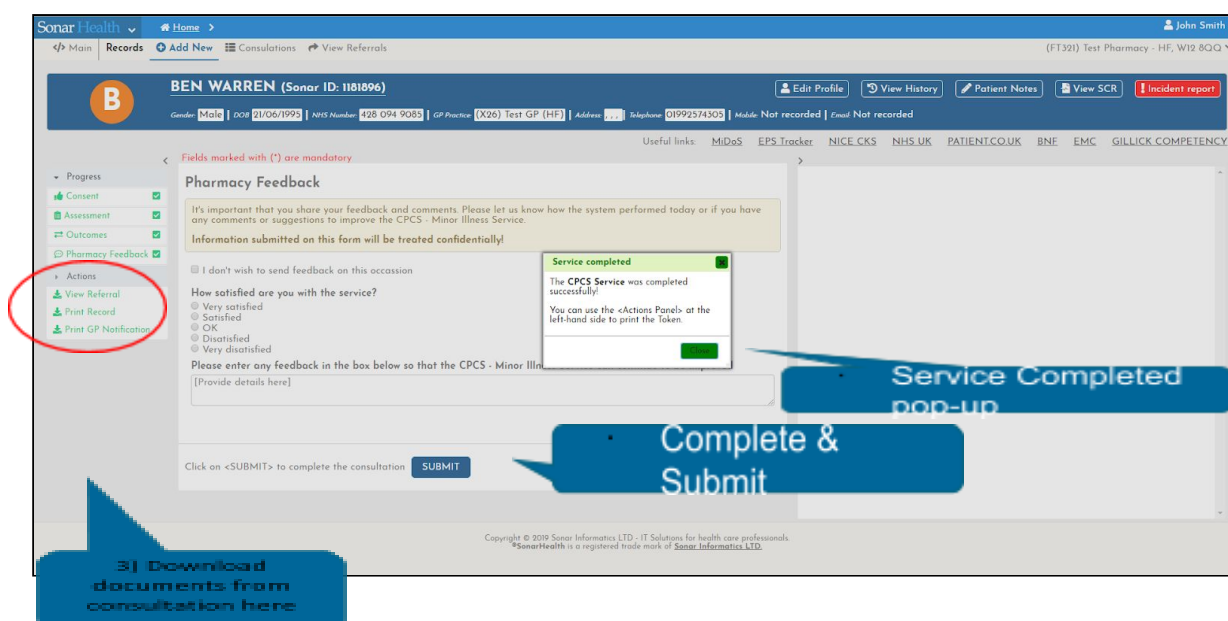
To check if the consultation was submitted successfully, select VIEW REFERRALS, and click on the label COMPLETED. The patient should be marked as COMPLETED.





## Printing Documents

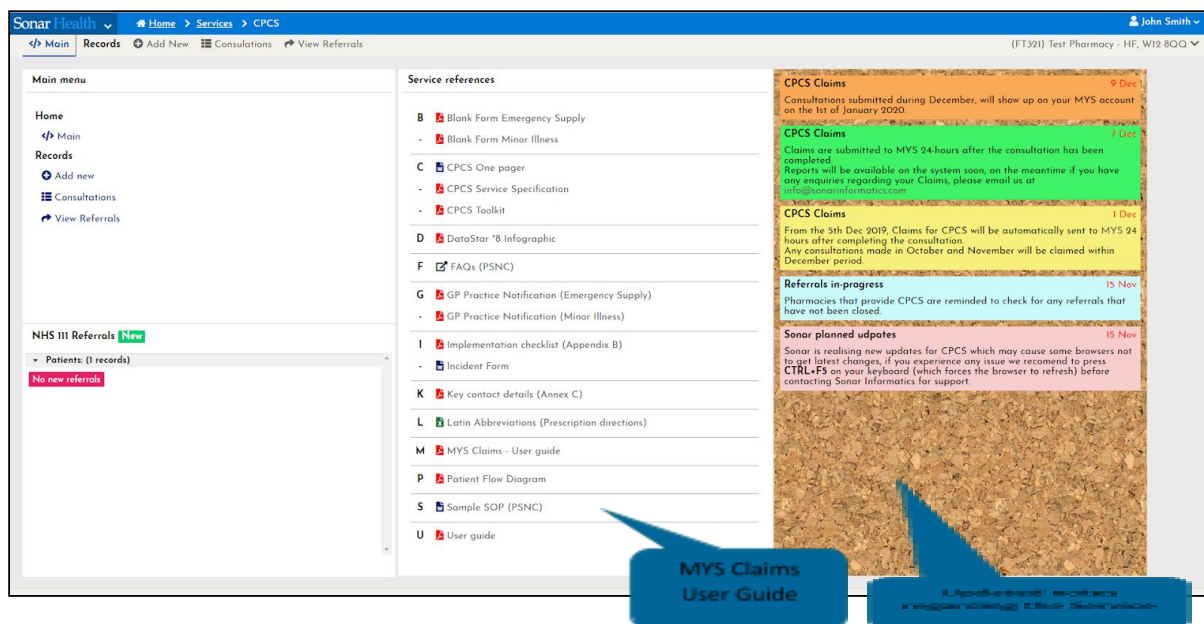
Once you have submitted your feedback and the consultation is completed, you can download the Token on the left-hand side menu.



## Payments & Claims

You get paid for the consultation you complete and for any medication/device supplied. If a consultation is finished as UNABLE TO COMPLETE you will not get paid for that referral.

All claims for the CPCS service MUST be made via the Manage Your Service (MYS) portal. The process of reporting claims has been automated by a link on Sonar (London CPCS) and NHSBSA. To further explanation, please refer to the specific user guide for MYS Claims in the CPCS home page under Service Reference list.



## CPCS FAQs

Please refer to the answers of the frequently asked questions (FAQs) to help with service navigation & delivery.

### How do I contact Sonar?

The best way is to email us at [info@sonarinformatics.com](mailto:info@sonarinformatics.com) with 1) your account details (pharmacy name, postcode and Sonar username), 2) your contact details (name, email & direct telephone number) as well as 3) the explanation of the issue.

### How do I gain or update my Sonar account details?

You can request Sonar details on [www.sonarhealth.org](http://www.sonarhealth.org). Click on the top right link 'New User? (Sign up)' and fill in the required information. Sonar will then send you an authorisation email, once completed and sent back to us we will send you your login details for your account.

You can update or refresh your Sonar account details by contacting Sonar through email ([info@sonarinformatics.com](mailto:info@sonarinformatics.com)) and giving us your current login details and details relating to your request for update.

### What if I or another pharmacist has lost our Sonar account details?

If you have lost or forgotten your account details please email us at [info@sonarinformatics.com](mailto:info@sonarinformatics.com) with whatever details you may have as well as your personal details (Name, base pharmacy, postcode, GPhC number) and contact



details (email & mobile number). We will do our best to reset it and if we need further information, we may call you to confirm.

### I have Sonar account details, but I don't have access to the pharmacy the CPCS referral is sent to.

#### How do I get multiple store access?

If you have existing Sonar account details, please email us (with as much advanced notice as possible) requesting an additional store to be added to your account. We will then be able to send you an authorisation email for you to fill out and return back to us including details about your account, the site you require access to and details about the person (usually the pharmacy manager) who is granting authorisation for your access. Once we receive this email from your or the store on your behalf, we will be able to add that additional store onto your account.

Once you have multiple stores on your account you login as usual, but instead of going directly into one specific store account, there will be a drop-down menu of *boroughs* and then *postcodes* to choose from. Once you have selected the required fields you will enter that specific store you have chosen.

### Where do I find the blank forms?

Blank forms and all reference materials and user guides are located within the reference list on the CPCS homepage.

### Where are the reference materials located?

All reference materials and user guides are located within the reference list on the CPCS homepage.

### Where do I find the video guide to present to my team?

The CPCS Video Guide and all reference materials and user guides are located within the reference list on the CPCS homepage.

### How do I know if the pharmacy has a referral?

Notifications are displayed on your CPCS homepage, within the Sonar Health website and can be viewed at any time via Sonar account access. An email notification is also sent to your pharmacy. This email is the shared NHS email address your pharmacy registered for the service with. You can add additional emails to the notification list by updating your CPCS profile.

### How do I update the email address the CPCS notification gets sent to?

Log into Sonar Health and click the CPCS icon. Once on the CPCS homepage, select 'View Referrals' from the second down of the two top menu bars, then select 'Profile' from the second down of the two top menu bars and enter in your updated email address. New notification alerts will be sent to this address.

### How do I find a referral once I have received it?

An email notice for a referral would have been sent to your pharmacies registered email address. All new referrals first appear on the bottom left of your CPCS homepage.

From here you select the 'View Referrals' tab from the second of the two top menu bars on the CPCS Homepage. From the referrals homepage there is a list of 5 Status types located on the bottom left of the page.

Select each one (New Referral, Acknowledged, In Progress, Completed, Unable to Complete) to view consultations under that particular status.

Once a referral has been looked at it moves down from 'New Referral' to 'Acknowledge', once it has been opened / data has been entered it moves to 'In Progress'. After you have concluded the consultation it will be placed in one of the final two statuses 'Completed' or 'Unable to complete' depending on the outcome.

### How do I contact the patient?

Once you are aware of a CPCS referral assigned to your pharmacy (via email notification) and/or the Sonar system, you enter the CPCS service and go through the process outlined in this user guide. First go to the CPCS service itself, then select 'View Referral' to see any incoming new or acknowledged referrals. Once you have found the patient referral you wish to look into, tick the small box on the left side of the patient ID and select 'View Referral' on the top of that sub-menu. A pop-up box will appear for you to 'View Consultation' or 'Unable to process'. Selecting 'View Consultation' will open up the patient record where contact details can be accessed.

### I don't know what page I'm on, how do I get back?

If you would like to return to a particular page but cannot get back to the CPCS homepage select the 'Home' option (with the house icon in the blue bar) on the top left of the page. Then select 'Services' and then 'CPCS' to return to the CPCS homepage.

### What do the different status headings mean?

- **New Referral** – This is a new referral that has come into the pharmacy. It's pending to be looked at.
- **Acknowledged** – This is a referral that has been identified as incoming, but it has yet to be actioned.
- **In Progress** – This is a referral that has been opened and is still in the process of being completed.
- **Completed** – This is a successfully finished referral and will be paid for.
- **Unable to Complete** – This is a referral that could not be completed. When you mark the referral status to 'Unable to complete' you will be asked to choose the reason from a drop-down menu, due to reasons such as the patient not being in contact or attending, the patient no longer needs the service etc.

### How do I delete a consultation?

If you need to delete a consultation for a reason such as:

- entered the consultation details incorrectly
- the information has changed throughout the process
- the patient has not attended though was due to attend and some parts of the consultation were already in the process of being recorded
- start the consultation from the beginning
- for another reason

You will need to go to the 'Consultation' tab on the CPCS homepage and select the relevant referral (from the list) on the consultation page. Check the box on the left side of the Record ID and select 'Delete' from the menu above.

A pop-up will appear asking you to choose the reason of your deletion, with another pop up appearing when this action is complete. Once this is done the patient referral will be sent through the system and appear under 'New Referral' for you to complete correctly.

### How do I use the test patients?

The test patients on the system (Mary Test E.S Patient & Lily Test M.I Patient) allow you and your team to go through each of the two services (Emergency Supply & Minor Illness) to familiarise yourself with each step of the process and practice. Once a test patient is successfully processed and 'Completed' you can delete them and start their journey again by placing them at the beginning of their journey within 'New Referrals', and thus allowing other team members to go over the process with the patient. If a test patient is processed and placed within 'Unable to complete' then you will have to contact Sonar to move the test patient to the beginning of the process.

### What is pharmacy feedback?

At the end of each consultation you are asked to enter your pharmacy feedback. This feedback is from you to us at Sonar regarding your use of the Sonar system and any suggestions or issues you may have.

### How do I print the token?

You are able to print a token only once a consultation has been completed. The link will be on the left side of the consultation page under 'Token'.

Select the token link to download the file. Ensure that the correct printer and printer tray (loaded with token paper) is selected for this printing, not regular A4 paper.

### What's next after I print the token?

For patients who are exempt from paying for their prescription: Once you have printed out the token on the correct token paper you must get the patient to firstly tick their particular exemption category and secondly sign the back of the token as they would with a regular prescription. This can then be sent with your prescription submissions at the end of the month.

### Do I get paid for consultations that I can't complete?

You are not paid for consultations that you have marked as 'Unable to Complete'.

### What do I do if I didn't supply a medication, do I still get paid?

Not all referrals will end with a sold / dispensed medication. If you have gone through the full consultation (over the phone or in person) then you are still able to mark the status at 'Completed' and subsequently get paid for it.

### How do I claim for my CPCS consultations?

Please refer to our user guide on claiming via MYS for your CPCS consultations. This is located within the reference list on the CPCS homepage.

### How much and when will I get paid for consultations?

Successfully completed Minor Illness consultations are paid at £14 per consultation. Successfully completed Emergency Supply consultations are paid at £14 per consultation plus the medication cost at tariff prices. Sonar will send the claim to the BSA via the MYS system, the pharmacist will accept the claim on behalf of the pharmacy, and

the BSA will pay for that service on that month's statement. (the claim made in December for November will be paid on the 1st of Feb as with the November statement).

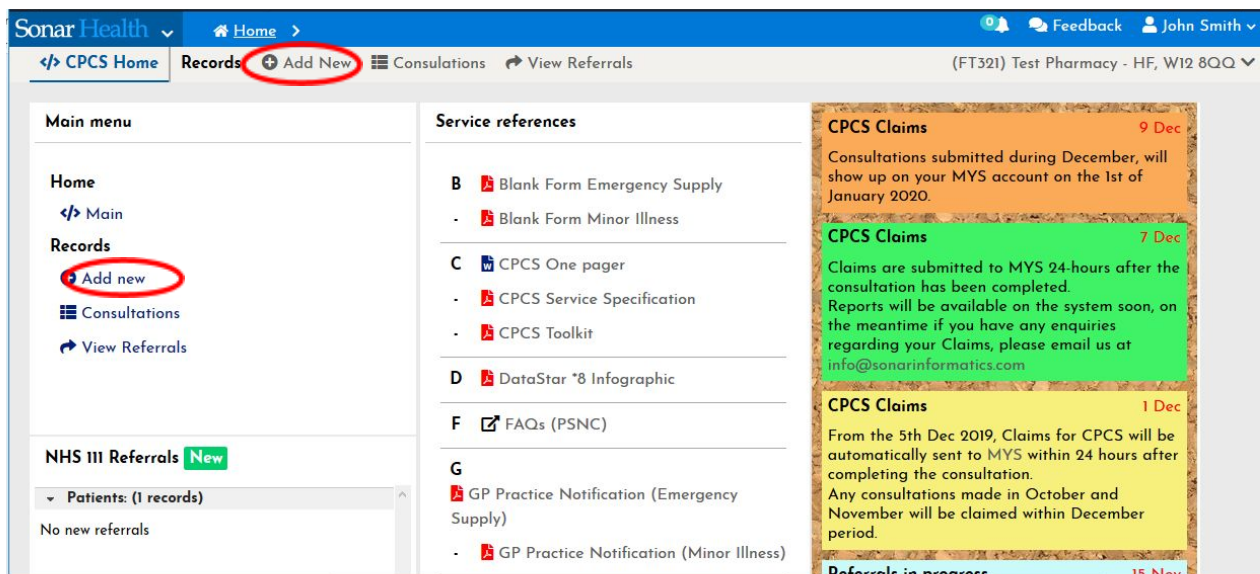
## USER GUIDE IMPORTANT UPDATES

### Adding a manual referral

When a iTK message fails to send the referral from 111 to Sonar system, the referral needs to be entered manually. To do that, select ADD NEW on the top menu or left hand side menu on the main screen of CPCS service and add the referral's information from the 111 referral file received via email.

### Adding Patient's details

Select **Add New** on the top menu or left hand side menu on the main screen of CPCS service.



Add the patient's information and select CONTINUE on the Patient PDS Lookup.

A screenshot of the Sonar Health PDS New Patient form. The form is titled 'To register a New Patient, please provide the following information:'. It has two tabs: 'General search' and 'NHS Number search'. The 'General search' tab is active, showing fields for 'First name' (Mary), 'Surname' (Patient), 'DOB' (27/04/1997), and 'Gender' (Female). A 'Continue' button is at the bottom. To the right, a yellow box titled 'USERS ARE REQUIRED TO USE THE PDS SERVICE' contains instructions: 'Please read the following instructions: 1. Please register your premise for the PDS service (Register here) 2. After the registration please allow up to 15minutes to start using the PDS Service'. Below this, an 'IMPORTANT NOTE' states: 'If the General Search DOES NOT return the patient details, then you can try the following: 1. Get the NHS Number from your PMR System, and use the NHS NUMBER search, you will also be...'. A footer note says: '\* Information entered above will be searched in the Sonar Database and the NHS Spine (PDS) to get a matching patient details.'

Edit the patient's details, especially the GP address and select CONTINUE WITH SERVICE.

First Name **Mary Test**  
Surname **E.S. Patient**  
Middle name(s) *Not recorded*

Birth Name *Not recorded*  
Maiden Name *Not recorded*  
Other Previous Name *Not recorded*

**Key details** Edit

Gender **F**  
NHS Number **6016224197**  
DOB **27/04/1997**  
Time of Birth *Not recorded*  
Country of Birth *Not recorded*  
Language **English** *Interpreter not required*  
General Practice **X26-Test GP (HF)**

Continue with service >

## Manual CPCS referral form

The next step is to enter the referral details received via email from the 111. A manual CPCS referral form needs to be filled with the information found in the document sent to the pharmacy via 111 with Case Reference, Case ID, Referred from and Encounter disposition as per images below.

**MARY TEST E.S. PATIENT (Sonar ID: 1173868)** Edit Profile View History Patient Notes View SCR Incident report

Gender: **Female** | DOB: **27/04/1997** | NHS Number: **601 622 4197** | GP Practice: **(X26) Test GP (HF)** | Address: **24 Shenley Road, London, SE5 8NN** | Telephone: **02076870397** | Mobile: **07960460173** | Email: *Not recorded*

Useful links: [MiDoS](#) [EPS Tracker](#) [NICE CKS](#) [NHS UK](#) [PATIENT.CO.UK](#) [BNF](#) [EMC](#) [GILLICK COMPETENCY](#)

**Fields marked with (\*) are mandatory**

Service Name **NHS III Report - Manual Referral**

\* Date & Time **16/01/2020** **11** **51**

\* Referred from **---Select---**

\* Case Reference **---**

\* Case ID **---**

\* Encounter Disposition **---Select---**

\* Upload NHS III Report **Please upload the pdf file received from NHS III (click on browse)**  
**Browse...** No file selected.

Click on <SUBMIT> to confirm details SUBMIT

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Case Reference and Case ID can be obtained from the nhs 111 referral file received by email

Document Created	03-Jan-2020, 17:01
Document Owner	<b>Vocare South 111</b>
Authored by	111 - Call handler, SWL111 Vocare House (Vocare South 111) on 03-Jan-2020, 17:01
Consent Status	Consent given for electronic record sharing

Encounter Type	NHS111 Encounter
Encounter Time	03-Jan-2020, 16:53 to 03-Jan-2020, 17:01
Case Reference	<b>02B08232-1234-426E-81DA-D20FB3A1234 B</b>
Case ID	<b>1234567</b>
Encounter Disposition	<b>To contact a Primary Care Service within 6 hours</b>
Care Setting Location	Incident Location
Visit Address	
Care Setting Address	
Care Setting Type	
Responsible Party	Dr Jim Heptinstall - Medical Director, Vocare South 111

Document ID	12345 F26-FC20- 1234-B0F1-80FED9EB8FFA	Version 1
Primary Recipient	CPCS++:	

Referred From: **Vocare South 111**

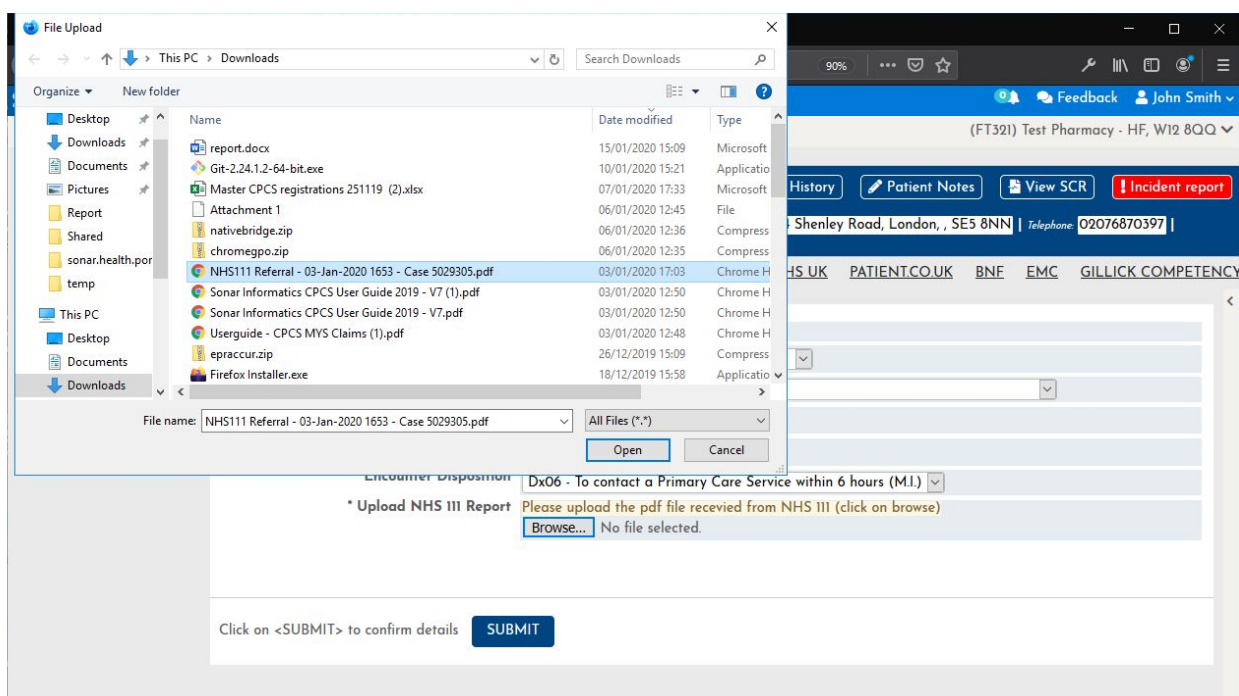
Case Reference: **02B08232-1234-426E-81DA-D20FB3A1234B**

Case ID: **1234567**

Dx Code (Encounter Disposition): **To contact a Primary Care Service within 6 hours**

Attaching the document sent from 111

Attach the NHS 111 pdf file (file received by email) where it reads "UPLOAD NHS 111 REPORT".



Attached file should be linked to proceed to the next step.

**MARY TEST E.S. PATIENT (Sonar ID: 1173868)**

Gender: Female | DOB: 27/04/1997 | NHS Number: 601 622 4197 | GP Practice: (X26) Test GP (HF) | Address: 24 Shenley Road, London, SE5 8NN | Telephone: 02076870397 | Mobile: 07960460173 | Email: Not recorded

Useful links: [MiDoS](#) [EPS Tracker](#) [NICE CKS](#) [NHS UK](#) [PATIENT.CO.UK](#) [BNF](#) [EMC](#) [GILLICK COMPETENCY](#)

Fields marked with (\*) are mandatory

Service Name: **NHS 111 Report - Manual Referral**

\* Date & Time: 16/01/2020 11:51

\* Referred from: (NLO21) Vocare South 111

\* Case Reference: 02B08232-8668-426E-81DA-L

\* Case ID: 5029305

\* Encounter Disposition: Dx06 - To contact a Primary Care Service within 6 hours (M11)

\* Upload NHS 111 Report: Please upload the pdf file received from NHS 111 (click on browse)  
Browse... NHS111 Referral - 03-Jan-2020 1653 - Case 5029305.pdf

Click on <SUBMIT> to confirm details **SUBMIT**

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When the submission of data has been successful, the referral will be displayed as **NEW** on the main page of CPCS service.

**Referrals**

0 Items | View Referral | Download selected

	Name	Date	Service	Type	From/To	Direction	Status
<input type="checkbox"/>	E 1294501 MARY TEST E.S. PATIENT, Mary	16/01/2020 11:51	Minor Illness	iTK Referral	Vocare South 111	Inbox	New Referral

Referral details: Patient: 1173868 | DOB: 27/04/1997 | NHS Number: 6016 224 197 | Telephone: 02076870397 | Mobile: 07960460173

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## Submitting a new consultation form manual entry

Submit a NEW CONSULTATION as if it was a normal referral sent directly to the CPCS system, selecting NEW CONSULTATION or UNABLE TO PROCESS.

The difference between a manual entry and the regular iTK message sent straight to the system is that you won't see the referral details in a manual entry as it is usually displayed. Instead you can view it by downloading the pdf uploaded to the system.



SonarHealth

Home

Services

London DMIRS

Referrals

Feedback

John Smith

Main

Records

Add New

View All

Referrals

View All

Dashboard

(FT321) Test Pharmacy - HF, W12 8QQ

Sort

Date

Asc

Desc

Referral Date

Date from

Date to

Direction

Inbox

Outbox

Service

CPCS

Type

ITK Referral

Status

New Referral

Acknowledged

In Progress

Completed

Unable to Complete

View referral

New Consultation

Unable to process

Referral Details

Referral Status

NHS ITK Referral - Manually uploaded

Download referral

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javascript:void(0);