NDR Prescribe – User Guide

NDR Prescribe sits alongside NDR-UK's existing printed resources to:

- Allow health professionals to prescribe - by email - resources with customised contact details, branding and signposting, as well as personal targets, notes and follow-up information.
- Provide patients with access to the tailored, prescribed advice on their phone, tablet or computer, or by printing at home.
- Allow everyone from freelancers through to managers of large teams / departments to manage their budgets via a flexible and cost-effective 'credits' based system.

This step-by-step guide will help you prepare for and use NDR Prescribe through your service. For further information and to find answers to frequently asked questions, please visit www.ndr-uk.org/faqs.

Please contact the NDR-UK team on info@ndr-uk.org or 0141 202 0690 for any further information or to arrange a demonstration.

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Before you start

Introduction
Before starting to use NDR Prescribe, browse the system and think about where and how it could be used within your service. You may wish to consider if one person will be using it or if there will be several through a variety of clinics. Refer to the information below about the different user types and how the credits can be purchased and allocated.

- If you work alone or are a freelancer, take some time to become familiar with the system and browse the resources that you are likely to use. This will help you understand how best to work with the system through your consultations and follow up with your patients/clients.
- If your service has multiple users who will access credits from a central source, think about:
  - who should manage credits
  - if different teams are needed
  - how Users should be organised.

You can change the structure of your Teams at any time, but it is best to have thought it through from the start to avoid the need to make changes at a later stage.

Browsing NDR Prescribe Resources
- Go to homepage and click 'Browse and Prescribe'.
- You will be taken into the Prescribe library and should be able to search through using filters, products references and/or key phrases. Using the search function at the top right-hand corner, search for products you wish to view.
- To view and buy printed products and/or credits, click on the 'View NDR's Shop' button at the top right-hand corner of the screen.
- Without logging in, you can view Sample copies and see where the editable fields are. To view the prescription options in full, you need to login and have credits on your account. You can buy credits directly from NDR-UK or have them allocated to you via your Administrator or your Team Lead.
- To login to use NDR Prescribe, click on the 'Login/register' button at the top right-hand section of the screen.
- As a new user, you will be classified as an Administrator. As an Administrator, you will be able to buy credits, prescribe resources and invite users to join your team and/or create other teams and assign team leads. These people can be current users and/or new users. However, each registered email address can only be one user type and a member of one team at a time.
- You can register with multiple email addresses if you have different roles and use NDR Prescribe differently in your different roles.

User types
NDR Prescribe aims to support different teams' management and structures by providing three different user types:
- As an **Administrator**, you can purchase and use credits. If you wish, you can also invite Users, and create teams and Team Leads. You can allocate credits to your Users and Team Leads, and respond to their credit requests. This is ideal for people who manage budgets or spending within teams or departments.
  - If you are a freelancer or working on your own, you will be an Administrator, with no need for other levels of user.

  - When you first register with NDR-UK, you will be an Administrator. If/When you accept an invitation from another Administrator or Team Lead to join their team, you will become a User.
- As a **Team Lead**, you can invite Users to join your team and will be allocated credits by your Administrator. You can use your credits to prescribe resources yourself, or allocate to Users within your team. You can also use the system to request additional credits from your Administrator.
- As a **User**, you will be allocated credits by your Administrator or Team Lead, which you can use to prescribe resources. You can also use the system to request additional credits from your Team Lead or Administrator.

In the future, when there are changes in your role or the structure of your service, you may wish to change your User type or join a different team. *Making changes* on page 5 provides further information on how changes can be made, as and when required.

Your NDR account is linked to your email address. Should you wish to set up more than one account for different roles/purposes, you will be required to use a separate email address.

Requirements

To use NDR Prescribe, you need:

- Your patients'/clients' permission to contact them by email for this purpose. Without this consent, you will not be able to send them their prescribed resource.
  * We store your data securely on servers using the latest AES-256 encryption cyphers. This data is only accessible via the link provided in the Prescribe email and will automatically be deleted after 1 year.
- Credits. To begin using NDR Prescribe you will first buy, or be allocated, a bundle of 'credits', which you will draw down on each time you prescribe a resource.
  Credits can be bought in bundles of 500 credits for £25 +VAT (product code NDRCR) via the shop area on the NDR-UK website or by emailing a Purchase Order (PO) to info@ndr-uk.org.

  Credits do not expire.

  - If you purchase credits directly on our website, these will automatically be added to your NDR Prescribe credit balance.
  - If you or your procurement department submit a PO, the order must state the name and email address of the person who will manage the credits - the Administrator.

  Individual resources have their own prescription credit values and the values are **per individual issue**, and are displayed alongside the resource on our website and on our downloadable Price List.

- If you and/or your colleagues are existing members of the NDR-UK website, you should check that your details – particularly name, email address and place of work – are up to date. This will help with setting up your teams. If you have forgotten your password, use the 'Forgotten Password?' link on the Login page.

For further Technical and Procedural Considerations, please refer to the information on page 9.

Getting started

Once you have decided on how you will initially use NDR Prescribe, follow the steps below to prepare yourself, your Teams and/or your Users to get started.

When you first register with NDR-UK, you will be an Administrator. If you will be a Team Lead or a User you should not buy credits independently – wait to be invited to a team and be allocated credits.

If you are a freelancer or working on your own, you will be an Administrator, with no need for other levels of user. You simply need purchase credits and begin prescribing.

When browsing and using NDR Prescribe and its different options, remember that you can only be logged into www.ndr-uk.org with one account at a time. If you try to access different accounts i.e. different email addresses on one device, all opened tabs will revert to the most recently logged in account.

To Create a Team

1. Log in
2. Go to your 'Prescribe Dashboard' from the side menu or the Members' Area landing page.
3. Click on 'New Team' and follow the steps on screen to:

    - Name the team
    - Complete a short description. This aims to identify Teams of Users as appropriate for your Board, Trust, Department etc. e.g. Paediatric team, Community team, Public Health team, etc.
    - As an additional option, you can upload a logo for the team here – this will appear as a watermark on all first and last pages of prescribed resources along with prescription details.

Note that if, as an Administrator, you have no need for separate teams, you can simply invite users as outlined below. You can also add a logo for your own prescriptions through your Account Details page accessed via the My Account button, when you're logged in.

To Invite Users

You can invite Users without using the Team option or invite them to join a team directly. For both you and Users, it is quicker and easier to create the team and invite Users to join the team directly.

1. From your Prescribe Dashboard, click on 'Invite/Manage Users'.
2. Complete the cells as described on the screen with the User's name and email address.
3. Use the drop down 'Team' menu to choose which of your teams you wish to invite the person to join. If you do not want them to be part of a team, choose 'Unallocated' and you will manage their credits directly.
4. Click 'Send Invite'.

    - This user will get an email inviting them to join your team. The email will state that you have invited them to join a team. They must follow a link within the email message to register/login to NDR-UK's website and accept the invitation.
    - Their details will be on your 'Pending invitations' list until they accept the invitation. You will receive an email to let you know when they've accepted the invitation.

If you wish, you can create a Team Lead to manage the team members' (Users') credits and invite new team members. Teams can operate without Team Leads, this is your choice.

All team members' credit requests will go directly to the Team Lead, but an Administrator can allocate/manage user credits directly e.g. if the Team Lead is on holiday. For more information go to Credits on page 8.

To Create a Team Lead

Only Administrators can create or change Team Leads.

1. Ensure the person you wish to be the Team Lead is a member of the team. If not, invite them to join the team.
2. Click 'Manage Team Lead' next to the team's name on your Prescribe Dashboard.
3. Click on the team member's name who you wish to become the Team Lead.
4. If you wish to remove the current Team Lead, click 'Manage Team Lead' from the Prescribe Dashboard, and then click 'Remove'. You can then choose a new Team Lead or operate without a Team Lead.

Making Changes

When there are changes in your role or the structure of your service, you may wish to change your Users, your team structure, your own user-type or join a different team.

- As an **Administrator**, you can:
    - Change, add or remove teams via your Prescribe dashboard.
        - Remove Users from teams by clicking the 'Remove' button next to their name.
        - Change a team's name and/or description by clicking the 'Edit Team' button from your Prescribe Dashboard
        - Delete teams that are no longer in use/needed by clicking 'View Team' from the Prescribe Dashboard, and then scrolling to the bottom of the page, and clicking the 'Delete Team' button at the bottom right of the page.
        - Team members will then become unallocated Users and will carry their credits with them. If you wish the User to be removed from your Administration, contact NDR-UK (info@ndr-uk.org) and we will make the change for you.
    - become a User.
        - When you first register with NDR-UK, you will be an Administrator. If you have no credits, no Users and no Teams, simply wait for an invitation to join a team and be allocated credits. The change in user-type will occur automatically when you accept the invitation email.
        - If you have credits, Users or Teams, please contact NDR-UK (info@ndr-uk.org) and we will make the change for you. This will ensure that your credits, Users and/or Teams have a new Administrator in place to manage their credits.
- As a **Team Lead,** you can become an Administrator, become a User within your own team or join a new team.
    - To become an Administrator, please contact NDR-UK (info@ndr-uk.org) and we will make the change for you.
    - If you are a Team Lead, your Administrator can change the Team Lead as described above.
    - To change team, simply wait for an invitation to join a new team. The change will occur automatically when you accept the invitation email.
    - *You cannot take credits with you when you change team – your credits will automatically be reallocated to your original Team Lead/Administrator.*

Credits – Managing, Distributing and Requesting

Administrators and **Team Leads** manage the credits of their Users. They can add and remove credits from individual Users directly and/or by responding to credit requests from their Users.

Note:

- Credits do not expire.
- All credits are 'owned' by the Administrator as they can access and allocate / reallocate from any User through their teams.
- If a User changes team or moves to a new Administrator, their credits will be reallocated to their original Team Lead/Administrator.

1. Go to your 'Prescribe Dashboard' by following the link from your Members' Area page or from the link on the left-hand panel.
2. From this page, you can directly manage the credits of each user and/or respond to Users' credit requests.
    - To respond to a credit request, follow the link in the email or navigate directly to the request from the 'Prescribe Dashboard'. Follow the 'Click here to view' link. You can accept, decline or provide an alternative number of credits.
    - To manage Users' credits, click 'Manage Credits' next to their name. Click the cell and type in the number of credits that you wish to 'Add' to or 'Remove' from the User's balance.
3. You must have enough credits available to add to the User's balance - your credit balance cannot be negative. If you do not have enough credits, you can:
    - buy/request more credits
    - reallocate from other Users by 'Removing' credits from their balance and 'Adding' to a different User.

Team Leads must request credits from their Administrator. Users must request credits from their Team Lead or Administrator.

1. Log in
2. Click on 'Request credits' from the side menu or any of the prompts throughout NDR Prescribe.
3. Type in the number of credits you wish to request – when you are familiar with the system, you will gauge how many credits you use and how often you will need to top up your credit balance.

Users can view their credit and prescription activity history from their Prescribe Dashboard; Administrators and Team Leads can view activities of their teams by choosing to 'View Team' from their Prescribe Dashboard.

Prescribing resources

1. Log in.
2. Navigate to NDR Prescribe.
3. Search by product code in the search box at the top of the page or filter through ranges from the side menu.
4. Select the product you wish to view/prescribe by clicking on the title or the image.

    - View the 'Sample' to see the resource.

5. To prescribe the resource, click 'Prescribe'. You can scroll through, page-by-page, to view pages, read content and add information within the editable fields. For speed, you can simply click on the 'Editable fields' button at the top right of the screen and select pages from the drop-down menu.

    - As described in the colour-coded key, some fields are optional (blue), while others require content (orange).
    - To add information into the editable fields, click onto the cells and type. **Ensure that the fields are not over-filled**, as overflow text will not be visible in the prescribed resource.
    - It is easiest to do this from a PC or a larger screened tablet – completing this step on a smartphone can be tricky due to smaller screen size.
    - Once you have completed the resource, complete the 'Patient Information' cells by inserting the patient's name and email address.

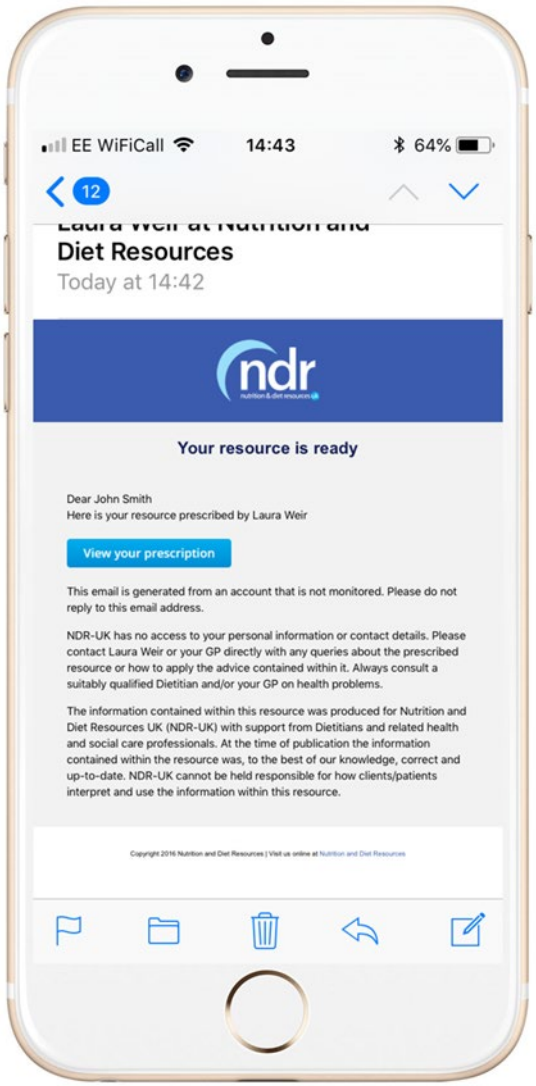
        - You can choose to 'Review' the resource at this time and revise any of the content you have added. This is your opportunity to double check that your patient's email address is entered correctly.
        - When you are happy with the resource and all the related details, click 'Prescribe'.

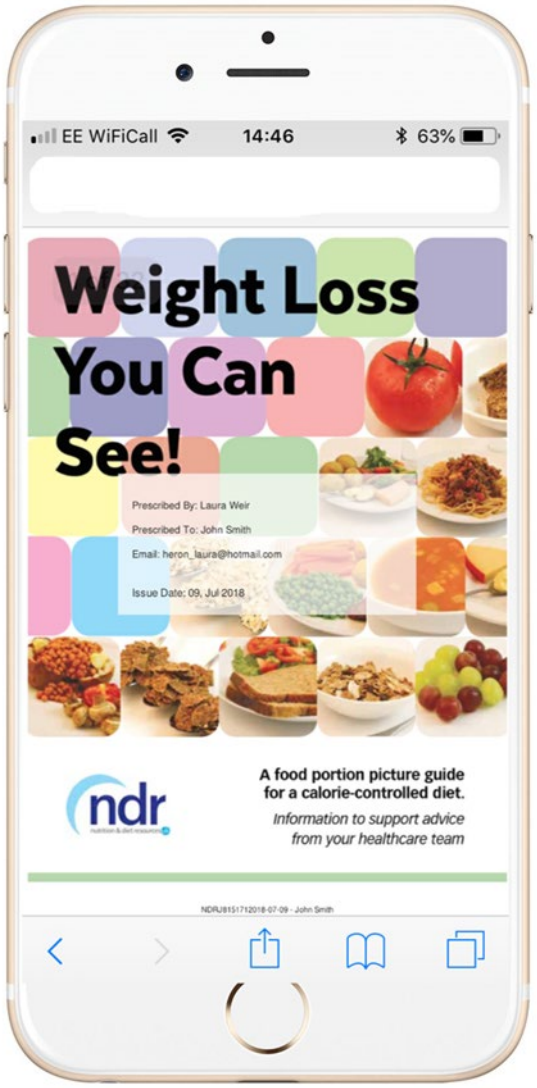
    - An email with a link to access the resource will be sent to the patient and a copy of this message will be sent to your registered email address - you can retain a copy of the resource for the patient's records.
    - Your name, the patient's name, the patient's email address and the prescription date will be included on the first and last pages of the resource with a unique code at the bottom of each page. This ensures that each resource is unique for each patient with a date stamp of prescribing.
    - Advise your patient to check their Junk/Clutter folder and add the address 'no-reply@ndr-uk.org' to their safe/contact list if the email does not appear in their inbox in the first instance.
    - The link contained within the email will be accessible for 12 months. After this time, it will automatically expire. Therefore, ensure that you have saved the resource for your files so that you can access it if needed after this time.

6. You will see that the credit value of the resource has been deducted from your credit balance. You will not be able to go into negative credit. If you need more credits, contact your Team Lead/Administrator or buy credits through the on-screen prompts.

How will NDR Prescribe work for my patients?

When a resource is prescribed to them, the patient will receive an email, giving them access to their customised, evidence-based information, wherever and whenever they wish to access it.





Patients can view the resource - including any personalised information and notes input by their health professional - on their phone, tablet or computer, or even print it at home if they wish.

Depending on the screen size and/or the field size within the prescribed resource, sizing of the editable fields may distort slightly. If this occurs, advise your patient to read the resource in landscape format via their phone or download the pdf and view it instead of the web view.

Technical and procedural considerations

- The NDR Prescribe system is an extension to the main NDR-UK website and will be accessible via any device with internet access. The site is built as 'responsive', to display clearly on whatever device is being used – desktop, phone, tablet etc.
- Credits can be purchased via the NDR-UK website or by Purchase Order.
- Credits do not expire.
- Administrators and Team Leads can allocate, recall and reallocate credits to/from Users as required.
- Your NDR Prescribe account will be linked to your email address. Should you wish to set up more than one NDR Prescribe account for different roles / purposes, you will be required to use a separate email address.
- Administrators can choose to upload a logo to their account – e.g. for their freelance business, Trust, Board or programme. When uploaded, this logo will appear on the front cover of the prescribed resource that the patient receives.
- Each prescription is for use by a single, named patient only. The health professional issuing the resource must not, through any other means, share, publish or distribute the link or PDF for any other purpose than for that named patient's records – this would be in breach of NDR-UK copyright and Terms and Conditions.
- NDR Prescribe has been developed with data protection and privacy regulations in mind. NDR-UK will not, at any point, have access to patients' personal information. The personalised resource and related data are stored securely on servers using the latest AES-256 encryption cyphers, and will automatically be deleted after one year.
- As with any type of personal information, to comply with EU General Data Protection Regulations (GDPR), users of NDR Prescribe will require to have active consent from patients to store and use their email address for this purpose. Users are responsible for ensuring their own internal procedures are suitably compliant with regulations.

FAQs

1. *How do I access NDR Prescribe?*
   You can access NDR Prescribe from the homepage of the website. When you are on the website, you can click between NDR Prescribe and the NDR's Shop by clicking simple navigation buttons at the top of your screen.

2. *I am not a licensed supplementary prescriber – can I use NDR Prescribe?*
   Yes! NDR Prescribe is information prescriptions. All NDR-UK, resources are risk assessed into 4 categories (see link above). We strongly recommend that the resources are prescribed with the support of the appropriate health and social care professional(s).

3. *What resources can I access through NDR Prescribe?*
   We aim to get almost all of NDR-UK's developed resources available through NDR Prescribe. Resources that are not available, are: those developed by other organisations e.g. Carbs & Cals; those that are not suitable for viewing via a screen and/or use stickers, charts or other devices to interact with patients out with a consultation setting e.g. Adult Learning Disability activity charts, or; those that will shortly be updated.

4. *Do I have to pay to use NDR Prescribe?*
   NDR-UK is a very small charity and needs to charge to sustain its services. To use NDR Prescribe, you need to purchase credits from NDR's Shop. These will be loaded onto your account and you will spend them each time you 'prescribe' a resource.

5. *How much do NDR Prescribe resources cost?*
   Just like NDR-UK's printed resources, NDR Prescribe resources vary in price. The credit value is typically around 20% cheaper than the cash equivalent for the printed resource.

6. *Can I pay for the prescribed resources as I prescribe them?*
   NDR Prescribe resource can only be used through credits. The aim of the system is to save people time and money. Charging for single purchase resources would not achieve this.

7. *How long do credits last?*
   Credits do not expire. If you have not used any credits and change your mind within 30 days of purchase, NDR-UK can refund you in line with our 30-day money back guarantee.

8. *Can I buy credits using a Purchase Order?*
   Yes. Apply credits as a product (NDRCR for 500 credits) and provide the email address of the person(s) who will manage the credits. NDR-UK will add the credits to their account on our website so that they can use or assign them to other users within 3 working days.

   The purchase order must provide:
   - The product reference number, the number of credit bundles (each bundle is 500 credits) and the name and email address of the people who will manage the credits – the Administrator.

9. *What are the different roles/access levels?*
   - Administrator – people who can use credits directly and assign credits to users. Administrators can invite users, create teams and appoint team leads. This is ideal for people who manage budgets or spending within teams or departments

- Team lead – this person can use credits assigned by an Administrator, can add users to their team and assign credits within their team.
- User – this person can use credits that they have been assigned. They cannot purchase credits directly and cannot assign credits to anyone else.

10. *How can I manage my department/team's use of credits?*
    When you order credits, you become an 'Administrator'. This means that you can prescribe resources yourself, using your available credit balance. You can also assign or remove credits to your users, teams and team leads. (Refer to the information in Getting Started in this document.) You can monitor what your users have been viewing and prescribing from your Prescribe dashboard.

11. *Can I print the resource to use with other patients?*
    No. Each prescription is for use by a single, named patient only. Printing and/or distributing a prescribed resource is in breach of copyright and our terms and conditions (link when live).

12. *Can I see if my patient has accessed their resource?*
    No. The emails are private with no tracking to ensure confidentiality.

13. *How can I record what has been sent to the patient?*
    You will receive a copy of each prescription that you have sent to patients and can save this to the patient's record. The prescribed resource will show the date, time, email address and name of the person that the resource was prescribed to.

14. *My Board/Trust won't allow staff to email patients – can I use NDR Prescribe?*
    Individual policies and procedures need to be consulted directly. NDR-UK will happily provide any additional information that you need to reassure your Board/Trust/other that the service meets local requirements. Please contact the team for further information.

15. *My patient doesn't have email – can I use prescribe?*
    Personal preferences must always be considered. NDR Prescribe may not be appropriate for all patients – NDR-UK continue to provide its full range of printed resources via NDR's Shop.

16. *The edited fields within the prescribed resource look odd – how can I change this?*
    Depending on the screen size and/or the field size within the resource, sizing of the editable fields may distort slightly. If this occurs, advise your patient to read the resource in landscape format via their phone or download the pdf and view it instead of the web view.