One Sheet Steps for the Blueteq Trust System

IFR / Prior Approval

Logging in

1. Go to https://www.blueteq-secure.co.uk/trust
2. Enter your username and password and click the **Login** button
3. Choose associated trust (If a member of more than one)

(For forgotten passwords or locked accounts, contact your local super user or alternatively, contact Blueteq using the email address below)

Adding patients

1. Click Patient > Add
2. Insert patient details into given fields (Bold fields are required)
3. Double check details and click **Save**

(For Prior Approval, only bold fields need to be entered)

Searching patients

1. Find search box in upper right hand corner of system
2. Choose search item from 'By:' dropdown box
3. Enter search term into 'Find patient:' text box
4. Click **Go!**
5. (If searching using 'patient' criteria, you can search via the
    - Surname
    - DoB
    - NHS Number

Editing patients

6. Search patient and access Patient Notes page
7. Navigate to **Patient > Edit** on the top menu
8. Change relevant patient details
9. Click **Save**

(If NHS Number needs changing, contact Blueteq using the email address below to discuss)

Add Request

Method 1.

1. Click on **Requests** on menu bar
2. Enter patients details
3. If patient exists select patient from choices given or create new patient
4. Click **Save**
5. On next page select correct GP to add request to, click **Next**
6. Choose '**On-Line Form'**
7. Find form from the form selector (Expand folders by clicking '+')
8. Click form to open it
9. Complete form for patient
10. If incomplete, check incomplete checkbox
11. If 'trust user', save as pending by clicking **Save**
12. If 'trust authorisee', submit by clicking **Submit**

Method 2. (For existing patients)

1. Find patient using the search function
2. On patient notes, click **Add Request**
3. Follow from step 5 of 'method 1'

Dedicated Support Email Address: trust@blueteq.co.uk ***(No PID to be sent to this address)***

Online Manual: Login to system, navigate to Help > Trust Manual

Submit forms which are pending (Authorisee)

1. Find patient using the search function
2. On patient notes, find pending request ('On-line Referral Pending')
3. Click on Edit button
4. Double check form for accuracy
5. Click **Submit**

Adding Comments to Requests

1. Find patient using the search function
2. On patient notes, click **Comment**
3. Find request that you'd like to place a comment against in 'Associated Request'
4. Type comment into text box
5. Choose to notify commissioner
6. Click **Ok**

Uploading Documents against requests

1. Find patient using the search function
2. On patient notes, click **Upload Docs**
3. Find request that you'd like to place a comment against in 'Associated Request'
4. Find file to upload by clicking **Choose File**
5. Type file description into text box
6. Choose whether to notify commissioner
7. Click **Upload**

Request History

Use request history to view all previous requests created by the trust. Results shown can also be exported as a report.

1. Navigate to **Administration > Request History**
2. Use various search boxes on top left of page to filter request history
3. Filter by,
   - To & From dates
   - Consultant or Intervention
   - Department
   - Request status
4. To Export results click **Export** to create report
5. Select either **Export to Excel** or **Export to CSV**