NHS
Blood and Transplant

Specialist Services Electronic Reporting System (Sp-ICE)

User Guide for Sp-ICE

The **Sp**ecialist Services Electronic Reporting System delivered via CliniSys **ICE** (Sp-ICE) is managed by NHSBT to provide its customers with timely and appropriate access to patient diagnostic reports.

If you have any queries regarding use of Sp-ICE in your hospital, please contact your local hospital administrator. Any feedback on this user guide can be sent to ICE@nhsbt.nhs.uk. Your comments will be collated and used to help improve future versions.

Patient identifiable data has been removed from the screenshots for confidentiality reasons.

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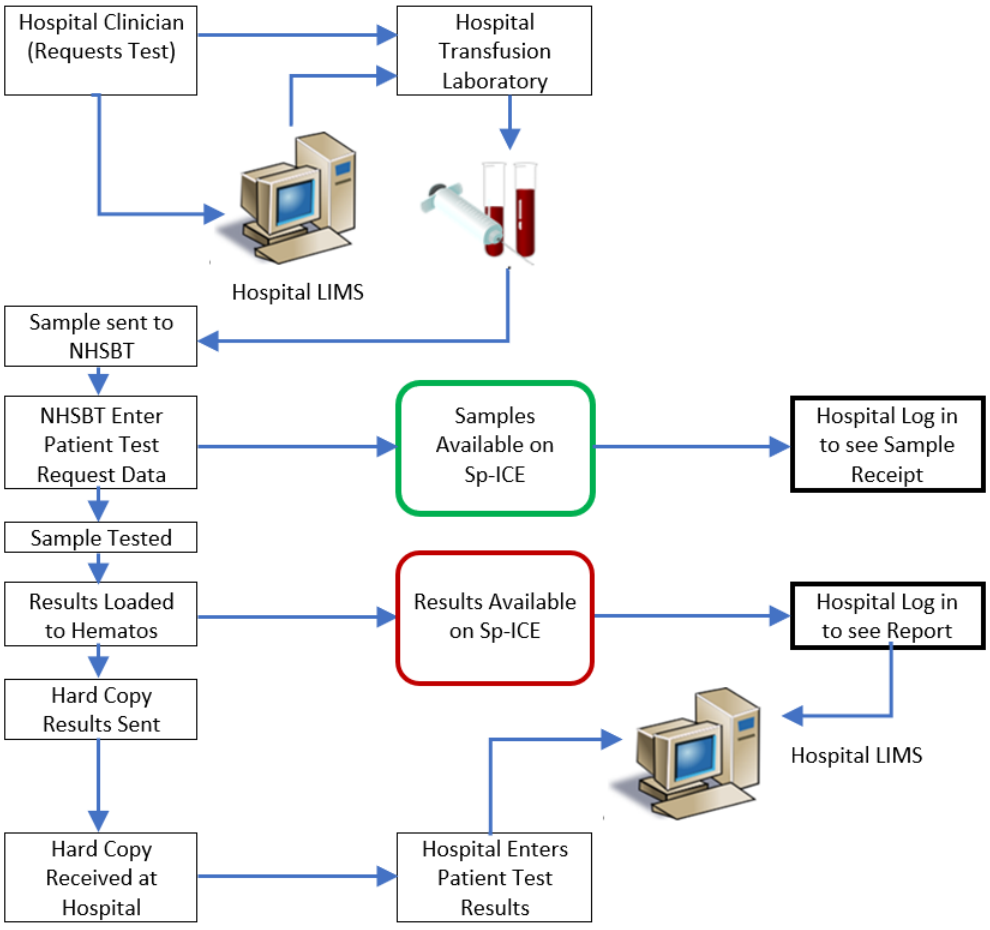
1. Introduction

1.1 Principle

NHSBT currently supplies diagnostic services to approximately 300 hospitals and to general practitioners in the primary care sector. Paper based reporting is no longer the system of choice and Sp-ICE provides an electronic solution to improve test turnaround times, remove the need to re-key data and reduce transcription error. NHSBT recognises Electronic reporting as an important patient safety initiative.

ICE is a web-based application enabling NHSBT Clinical Services to rapidly disseminate the results of diagnostic testing from its core IT system (Hematos) to NHSBT customers via approved file transfer protocols. Users can securely view sample receipt and print diagnostic test results shortly after they are authorised for release on Hematos. The system will be referred to as Sp-ICE – **Sp**ecialist Services **ICE**. A subset of results for Red Cell Immunohematology (RCI) requests are displayed within the Sp-ICE browser with a link to the PDF report. For International Blood Group Reference Laboratory (IBGRL), Histocompatibility and Immunogenetics (H&I) Cellular and Molecular Therapies (CMT) / Stem Cell Immunotherapy (SCI) results there will be a link to the PDF report. Sp-ICE is accessed via secure HSCN or Azure Application Proxy connections.

1.2 A schematic of system architecture



1.3 Responsibilities

Healthcare Caldicott Guardian / Senior Information Risk Owner (SIRO) via the Primary Contact is responsible for:

- Ensuring that prospective users are authorised to view confidential patient data.
- Ensuring that training is provided in the use of the system.
- Requesting system access.
- Reporting to NHSBT all potential adverse events including system security breaches and performance issues highlighted by staff.

Healthcare users are responsible for:

- The correct use of the system.
- Maintaining the security of patient data.
- Reporting to their Primary Contact all potential adverse events including system security breaches and performance issues.

NHSBT will promote self-directed training of Caldicott Guardians / SIRO / Primary Contacts in the use of Sp-ICE and then approve their access.

2. System management

See Appendix 2.

3. Access control/requests

3.1 Requests for local hospital administrator accounts

Access to Sp-ICE must be through the Trust or hospital's Caldicott Guardian / SIRO / Primary Contact who must complete the declaration in FRM4116 and scan and email a signed copy to ICE@nhsbt.nhs.uk

The Caldicott Guardian/SIRO/Primary Contact will:

- Identify local administrators within their Trust or hospital.
- Train and set up accounts for additional administrators and users.
- Request additional local administrators accounts from NHSBT using FRM4117 if required.

NHSBT will promote self-directed training for local administrators, set up their account(s) and e-mail details directly to the local administrator. Local Administrators will:

- Identify Hospital/Trust administrators and users.
- Create accounts for Hospital/Trust administrators and users

Note: A dummy test sample is available on Live for training. NHS no 9999911684

3.2 Administrator/User password

When a new administrator / user logs onto Sp-ICE for the first time using their agreed username, they will obtain their password by selecting the “Forgotten Password” option. An email containing the password will be sent to the email address supplied when the user account was created. Using the emailed password, the administrator / user will be prompted to change their password before accessing records. The password chosen must be alphanumeric and consist of at least 8 characters.

The system allows five attempts at a password before locking the account. To avoid being locked out of your account use the “Forgotten Password” option before you exhaust the five attempts.

3.3 Locked accounts

Users must contact their local administrators to unlock locked accounts. Once the account is unlocked use the “Forgotten Password” option.

If a local administrator is locked out, contact another local administrator at the same location who will reset the account and advise the use of the “Forgotten Password” option. If a local administrator is not available contact NHSBT at service.desk@nhsbt.nhs.uk who will reset the account and advise the use of the “Forgotten Password” option.

3.4 Inactivating / Amending a user account

Local hospital administrators will be responsible for inactivating, amending and reactivating their own users. If assistance is required from NHSBT contact ICE@nhsbt.nhs.uk using FRM4117.

4. Use of Sp-ICE

4.1 Accessing Sp-ICE

- Open the application by double clicking the ICE Desktop icon.

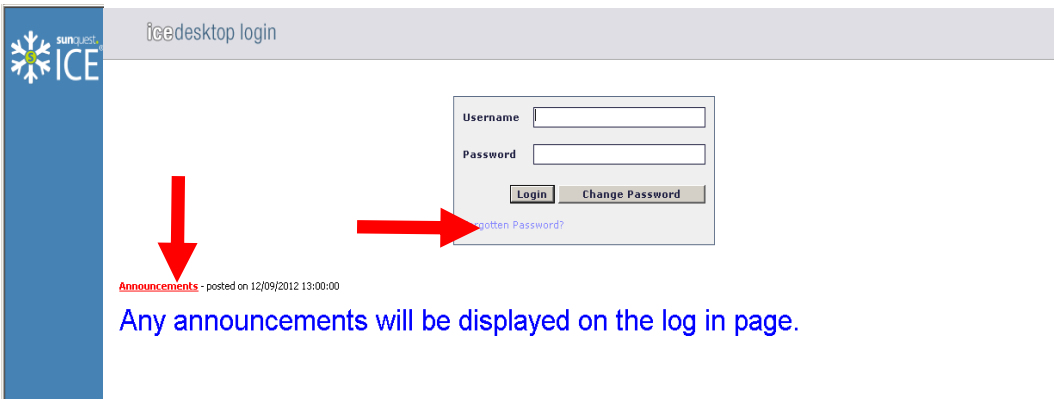
Or use the following link to the web browser: https://edilive.nhsbt.nhs.uk/icedesktop/

- The ICE Desktop Launch window is now displayed.
- Click on the **Launch ICE** button

- The ICE Desktop Login window is displayed.
- Any announcements will be displayed beneath the **Username** and **Password** box.

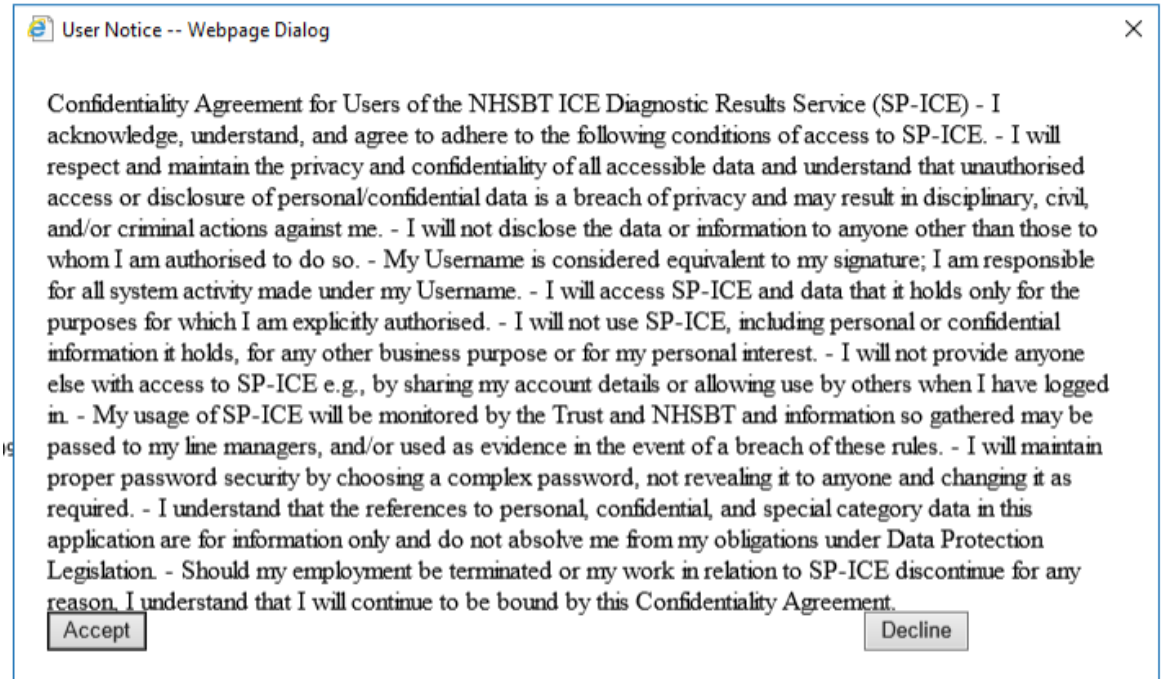
First Login/Forgotten Password Login:
Enter your **Username** (not case dependent)**.**
Select **Forgotten Password.**
Open e-mail generated from Forgotten Password.
Copy password from email.
Paste **Password.**
Click **Login** or press enter.
Change Password as prompted (must be alphanumeric and at least 8 characters).

Subsequent Logins:
Enter your **Username** (not case dependent)**.**
Enter your **Password** (case dependent)**.**
Click **Login** or press enter.

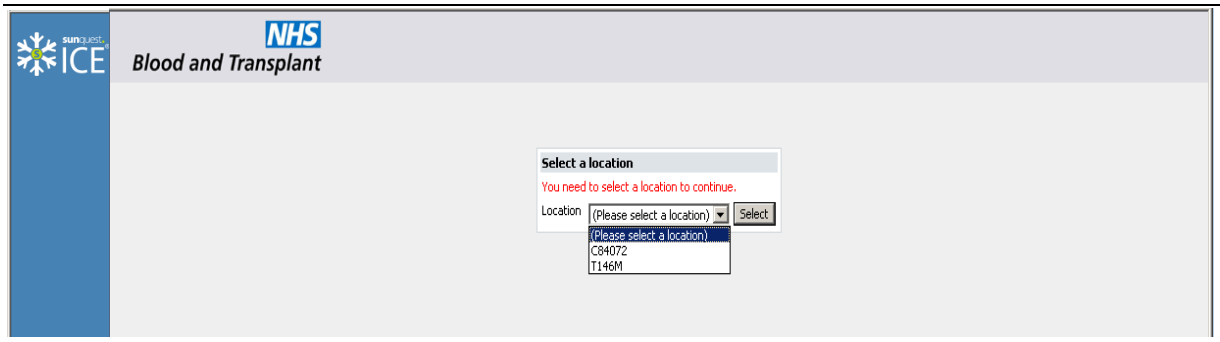


The NHSBT confidentiality agreement is displayed

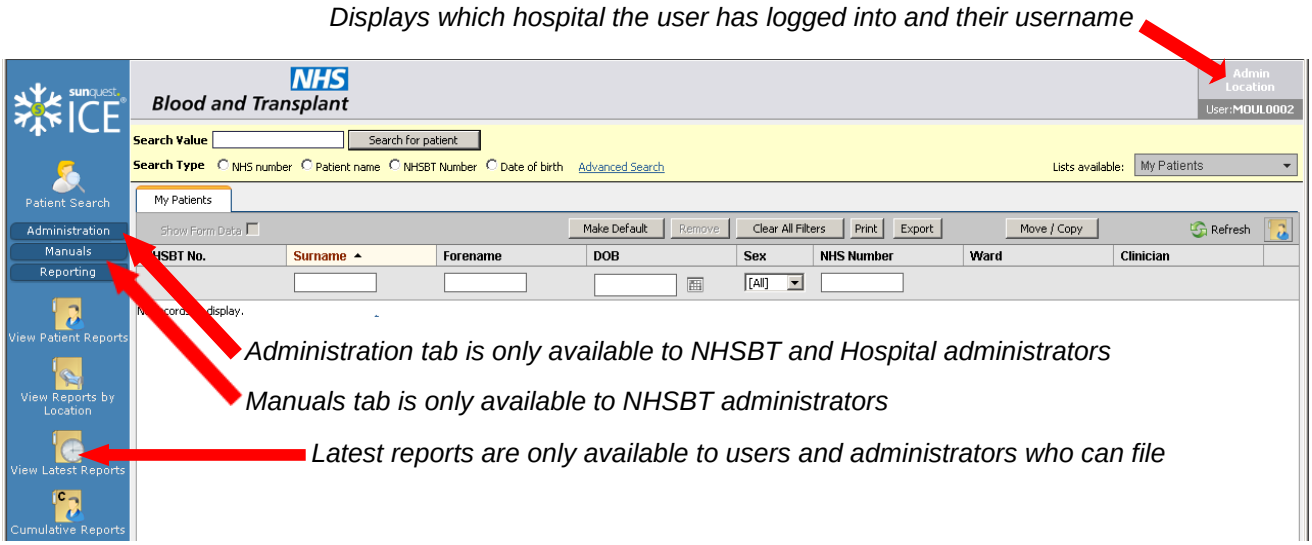
- Select **Accept** to continue, **Decline** to reject (if you select **Decline** the login screen will be displayed).



- If you have access to more than one location/hospital, select a location to continue.



- The ICE Desktop Search window is now displayed.



This window can be used to:

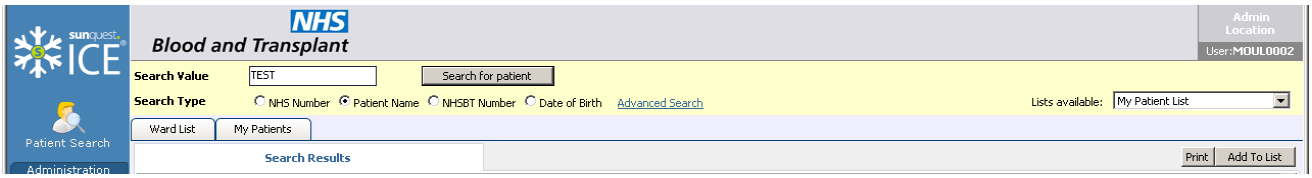
- **Search for a patient record –** using “Patient Search”.
- **View Patient Reports** – view sample receipt and reports for the selected patient.
- **View Reports by Location** – displays the reports for a selected location for unfiled and filed reports.
- **Latest Reports by Location** – displays the latest unfiled reports for a selected location.
- **View Cumulative reports** – displays all the previous anti-D/c quantification results or titration results.
- **Create patient lists –** using “Patient Search”.

4.2 Viewing sample receipt & patient reports, and printing patient reports

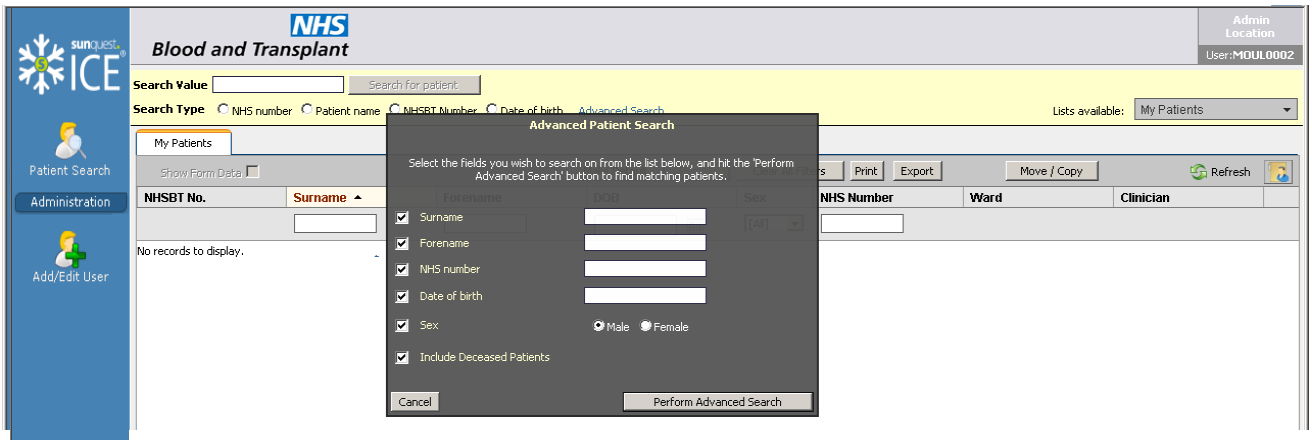
Search for a patient using NHS Number, Name (just “surname” or “surname**,** forename”), NHSBT number or Date of Birth (dd/mm/yyyy). The radio button moves depending on the value entered into the field. You can search by hospital number using the following format hospital number-Location Code (the location code is the Hematos/NACS Code). The hospital number/s is linked to the NHSBT number and can be viewed in the “See Case Note Numbers” see over.

- Enter search criteria in the **Search Value** field.

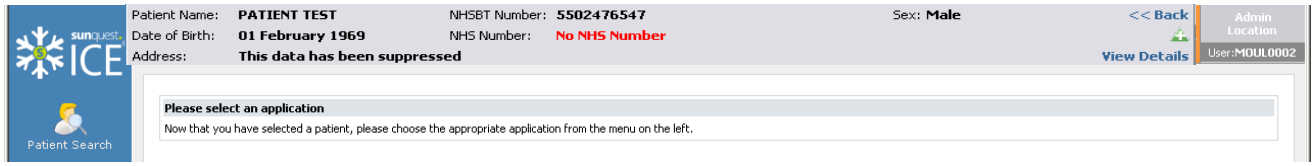
- Select the **Search for a patient** button. If a single patient is found, they will be displayed, if multiple patients are found they will be displayed in a list. If patient records have been merged in Hematos the patient may have more than one NHSBT number.



- An advanced search is available which enables you to enter multiple search parameters.

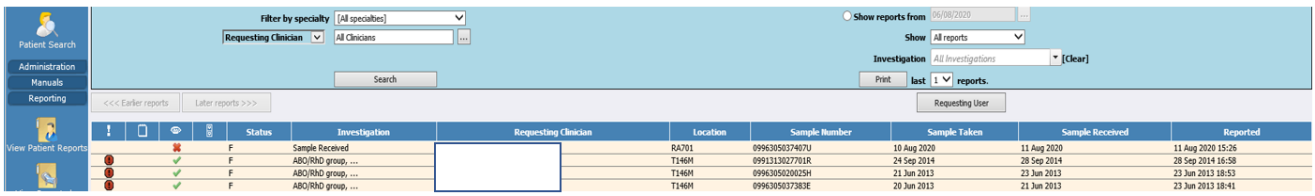


- Select the patient from the resulting list by highlighting the correct record. The selected patient demographics are displayed at the top of the window.



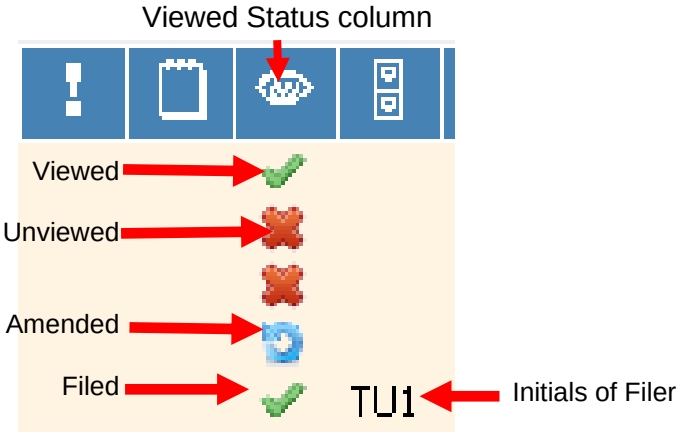
- Once the correct patient has been selected click on the **View Patient Reports** icon. Sample receipt and / or patient reports are now displayed in most recent sample date order.

- When a sample has been received by NHSBT and booked in by the laboratory a Sample Received notification will appear (see top row below). Once testing has been completed and the report produced, the sample notification will be overwritten by the report and the date Reported will change.



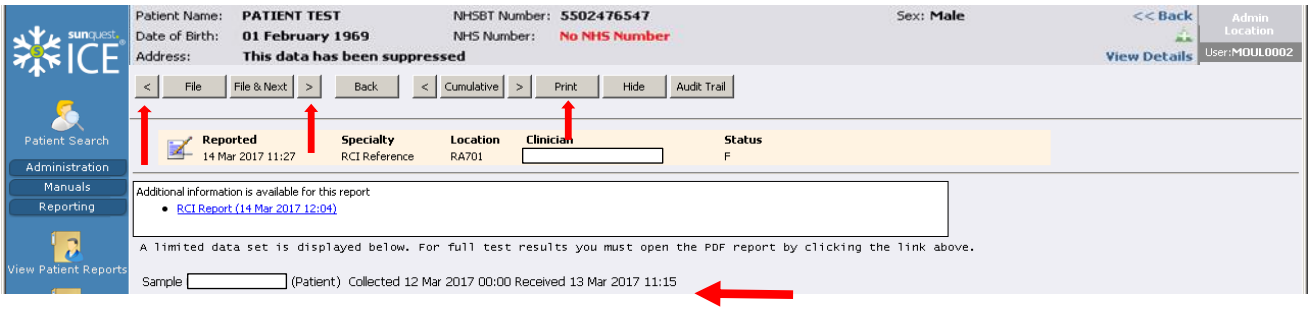
- This sign indicates that the sample has atypical results e.g. red cell antibodies have been detected.

- It is possible to see if a report has been viewed, filed or amended in the “Viewed Status” column see screenshot below –



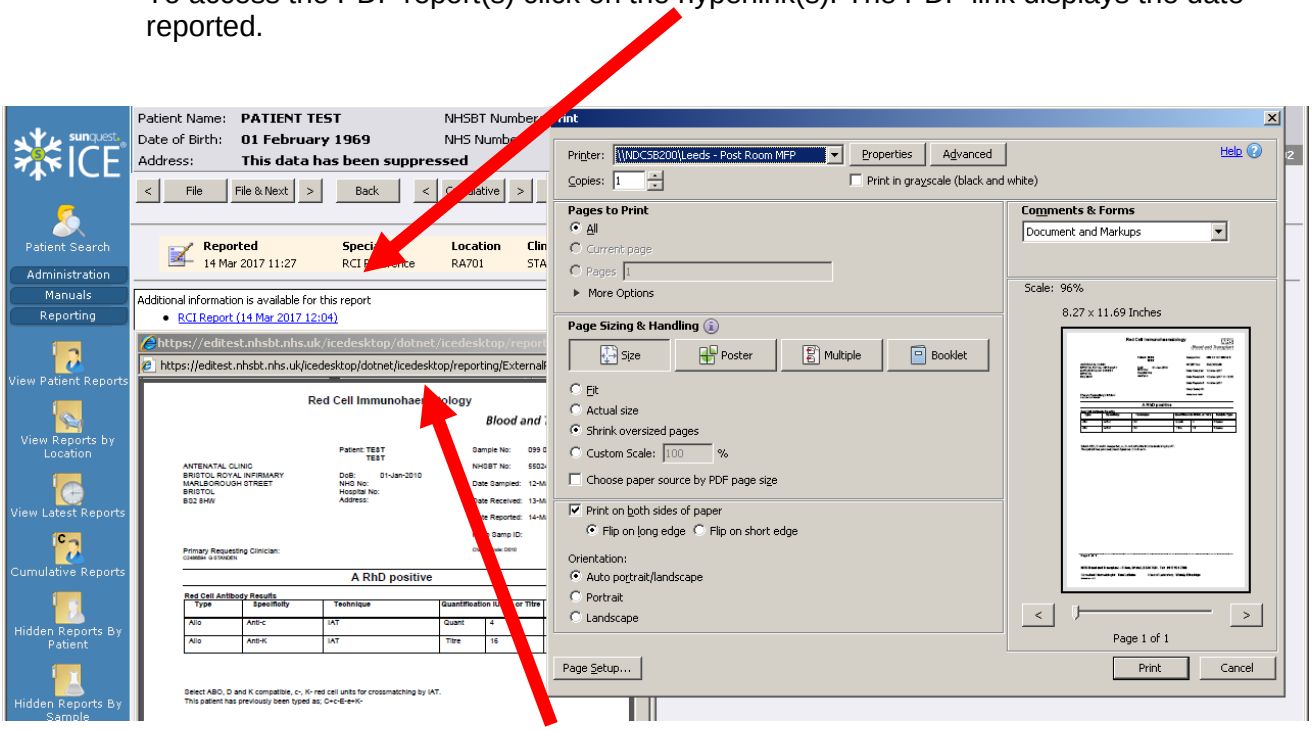
- If there is more than one page of reports use the **Earlier reports** and **Later reports** buttons respectively. **You will only be able to view reports for locations (hospitals) that you have been granted access to i.e. those that are sharing reports with your location or all locations.**
- To view an individual report highlight it by clicking the left mouse button. The patient’s report is displayed.
- To navigate between earlier and later reports when viewing an individual patient report click on the “Previous report in list” and “Next report in list” arrows (these arrows are greyed out when there is only one report).
- A summary of the information displayed on screen can be printed by clicking on the “Print” button.

Please note: A subset of results for RCI requests will be displayed within the Sp-ICE browser with a link to the PDF report. For H&I and CMT (SCI) requests there will be a link to the PDF report. If no sample collected date was provided with the request the PDF report will state “No date given”, however the dataset will report the ‘Collected’ date as the ‘Received’ date.



- Please note for CMT (SCI) reports and H&I Stem Cell Summary reports the report is not sample based but represents a summary of information from multiple requests. In these cases the collection and receipt date are generated from the date the summary report was reported by the NHSBT lab.
- To print the full report, you must access the PDF – see below. Please do not print the limited data set on the web browser particularly as the number displayed in the top left-hand corner of the print out, labelled as the Hospital Number is the NHSBT number, (this will be amended in a later version).

- To access the PDF report(s) click on the hyperlink(s). The PDF link displays the date reported.



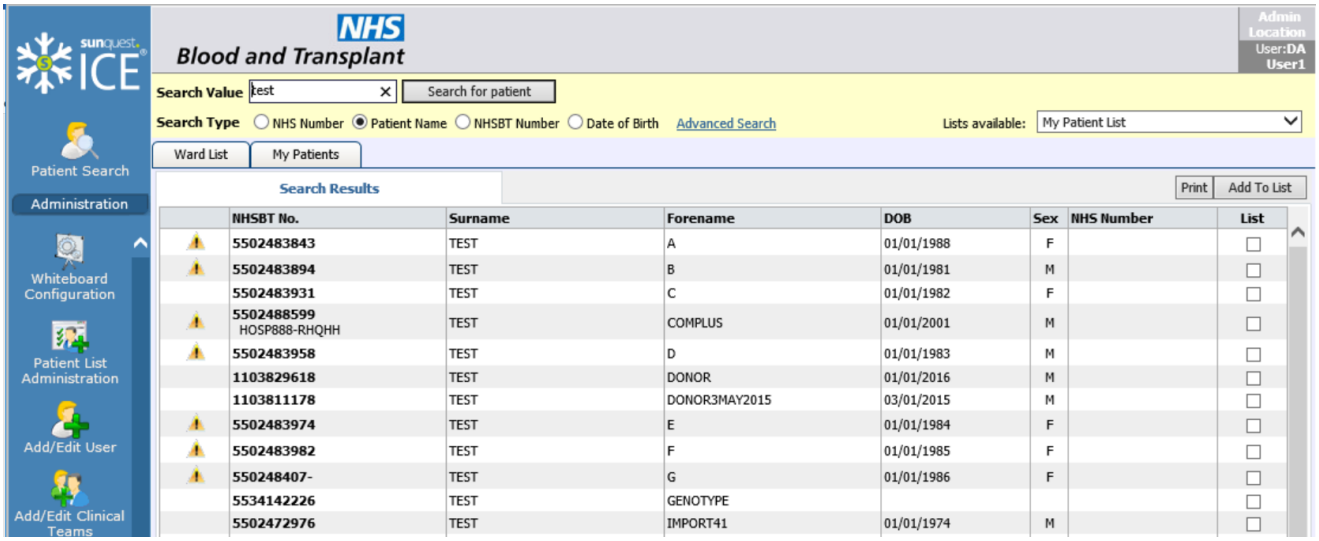
- The PDF is displayed in Adobe viewer where you can do the following:
  - Save the PDF report to a local drive.
  - Print the PDF report to a local printer (see above).
  - E-mail a link to the PDF report to another person.

  Note: *The position and appearance of the 'Save, Print & E-mail' icons will vary dependent on the version of Adobe in use.*
- It is possible to copy and paste the PDF report.

Please ensure you comply with NHS data security guidelines when sharing patient information.

Patient Alerts

Patient Alerts have been configured so that Patients with clinically significant Red Cell Antibodies and / or Special Blood Requirements are easily identifiable. These patients will be displayed with a Warning Triangle in the first column



NHSBT No.	Surname	Forename	DOB	Sex	NHS Number	List
5502483843	TEST	A	01/01/1988	F		
5502483894	TEST	B	01/01/1981	M		
5502483931	TEST	C	01/01/1982	F		
5502488599 HOSP888-RHQHH	TEST	COMPLUS	01/01/2001	M		
5502483958	TEST	D	01/01/1983	M		
1103829618	TEST	DONOR	01/01/2016	M		
1103811178	TEST	DONOR3MAY2015	03/01/2015	M		
5502483974	TEST	E	01/01/1984	F		
5502483982	TEST	F	01/01/1985	F		
550248407-	TEST	G	01/01/1986	F		
5534142226	TEST	GENOTYPE				
5502472976	TEST	IMPORT41	01/01/1974	M		

The following Patient Alerts have been configured:

Red Cell Antibodies:

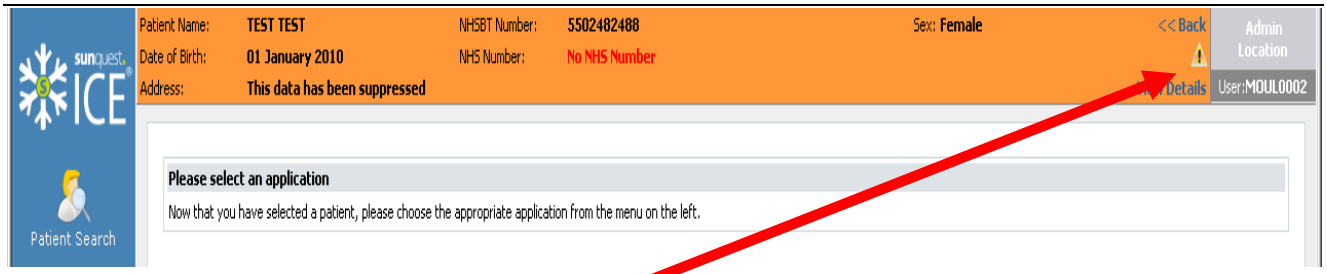
- Anti-Fya, Anti-Fyb, Anti-Jka, Anti-Jkb, Anti-K, Anti-k, Anti-Kpa, Anti-Kpb, Anti-Lea, Anti-Leb, Anti-Lua, Anti-Lub, Anti-M, Anti-N, Anti-S, Anti-s, Anti-U, Anti-D, Anti-C, Anti-E, Anti-c, Anti-e, Anti-Cw

Once a listed antibody has been detected and reported by NHSBT, the alert will remain on the patient's record.

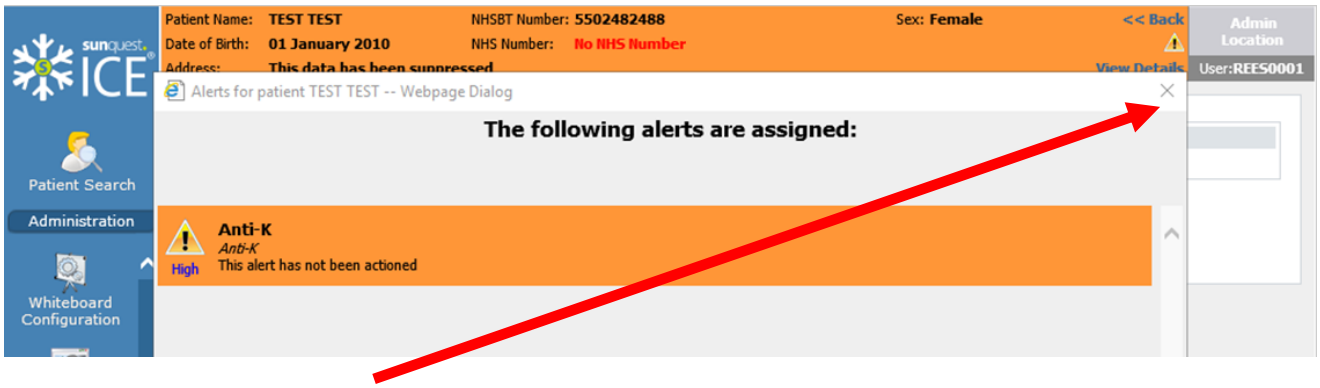
Special Blood Requirements:

- CMV negative products required
- Irradiated products required
- Washed products required
- Washed and irradiated products required
- IgA deficient products required
- Sickle neg Rh matched products required
- HEV negative products required

These alerts only display if the hospital has informed NHSBT and can be removed by NHSBT on request. Selecting a patient with an alert will display the following:



- Clicking on the Warning Triangle displays the alert assigned:

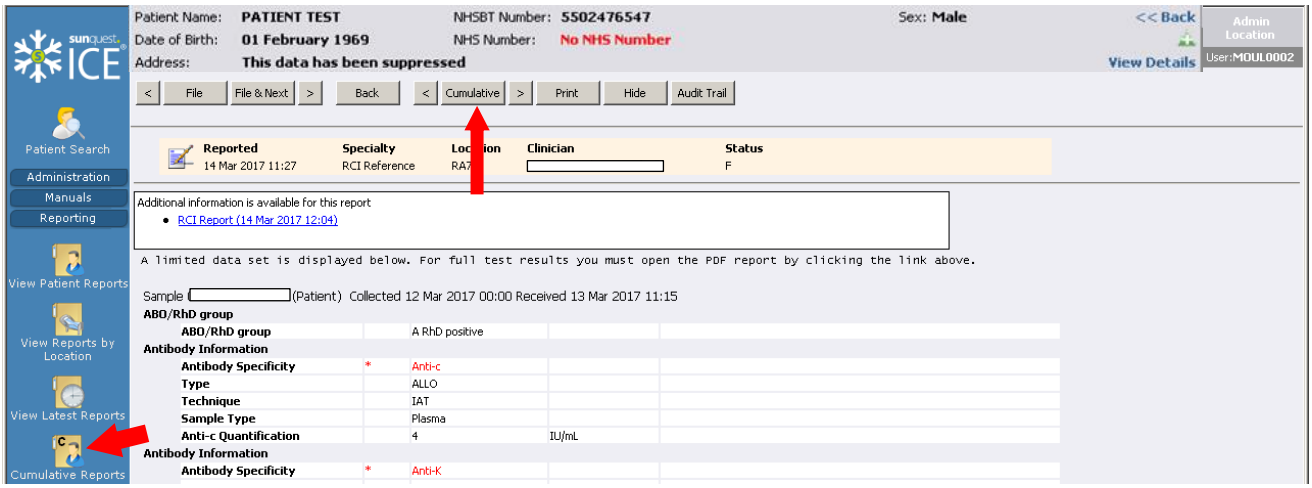


- Clicking on the X closes this screen.

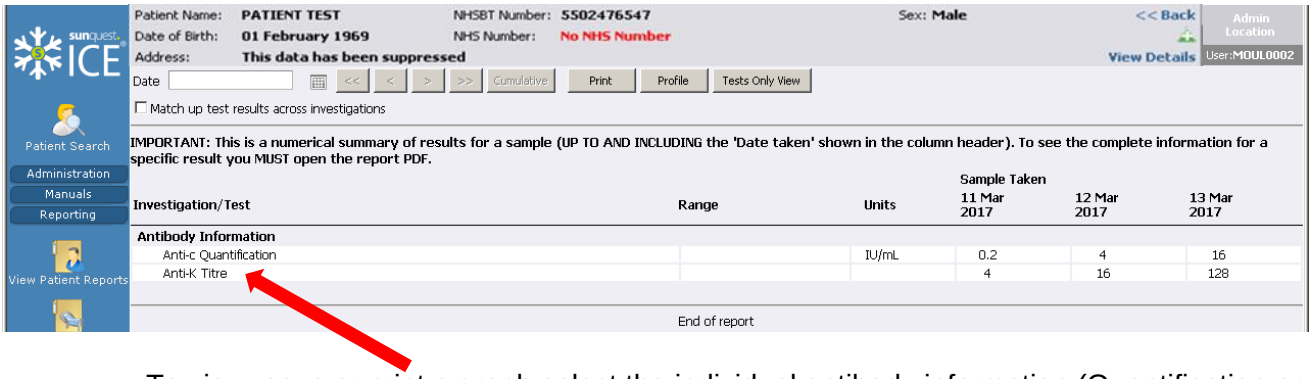
Cumulative Reports

Cumulative reports are available for titration or quantification results. It is possible to see all the previous anti-D/c quantification results or titration results for a pregnancy (providing you have access to the appropriate locations). It is possible to produce graphs showing the cumulative results.

- Select the “Cumulative Reports” icon from the left hand tool bar or the Cumulative button in the individual report.

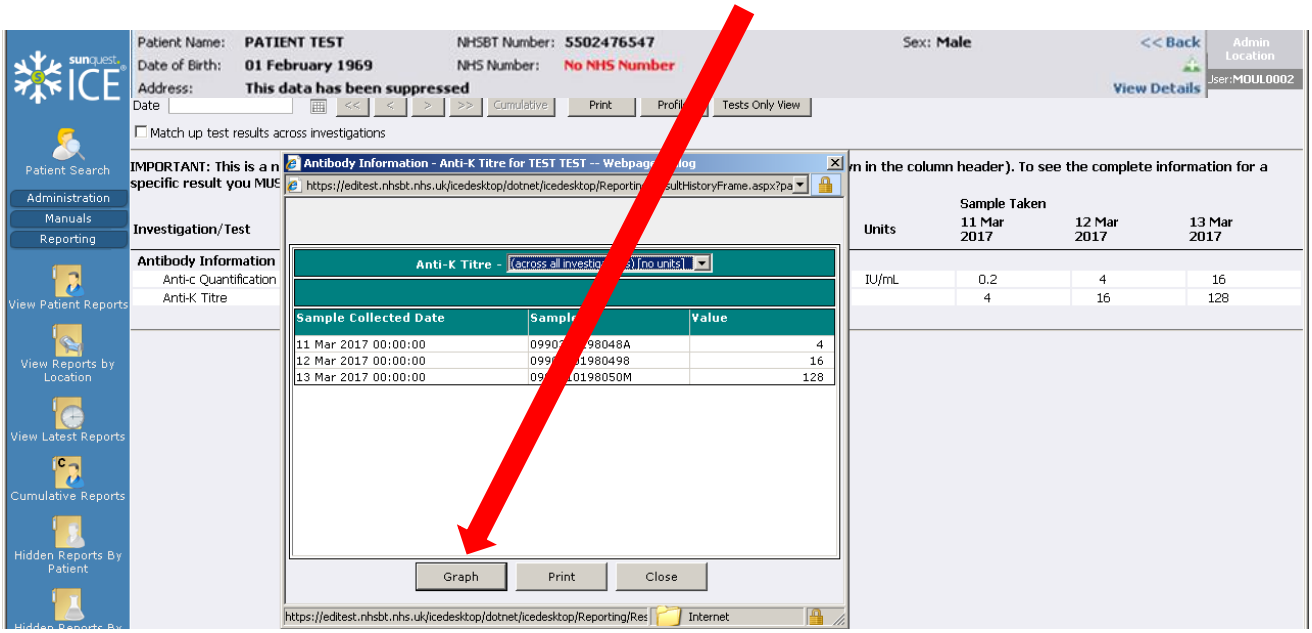


- The cumulative view is displayed. If accessing through Cumulative button in the individual report, the **Back** button, takes the view back to the individual report view. The **Print** button is used to print out the results cumulatively (the number displayed above the barcode in the top left-hand corner of the print out is labelled as the Hospital Number but is actually the NHSBT number, this will be amended in a later version). The “Next” and “Previous” **arrow** buttons enable the user to view earlier or later results – it is possible to view a maximum of six results with the latest result on the far right of the screen.

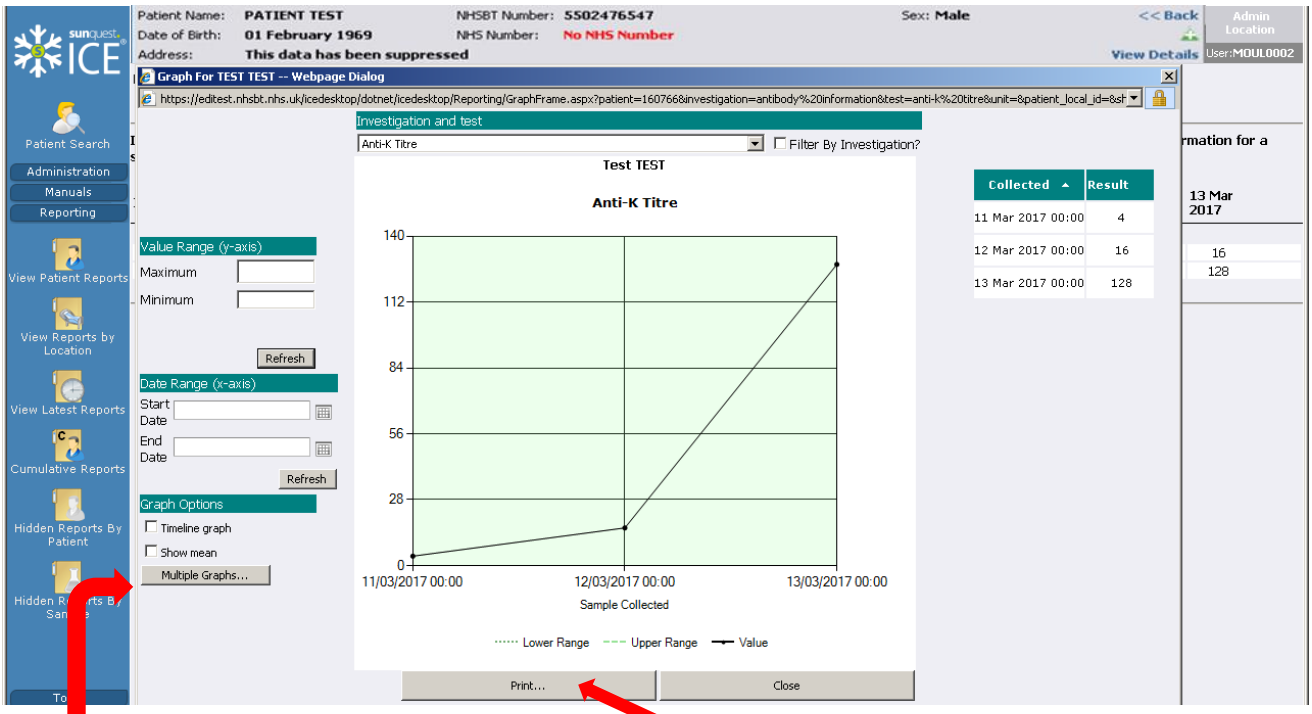


- To view, save or print a graph select the individual antibody information (Quantification or Titre).

- The results will appear in tabular form, select graph.

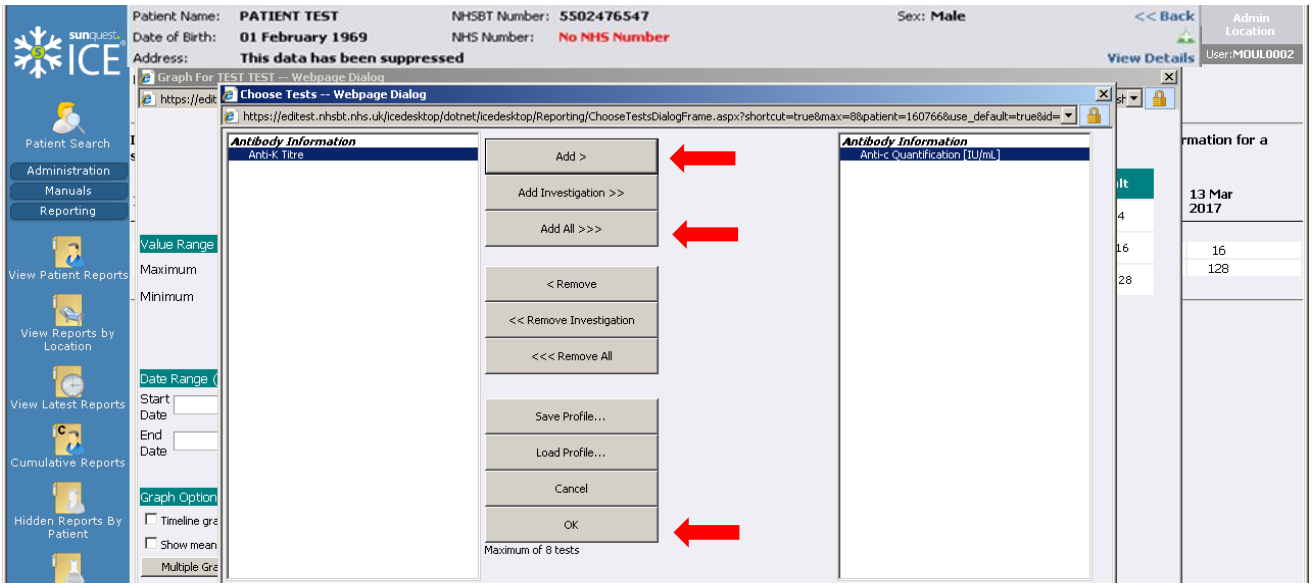


- The individual graph appears.

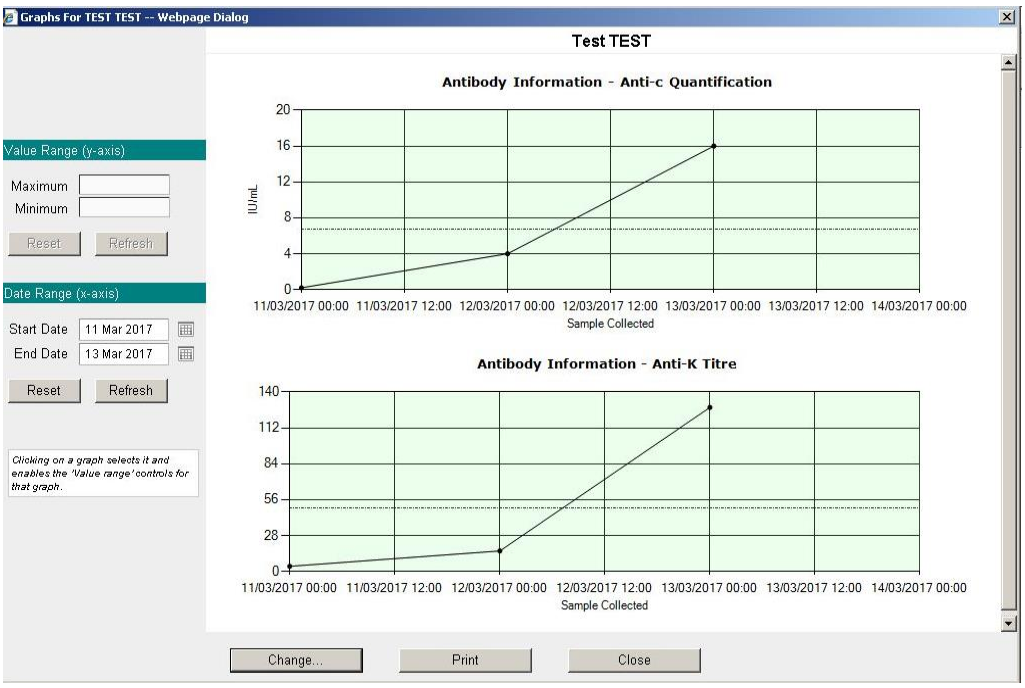


- Graphs can be printed using the print button.
- You can select “Multiple Graphs”

- From the multiple graphs view you can select individual tests using **"Add"** or all tests using **"Add All"**



- Click **"OK"** and the selected graphs will appear on one page
- From the multiple graphs view you can select a date range.



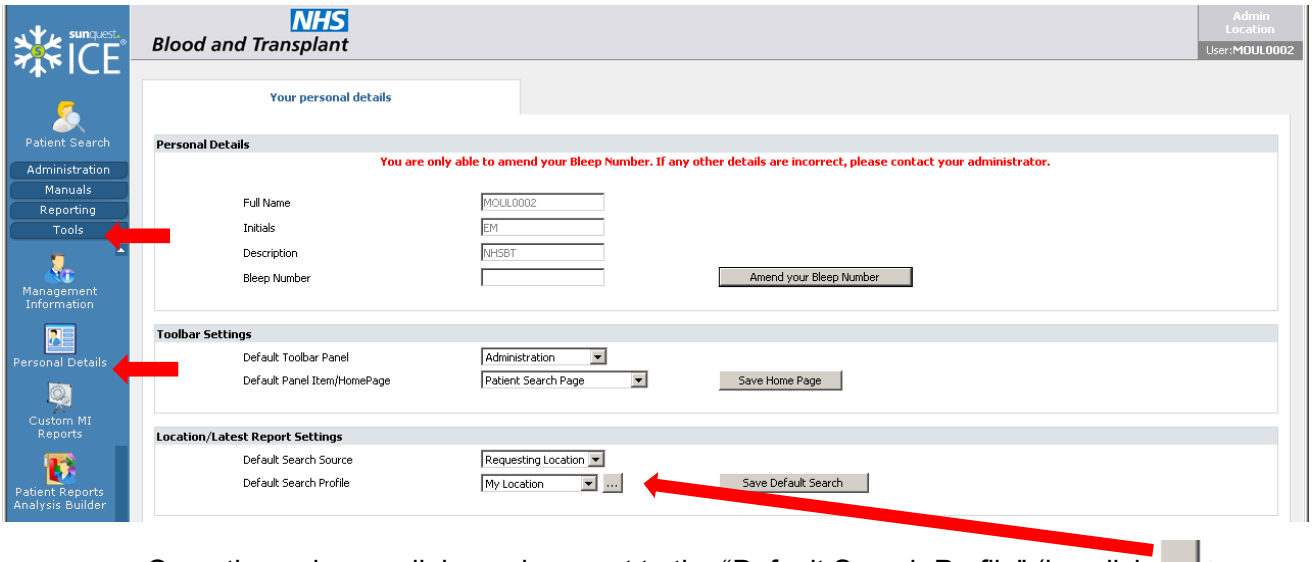
Amended/Updated Reports

If a report is amended, the original PDF report will be replaced by an amended PDF report and the "Viewed Status" icon will change to - . Reports may simply be amended (i.e. overwritten) because they have been reprinted within NHSBT even though the actual report has not changed. If a report has been changed, the updated PDF report will state "amended report". NHSBT will contact by telephone the Lab Manager/deputy from the referring location.

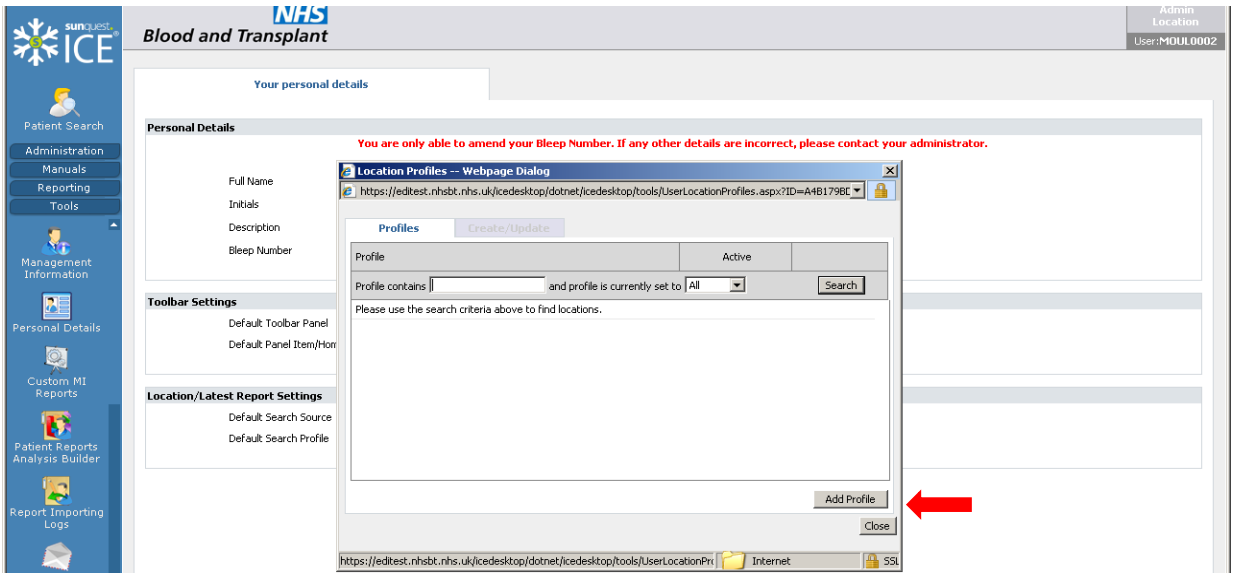
4.2 Search Options

It is possible to set up a customised profile that includes hospitals that you would regularly view results for other than your log in location. You can set this profile as your default search locations.

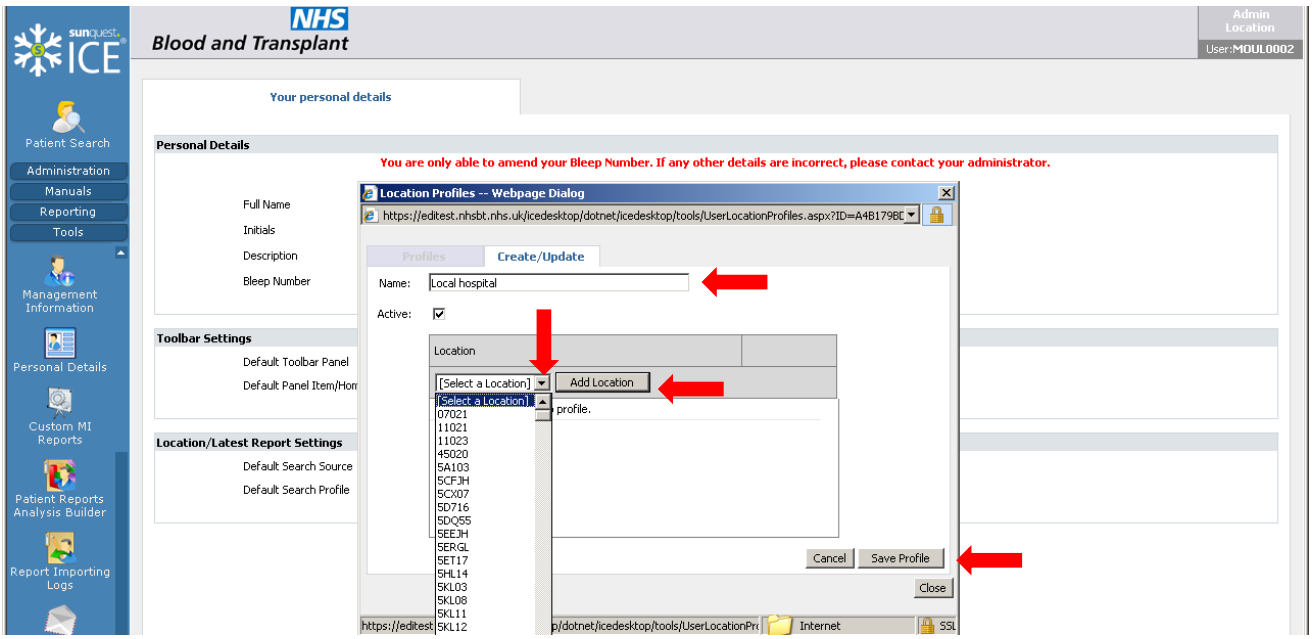
- Select "Tools" & then "Personal Details" from the tool bar.



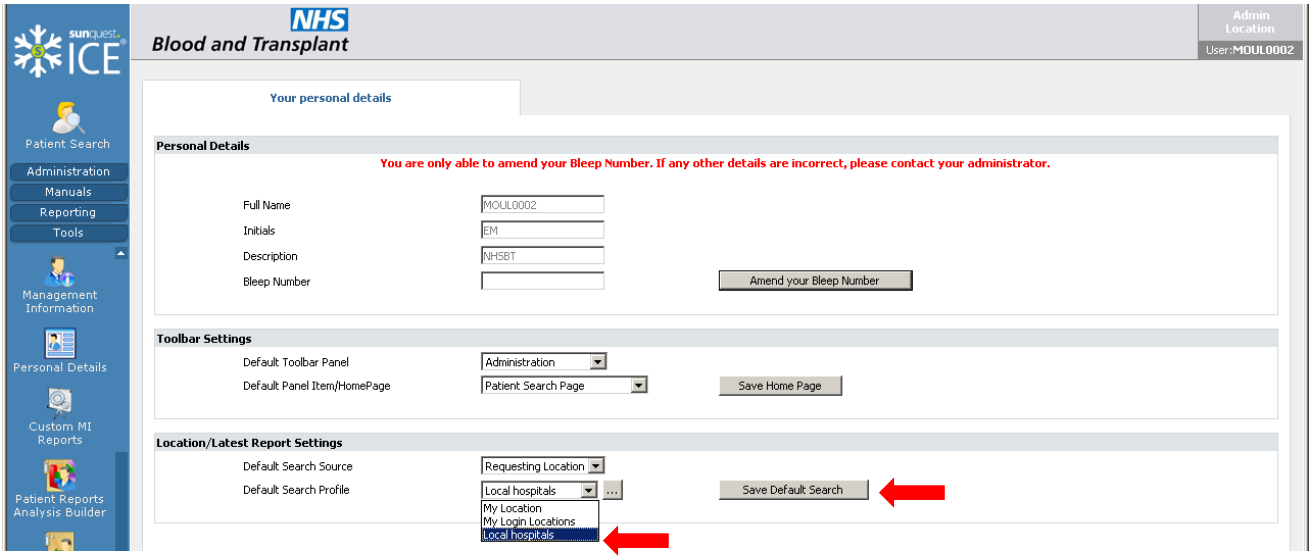
- Open the webpage dialogue box next to the "Default Search Profile" (i.e. click ...)
- Select "Add Profile".



- Type in a name for the profile e.g. Local hospitals. Select location from the drop down list and select “Add Location”, repeat for each location required.
- Select “Save Profile”. Close Webpage dialogue box.



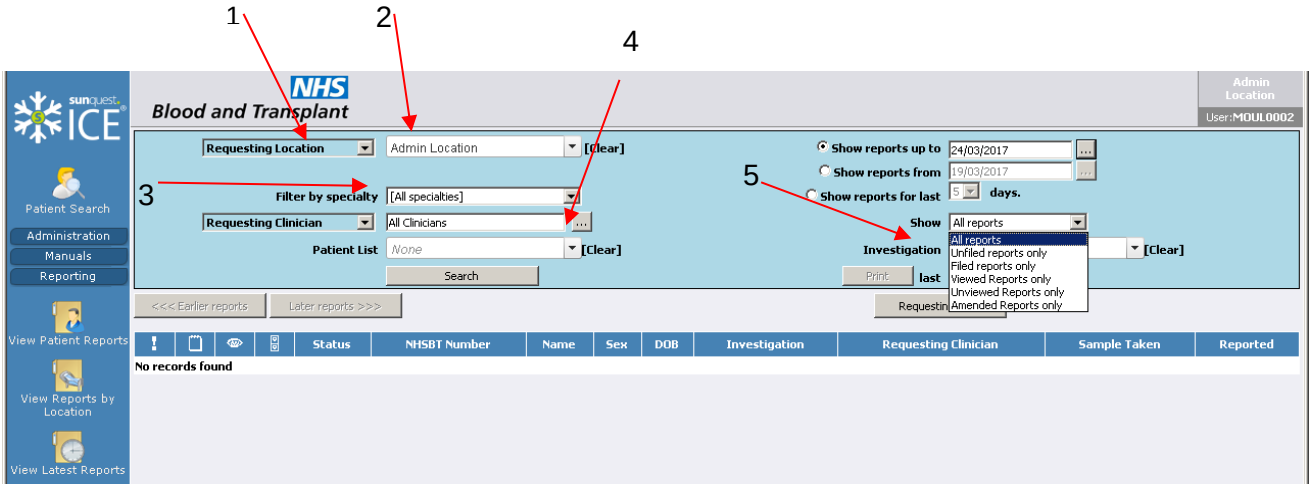
- Select required “Default Search Profile” from the drop-down list and select “Save Default Search”.
- Administrators can change the “Default Toolbar Panel” from “Administration” to “Reporting”. Selecting anything other than “Reporting” or “Administration” from the drop-down list will have no impact.



- Log out of Sp-ICE and log back in to check that the default settings have been updated.

The **View Latest Reports** and **View reports by location** screens have various search options see screenshot below.

Note: *Once search criteria are selected for "View Latest Reports" or "View Reports by Location", these same parameters are applied when toggling between these screens.*

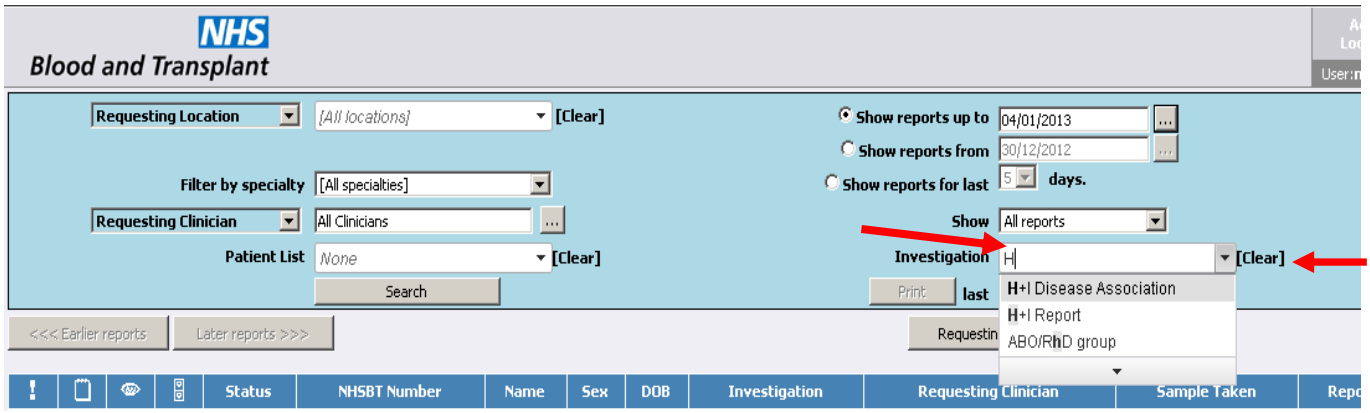


Enter the required search criteria based on the information in the table below and then click **Search**. Please note the search parameters do not update unless you click **Search.**

Location (1)	Leave as "Requesting Location"
Location (2)	Defaults to users log in location or profile set by user. Select "[Clear]" to obtain *"[All locations]*" followed by "Search", a drop-down list is then available from which to select an alternative location, once selected click on "Search".
Filter by Speciality	Select speciality from drop down list.
Clinician (3)	Leave as "Requesting Clinician"
Clinician (4)	Leave as "All Clinicians" or open web page dialogue box and search for clinician
Patient List	Leave as "None"
Show reports up to	Select the radio button and enter the date up to which you wish to display any available reports (this is the default option and is automatically set to the current date)
Show reports from	Select the radio button and enter the date from which you wish to display any available reports
Show reports for last x days	Select the radio button and select the number of days from the drop-down list for which to view previous reports
Show	Select option from drop down list: • All reports – displays filed, unfiled and amended reports • Unfiled reports only (not available on **View Latest Reports)** • Filed reports only (not available on **View Latest Reports)** • Viewed reports only • Unviewed reports only • Amended Reports only
Investigations (5)	Use to filter investigations/tests – see next page.
Print last x reports	Do not print from this option it does not print the full PDF report

Filter by Investigation

- Select 'View Reports by Location' or 'View Latest Reports'
- Click into the Investigation box and type in a letter e.g. 'H' (5)
- All investigations that include the letter H will be listed in the drop down
- Select the desired Investigation and click 'Search'
    - H+I Disease Association will display just the HLA B27 results
    - Typing the NHSBT function will display all reports for that function e.g. 'H+I' will display **ALL** H&I reports, 'SCI' will display **ALL** SCI reports
- Searching by 'Sample Received' in the Investigation field will return samples that have been booked in by an NHSBT laboratory



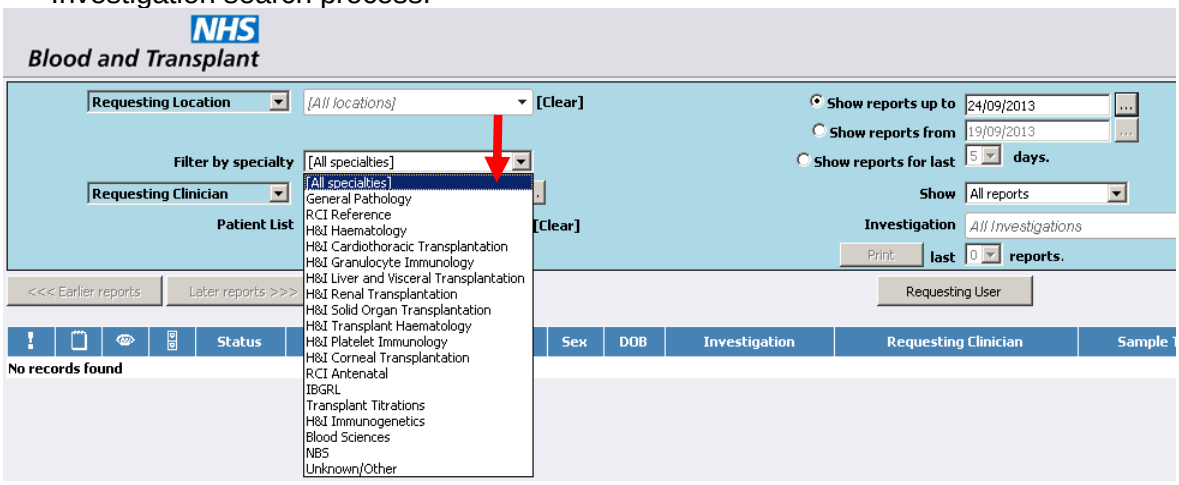
Please note: If you wish to change, your search parameters after using the Investigation field you MUST click (Clear)

Filter by Speciality

- Select 'View Reports by Location' or 'View Latest Reports'. Click 'Filter by speciality' drop down.
- Select the desired Speciality and click 'Search'.

Department	Speciality	Report Dates
RCI	All RCI referrals (latest report only). Excluding routine antenatals and antibody cards.	31st Oct 2006 – 8th Nov 2011
	All RCI referrals	Nov 9th 2011 – 27Th Nov 2013
	RCI reference	From 27th Nov 2013
	RCI antenatal	From 27th Nov 2013
	Transplant titration	From 27th Nov 2013
RCI/IBGRL	RCI reference or antenatal with linked IBGRL **genotype report.**	From 27th Nov 2013
RCI/IBGRL	RCI reference or antenatal with linked IBGRL **red cell report**	From 8th May 2014
IBGRL Molecular Diagnostics	IBGRL, all fetal blood group genotyping from maternal plasma, full genotyping (for common blood group antigens), Rh genotyping, paternal *RHD* zygosity testing and fetal sex typing	From 27th Nov 2013
H&I	H&I Haematology	From 28th Nov 2012
	H&I Cardiothoracic Transplantation	From 28th Nov 2012
	H&I Granulocyte Immunology	From 28th Nov 2012
	H&I Liver and Visceral Transplantation	From 28th Nov 2012
	H&I Renal Transplantation	From 28th Nov 2012
	H&I Solid Organ Transplantation	From 28th Nov 2012
	H&I Transplant Haematology	From 28th Nov 2012
	H&I Platelet Immunology	From 28th Nov 2012
	H&I Corneal Transplantation	From 28th Nov 2012
	H+I - Stem Cell Summary	From 31st July 2015
	H+I Immunogenetics	From 31st July 2015
CMT (or SCI)	SCI - Donation	From 31st July 2015
	SCI - Final (Stock)	From 31st July 2015
	SCI - Transplant (issue)	From 31st July 2015
	SCI - Post Transplant Follow up	From 31st July 2015

- If the expected report is not displayed against a specific H&I speciality use the Filter by Investigation search process.



4.3 Viewing Reports

Viewing Reports by Location

Select the "View Reports by Location" icon. Reports from the user's default location are displayed unless they have set their own profile. To change the default location, select clear, select new location code from drop down list, select search. The process to view a report is identical to that previously described in "View Patient Reports".

Viewing Latest Reports

The main benefit of using "View Latest Reports" is that it can be used as a tool to view the most recent reports for a specific location as they are received. All new reports will be available through this view until the report is "filed". Once a report is filed, it is automatically removed from the "View Latest Reports".

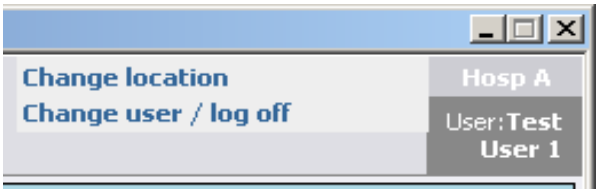
PLEASE BE AWARE – If a report is filed it will no longer be viewable through "View Latest Reports".

Select the "View Latest Reports" icon. Ensure the correct location code is selected from the drop-down list. The list of reports for the selected location is displayed. Patients reports are accessed as previously described.

4.4 Filing a Report

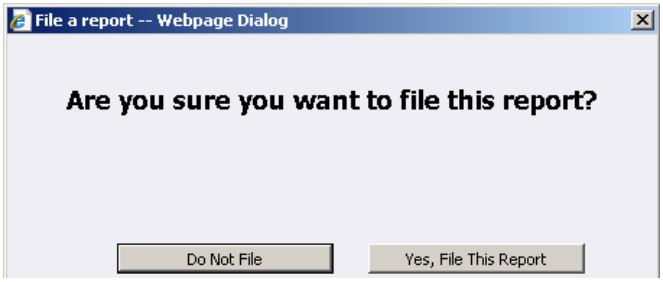
User accounts can be set up with or without access to filing reports for their log in location/s. For those with access to filing:

- Ensure you either initially log in to the location you wish to file for or change locations using the change location option by hovering over the current hospital location (Hosp A in the example below).

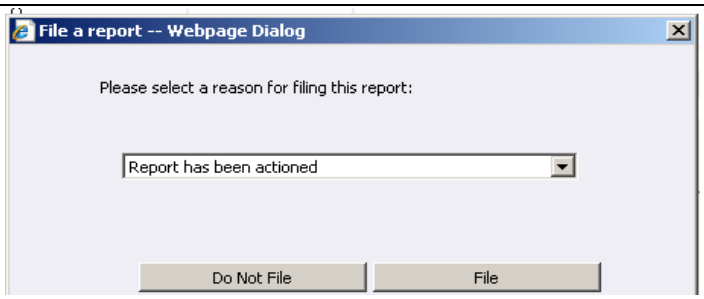


- Access "View Latest Reports".
- Select the patient report to view
- Select the **File** button

- The following message is displayed:



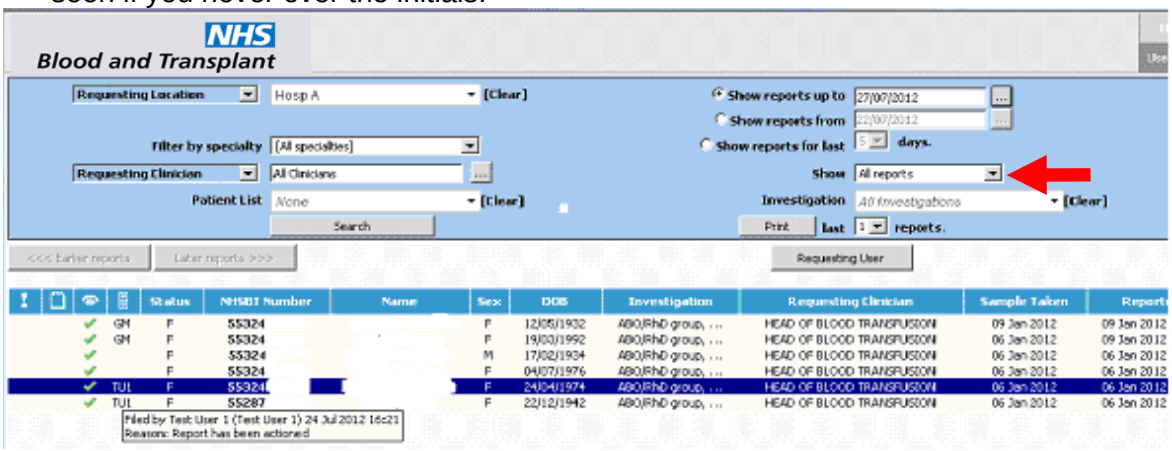
- If you select **Do Not File,** you will be returned to the report. If you select **Yes, File This Report** the following dialog box is displayed:



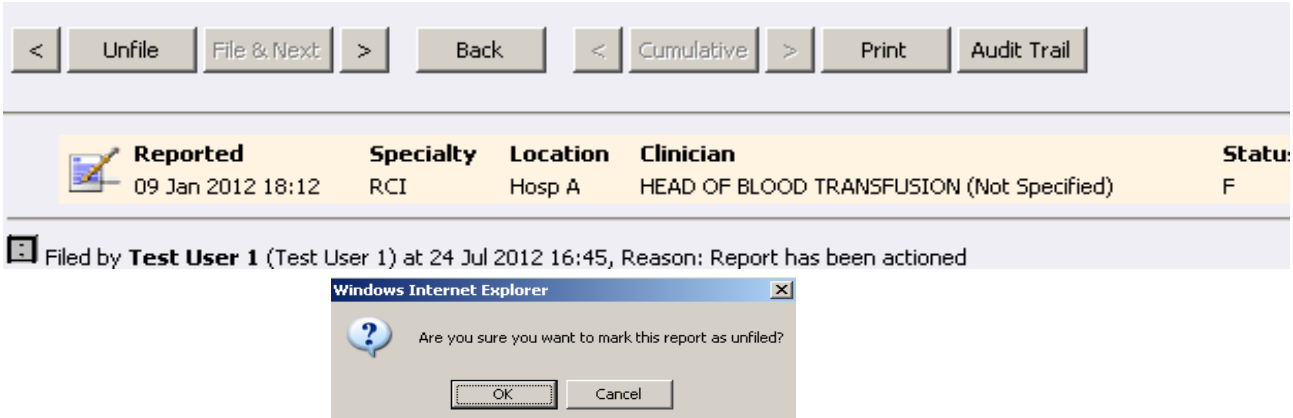
- Select the correct reason for filing the report and select file.

Un-filing a Report

- Select **View Reports by Location** from the tool bar
- Select the location for which you wish to display reports and ensure that the **Show** is set to **"All reports"**.
- Select "Search" to display available reports. Both filed and unfiled reports for that location will be displayed. A report that has been filed will be marked by the filer's initials in the fourth column. Information relating to who filed the report and the reason for filing can be seen if you hover over the initials.



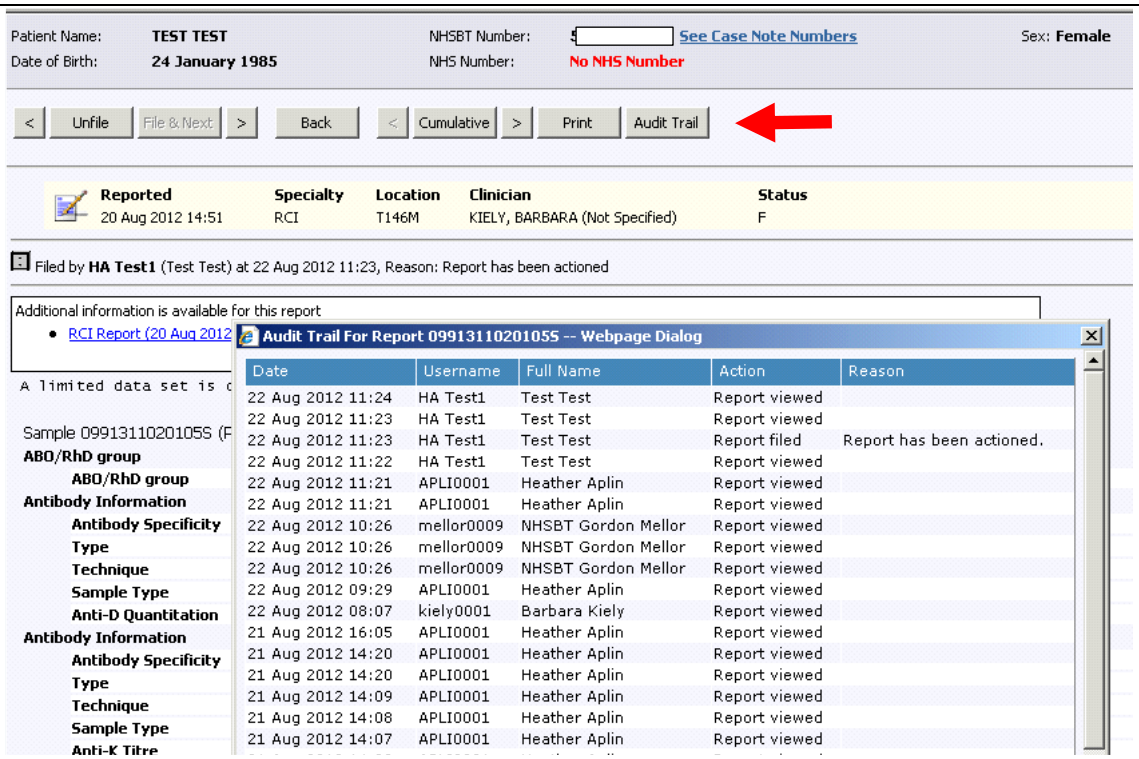
- Select the filed report and then select "Unfile".



- Select OK
- Report is again available through the "View Latest Reports".

4.5 Audit Trail

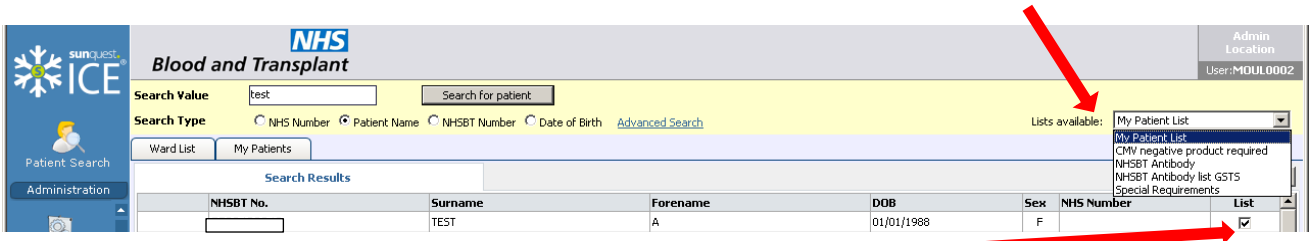
There is a full audit trail of report access.


Patient Name: TEST TEST
Date of Birth: 24 January 1985
NHSBT Number:
See Case Note Numbers
NHS Number: No NHS Number
Sex: Female
< Unfile File & Next > Back < Cumulative > Print Audit Trail
Reported 20 Aug 2012 14:51
Specialty RCI
Location T146M
Clinician KIELY, BARBARA (Not Specified)
Status F
Filed by HA Test1 (Test Test) at 22 Aug 2012 11:23, Reason: Report has been actioned
Additional information is available for this report
RCI Report (20 Aug 2012
Audit Trail For Report 09913110201055 -- Webpage Dialog
Date | Username | Full Name | Action | Reason
22 Aug 2012 11:24 | HA Test1 | Test Test | Report viewed
22 Aug 2012 11:23 | HA Test1 | Test Test | Report viewed
22 Aug 2012 11:23 | HA Test1 | Test Test | Report filed | Report has been actioned.
22 Aug 2012 11:22 | HA Test1 | Test Test | Report viewed
22 Aug 2012 11:21 | APLI0001 | Heather Aplin | Report viewed
22 Aug 2012 11:21 | APLI0001 | Heather Aplin | Report viewed
22 Aug 2012 10:26 | mellor0009 | NHSBT Gordon Mellor | Report viewed
22 Aug 2012 10:26 | mellor0009 | NHSBT Gordon Mellor | Report viewed
22 Aug 2012 10:26 | mellor0009 | NHSBT Gordon Mellor | Report viewed
22 Aug 2012 09:29 | APLI0001 | Heather Aplin | Report viewed
22 Aug 2012 08:07 | kiely0001 | Barbara Kiely | Report viewed
21 Aug 2012 16:05 | APLI0001 | Heather Aplin | Report viewed
21 Aug 2012 14:20 | APLI0001 | Heather Aplin | Report viewed
21 Aug 2012 14:20 | APLI0001 | Heather Aplin | Report viewed
21 Aug 2012 14:09 | APLI0001 | Heather Aplin | Report viewed
21 Aug 2012 14:08 | APLI0001 | Heather Aplin | Report viewed
21 Aug 2012 14:07 | APLI0001 | Heather Aplin | Report viewed
A limited data set is
Sample 09913110201055 (F
ABO/RhD group
ABO/RhD group
Antibody Information
Antibody Specificity
Type
Technique
Sample Type
Anti-D Quantitation
Antibody Information
Antibody Specificity
Type
Technique
Sample Type
Anti-K Titre

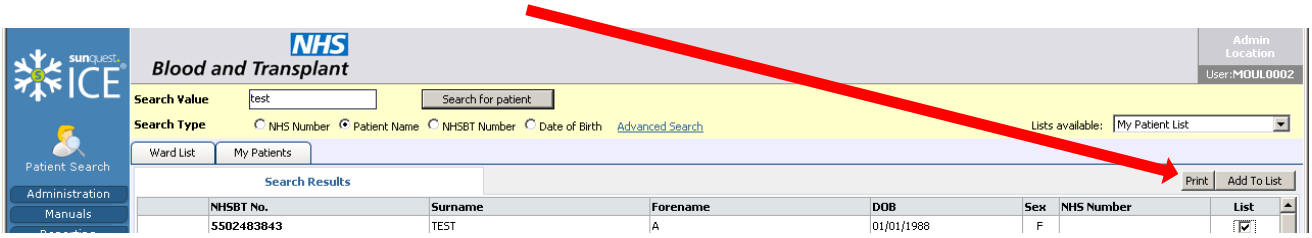
4.6 Creating & amending patient lists

Adding a patient to a List

- Search for a patient as in section 4.3.
- Select a list from the ‘Lists available:‘drop down list e.g. ‘My Patients‘.

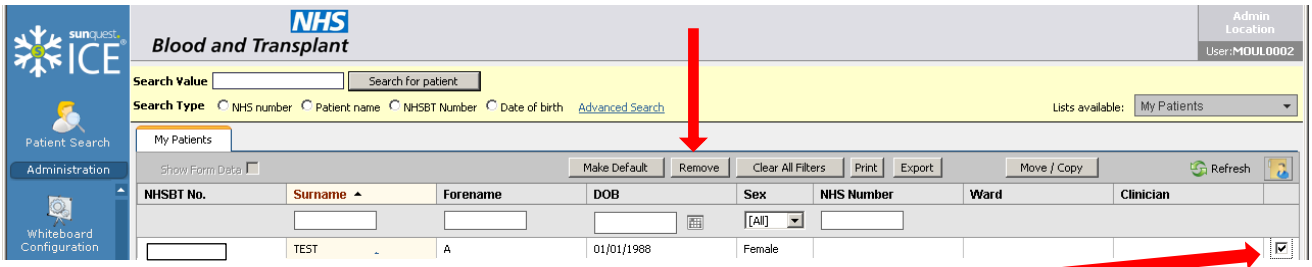


- Click on the ‘List‘ box to tick.
- Click the ‘Add to List‘ button.



- Patient appears on list e.g. ‘My Patients‘.

Removing a patient from a List



- Click the box to the far right of the patient to tick.
- Click on the ‘Remove‘ button.

4.7 Closing Sp-ICE

- To exit the application, select the **Log off** button (located at the bottom of the left-hand tool bar).

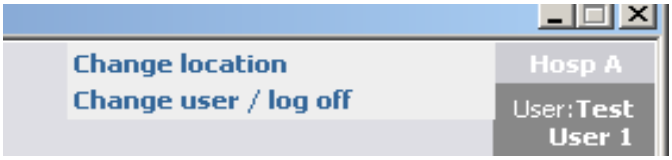
- The user can then exit the application completely by clicking on **Log off and close window**.

Alternatively

- The user can exit the application but leave it running for someone else to log on by:
  - Clicking the **Change User** button.

OR

  - Selecting “Change user/log off” in the top right hand corner after hovering over the hospital location (Hosp A in the example below).



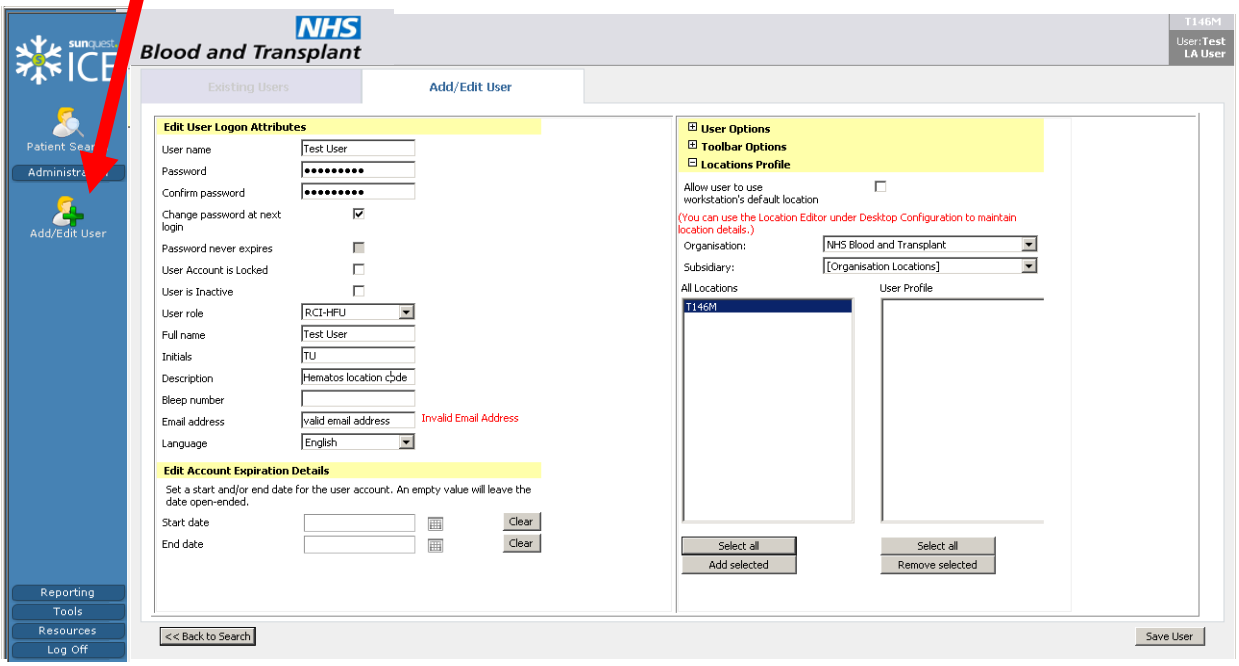
This will log the user off but display the login screen for the next user

5. Local Hospital System Administration

5.1 Add a new Sp-ICE user account

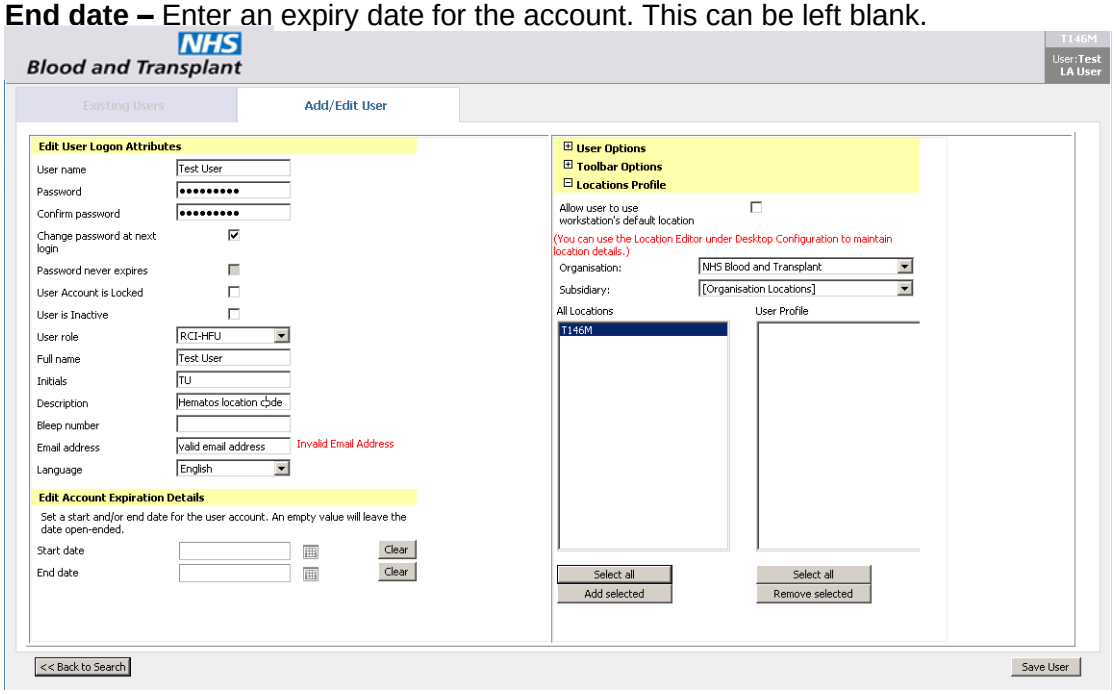
Note: Generic accounts must NOT be created. NHSBT will check for generic accounts and request they are deactivated.

- Log into Sp-ICE using your local administrator account
- Click “Add/Edit user” from the tool bar in the “Administration” tab.



- A screen is displayed where you can either add a new user or search for existing users.
- Click “Add new user…” button at the right of the screen to move from the ‘Existing Users’ tab to the ‘Add/Edit User’ tab.

- **User name –** Enter a user name. A warning will be displayed when you save the user if the username has already been used (possibly by a different organisation).
- **Password –** Enter a password for the user (minimum eight characters including at least one number).
- **Confirm password –** Re-enter the same password for the user.
- **Change password at next login –** You must tick to force the user to change their password when they login for the first time.
- **Password never expires –** this is greyed out and cannot be changed.
- **User Account is locked –** This will be ticked if the user has locked their account by entering their password incorrectly 5 times.
- **User is Inactive –** Tick to inactivate a user account.
- **User role –** Select a suitable role for the user from the drop-down list. See Appendix 1 for details of roles.
- **Full name –** Enter the users Forename followed by Surname:
  - This information is displayed when a user has viewed a report.
- **Initials –** Enter the users' initials.
- **Description –** Enter your Hematos location code. This is not mandatory but is essential should you wish to retrieve a list of all the users and administrators set up for your location/s.
- **Bleep number –** Leave blank.
- **Email address –** Enter a valid organisational email address for the user:
  - Sp-ICE will display a message if an invalid format is entered.
  - If no email address is entered, the user will be unable to receive a new password via the "Forgotten Password" option. This would then require the user to contact the local administrator to reset their account.
- **Language –** Defaults to English.
- **Start date –** Enter an active from date for the account. This can be left blank.
- **End date –** Enter an expiry date for the account. This can be left blank.



- **User Options –** This is configured at role level by NHSBT, nothing can be changed.
- **Toolbar Options –** This is configured at role level by NHSBT, nothing can be changed.
- Expand **Locations Profile:**
  - **Allow user to use workstation's default location –** leave un-ticked.
  - **Organisation –** Leave as "NHS Blood and Transplant".

- **Subsidiary –** Leave as “[Organisation Locations]”.
- **All Locations –** From the left hand column select the location code to which the user belongs and click “Add selected”. This adds that location to the “User Profile”. Some users may have more than one location allocated.
- A user **MUST** have at least one location code within their “User Profile”.
- If a user has a role that enables them to file reports they will be able to do so for any locations added to the “User Profile” section, when logged into that location.
- To remove a location from “User Profile” select the location and click “Remove selected” button.

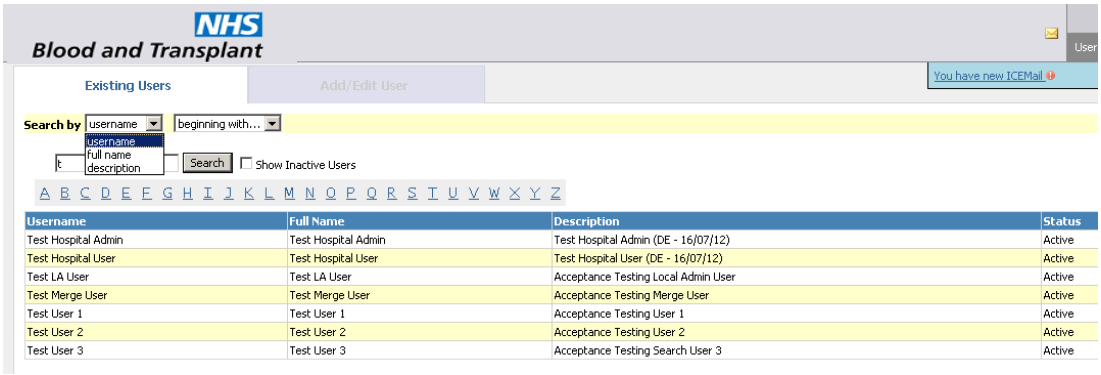
- Click “Save User” button to save the user account details.
- The screen returns to “Add/Edit User”.

Please note if any details entered are incorrect, an error message will appear in red; make corrections and click “Save User” button.

- Confirm the username to the user and advise them to use the forgotten password option.

5.2 Edit an existing Sp-ICE user account

- Log into Sp-ICE using your local administrator account
- Click “Add/Edit user” from the tool bar.
- Search for the user by Username or Full name selecting “beginning with” or “containing” from the second drop down. NB tick “Show Inactive Users.”
- A list of administrators and users for a location can be obtained by selecting Description from the first drop down, selecting “beginning with” or “containing” from the second drop down, and adding the location code to the search field.
- Click on the username you require to edit



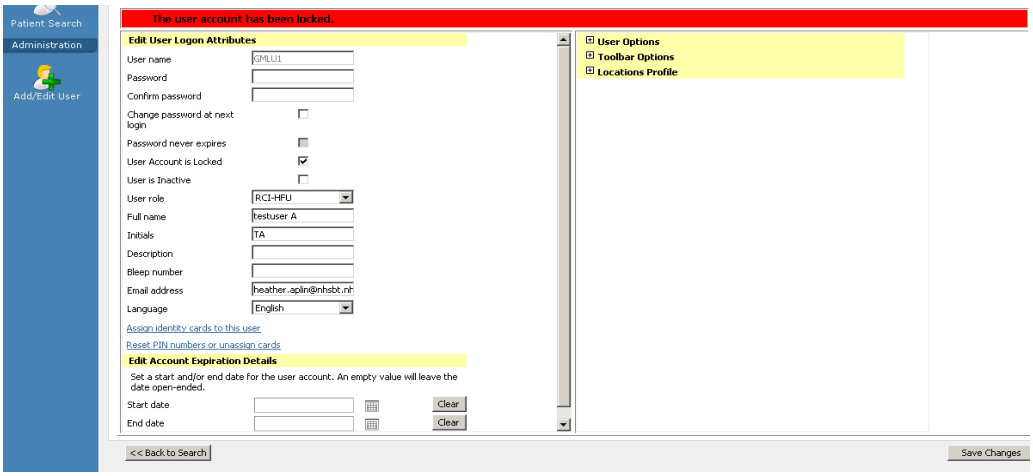
- Make the required changes to the user details and click “Save User” button.

Warning – If an administrator removes a location code from their own account, they will be unable to view user accounts with that location code. Location codes can be re-added by other hospital administrators with appropriate access or NHSBT.

5.3 Unlocking a user account

If a user has locked their account by incorrectly entering their password 5 times, then they will receive a message to contact their local administrator.

- Log into Sp-ICE using your local administrator account
- Click “Add/Edit user” from the “Administration” tool bar.
- Search for the user by Username or Full name selecting “beginning with” or “containing” from the second drop down (minimal details can be entered and name selected from resulting list). NB tick “Show Inactive Users.”
- Click on the username you require to edit.
- Un-tick the “User Account is Locked” box, the Change Password at next login box is automatically ticked.
- Click “Save Changes” button.
- Contact the user and instruct them to use the “Forgotten Password” option, which will send them a new password via email (if their account has their correct email address).



5.4 Inactivating a user account

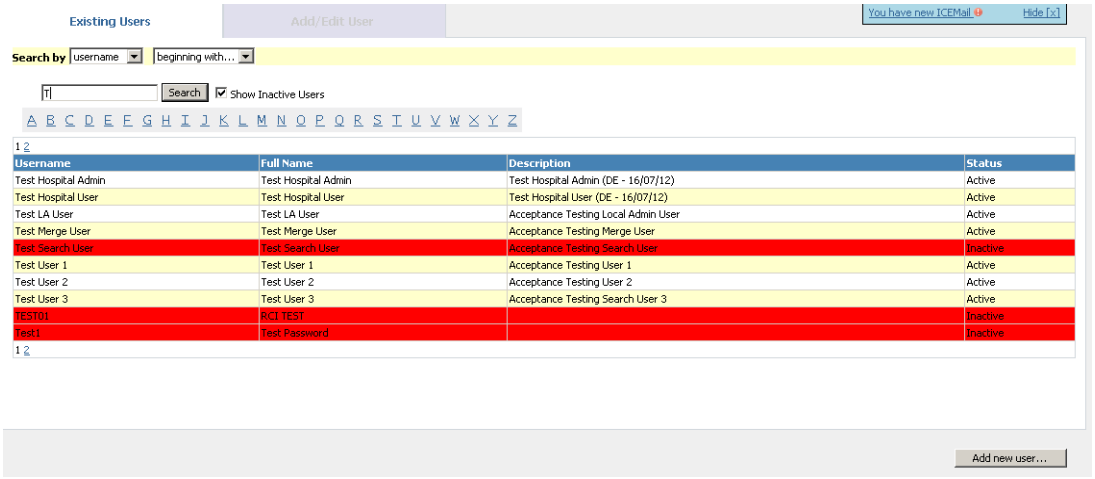
If there is a requirement to inactivate a user account; e.g. because they have left the organisation or have breached data protection guidelines, then it is the responsibility of the local administrator to set that account to inactive.

- Log into Sp-ICE using your local administrator account.
- Click “Add/Edit user” from the “Administration” tool bar.
- Search for the user by Username or by Full name selecting “beginning with” or “containing” from the second drop down (minimal details can be entered and name selected from resulting list).
- Click on the username you require to edit.
- Tick the “User is Inactive” box.
- Click “Save Changes” button.

5.5 Re-activating a user account

An account that was set to inactive can be re-activated if required.

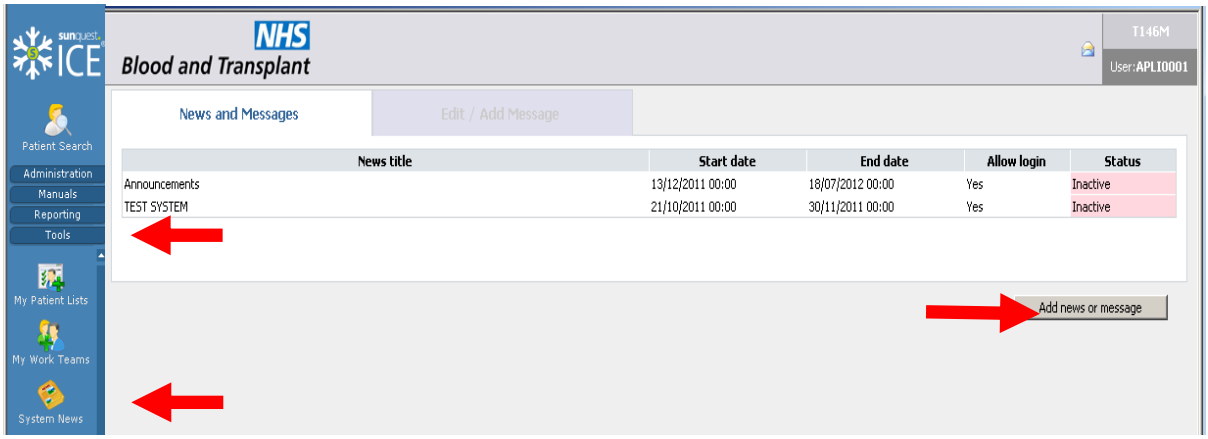
- Log into Sp-ICE using your local administrator account.
- Click “Add/Edit user” from the “Administration” tool bar.
- Search for the user by Username or by Full name selecting “beginning with” or “containing” from the second drop down, ensuring the “Show Inactive Users” box is ticked (minimal details can be entered, and name selected from resulting list).



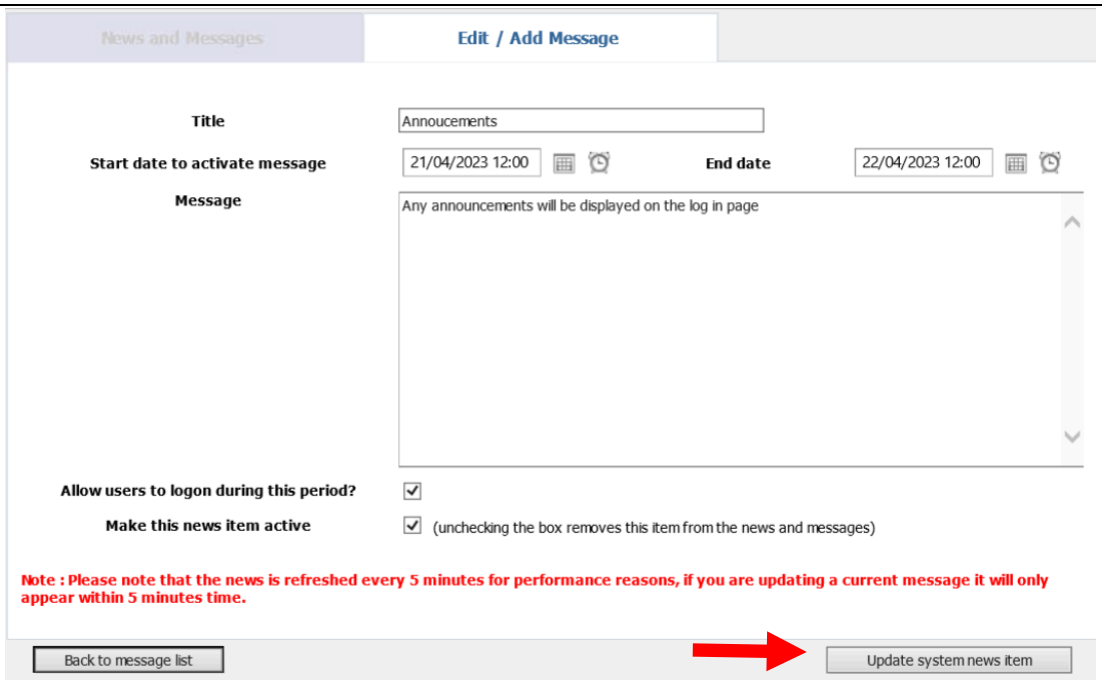
- Click on the username you require to edit, as the account is inactive it will be highlighted in red.
- Un-tick the “User is Inactive” box.
- Click “Save Changes” button.
- Contact the user and instruct them to use the “Forgotten Password” option, which will send them a new password via email (if their account has their correct email address).

6. Adding and Editing an Announcement (NHSBT only)

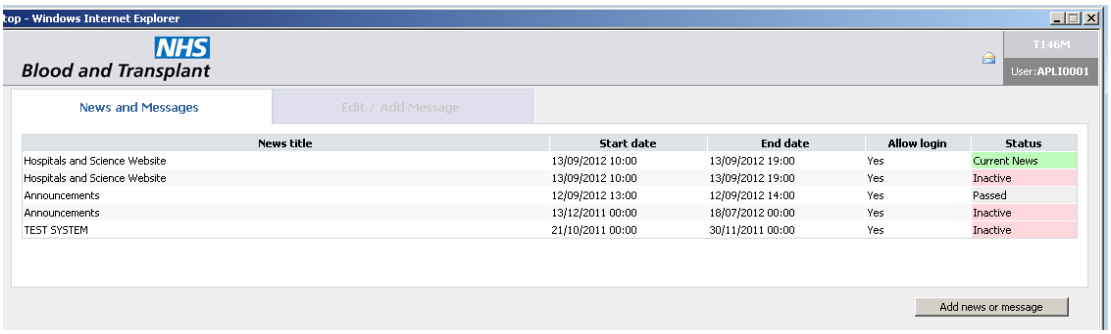
- Select “Tools”.
- Select “System News”.
- Select “Add news or message”.



- Add Title
- Select start and end dates.
- Add message (Please note there is no spellcheck but text can be composed in Word, checked then copy and pasted).
- Select “Update system news item”.
- Announcements are displayed on the login page.



- To edit an announcement, select the relevant announcement from the list.
- Edit as appropriate including removing from news and messages.
- Select “Update system news item”.



7. Support Arrangements

NHSBT provide support from 08:00 to 17:00 Monday to Friday, excluding public holidays. Contact details are as follows:

- Telephone – 0300 2000 173
- Email – service.desk@nhsbt.nhs.uk

Users must not contact the software supplier directly concerning any issues.

NHSBT will notify in advance of all planned system down time and a message will be displayed on the logon screen.

- For non-urgent results if there is an interruption to the Sp-ICE service, please try logging in one hour later.
- In the unlikely event of long interruptions to the Sp-ICE service NHSBT will inform hospitals of contingency arrangements via normal contingency planning communication routes.
- For urgent results, telephone your local RCI, IBGRL, H&I or CMT (SCI) department.

8. System performance and adverse event / incident reporting

- If you experience any system performance issues, please contact your local IT to ensure there are no local issues affecting your network.
- It is essential that any software issues or unexpected error messages are reported (contact details in 7 above) at the earliest opportunity. The priority / urgency of the call should be made clear. Please note errors in patient data must be reported to your local RCI, IBGRL, H&I or CMT (SCI) department.
- Any sustained performance issues and unresolved adverse events / incidents should be discussed with an NHSBT Customer Services Manager. A customer complaints / comments form is available from the Customer Services Manager for written notifications.

9. Software development and new versions

Software development and installation will follow NHSBT's software development life cycle and service transition methodology.

Software changes may result from a Request for Change (RFCs) which should for non-NHSBT staff be discussed with the NHSBT Customer Services Manager.

Routine software upgrades will be evaluated by NHSBT for their benefits, validated and implemented in accordance with an NHSBT release cycle. Essential “bug” fixes will take priority.

All NHS users will be kept up to date with planned developments through the monthly Update and the NHSBT website.

10. System back up and archiving arrangements

Sp-ICE is refreshed with new report data on an hourly basis and the entire system is backed-up each day. In the event of needing to restore the database, more recent data would be reloaded.

Sp-ICE contains:

- All RCI report data from 9th November 2011.
- The latest report from the most recent RCI sample from 31st October 2006 to 8th November 2011 for Red Cell Reference and Antenatal Reference reports (excluding routine antenatals and antibody cards).
- RCI report data with linked IBGRL genotype report from 27th November 2013.
- RCI report data with linked IBGRL red cell report from 8th May 2014.
- IBGRL Molecular Diagnostics reports from 27th November 2013.
- H&I report data from 28th November 2012.
- Reports from CMT (SCI) from 31st July 2015.

There is currently no intention to archive and remove data from Sp-ICE although system performance will be monitored closely, and this may be necessary at some point in the future. It is NHSBT’s intention to manage retention of data in compliance with the NHS Records Management Code of Practice.

Historical reports not uploaded to Sp-ICE will remain available through the Hematos LIMS and can be obtained by arrangement with the appropriate NHSBT Reference Laboratory Manager.

11. Sp-ICE related documentation

- FRM4116 – Information for Healthcare Organisations wishing to access NHSBT Diagnostic Results via Sp-ICE
- FRM4117 – Sp-ICE Hospital Administrator User Access Request
- SOP3620 – Creating Maintaining External User Accounts for Specialist Services Electronic Reporting System (Sp-ICE)
- SOP5099 – Creating or Updating Sp-ICE User Accounts for NHSBT Staff

Appendix 1 - Sp-ICE User Roles

Role	Description	Permissions
RCI-HFU	Hospital user who can view and file RCI reports	• Can access RCI results • Cannot access H&I results • Can file RCI reports for their location(s)
RCI-HU	Hospital user who can only view RCI reports	• Can access RCI results • Cannot access H&I results • Cannot file reports for their location(s)
H&I-HFU	Hospital user who can view and file H&I reports	• Can access H&I results • Cannot access RCI results • Can file H&I reports for their location(s)
H&I-HU	Hospital user who can only view H&I reports	• Can access H&I results • Cannot access RCI results • Cannot file reports for their location(s)
RCI/H&I-HFU	Hospital user who can view and file RCI and H&I reports	• Can access RCI and H&I results • Can file RCI and H&I reports for their location(s)
RCI/H&I-HU	Hospital user who can only view RCI and H&I reports	• Can access RCI and H&I results • Cannot file reports for their location(s)
RCI-LHA	Hospital administrator who can add RCI users and administrators, view and file RCI reports	• Can add/edit RCI users/administrators • Can access RCI results • Cannot access H&I results • Can file RCI reports for their location(s)

Continued

Sp-ICE User Roles Continued

Role	Description	Permissions
H&I-LHA	Hospital administrator who can add H&I users and administrators, view and file H&I reports	• Can add/edit H&I users/administrators • Can access H&I results • Cannot access RCI results • Can file H&I reports for their location(s)
RCI/H&I-LHA	Hospital administrator who can add RCI and H&I users and administrators, view and file RCI and H&I reports	• Can add/edit RCI and H&I users/administrators • Can access RCI and H&I results • Can file RCI and H&I reports for their location(s)
RCI-LHA-NF	Hospital administrator who can add RCI users and administrators, view RCI reports but not file any reports	• Can add/edit RCI users/ RCI-LHA-NF administrators • Can access RCI results • Cannot access H&I results • Cannot file RCI reports for their location(s)
CMT/H&I/RCI-HFU	Hospital user who can view and file RCI, H&I and CMT (SCI) reports	• Can access RCI, H&I and CMT (SCI) results • Can file RCI, H&I and CMT (SCI) reports for their location(s)
CMT/H&I/RCI-HU	Hospital user who can only view RCI, H&I and CMT (SCI) reports	• Can access RCI, H&I and CMT (SCI) results • Cannot file reports for their location(s)
CMT/H&I/RCI-LHA	Hospital administrator who can add RCI, H&I and CMT (SCI) users and administrators, view and file RCI, H&I and CMT reports	• Can add/edit RCI, H&I and CMT (SCI) users/administrators • Can access RCI, H&I and CMT (SCI) results • Can file RCI, H&I and CMT (SCI) reports for their location(s)

Continued

Sp-ICE User Roles Continued

Role	Description	Permissions
H&I-LHA	Hospital administrator who can add H&I users and administrators, view and file H&I reports	• Can add/edit H&I users/administrators • Can access H&I results • Cannot access RCI results • Can file H&I reports for their location(s)
NHSBT-SM[1]	NHSBT system manager	• Full system configuration access • Can access all results • Cannot file any results
NHSBT-SA[1]	NHSBT system administrator	• Limited system configuration access • Can access all results • Cannot file any results
NHSBT-SD[1]	NHSBT Service Desk	• Can access all results • Cannot file any results • Access to Add/ Edit user accounts
NHSBT-CS[1]	NHSBT Customer Services	• Access to Add/ Edit user accounts only
NHSBT-U1[1]	NHSBT user	• Can access all results • Cannot file any results

[1] These roles will only be available for selection by NHSBT system administrators

Appendix 2 - System management

Sp-ICE is managed by the NHSBT Clinical Services Product Centre Senior Delivery Lead supported by:

- Quality Assurance, Technical Assurance manager
- Clinical Systems Developers (CSD)
- Senior practitioners from Red Cell Immunohaematology (RCI), International Blood Group Reference Laboratory (IBGRL), Histocompatibility and Immunogenetics (H&I) and Cellular and Molecular Therapies (CMT) / Stem Cell Immunotherapy (SCI)
- NHSBT Service Desk

The Clinical Services Product Centre Senior Delivery Lead liaises with:

- NHSBT Systems and Securities Manager to assure the security of NHSBT confidential patient data
- NHSBT IT/Technical Services concerning system performance, integrity and development
- National Acceptance Manager concerning the testing of new software releases
- Configuration Control and Release Manager concerning new software releases
- NHSBT Customer Services concerning performance issues and external user perspectives
- Clinisys concerning system performance, integrity and development