

Briefing DSPTK-C: Using the Data Security and Protection Toolkit's parent org batch submission feature: step-by-step guide

This briefing has been designed to help community pharmacy owners with **three or more pharmacies** to use the [NHS Parent Organisation Code \(POC\)](#) batch submission feature when completing their submission for the 2023/24 Data Security and Protection Toolkit ('Toolkit'). The Toolkit POC batch submission feature enables one combined 'submission' for all the pharmacies 'linked' to that POC.

We recommend that pharmacy teams prepare early so that they are ready to use this feature later. If you have not used the DSPTK POC feature before, you may need to request the Exeter helpdesk switch on the feature.

This briefing is divided into four stages. Stages 1-3 should be completed as soon as possible, whereas Stage 4 should be completed after completing the first three stages and once you have begun to update your Toolkit and to fill in the new and changed questions.

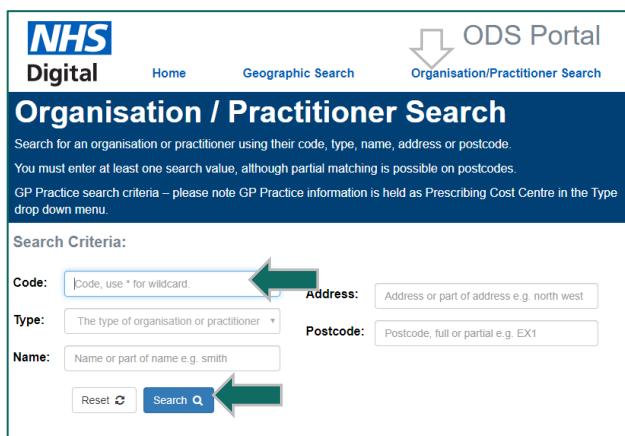
Stage 1: Assess whether the POC batch feature will be useful

Those with three or more pharmacy branches will find this feature most beneficial. However, those with only two premises can still use this feature. Pharmacy owners should only use the POC batch submission function if their responses apply to every branch selected and the individual completing the master submission coordinates the standards being met at each premises. If one or more of your branches has different policies, software, etc., then you should complete a separate assessment for each and assign a person responsible for each premise.

Stage 2: Use the ODS portal to check the pharmacies linked to your POC

Every pharmacy branch has an [Organisation Data Service \(ODS\) code](#) and a POC provided by NHS Digital's Organisation Data Service (ODS) team. One way to check whether all your pharmacies are associated with your pharmacy organisation POC is to use NHS Digital's ODS portal (see below):

1. Navigate to the [ODS portal organisation search](#). This enables you to search for pharmacies and relevant information like ODS and POCs (e.g., looking up by postcode). Use 'Organisation Search'.



The screenshot shows the 'Organisation / Practitioner Search' page of the NHS Digital ODS Portal. At the top, there are links for 'Home', 'Geographic Search', and 'Organisation/Practitioner Search'. The main search area is titled 'Organisation / Practitioner Search' with the sub-instruction 'Search for an organisation or practitioner using their code, type, name, address or postcode.' Below this, there is a 'Search Criteria:' section with four input fields: 'Code:' (with placeholder 'Code, use * for wildcard.'), 'Address:' (with placeholder 'Address or part of address e.g. north west'), 'Type:' (with placeholder 'The type of organisation or practitioner'), and 'Postcode:' (with placeholder 'Postcode, full or partial e.g. EX1'). At the bottom of the search criteria section are 'Reset' and 'Search' buttons, with a green arrow pointing to the 'Search' button.

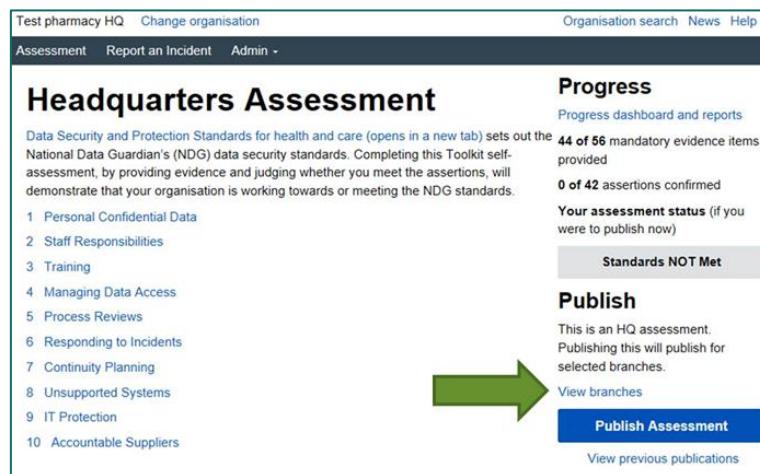
2. Search by typing an ODS code into the 'Code' field or by using one of the other fields to enter data about one of the pharmacies you own or work at and use the 'Search' button. Select the correct pharmacy from the list. Under the 'Parent' section, a code should start with 'P'. Select this to open the details for your Headquarters.
3. Information associated with that POC includes a section for the 'Pharmacy' list. The pharmacies may be 'hidden', but you can use on the downward facing (▼) arrow to 'unhide' the linked pharmacies as per the image on the right:
4. Pharmacy owners with many premises may alternatively find it easier to reconcile by following the further steps within stage 3 (in which the DSPTK Toolkit portal POC 'headquarters' section enables the spreadsheet (CSV file) export option).

Stage 3: Preparing for and using the Toolkit POC features

1. The ODS portal should let you check which pharmacies are linked to your POC (covered by 'Stage 2' above). Alternatively, you can check this using the Toolkit. You need to log in to the Toolkit to use POC features. To **Log in to the Toolkit portal**, visit the [Toolkit home webpage](#) and log in using the exact details (email address and password) you used last year.
Note: If you have forgotten your password, use the password reset option. If you are a new contractor who owns/is employed by a pharmacy that opened this year, then register to receive further login details by using the 'Register' option at the top right of the Toolkit webpage.
2. **Visit the 'Assessment' webpage of your account.** You may arrive at the 'Assessment' webpage immediately after you log in; you can also reach the webpage by selecting the 'Assessment' menu option.
3. **Check whether the POC batch feature is enabled.** If it is, then you should see 'headquarters Assessment' at the top of the page as per the image below:



You can also confirm that this is enabled by checking whether the 'View branches' option is visible'. This option appears at the far right-hand side of the screen under the 'Publish' heading, as per the image below:



The screenshot shows the 'Headquarters Assessment' page. On the left, a list of 10 items is shown. On the right, there is a 'Progress' section with statistics and a 'Publish' section. A green arrow points to the 'View branches' link in the 'Publish' section.

Note: If you have confirmed that the POC feature has not yet been enabled, but you want to use this feature, then you can request that the feature be facilitated by contacting the Exeter helpdesk (the necessary contact details are included at the bottom of this briefing). You can do so before the Toolkit deadline via email (this must be from the same address you used for your Toolkit login). Within your email, include your pharmacy name, ODS code(s), POC, name, phone number, position, and request to 'Please switch on POC HQ functionality'.

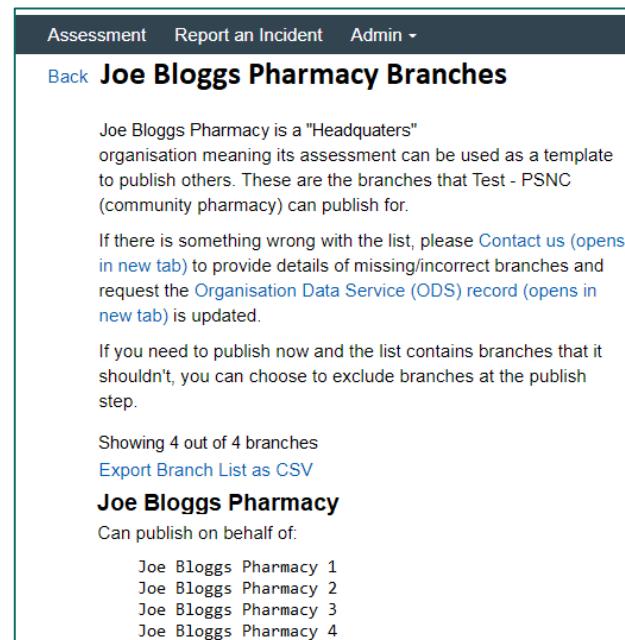
- 4. After the POC functionality is switched on, select 'View branches'. This appears at the far right-hand side of the screen under 'Publish' (see image on the top right of this page).**

- 5. View the list of pharmacy branches on the screen** (see image on the right).

- 6. Assess whether your branch list is now accurate.**

This is a priority step and should be done as soon as possible.

Note: You may also use the 'Export Branch list as CSV' option to download the list into a spreadsheet (which can be opened within Microsoft's Excel or an alternative spreadsheet program such as free-to-use OpenOffice spreadsheet software) that includes both the ODS code and the pharmacy name.



The screenshot shows the 'Joe Bloggs Pharmacy Branches' page. It displays a list of 4 branches: Joe Bloggs Pharmacy 1, Joe Bloggs Pharmacy 2, Joe Bloggs Pharmacy 3, and Joe Bloggs Pharmacy 4.

You can compare the Toolkit spreadsheet list with your records of pharmacy names and their ODS codes. If required, you can do this more than once during the year, e.g., if some branches have changed ODS code following changes.¹

You may also check the [ODS portal](#) (see page 1) because this allows a search of ODS and POCs and shows which pharmacies are associated with your POC. Pharmacy organisations with many premises may benefit from logging into the pharmacy POC pages and using the CSV export option mentioned above.

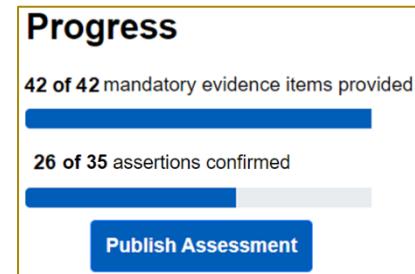
7. You can return to the DSPTK Organisation Profile webpage if needed.



Stage 4: Step-by-step POC batch process to complete

This briefing should be used alongside the upcoming Toolkit question-by-question 2023/24 guidance document (cpe.org.uk/ds). You should complete and ‘publish’ your Toolkit submission no later than **30th June 2024**. You may publish more than once before the deadline (this is explained further below).

1. **Use Community Pharmacy England’s question-by-question guidance to gradually work through the Toolkit questions within your ‘master submission’.** The questions are within the ‘Assessment’ section. You do not have to complete all the questions in one sitting; instead, you can complete them over weeks or months. The ‘Progress’ box on the right of the Assessment sub-page tallies mandatory evidence items (questions) and assertions (information submitted into a question) as you work through the questions. Your total confirmed assertions may be lower than the overall number seen (e.g. within image: ‘26 of 35’ is stated), even after you have completed all that is necessary.
2. **Determine when you will be ready to publish for some or all your pharmacies for the first time in the year:** Once you have sufficiently populated the Toolkit, ‘Standards Met’ should appear on the right-hand side (see image on the right) and, when ready, you may move to the next steps.



¹ **Note about the ODS reconciliation exercise for larger pharmacy owners with many pharmacies or owners with branches that changed ODS codes:** This reconciliation exercise may be re-performed more than once if necessary (e.g. every few months or after there has been an ODS code change at one or more of your branches) and you may choose to also perform the task closer to the time of when you plan your final DSPTK submission. Note that ODS changes close to the submission time may not be incorporated within time into the Toolkit’s ‘POC’. If any of your branches have recently gone through the ODS change process note that the ODS change process can take a minimum of one calendar month to complete. Read more at Community Pharmacy England’s [ODS change checklist](#). The Exeter helpdesk can be contacted but the Exeter helpdesk and the ‘POCs’ databases rely on the data from the NHS Digital ODS team who in turn rely on others such as Primary Care Support England (PCSE), NHSBSA and the NHS Digital ODS department to process the ODS change within the usual timescales. Community Pharmacy England is working with others to further streamline the processes involved with ODS changes.

3. **Prepare to publish your DSPTK submission for the first time this year:** Once you are ready, confirm 'Publish'. This will move you towards the pharmacy selection screen.
4. **Select which pharmacy branches you currently wish to publish for.** You can post more than once after completing the Toolkit questions because the assessment is a "living" document which can be updated when there is a change to the relevant information during the year. For your first publishing, you can select which pharmacy branches you wish to publish, e.g., all or only some. If a 'select all' option is available, use that as needed or toggle specific branches to make your selection.
Note i: Some small pharmacy chains prefer a batch submission for most pharmacies, but for certain branches to complete their submission. This is allowed.
Note ii: Consider if an ODS code change occurs close to your final submission time.²
5. **Publishing again is an option available (before the deadline). Still, it is not required:** There is a requirement to make at least one submission during each annual toolkit submission period for each pharmacy branch, but you may choose to publish again, e.g., if new information is entered into one of the questions, or you wish to make a separate submission for different premises. Each time you publish, you must select your pharmacy branch. Once you are satisfied with your final submission(s), your use of the batch feature is completed for the year.

Further information

Read more at cpe.org.uk/dsptk, including the [Toolkit](#) and [Question-by-question guidance](#).

About the Exeter Helpdesk technical support: Technical requests may be emailed to exeter.helpdesk@nhs.net or tel: 0300 303 4034. The Exeter helpdesk explains on their website: "We deal with calls in order of receipt and respond as quickly as possible. *Occasionally, it can take longer for us to respond during hectic periods. Please wait five days before escalating unless your call is particularly urgent.*" The helpdesk receives most of its calls in the last few weeks of the financial year, so completing your assessment (and raising any helpdesk calls) is helpful as early as possible. The Exeter helpdesk cannot instantly link or unlink pharmacies because it uses centralised NHS information flowing from NHS Digital's ODS team and Primary Care Support England (PCSE) – particularly following a change such as ownership.

Note: The Exeter helpdesk reference has a 'self-service portal', but this is hosted on what is known as the 'nww' network area of the internet, which generally will not be accessible to pharmacy teams because it will not have been white-listed by IT support bodies.

If you have queries on this Community Pharmacy England Briefing or require more info, please contact [Daniel Ah-Thion, Community Pharmacy IT Policy Manager](#) or [Katrina Worthington, Regulations Officer](#).

² If there has been a recent ODS change at one of your branches, and this is unlikely to be processed in time for your final master submission,

Read Community Pharmacy England's step by step guide:

- [Preparing for and using the Toolkit HQ batch feature](#)