



Your guide to using North Somerset Quit Manager (QM) 2026

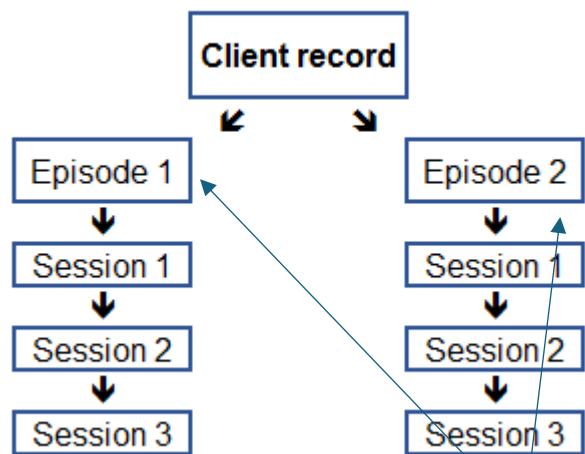
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Introduction:

Quit Manager (QM) is an internet-based database used to record the data on individual quit attempts, the website address is <https://nsomerset.quitmanager.co.uk>
It can also be used to record referrals to Smokefree North Somerset.

There are 3 levels to the system:



Client record:

Every client who accesses the Smokefree North Somerset service will have their own unique reference number and record on the system.

Episode:

Each quit attempt, known as an episode, either creates a new client record or is added to a client's previous record.

Episodes can take place in different settings, e.g. episode 1: at a drop-in; episode 2: within the client's GP surgery; episode 3: within a pharmacy. Some clients make one quit attempt while others may make several.

Session:

Each episode contains several sessions, these are the individual appointments that an advisor has weekly or fortnightly with their client.

Login:

- When you click the QuitManager link <https://nsomerset.quitmanager.co.uk> you will be taken to the login screen shown below.
- Enter your Username and Password and click [Login](#)



HealthManager Login

Username

Password

[Log in](#)

This application is only for use by authorised personnel. You must be registered to use the system and will be required to log in to authenticate your status.

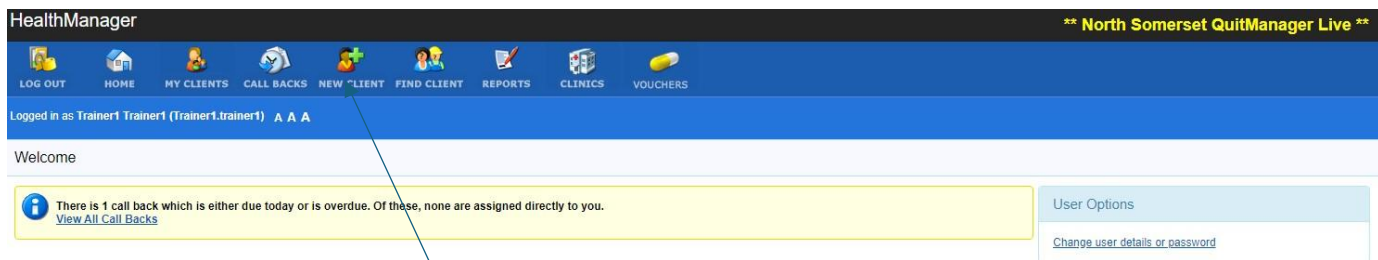
[Forgotten Password?](#)

Designed and developed by Renical Solutions
Version: 4.2024.7.9 Released: 05-Jul-2024

- Keep your login and password safe and do not share them with anyone else.
 - **Please read the Hints and Tips at the end of this document, before continuing.**
 - **Please note: You may not have access to all the icons or menu options that are shown in these notes. If you are missing something that you think you need, please contact Smokefree North Somerset who will review your access level.**

Starting off – Home page:

- This is the welcome page you will see at every login and where you can view the clients you have put onto the system.



HealthManager ** North Somerset QuitManager Live **

LOG OUT HOME MY CLIENTS CALL BACKS **NEW CLIENT** FIND CLIENT REPORTS CLINICS VOUCHERS

Logged in as Trainer1 Trainer1 (Trainer1.trainer1) A A A

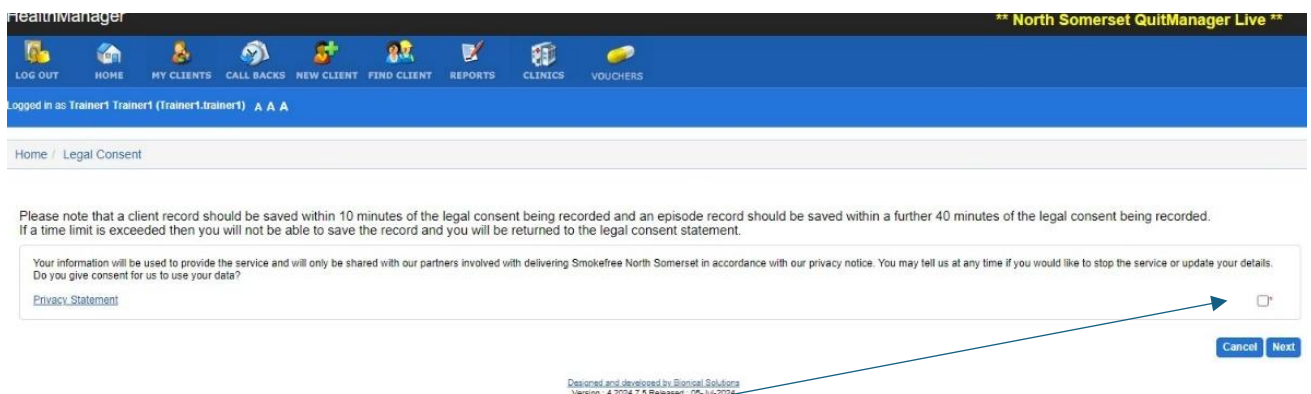
Welcome

There is 1 call back which is either due today or is overdue. Of these, none are assigned directly to you.
[View All Call Backs](#)

User Options
[Change user details or password](#)

Recording a New Client:

- Click on the [New Client](#) logo.



HealthManager ** North Somerset QuitManager Live **

LOG OUT HOME MY CLIENTS CALL BACKS **NEW CLIENT** FIND CLIENT REPORTS CLINICS VOUCHERS

Logged in as Trainer1 Trainer1 (Trainer1.trainer1) A A A

Home / Legal Consent

Please note that a client record should be saved within 10 minutes of the legal consent being recorded and an episode record should be saved within a further 40 minutes of the legal consent being recorded. If a time limit is exceeded then you will not be able to save the record and you will be returned to the legal consent statement.

Your information will be used to provide the service and will only be shared with our partners involved with delivering Smokefree North Somerset in accordance with our privacy notice. You may tell us at any time if you would like to stop the service or update your details. Do you give consent for us to use your data?

[Privacy Statement](#)

☐

[Cancel](#) [Next](#)

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- Tick the consent box
- **Please ensure the client is aware that by accepting this service their information will be shared with North Somerset Council**

HealthManager

** North Som

LOG OUT

HOME

MY CLIENTS

CALL BACKS

NEW CLIENT

FIND CLIENT

REPORTS

CLINICS

VOUCHERS

Logged in as Trainer1 Trainer1 (Trainer1.trainer1) A A A

New Client

Fields marked with an * are required fields.

Forename *

Surname *

Date of Birth (dd/mm/yyyy) *

Gender *

Do you identify as a transgender person?

NHS Number

Create Client

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Version : 4.2024.7.5 Released : 05-Jul-2024

- Enter the requested information and click **Create Client**. (You do NOT need to input the NHS number or the transgender question unless you ticked other).
- After you have entered the information, Quit Manager checks if there has been a previous episode e.g. date of birth. A screen may appear with a possible matching client. If an exact or close match is found the information will be displayed as below

HealthManager

** North Somerset QuitManager Live **

LOG OUT

HOME

MY CLIENTS

CALL BACKS

NEW CLIENT

FIND CLIENT

REPORTS

CLINICS

VOUCHERS

logged in as Trainer1 Trainer1 (Trainer1.Trainer1) A A A

New Client > Test, Test, 17/10/1984, Male

Matching Clients

There are a number of clients which are similar to the new client you are adding. The details you have entered match 3 other clients.
These are all close matches i.e. some of the details match but not all of them. The matching criteria is highlighted in the results.

Exact Matches (0)

Close Matches (3)

ID	Name	NHS No	Gender	Ethnicity	Registration Date	PCT	GP/Practice	Address	Select
28923	Hedgehog, Dave - 17 Oct 1984		Male	White English/Welsh/Scottish/Northern Irish/British	17 Sep 2024	NORTH SOMERSET	CLEVEDON MEDICAL CENTRE	Castlewood Tickenham Road Clevedon BS21 6FW	Select
28917	Test, Tester - 17 Oct 1984		Male	White English/Welsh/Scottish/Northern Irish/British	11 Sep 2024	NORTH SOMERSET	GRAHAM ROAD SURGERY	1 Tickenham Road Clevedon BS21 6FW	Select
28972	The Tiger, Tony - 17 Oct 1984		Male	White English/Welsh/Scottish/Northern Irish/British	25 Sep 2024	NORTH SOMERSET	CLEVEDON MEDICAL CENTRE	1 Tickenham Road Clevedon BS21 6FW	Select

Create New Client

Start Again

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- **Registration date** is the date you first see the client.
- **Consent** Ask the client if they agree to being contacted in the various ways listed and explain that SMS text messaging is the main way Smokefree North Somerset contacts clients for follow up.
- **You can ignore the client details section** unless appropriate
- Enter client's **postcode** and click [Find Address](#) then select the correct address or one similar from the list making any necessary amendments. It is important you use this feature, do not manually enter the address unless the system cannot find one.
- **Contact details** – enter as many as you need to contact your client – please input mobile phone numbers without spaces. If only a mobile phone number is given, please add this in the **Mobile box only**.
- **Ignore** 'Preferred Methods of Contact, Interpreter Needed, and Preferred Language' unless appropriate.
- **Episode Details:**
- **Pregnancy and Breastfeeding** - complete if applicable.
- **GP/Practice** – click on [Practice](#), enter the Practice name (first three letters) and click [Find](#).
- **Ethnicity** – choose from the drop-down list. Select [Unknown](#) or [Declined](#) if you don't know
- You can ignore- **Do you consider yourself disabled**. Complete if applicable.
- **Occupation** – choose from the drop-down list. If your client does not give an occupation, then select [Unable to Code](#). **PLEASE DON'T LEAVE THIS BLANK.**
- **Pays for prescription** – select from the drop-down list. If your client is unsure select [Unknown](#). **PLEASE DON'T LEAVE THIS BLANK.** If a client is over 60, prescriptions will be free.
- **How Heard** – choose from the drop-down list or select [Other](#) if applicable. Leave blank if option is not available.

- **Referrer** – can either be left blank or choose from the options on the drop-down list. if [Other](#) is selected, choose from the options available e.g. Been Before, School Nurse, Internet.

Service Details

- Important **Quit Date** – client's chosen date to stop smoking. - This box must be completed even if the quit date has not yet been decided. (If necessary, adjustments can be made after details have been saved, by choosing [Edit Episode Details](#)).
- **Date of last Cigarette** – please leave this blank.
- **Service Provider** – the details of your setting i.e. GP Surgery/Pharmacy/Other should automatically appear in the Service Provider field. If not, select your base from the available options.
- **1st appointment date** – this should match the **Registration date**.
- **Advisor** – select your name from the drop-down box if not already showing or select another advisor from your setting.
- **Intervention Type** – choose the appropriate option, telephone or one to one if seeing face to face
- **Intervention Setting** – this should automatically prefill based on the information in the Service Provider box i.e. if Service Provider is a GP Surgery, the intervention setting should default as General Practice setting. If blank, please select your setting type.
- When all boxes are completed click [Create Episode](#). The following screen will then appear:

HealthManager ** North Somerset QuitManager Live **

LOG OUT HOME MY CLIENTS CALL BACKS NEW CLIENT FIND CLIENT REPORTS CLINICS VOUCHERS

Logged in as Trainer1 Trainer1 (Trainer1.Trainer1) A A A

30161 - Example, Client1 {DOB - 09/06/1969 | Age - 55} Under 16 ✖

Ep No : 1 Registration Date : 06 Nov 2024 Service : Added to One to One PCT : North Somerset Status : In Progress [Book Forthcoming](#) Pregnant : ✖ Breast Feeding : ✖

Client Client Details

Episode 1

Episode Details Address Medical Sessions Vouchers Follow Up Mark Complete Client Letters Client Activity

Episode Summary

Options : [Print Client Sheet](#)

The new episode has been successfully created.

Review the Episode Details below. Fields marked with a * are required fields.
Last Update : 06 Nov 2024 14:51 (Trainer1 Trainer1)

Episode Details

Status	: Episode In Progress	GP	: Not Specified
Registration Date *	: Wed 06 Nov 2024	Practice *	: Not Specified
Quit Date	:	Pays For Prescription	: Unknown
Date of last Cigarette	:	Interpreter Needed	: ✖
1st Appointment Date	: Take up : Not Specified	Preferred Language	: Not Specified
Occupation	: Unknown	Has Dependent Children	: No
Advisor	: Trainer1 Trainer1		
Planning a pregnancy	: ✖		
Pregnant	: ✖		
Breast Feeding	: ✖		

[Edit Episode Details](#)

Contact & Referral Information

Primary Contact	:	How Heard	: Not Specified
Telephone No.	:	Referrer	: Not Specified
Alternative Contact Tel	:		
Mobile No.	:		
Email	:		

Service Information

Service Provided *	: Added to One to One Name: Telephone Support Full Address: Castlewood, Tickenham Road, Clevedon, Somerset, BS21 6FW, BS21 6FW
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- If you need to amend or add anything to the episode click on [Edit Episode Details](#).

Sessions screen:

- Select **Sessions** from the list on the left-hand side.

HealthManager

LOG OUT HOME MY CLIENTS CALL BACKS NEW CLIENT FIND CLIENT REPORTS

Logged in as Trainer1 Trainer1 (Trainer1.Trainer1) A A A

30161 - Example, Client1 {DOB - 09/06/1969 | Age - 55}

Ep No : 1 Registration Date : 06 Nov 2024 Service : Added to One to One PCT : North Somerset Status : Appointment

Client Client Details

Episode 1

Episode Details Address Medical Sessions Vouchers Follow Up Mark Complete Client Letters Client Activity

Episode Summary

The new episode has been successfully created.

Review the Episode Details below. Fields marked with a * are required fields.
Last Update : 06 Nov 2024 14:51 (Trainer1 Trainer1)

Episode Details

Status	: Episode In Progress	GP	: Not Specified
Registration Date *	: Wed 06 Nov 2024	Practice	: Not Specified
Quit Date	:	Pays For Prescription	: Unknown
Date of last Cigarette	:	Interpreter Needed	: ✖
1st Appointment Date	: Take up : Not Specified	Preferred Language	: Not Specified
Occupation	: Unknown	Has Dependent Children	: No
Advisor	: Trainer1 Trainer1		
Planning a pregnancy	: ✖		
Pregnant	: ✖		
Breast Feeding	: ✖		

- Click on **Record Session outcome**

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LOG OUT HOME MY CLIENTS CALL BACKS NEW CLIENT FIND CLIENT REPORTS CLINICS VOUCHERS

Logged in as Trainer1 Trainer1 (Trainer1.Trainer1) A A A

30161 - Example, Client1 {DOB - 09/06/1969 | Age - 55} Under 16 : ✖

Ep No : 1 Registration Date : 06 Nov 2024 Service : Added to One to One PCT : North Somerset Status : In Progress [Book Forthcoming](#) Pregnant : ✖ Breast Feeding : ✖

Client
Client Details
Episode 1
Episode Details
Address
Medical
Sessions
Vouchers

Sessions

Valid 4 week follow up range:

[Book Appointments](#) [Record Session Outcome](#)

Sess No	Date	Attended	How Conducted	Quit	CO	4 Wk F/U	Medication	Created By	Options
---------	------	----------	---------------	------	----	----------	------------	------------	---------

- If there is no quit date on the first screen you will be prompted to enter it before proceeding.

Record Session

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LOG OUT HOME MY CLIENTS CALL BACKS NEW CLIENT FIND CLIENT REPORTS CLINICS VOUCHERS

Logged in as Trainer1 Trainer1 (Trainer1.Trainer1) A A A

30161 - Example, Client1 {DOB - 09/06/1969 | Age - 55}

Ep No : 1 Registration Date : 06 Nov 2024 Service : Added to One to One PCT : North Somerset Status : In Progress [Book Forthcoming](#) Pregnant : ✖ Breast Feeding : ✖

Client
Client Details
Episode 1
Episode Details
Address
Medical
Sessions
Vouchers
Follow Up
Mark Complete
Client Letters
Client Activity

Record Session

Review the Session details below. Fields marked with a * are required.

Quit Date :
Service Type : One to One
Clinic Name : Telephone Support, Castlewood, Tickenham Road, Clevedon, Somerset
Client Address :
GP Practice :

Session Date * :
Attendance :
Session Number : 1
How Conducted :
Session is 4 Week Follow Up :
Date of Last Cigarette :
(If changed from original date of last cigarette)
Quit Smoking :
CO Reading Attempted :
CO Reading : (a value of < 7.0 indicates a successful quit)
CO Confirms :
Quit Status :
Medication # 1 : Type/Formulation :
Medication # 2 : Type/Formulation :
Medication # 3 : Type/Formulation :
Medication Voucher No :
Unlicensed NCPs : ☐ e-cigarette
Has the unlicensed product been used concurrently or consecutively with a licensed product?
☐ Concurrently ☐ Consecutively

- **Session Date** - date you saw or phoned your client for current appointment.
- **Attendance** - this will give options e.g. Attended or various DNA reasons.
- **How conducted** - 'In Person' or via telephone etc.
- **Session is a 4 Week Follow-Up** - QM automatically calculates the range of dates in which to complete the 4 week follow-up. QM also highlights 'This client is now in the valid 4 week follow up period' at the top of the **Sessions** screen. So if this does not appear click NO
 - It is important that the 4 Week Follow-Up occurs between the dates shown because it makes it a valid Department of Health quit. (If necessary, adjust the quit date before doing the 4 Week Follow-up session. Remember if you adjust the quit date, follow up dates will also change. You may need to ask us to go into the system to edit the session).
 - If we have reminded you that a follow up is overdue, you will need to do the follow up by choosing - Follow up on the left-hand side of the episode summary, rather than session and enter this manually. In order to be a valid D of H quit the follow up date will need to be within the allowed time so you may need to pick a date nearest to when you did the follow up that falls between these dates, if they are not quit or LTFU this will not matter and you can just put in the actual date you tried to contact the patient. Please see follow up screen section below.
- You can ignore **date of last cigarette** – Do not fill in.
- **Quit Smoking** - this will either be Yes or No, usually No on a first session
- **CO Reading Attempted** - Yes or No.
- **CO Reading** - Please note that QM counts anything under 6 as a quit reading.
- **Ignore medication Voucher number**

The screenshot shows a form for entering medication details. It has three rows for Medication #1, Medication #2, and Medication #3. Each row has dropdowns for 'Type/Formulation' and 'Specific Medication', a 'Supply Given' dropdown, an 'Expiry Date' field, and a 'Batch Number' field. Medication #1 is filled with 'Patch', '25.00mg Nicorette 16 hour (Qty: 7)', '2', and an empty expiry date. Medication #2 is filled with 'E-Cig', 'Generic Vape Starter Kit - Voucher Code (Qty: 1)', '1', and an empty expiry date. The 'Swap To Stop' checkbox for Medication #2 is checked. Medication #3 is empty. Below the rows, there is a checkbox for 'e-cigarette' and a question: 'Has the unlicensed product been used concurrently or consecutively with a licensed product?' with radio buttons for 'Concurrently' and 'Consecutively'.

- **IT IS VERY IMPORTANT THAT MEDICATION DETAILS ARE ADDED ON THIS SCREEN.** Click on Medication 1 then choose your option, and add specifics such as 25mg patch and number of weeks worth given (2 weeks worth of patches is 14 but supply given will be 2). Add any further medication in the next box. If receiving a swap to stop kit from us, the medication listed as generic vape starter kit, supply 1 and please tick the swap to stop box
- **Unlicensed NCPs** (nicotine containing products) - Add in if the client is using an vape, either before/ after or alongside the treatment you are offering. Either their own or one supplied by smokefree.
- Use the **Comments Box** to write anything you feel is necessary.
- Once all the information is entered click on [Save](#).
- You can view the session anytime by clicking on [Sessions](#)
- When the session has been recorded you **will not be able to edit it**. (Contact Smokefree North Somerset for requests to edit information).
- Repeat this process for every client appointment, including updating the **Session** screen if the client **Does Not Attend (DNA)**.
- **IMPORTANT – the Week 4 Follow-Up Session:** It is very important that the Week 4 Follow-Up Session is fully and correctly completed in the allowed timescales i.e. the date **MUST** be between days **25 and day 42 after the quit date**, and the 'Session is 4 week follow up' is **YES**.
- **4 Week Follow-Up Session:**
 - **The 4 Week Follow-up Session is always four weeks after the quit date, not necessarily four weeks after the client's first appointment.**

Follow Up screen: this can be accessed if a session has not been completed

- It is important to complete this following the 4 week Follow-Up appointment.
- This screen should already be pre-filled from the previous session screens, however please check through the details.
- If you are not doing sessions or if your client has not returned you will need to check and update the Follow-Up screen as shown below (if it has not already been pre-filled from the Session Screens). **Important: It is necessary to complete this screen for both Not Quit and Lost to Follow Up clients.**

- Select **Follow Up** from the left-hand side menu.

HealthManager ** North Somerset QuitManager Live

LOG OUT HOME MY CLIENTS CALL BACKS NEW CLIENT REFERRAL FIND CLIENT REPORTS ADMIN CLINICS

REFERRAL TRACKING VOUCHERS

Logged in as Christine Jones (christine.jones) A A A

28917 - Test, Tester (DOB - 17/10/1984 | Age - 40) Under 16 :

Ep No : 1 Quit Date : 11 Sep 2024 Quit Status : Not Set Service : Added to One to One PCT : North Somerset Status : In Progress Book Pregnant : Breast Feeding : ☒

Client Client Details

Episode Summary Options : - Select Option - Print Client Sheet

Review the Episode Details below. Fields marked with a * are required fields.
Last Update : 11 Sep 2024 11:43 (Chris Miles)

Episode Details Edit Episode Details

Status	: Episode In Progress	GP	: Not Specified
Registration Date *	: Wed 11 Sep 2024	Practice *	: GRAHAM ROAD SURGERY (North Somerset)
Quit Date	: Wed 11 Sep 2024		: 22 GRAHAM ROAD
Date of last Cigarette			: WESTON-SUPER-MARE
1st Appointment Date			: BS23 1YA
Take up	: Not Specified	Pays For	: Yes - Pay For Prescriptions

- Using information from the client's quit status at 4 weeks, complete the screen as follows:

4 Week Status - Quit CO Verified:

16444 - Test, Test (DOB - 01/01/2000 | Age - 19) Under 16 :

Ep No : 2 Quit Date : 25 Dec 2018 Quit Status : Yes Service : Information Only PCT : North Somerset Status : In Progress Pregnant : Breast Feeding : ☒

Client Client Details

Episode 2 Episode Details

Follow Up Details Last Update : 24 Jan 2019 11:31 (Donna Davis)

Quit Date Tue 25 Dec 2018

Save Changes Cancel Changes

4 Week Follow Up (19 January 2019 - 05 February 2019)

4 week follow up completed?	Yes	Date completed	24/01/2019
Quit smoking at 4 weeks?	Yes	Date of Last Cigarette	
CO Validation attempted at 4 weeks?	☒	CO reading (ppm)	3
CO confirms non-smoking status?	☒		
Create 12 week call back on 4 week reached?	☐		

- 4 Week follow up completed – **Yes**.

Date completed - the date MUST be between day 25 and day 42 after the quit date.

The Department of Health will only validate a 4 week quit if the follow-up has been completed in the allowed time. If the date is outside of the range, the following message will appear:

Date completed	14/01/2019	 This will not count as a DH 4 week quit as follow up has not been completed in allowed period
----------------	------------	---

- If the date is outside of the range, please return to the session screens to look for a session that falls inside of the range and use this date on the follow up screen – if necessary, you may need to adjust the date to ensure it fits within the range.
- Quit smoking at 4 weeks – **YES**
- Date of last cigarette – **IGNORE THIS**
- CO Validation attempted at 4 weeks – **YES**
- CO Reading (ppm) - CO Confirms non-smoking status – **This should automatically change to Yes if the CO reading is below 10**
- Click [Save Changes](#).

4 Week Status - Quit Self Report:

QuitManager ** NHS North Somerset **

LOG OUT HOME MY CLIENTS CALL BACKS NEW CLIENT REFERRAL FIND CLIENT REPORTS ADMIN DASHBOARD

Logged in as Donna Davies (donna.davies) A A A

16444 - Test, Test (DOB - 01/01/2000 | Age - 19) Under 16 : .

Ep No : 2 Quit Date : 25 Dec 2018 Quit Status : Yes Service : Information Only PCT : North Somerset Status : In Progress Pregnant : ✗ Breast Feeding : ✗

Follow Up Details Last Update : 24 Jan 2019 11:31 (Donna Davies)

Quit Date Tue 25 Dec 2018

[Save Changes](#) [Cancel Changes](#)

[4 Week Follow Up \(19 January 2019 - 05 February 2019\)](#)

4 week follow up completed?	☒ Yes ☐ No	Date completed	24/01/2019
Quit smoking at 4 weeks?	☒ Yes ☐ No	Date of Last Cigarette	
CO Validation attempted at 4 weeks?	☐	CO reading (ppm)	
CO confirms non-smoking status?	☐		
Create 12 week call back on 4 week reached?	☐		

- 4 week follow-up completed – **YES**
- Quit smoking at 4 weeks – **YES**
- Date of last cigarette - **IGNORE THIS**
- Click [Save Changes](#)

4 Week Status – Not Quit:

QuitManager ** NHS North Somerset **

LOG OUT HOME MY CLIENTS CALL BACKS NEW CLIENT REFERRAL FIND CLIENT REPORTS ADMIN DASHBOARD

Logged in as Donna Davies (donna.davies) A A A

16444 - Test, Test (DOB - 01/01/2000 | Age - 19) Under 16 : .

Ep No : 2 Quit Date : 25 Dec 2018 Quit Status : Yes Service : Information Only PCT : North Somerset Status : In Progress Pregnant : ✗ Breast Feeding : ✗

Follow Up Details Last Update : 24 Jan 2019 11:31 (Donna Davies)

Quit Date Tue 25 Dec 2018

[Save Changes](#) [Cancel Changes](#)

[4 Week Follow Up \(19 January 2019 - 05 February 2019\)](#)

4 week follow up completed?	☒ Yes ☐ No	Date completed	24/01/2019
Quit smoking at 4 weeks?	☐ Yes ☒ No	Date of Last Cigarette	
CO Validation attempted at 4 weeks?	☐	CO reading (ppm)	
CO confirms non-smoking status?	☐		
Create 12 week call back on 4 week reached?	☐		

- 4 week follow-up completed - **YES**
- Date completed.

- Quit smoking at 4 weeks - **NO**
- Click [Save Changes](#)

4 Week Status – Lost to Follow Up (LTFU):

The screenshot shows the QuitManager interface for NHS North Somerset. The user is logged in as Donna Davies. The client being viewed is 'Test, Test' (DOB: 01/01/2000, Age: 19). The 'Follow Up Details' section shows the 'Quit Date' as 'Tue 25 Dec 2018'. The '4 Week Follow Up' period is '19 January 2019 - 05 February 2019'. The '4 week follow up completed?' field is set to 'Yes'. The 'Quit smoking at 4 weeks?' field is set to 'Lost To Follow Up'. The 'Date completed' field is set to '24/01/2019'. Other fields include 'Date of Last Cigarette' and 'CO reading (ppm)'. The left sidebar shows navigation options like 'Client Details', 'Episode 2', 'Address', 'Medical', 'Sessions', 'Medication', 'Follow Up', 'Mark Complete', 'Client Letters', and 'Client Activity'.

- If **after 2 phone calls** you have still been unable to contact the client, please record the 4 week status as - **Lost to follow-up. Record these calls in sessions**
- 4 week follow-up completed? – **YES**
- Date completed? – **date you made the second phone call** Quit smoking at 4 weeks? – **Lost to follow-up**
- Click [Save Changes](#)

*** If it becomes clear that the client is not continuing with the Quit Attempt before the 4 week follow-up appointment i.e. client tells you they no longer wish to quit or you have been unable to make any further contact with them, please complete the follow-up screen at that point, there is no need to wait until the date of the 4 week follow-up.**

Mark complete screen:

- When you have finished seeing a client for whatever reason i.e. they have completed 12 weeks of support with you, they are not quit at 2 weeks and don't want to continue, or they are Lost to Follow Up after 2 phone calls, then you need to mark the episode as complete.

QuitManager

LOG OUT HOME MY CLIENTS CALL BACKS NEW CLIENT REFERRAL FIND CLIENT REPORTS ADMIN DASHBOARD

Logged in as Donna Davies (donna.davies) A A A

16444 - Test, Test {DOB - 01/01/2000 | Age - 19}

Ep No : 2 Quit Date : 25 Dec 2018 Quit Status : Yes Service : Information Only PCT : North Somerset Status : In Progress

Client
Client Details

Episode 2
Episode Details
Address
Medical
Sessions
Medication
Follow Up
Mark Complete
Client Letters
Client Activity

Administrators

Episode Completion

To mark the episode as complete, please supply the reason and comments below. Fields marked with a * are required fields.

Reason for completion * :

Late IRS Return : ☐

Comments :

Marked complete by : Donna Davies

[Save Changes](#) [Cancel Changes](#)

- Select [Mark Complete](#) on the left-hand side.
- Select the 'Reason for completion' from the drop-down menu. The most used options will be 'Client completed service' – this can be used if the client has been either successful OR unsuccessful in their quit attempt. The other option will usually be 'Lost contact with client', this will be used for Lost to Follow-Up clients.
- Please add any comments that you feel relevant in the comments box and [Save](#)

My Clients:

QuitManager ** NHS North Somerset **

LOG OUT HOME MY CLIENTS CALL BACKS NEW CLIENT REFERRAL FIND CLIENT REPORTS ADMIN DASHBOARD

Logged in as Donna Davies (donna.davies) A A A

Current Clients

Filter

Clinic filter:

Advisor

Last Session Attended Date

Quit Date

Completion Date

4 Week FU Completed

Pregnant

[Filter List](#)

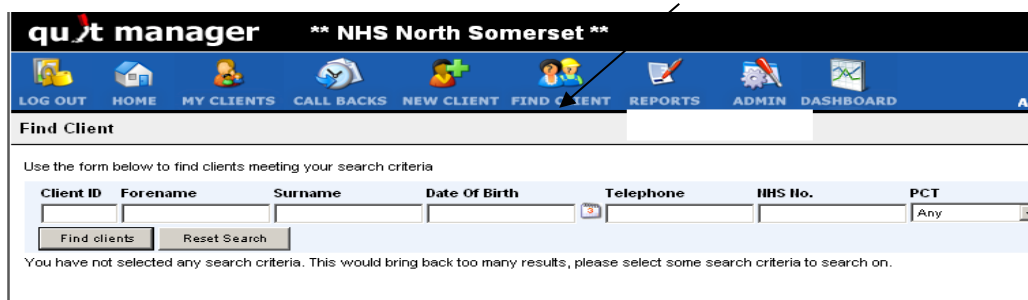
Current clients matching criteria : 247
Showing 1 to 25 of 247

Client Id	Ep No	Name	Registration Date	Advisor	GP & Practice	Quit Date	Last Session Attended	Quit @ 4 Wks
16444	2	Test_Test [01/01/2000]	Sat 31 Mar 2018	Davies Donna		Tue 25 Dec 18	Thu 24 Jan 19	Yes [Record Session] [Mark Complete]

- On this page you can search for your clients either by the drop down menus or by viewing the list of clients. If you are currently seeing a client and want to record a new session, click on [Record Session](#) or [Mark Complete](#) if they have completed the course.
- You can only view the clients from your setting.
- A client will be removed from the list when you mark an episode as complete. [Find Client](#) option on the toolbar or the home page if you have recently viewed them.

Find Client:

- You can search for a client using their unique reference number, name, date of birth, telephone or NHS number.



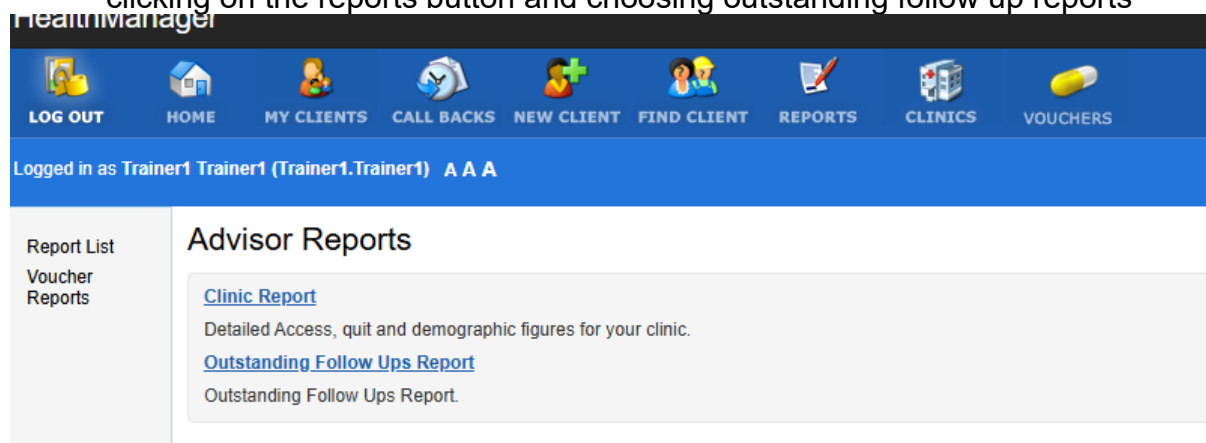
The screenshot shows the 'quit manager' interface for 'NHS North Somerset'. The top navigation bar includes links for LOG OUT, HOME, MY CLIENTS, CALL BACKS, NEW CLIENT, FIND CLIENT (highlighted with an arrow), REPORTS, ADMIN, and DASHBOARD. Below this is a 'Find Client' section with a search form. The form has a header 'Find Client' and a sub-header 'Use the form below to find clients meeting your search criteria'. The form contains several input fields: Client ID, Forename, Surname, Date Of Birth, Telephone, NHS No., and PCT. Below these fields are two buttons: 'Find clients' and 'Reset Search'. A message at the bottom states: 'You have not selected any search criteria. This would bring back too many results, please select some search criteria to search on.'

Hints and Tips:

- In most name fields, you do not need to put the capital letter at the front of a name as when you Tab, QuitManager will automatically change it for you. Exceptions include the second name of a double-barrelled name.
- In most date fields, you do not need to put the / in i.e. you could input a date as 150811 and QuitManager will automatically change it for you to 15/05/2011.
- Postcodes can be input without capital letters and spaces as QuitManager will automatically change it to the correct format for you. The Postcode system that is used is the Royal Mail system, so if it says Somerset/Bristol please do not change it to North Somerset. Also, if the postcode brings up a wildly different

address, the chances are the postcode is incorrect, therefore input the address, click [Find Address](#) and from there you will see the correct postcode.

- Contact consent options – when inputting a new episode, simply click on the [Load Previous/Default Consent Answers](#) button. This will then answer the consent questions as per the client's previous episode, or if they've not been before the default answer is Yes to all. Simply amend as necessary.
- In all instances the [Follow Up](#) screen needs to be completed, either via the Four Week Session screen or the actual [Follow Up](#) screen.
- The Four Week Follow Up date must be between 25 and 42 days after the Quit Date. If you are not seeing the client within these dates, you will need to call them to check smoking status.
- Due to the way Quit Manager is set you can only view data of clients who have been seen in your setting.
- Save QM to your desktop for quick and easy access or add it to your favourites.
- If you have forgotten your password please call Smokefree North Somerset on 01275 546744 to reset your password.
- You can check any outstanding follow up dues by running a report once a week from quit manager, to show when any follow up are due. You can do by clicking on the reports button and choosing outstanding follow up reports



Then choose a date range or the previous six months

healthmanager

** North Somerset QuitManager Live **

LOG OUT

HOME

MY CLIENTS

CALL BACKS

NEW CLIENT

FIND CLIENT

REPORTS

CLINICS

VOUCHERS

ogged in as Trainer1 Trainer1 (Trainer1.Trainer1) A A A

Report List
Voucher
Reports

Outstanding followup Report

PCT

North Somerset

Advisor

Trainer1 Trainer1

Due Date Start

01/01/2026

Due Date End

25/08/2026

This report will return all the outstanding followups that are due between the provided dates.
For example, given an episode with a Quit Date on the 11th of May, if no 4 week follow up has been recorded, and the due date start is the 5th of June and the due date end is the 5th of July, the 4 week followup will be returned.

Create Report

Then click run report. It will let you know who is due for a follow up