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Clinical Governance Practice Self Assessment Tool (CGPSAT) 2017/18

Tutorial

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Status: Final

Intended Audience: General Medical Practices completing the CGPSAT in 2017/18

Purpose and Summary of document:

This tutorial provides updated instructions for use with the updated on-line Clinical Governance Practice Self Assessment Tool (CGPSAT)

As well as:

- Directions for logging on
- How to navigate the FormBuilderTwo platform
- Screenshots giving a step by step guide through the CGPSAT and how it should be completed
- How to share your work in progress with other practices in your cluster or with your Health Board. Please note that this option is intended to support cluster development and is voluntary.
- Clarification of where resources can be found on the PCOne website

This document is intended for Welsh General Medical Practices and Health Boards that use the All Wales CGPSAT and should be read in conjunction with the other documents available on the [PCOne website](#)

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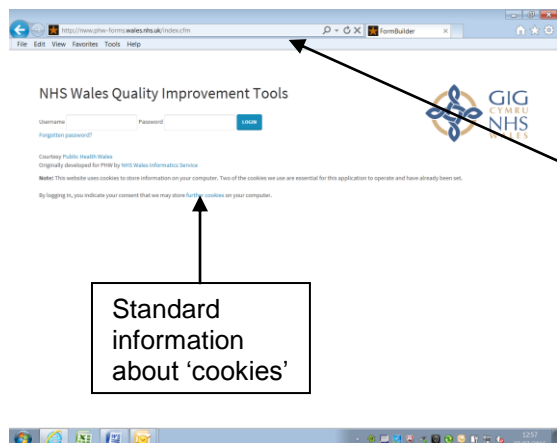
All Wales Clinical Governance Practice Self Assessment Tool for General Medical Practices

Please read these instructions carefully before you begin

1. Logging in

The CGPSAT can be accessed via <https://primarycareone.nhs.wales/technical/cgpsat/>.

Click on the link to the 'All Wales CGPSAT 2017/18', and you will then see the FormBuilderTwo login screen pictured below.

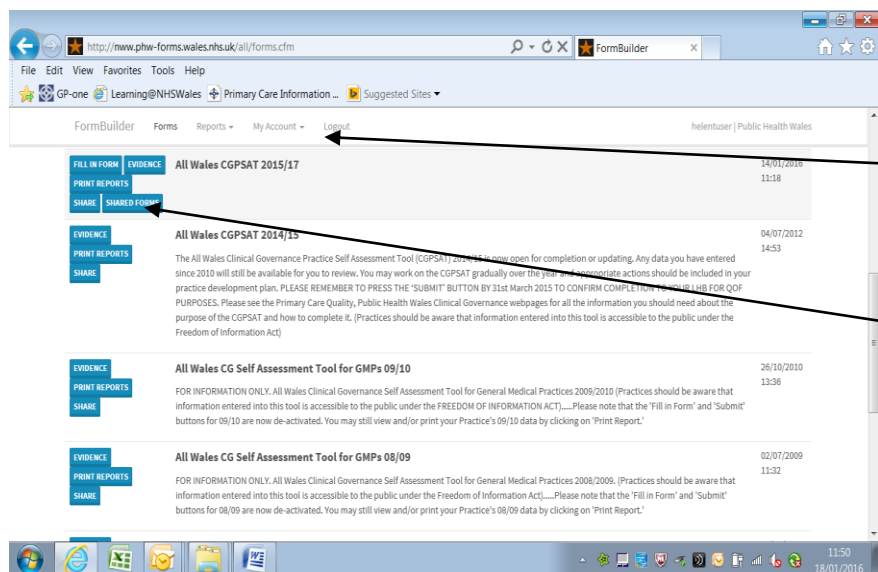


Note that the new address for FormBuilderTwo is: <http://nww.phw-forms.wales.nhs.uk>. If you add the login page link to your Favourites or if you create a shortcut on your computer desktop, you may need to refresh the link if your practice system is updated or if a new version of Internet Explorer is installed.

Please contact [Digital Health and Care Wales](#) / Tel: 0333 200 8048 for details

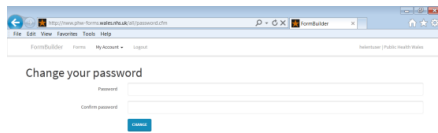
1.2 Initial log in

When you first log in using the generic password sent to you by your Health board CGPSAT lead, you will see the following screen. You are **strongly advised** to change the generic password to a secure password of your own. You can also change your email address here (this is the address which is registered to you should you forget your password)

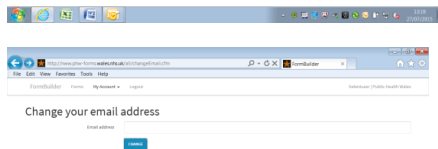


Click on 'my account' and choose an option

Optional 'Share' buttons. You do not need to use these until you have entered data. Please see section 6 for information about their use



To change the generic password on initial log in and to change your password again at any time, choose a password of 6 characters or more, enter again to confirm and click on the change button.

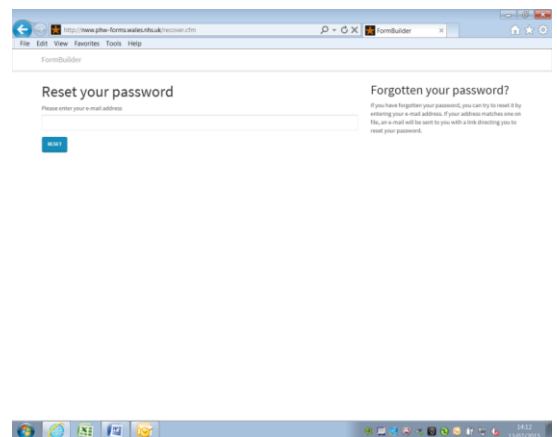
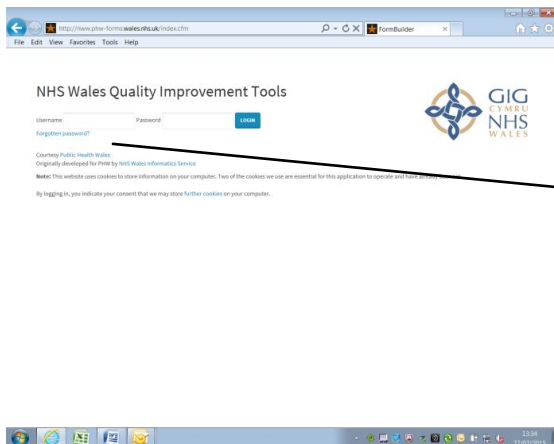


To change your email address, enter a new email address and click on the change button.



1.3 Forgotten password

If you have forgotten your password use the 'forgotten password' option on the login page.



You will be asked to enter your email address and if your address matches the one on file, an e-mail will be sent to you with a link directing you to reset your password. Your Health board CGPSAT lead provided all practice manager email addresses for the 'forgotten password' database in June 2015. If you have started using a new email address recently you should update it as shown in 1.2 above.

Contact [Digital Health and Care Wales](#) / Tel: 0333 200 8048

1.4 New or changed W codes

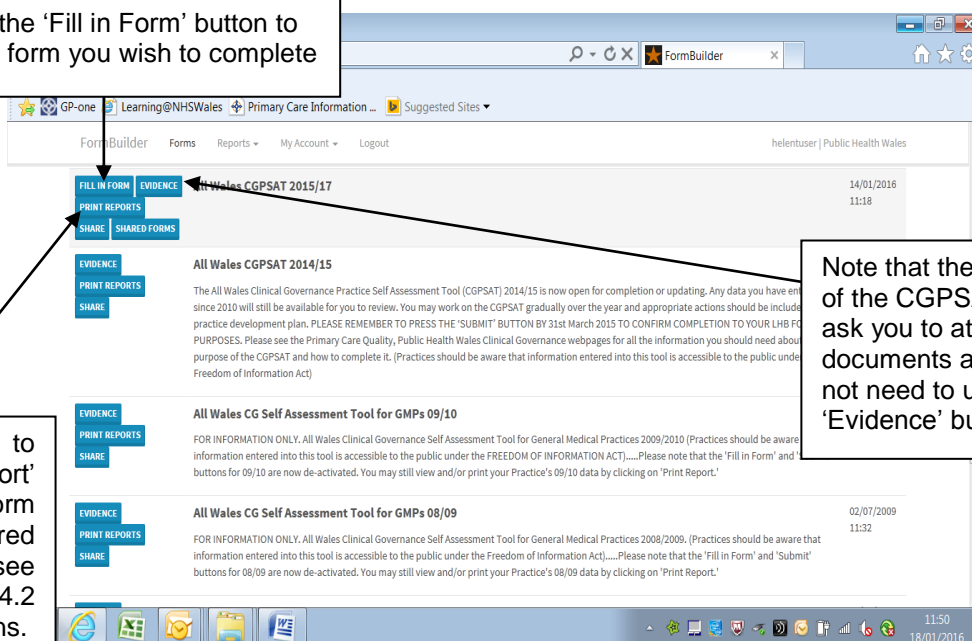
Health boards have been requested to let PCQ know about any new or changed W codes. If you are a new practice or have changed your w code, please contact your Health board CGPSAT lead.

2. Navigating

2.1 'Forms' page

When you have logged in you will be on the 'Forms' page. On this page you will see all the Quality Improvement Toolkits available to you. The All Wales CGPSAT 2017/18 can be found under 'Clinical Governance Self Assessment Tools'. Tools that you have not yet completed will be at the top. Scroll down the page to find those you have completed and/or submitted in the past.

Click on the 'Fill in Form' button to open the form you wish to complete



You will not need to use the 'Print Report' button in a new form until you have entered data. Please see sections 4.1 and 4.2 below for instructions.

Note that the new version of the CGPSAT does not ask you to attach any documents and so you will not need to use the 'Evidence' button at all.

You may wish to view the data you have entered in a form you have submitted in the past. To do this you can use the 'print report' button for that form. See section 4.1 and 4.2 for how to print reports.

2.2 Functions, Introduction page and submit button

When you have entered the CGPSAT 2017/18 by clicking on the 'fill in form' button you will see the screen below.

The introductory page gives a short explanation of the CGPSAT and how to find references and resources. At the bottom of this page you will find the 'Submit' button. (See section 7 for how to submit your work)

'Back to Forms' takes you back to the 'Forms' page (as does the 'Formbuilder' button)

'Previous' takes you back to the previously viewed page

'Next' will take you to the next page down the menu

Check that 'Autosave' is ON. This will automatically save your work every few minutes. If it is OFF then click to switch on. It will then remain on whenever you log in.

Introduction and SUBMIT button

The screenshot shows the 'FormBuilder' interface for the 'Introduction and SUBMIT button' form. The left sidebar contains a menu with items like 'Introduction and SUBMIT button', 'Governance, Leadership and Accountability', and various 'Theme' sections (Theme 1 to Theme 7). The main content area displays the 'Introduction and SUBMIT button' form, which includes sections for 'About the CGPSAT', 'References and Resources', and a 'Submit Button' at the bottom. The 'Autosave' button is highlighted in the top right corner.

2.3 Understanding the Menu

Health and Care Standards for Wales and their relevance to General Practice

The pages of the CGPSAT are opened by clicking on the + symbol. The main pages are Welsh Government Health and Care Standard 'Themes' and under each theme are individual pages for each of the Health and Care Standards. See the e-governance website for more information about the Health and Care Standards

<http://gov.wales/topics/health/publications/health/guidance/care-standards/?lang=en>

On each page you will find information about the Health and Care Standard and its relevance to General Practice.

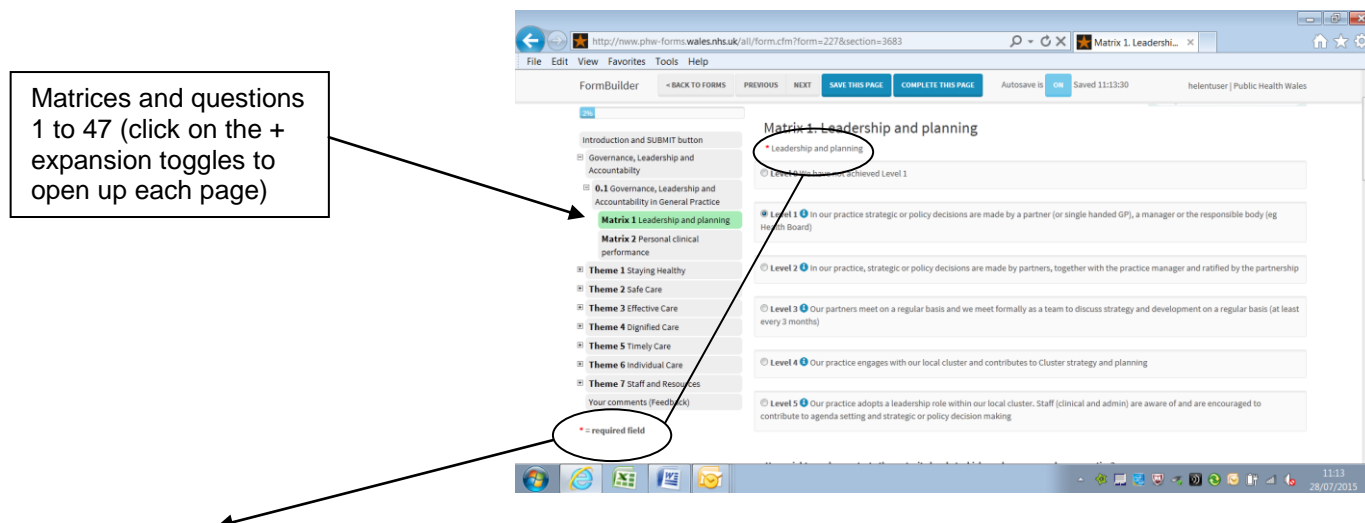
Health and Care Standard Theme

Health and Care Standard

Information about the Health and Care Standard and its relevance to General Practice

The screenshot shows the 'All Wales CGPSAT 2015/17' page. The left sidebar contains a menu with items like 'Introduction', 'Governance, Leadership and Accountability', and various 'Theme' sections (Theme 1 to Theme 7). The main content area displays the '1.1. Health Promotion, Protection and Improvement' section, which includes a description of the standard and a list of 'What does the standard 'Health promotion, protection and improvement' mean for General Practice?'. The 'Health and Care Standard Theme' callout points to the 'Theme 1 Staying Healthy' section. The 'Health and Care Standard' callout points to the '1.1. Health Promotion, Protection and Improvement' section. The 'Information about the Health and Care Standard and its relevance to General Practice' callout points to the 'What does the standard 'Health promotion, protection and improvement' mean for General Practice?' section.

Under each Health and Care Standard you will find the pages where you can assess the maturity of your governance systems. There are **45 matrices and 2 sets of questions** in the new CGPSAT. Section 3 below shows you how to complete the matrix fields.



You will notice the red star indicating that the self assessment levels are a 'required field'. This does not mean that completion is compulsory. The CGPSAT now has a system whereby you can track your progress (see 2.6 below) and a level entry is 'required' in order for the page to be marked complete and green in the menu.

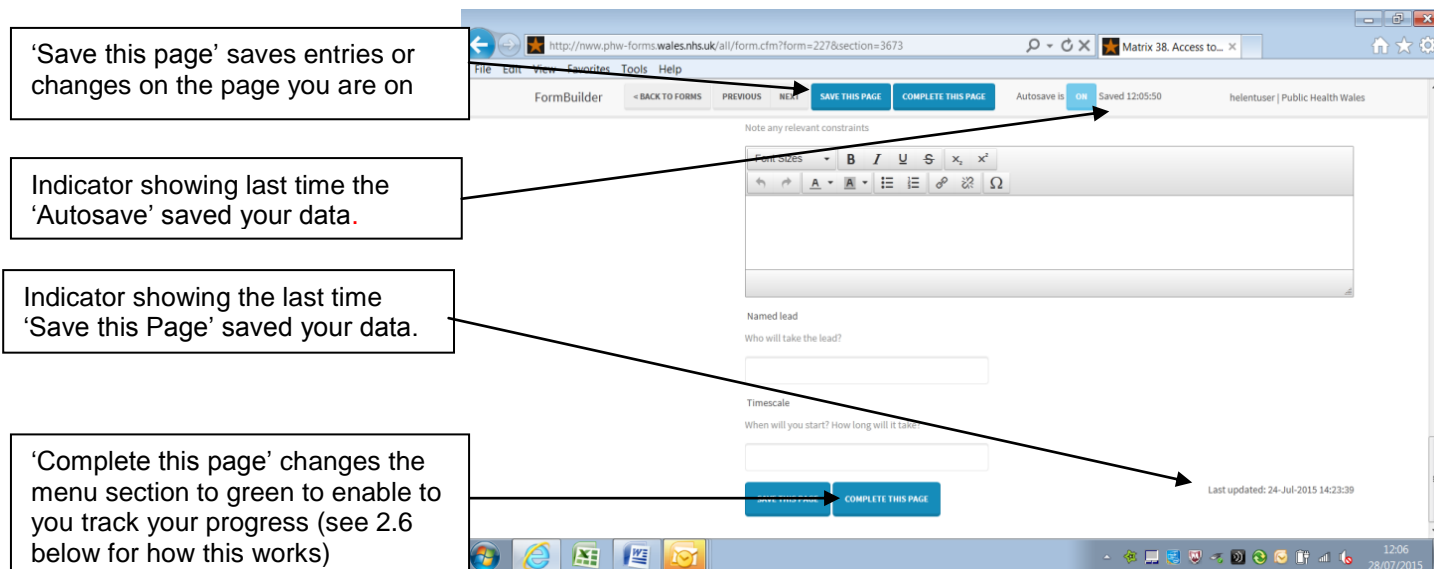
2.4 Saving your work

If you make sure that the AutoSave button is on, then your entries will be automatically saved at regular intervals. (see 2.2 above)

You should also save your work in progress by regularly clicking on one of the 'Save This Page' buttons at the top and at the bottom of each page.

Note that if you have not used AutoSave, manually saved your work or moved about within the CGPSAT for over 25 minutes you will receive a prompt asking you to save. If you do not do so within the next 5 minutes you will be automatically logged out of the toolkit and work done within the last 30 minutes may be lost. This is a feature to stop others from altering your CGPSAT entry if you should leave your computer without logging out of the CGPSAT.

You can log in and out of the CGPSAT as many times as you like, saving your work as you do so, until you are satisfied that you have completed the whole tool. When you are ready to submit the data you can do this on the 'Forms' page. (see section 7)

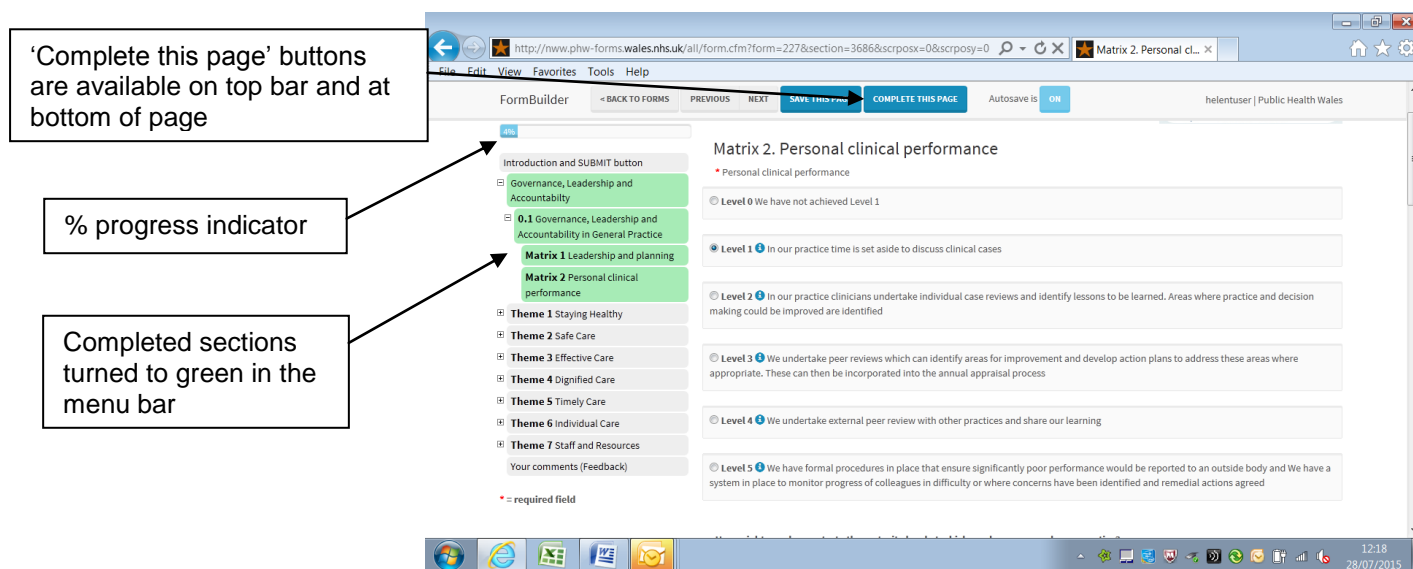


2.5 Tracking your progress

The CGPSAT remains voluntary and no entry is compulsory. However your Health Board may request that you complete certain parts of the tool for GMS contract purposes.

There are 4 ways of tracking your progress.

1. If you wish to use the system for tracking your progress by turning menu entries green when you have entered all the information asked for on the page, you must use 'Complete this Page' as follows:



If you press 'Complete this page' without assessing your practice at a level then you will receive an error message as a completed field is needed in order to change the menu to green.

To remove these banners; press 'Save this page', enter a level and then press 'Complete this Page' again.

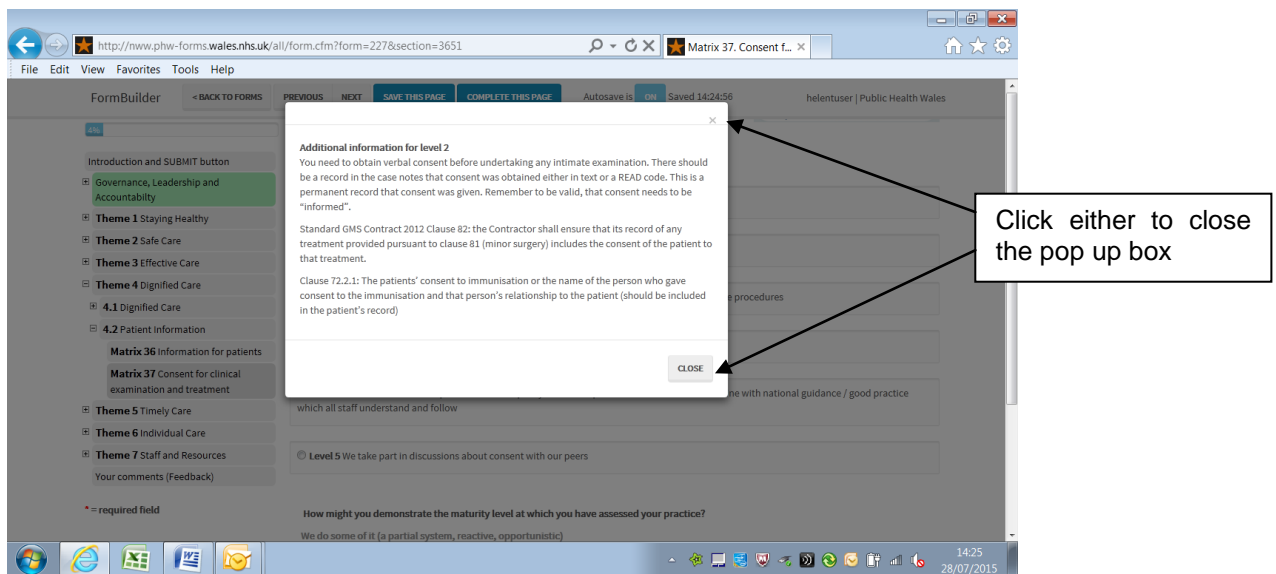
2. A bar at the top of the menu may also help you to track your progress as it will gradually move across to indicate the percentage of the tool that you have completed.
3. A link to a printable checklist that you can complete manually is available on the PCQ webpage.

Note that data you have entered will only be available to your Health Board when you use the 'Submit' button after you have completed the whole tool (see sections 6 and 7).

3. Assessing the maturity of your governance systems

You can complete the CGPSAT matrices in any order. Choose a topic from the menu or use the 'Previous' and 'Next' buttons to move through the tool.

The blue icons open a pop up box with additional information to help you assess the maturity level for your practice system



This year we have provided significantly more additional information. You cannot print out these information boxes but the entire contents are available in Word and .pdf format on our [clinical governance webpage](#)

3.1 Accessing links and returning to the CGPSAT

If you are on a webpage that you have accessed by via a link in one of the pop-up boxes you should return to the CGPSAT by clicking on the 'back' arrow on your browser.

Note that the tool may 'time out' if you link to a webpage and stay out of the tool for over 25 minutes so you may have to log in again. (see section 2.4 'Saving your work')

3.2 Validating your assessment

Each matrix page includes suggestions for ways you might demonstrate how you have achieved the level assessed if requested by your Health Board or other body (eg Healthcare Inspectorate Wales or Community Health Council). Please note that these are examples only and won't be applicable to all practices. It is not expected that you will produce all the examples listed and you may need to negotiate with your Health Board what they wish to see. Note that you do not need to attach any documents to the new CGPSAT and the 'Evidence' button is no longer operational.

Please see 'Hints and Tips for completing the CGPSAT' for further information about assessing your practice and validation of your assessment.

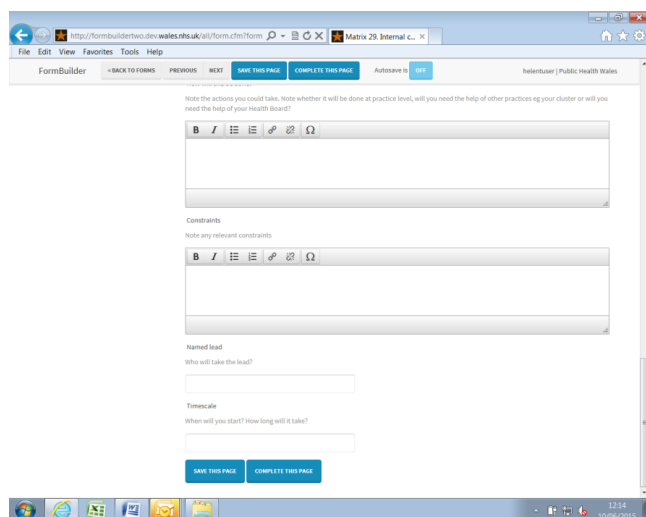
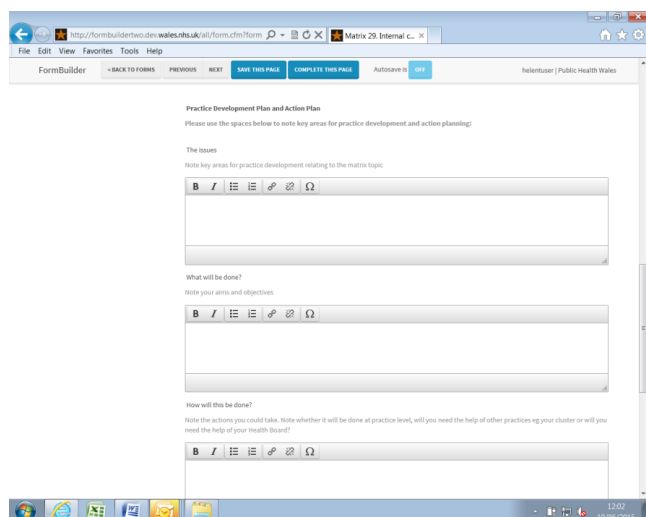
Maturity levels are described individually for each topic in the CGPSAT but the following table shows their generic meaning:

Level 0	We have not achieved level 1
Level 1	We do some of it (a partial system, reactive, opportunistic)
Level 2	We do it well (i.e. in a structured way, a complete system, proactive, planned)
Level 3	We ensure we continue to do it well (i.e. monitoring, safety netting, review, Plan, Do, Study, Act (PDSA) and audit cycles)
Level 4	We do it consistently and sustainably (we have a formal policy, the whole team takes ownership). We engage with and contribute to our local GP cluster.
Level 5	We strive to do it even better and we share it (Best practice, working in clusters, local planning, developing effective collaborative working with community services). We adopt a leadership role outside our practice and we bring what we learn from our cluster work back into our practice.

4. Adding to your Practice Development and Action Plan

A practice development needs assessment and action plan area is provided with each topic (you may need to scroll down the page to find it) here you can enter key areas for practice development relating to the topic and any constraints. This year we have included fields to match the QOF QP Practice Action Plan proforma. See 4.1 below for how to save and print off a Practice development and action plan using the information you have put into the CGPSAT.

Please see 'Using the CGPSAT for Practice Development, Action Planning and Cluster network Development' for further information about completing the PDP and action plan areas.



Use these areas to add information for your practice development, needs assessment and priorities for action plan. Please note that whilst the boxes have a large capacity and will expand as you add text, you should not deposit whole documents eg: practice policies within them as this will cause the tool to run very slowly.

4.1. Saving and printing your Practice Development and Action Plan

Using the 'Print reports' button on the 'Forms' page you can choose a .pdf file report which you can then save on your computer, print out, or attach to an email to share with your cluster should you wish.

Return to the 'Forms' page

Click on 'Print Reports'

To save/print your PDP for all the Health and Care Standard topics in the CGPSAT choose 'All question categories'

To choose specific Health and Care Standard topics scroll down the list to find the ones you require. You can choose multiple topics by using Ctrl and click.

Choose topic/s

Select 'questions and answers' and 'pdf'

Choose report view options

Select Question Categories: All Question Categories

Include all topics

Questions and answers Questions only

Screen PDF

You may need to wait for a few minutes for your report to appear, depending on the amount of text you have entered.

Chosen topic

Click on the back arrow to return to the 'Forms' page

Matrix 4. Health risk factors

Health risk factors

Level 2: We systematically collect health risk data on our patients

The issues

Not answered

What will be done?

Not answered

How will this be done?

Not answered

Constraints

Not answered

Named lead

The maturity level at which you have assessed your governance systems

Your practice development and action plan

Adobe Reader tools for saving, printing pdf. files (The tools you see will depend on the version of Adobe Reader installed on your computer. They may be on one of the bars at the top or bottom of the screen or may open in a separate box at the side)

FormBuilder

Matrix 1. Leadership and planning

Leadership and planning

The issues

What will be done?

How will this be done?

You can also select 'screen' rather than 'pdf' to view your entries but this report cannot be saved or printed.

4.2. Saving and printing a report of the levels at which you have assessed your practice

Should you need to send a report showing just the levels at which you have assessed the maturity of your practice governance systems to your Health Board or other body should they request it then proceed as above but just choose 'Levels' from the list.

The maturity level at which you have assessed your governance systems

Matrix 3. Patients' involvement in their own care - shared clinical decision making

Patients' Involvement in their own care – shared clinical decision making

Level 1: Our clinicians provide their patients with information about their health/illness.

Matrix 4. Health risk factors

Health risk factors

Level 2: We systematically collect health risk data on our patients

Matrix 5. Carers' needs

Carers' needs

Not answered

5. Your comments - optional

Please use this questionnaire to tell us about your experience of using the CGPSAT and the improvements we could make.

FormBuilder

http://www.phw-forms.wales.nhs.uk/all/form.cfm?form=226

Our comments (Feedback)

Primary Care Quality, Public Health Wales (PCQ) would like to ensure that the Clinical Governance Self Assessment Tool remains useful and relevant to practices and therefore welcomes your feedback in order to address any aspects causing concern and improve the tool in future versions. We would be grateful if you could spend a few minutes completing this form. Please see 'Frequently Asked Questions' on the PCQ webpage for practice answers in previous years.

helen.info@wales.nhs.uk

Accessing the CGPSAT and supporting information:

For how long have you used the CGPSAT?

Started before 2010 (questionnaire version)

How did you complete the CGPSAT?

In one go at the beginning of the year?

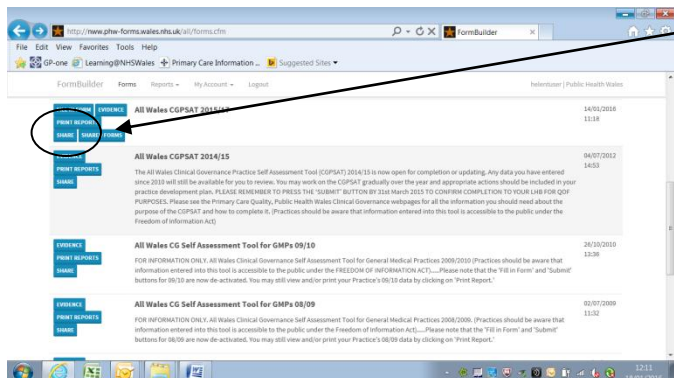
6. Sharing your work

The CGPSAT now includes a voluntary option that allows you to share your CGPSAT with your Health board or cluster before you submit your work rather than just sharing when you have submitted. You have the control to decide who you wish to share with or indeed if you wish to share at all until submission. This is not a once only selection - you can change your mind if you have chosen one option initially and at a later point want to extend or retract any level of sharing.

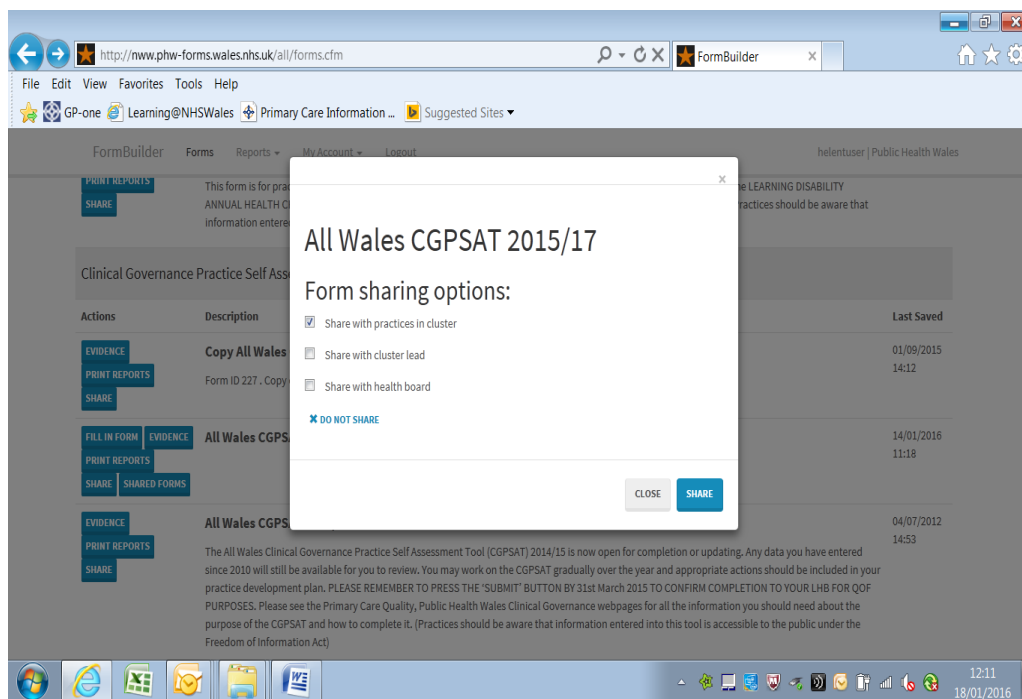
The 'Share' button is defaulted to 'Do not share' and you can change back to it at any time but you now have the option to share with other practices in the same cluster as you and/or share with your cluster and Health Board reporter leads.

Please note that if you have not chosen to share, pressing 'Submit' will make the form available to your Health Board as in previous years. The screen shots below show how you can choose your sharing options
Choose the share button

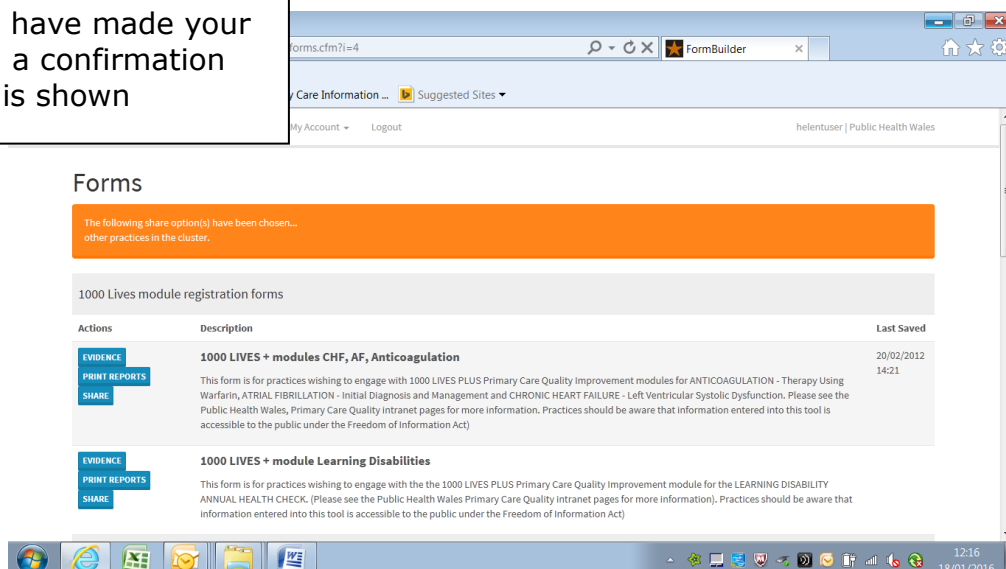
Click on the share button



You can choose one or more options and you can return to 'Do Not Share' at any time



Once you have made your selection, a confirmation message is shown



7. Submitting your completed CGPSAT

Do not submit your data until you have completed all the matrices you need to complete for the current year and entered all the notes you wish to make on your Practice Development Plan pages. You can log in and out of the CGPSAT as many times as you like, saving your work as you do so, until you are happy with the data you have entered.

To retain the integrity of your submitted data, once you press the submit button you will not be able to re-enter the toolkit. However if you find that you do urgently need to go back in to change something before the end of year deadline then please contact [Digital Health and Care Wales](http://www.dh.wales.nhs.uk) / Tel: 0333 200 8048 to arrange for the CGPSAT to be re-opened.

To submit your completed CGPSAT you will need to return to the Introduction page (see section 2.2 above)

Click here to submit your completed CGPSAT

Form Confirmation

You are about to make the final submit for the form "All Wales CGPSAT 2015/17". This will cause the results of this form to be submitted to its creators and you will no longer be able to edit/update answers.

Are you sure you wish to submit this form?

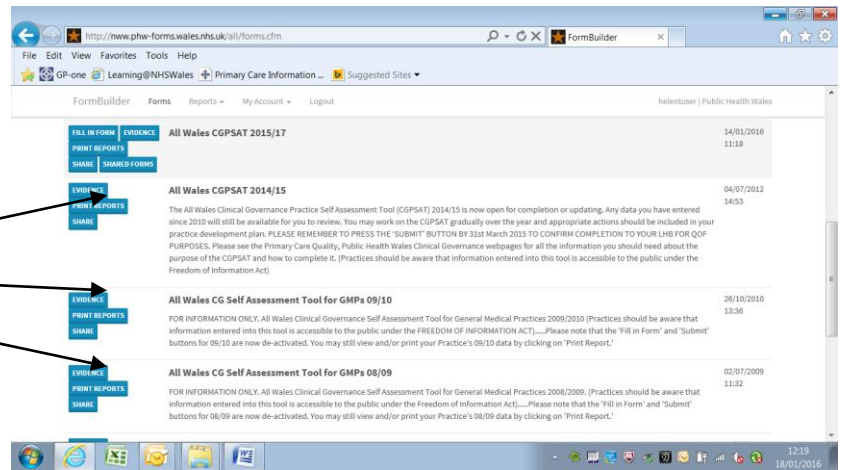
Yes No

confirm submission

7.1 Viewing previous submissions

You may need to view information you have entered in a previously submitted CGPSAT form. To do this you can use the 'print report' button for that form. See section 4.1 and 4.2 for how to print reports.

Use 'Print report' to open a report of the data in a previous submission that can be printed and/or saved



8. Logging out

To log out from any point within the tool click on the 'Back to Forms' button to return to the 'Forms' page where you will find the 'Logout' button

