

Health Board Reporting Quick- Start Guide

Health boards can now report locally on the data entered by practices in their coverage with the proviso that practices have either submitted data or have opted to share their ongoing input to the data collection form. Please note that this is a quick guide to get you started, a full HB reporting tutorial and background information is available on the PConOne website: This guide is designed to help LHBs navigate the reporting tool, and covers:

- logging in
- Reporting on
- numbers of practices submitting
- numbers of practices reaching each maturity level for each matrix
- Viewing shared and submitted forms
- Managing your account, changing passwords and prime user e-mail

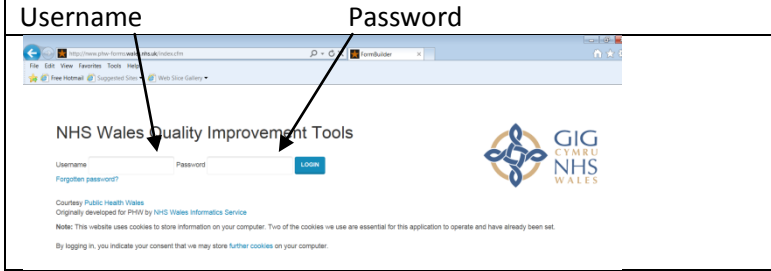
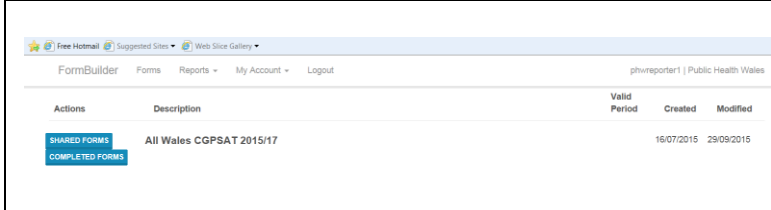
NB All the screenshots are from our development site and do not reflect any real practice data

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Logging in

The LHB will be provided logging in credentials, and will login through the same portal as practices.

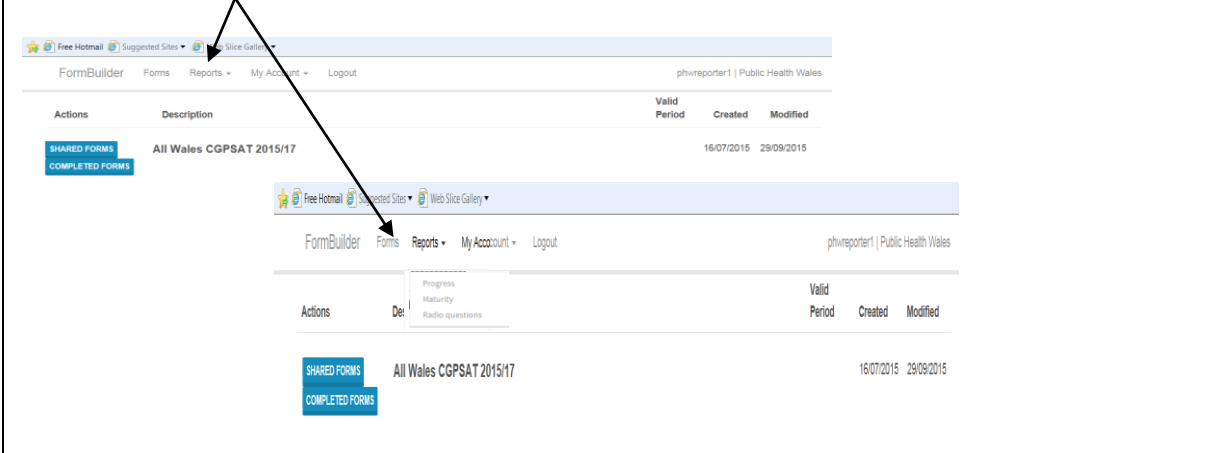
	<p>Link to the login screen by clicking on the link below https://formbuildertwo.wales.nhs.uk/</p>
	<p>Once you select Login you will be presented a list of the available forms. This list will change depending on topics available. This view only shows the clinical governance form</p>

Reporting

There are three built in reports, progress, maturity and option questions. A custom reports tool is being developed and will be made available during 2016.

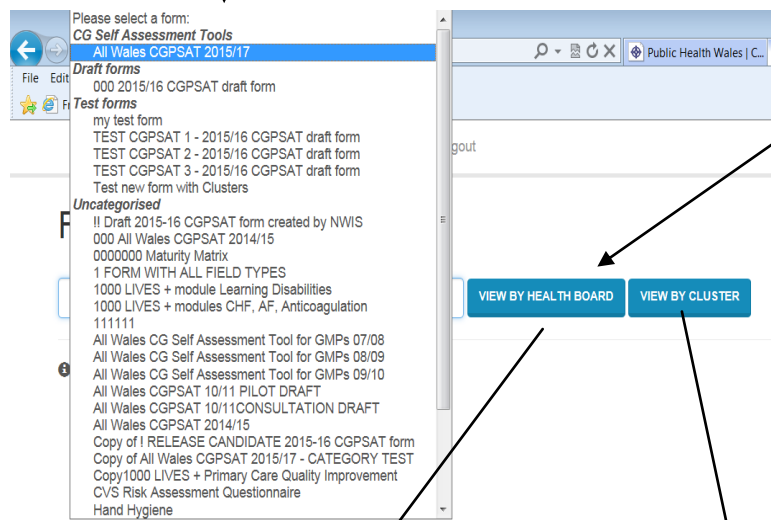
Reporting progress and submissions

From the menu select Reports



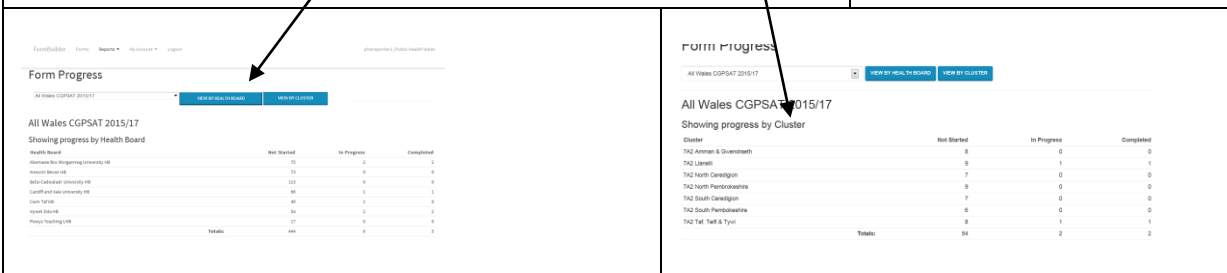
Dropdown provides three options to report on progress, maturity and option questions. If you select progress you will pass to the reporting screen where you will need to choose the current clinical governance form.

Progress gives a count of practices across the Health Board



you will be able to report by all or by cluster.

NB this is the test system and the list of forms should be considerably less



Reporting on Maturity

You are now able to report on the level of maturity practices have assessed themselves at (zero to five, with five most mature), our web pages provide more information.

This will report on practices who, have submitted their form or have opted to share their in progress forms. Practices can choose to share their form as in progress with the cluster or HB as they see fit or not at all. Submission however makes the form available to the LHB and cluster.

Choose maturity form the reports option

And the current clinical governance form as in the progress report

Please select a form:
CG Self Assessment Tools
All Wales CGPSAT 2015/17
Draft forms
 000 2015/16 CGPSAT draft form
Test forms
 my test form
 TEST CGPSAT 1 - 2015/16 CGPSAT draft form
 TEST CGPSAT 2 - 2015/16 CGPSAT draft form
 TEST CGPSAT 3 - 2015/16 CGPSAT draft form
 Test new form with Clusters
Uncategorised
 !! Draft 2015-16 CGPSAT form created by NWS
 000 All Wales CGPSAT 2014/15
 0000000 Maturity Matrix
 1 FORM WITH ALL FIELD TYPES
 1000 LIVES + module Learning Disabilities
 1000 LIVES + modules CHF, AF, Anticoagulation
 1111111
 All Wales CG Self Assessment Tool for GMPs 07/08
 All Wales CG Self Assessment Tool for GMPs 08/09
 All Wales CG Self Assessment Tool for GMPs 09/10
 All Wales CGPSAT 10/11 PILOT DRAFT
 All Wales CGPSAT 10/11CONSULTATION DRAFT
 All Wales CGPSAT 2014/15
 Copy of 1 RELEASE CANDIDATE 2015-16 CGPSAT form
 Copy of All Wales CGPSAT 2015/17 - CATEGORY TEST
 Copy1000 LIVES + Primary Care Quality Improvement
 CVS Risk Assessment Questionnaire
 Hand Hygiene

Maturity by Matrix

Form: All Wales CGPSAT 2015/17

Show: Incomplete and shared forms **VIEW RESULTS**
 All forms completed and submitted

Please select the form you wish to report on.

Then select what forms you wish to report on either submitted complete only

Or

those forms that are incomplete where the practice has allow sharing while in progress

Form: All Wales CGPSAT 2015/17

Show: All forms completed and submitted **VIEW RESULTS**

All Wales CGPSAT 2015/17

By placing the cursor over the matrix number the description will appear. You can export results to excel

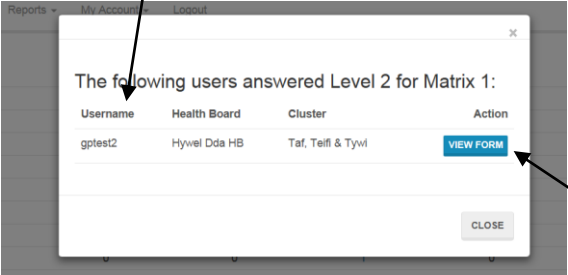
Matrix	Level 0	Level 1	Level 2	Level 3	Level 4	Level 5
Matrix 1 Leadership and planning	0	0	1	0	1	0
Matrix 2	0	0	1	0	1	0
Matrix 3	0	0	1	0	1	0
Matrix 4	0	0	1	0	1	0
Matrix 5	0	0	1	0	1	0
Matrix 6	0	0	1	0	1	0
Matrix 7	0	0	1	0	1	0
Matrix 8	0	0	1	0	1	0

The table generated provides a list of matrices and a count of practices that have assessed themselves at each maturity level.

Viewing practice maturity from counts

Matrix	Level 0	Level 1	Level 2	Level 3	Level 4	Level 5
Matrix 1	0	0	1	0	1	0
Matrix 2	0	0	1	0	1	0
Matrix 3	0	0	1	0	1	0

By clicking on the numeric a window will pop up showing the practices that are at that level



The following users answered Level 2 for Matrix 1:

Username	Health Board	Cluster	Action
gplest2	Hywel Dda HB	Taf, Teifi & Tywi	VIEW FORM

CLOSE

Matrix 1. Leadership and planning

Leadership and planning

Level 2: In our practice, strategic or policy decisions are made by partners, together with the practice manager and ratified by the partnership. How might you...

Indicate the maturity level at which you have assessed your practice?

Is some of it (a partial system, reactive, opportunistic)

- Minutes of practice and partner meetings

Is it level (or in a structured way, based on best practice) (a complete system, proactive, planned)

- There are regular minuted meetings of those members of the team with management responsibility
- Practice are organised to do it well (or assisting, safety meeting, reviews, audit)
- Records of team meetings

Is it consistently and sustainably. We have a formal policy and the whole team takes ownership

- Annual development plan

Write to do it even better and see where it fits with a leadership role outside our practice and see what we learn back into our practice

- Agenda and attendance of whole team meetings
- GP One forum utilized for sharing examples of good practice

Practice Development Plan and Action Plan

Please use the spaces below to note key areas for practice development and action planning

The issues

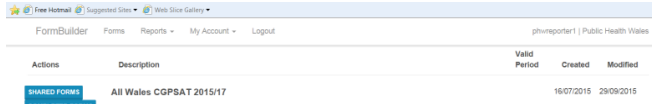
- Not answered: What will be done?
- Not answered: How will this be done?
- Not answered: Constraints
- Not answered: Named lead

If you click view form it will take you to the practice form and to the appropriate matrix, here you can view any contextual information the practice has entered for their PDP or constraints etc.

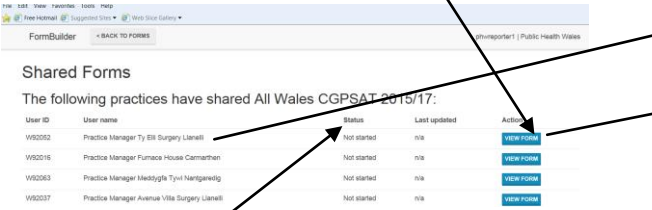
Viewing Practice forms

You can also just view the practice form in its entirety from the entry page provided the form has been submitted or the practice has decided to share its form prior to submission.

From the login page you have the opening screen



If you select shared or completed form you will have a list of practices who, have submitted or decided to share. Select the view form button and a copy of the practice form will be generated



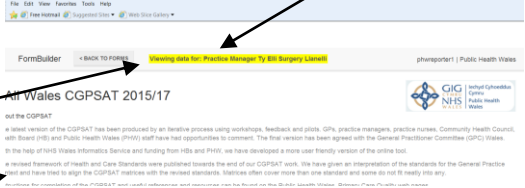
Shared Forms

The following practices have shared All Wales CGPSAT 2015/17:

User ID	User name	Status	Last updated	Action
WS2052	Practice Manager Ty Eir Surgery Llanelli	Not started	n/a	VIEW FORM
WS2016	Practice Manager Fumace House Carmarthen	Not started	n/a	VIEW FORM
WS2063	Practice Manager Mledyglle Tywi Harrogate	Not started	n/a	VIEW FORM
WS2037	Practice Manager Avenue Villa Surgery Llanelli	Not started	n/a	VIEW FORM

Check the status if it is not complete the form is subject to change. The last updated column will give you the date and time when the form was last worked on.

The practice you are viewing is highlighted



Viewing data for: Practice Manager Ty Eir Surgery Llanelli

All Wales CGPSAT 2015/17

What the CGPSAT

A latest version of the CGPSAT has been produced by an iterative process using workshops, feedback and pilots. GPs, practice managers, practice nurses, Community Health Councils, with Board (HB) and Public Health Wales (PHW) staff have had opportunities to comment. The final version has been agreed with the General Practitioner Committee (GPC) Wales. In the hope of NHS Wales Informatics Service also building from this, our PHW, we have developed a more user friendly version of the online tool. A revised framework of Health and Care Standards were published towards the end of our CGPSAT work. We have given an interpretation of the standards for the General Practice Unit and have tried to align the CGPSAT matrices with the revised standards. Matrices often cover more than one standard and some do not fit neatly into any...

Reporting on option question answers

The screenshot shows a table with the following data:

Question	Count	Answer
Research governance	0	We do not contribute to research or have contact with researchers of any kind. See note 1 below
	0	We contribute to research. See note 2 below
	0	We participate in research studies. See note 3 below
	2	We research practice. See note 4 below
Information governance assurance question	0	Yes
	2	No
Information governance assurance question	0	Yes
	2	No
Your comments (Feedback)	1	Yes
	0	No
Did you access and read the supporting information on the Primary Care Quality clinical governance webpage?	0	Yes
	0	No
Did you find it easy to access the CGPSAT via the PCQ webpage?	0	Yes
	0	No
Did you use the GPCOne website to access resources?	0	Yes
	0	No
If 'yes', did you find the information you were looking for?	0	Yes
	0	No

Most of the toolkit is made up of maturity questions however there are two question in the toolkit that require a Yes/ No answer or choosing from a range of options. These are Research governance and has the practice completed the ISMS information governance tool.

This provides the number of practices answering to the appropriate option. You can link through to the shared forms by clicking on the blue highlighted numbers as in the other sections.

This report provides the number of practices answering the various evaluation questions on the tool which PCQ review each year.

Managing your reporting account

The reporting accounts have been created and are aligned to a specific user to ensure there is one point of contact to manage the account. This can be shared amongst colleagues; however one person should be responsible for the account credential ie password. The password and allocated lead e-mails can be changed.

Click on my account and you have the two options change password or change e-mail

Similarly click change e-mail

Once you click change it will be changed

To change the password just type the new one in and confirm and the password will be changed

If password or e-mails are incorrect or forgotten they will have to be reset and you should contact [Digital Health and Care Wales](#) / Tel: 0333 200 8048

Annex A – GP practice sharing option

(The CGPSAT tutorial for practices has been updated to include this. Please see the Primary Care Hub clinical governance webpage. Practices can now make a choice to share forms that are in progress, rather than just sharing when they have submitted. This function has a great deal of flexibility for the practice. The practice has the control to decide who they wish to share with or indeed if they wish to share at all until submission. This is not a onetime selection and practices can change their mind if they have chosen one option initially and at a later point want to extend or retract any level of sharing. If practices have not shared in progress forms they will at submission make the form available as before. The screen shots below show how the practice can choose its sharing options

<p>The practice chooses the share button</p>	<p>Sharing options are shown to the practice and they can choose one or more options including “Do Not share” This is the default</p>
<p>Once the practice has selected a confirmation message is shown</p>	