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

Health Board Reporting Tutorial

Published by: Public Health Wales, Primary Care Hub

Date: January 2016

Version: 2c for FormbuilderTwo

Status: Final

Intended Audience: Health Boards reporting on the CGPSAT in 2017/18

Purpose and Summary of document:

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

Health Boards can now report locally on the data entered by practices in their area with the proviso that practices have either submitted data or have opted to share their ongoing input.

This tutorial covers:

- Logging in
- Managing your reporting account, changing passwords and e-mail
- Reporting on
 - numbers of practices submitting
 - numbers of practices reaching each maturity level for each matrix
 - 'custom' reporting is being developed and will be available during 2016
- Viewing shared and submitted forms

A similar tool for Cluster Lead reporting is in development during 2016.

NB All the screenshots are from the PCQ demonstration site and do not show any real practice data

This document is intended for Health Boards and should be read in conjunction with the other documents available on the [PCOne web page](#).

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Please read these instructions carefully before you begin

1. Logging in

Health Boards have been provided with reporting login details and will log in through the same link as GP practices. The CGPSAT can be accessed either

- via the Primary Care Hub PCOne page where you will also find background information about the [CGPSAT](#).

You will then see the FormBuilderTwo login screen pictured below.

NHS Wales Quality Improvement Tools

Username Password

[Forgot your password?](#)

Courtesy Public Health Wales
Originally developed for Print by NHS Wales Informatics Service

Note: This website uses cookies to store information on your computer. Two of the cookies we use are essential for this application to operate and have already been set.

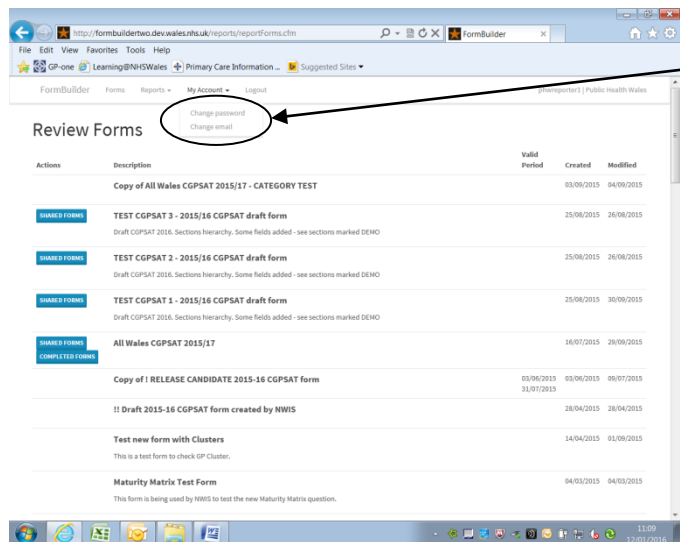
By logging in, you indicate your consent that we may store [cookies](#) on your computer.

Standard information about 'cookies'

Note that the new address for FormBuilderTwo is: <http://www.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.

1.1 Managing your Health Board reporting account

Health Board reporting accounts are allocated to a specific user to ensure there is one point of contact to manage the account. One person should be responsible for the password but it can be shared amongst colleagues. The password and allocated e-mail address can be changed.



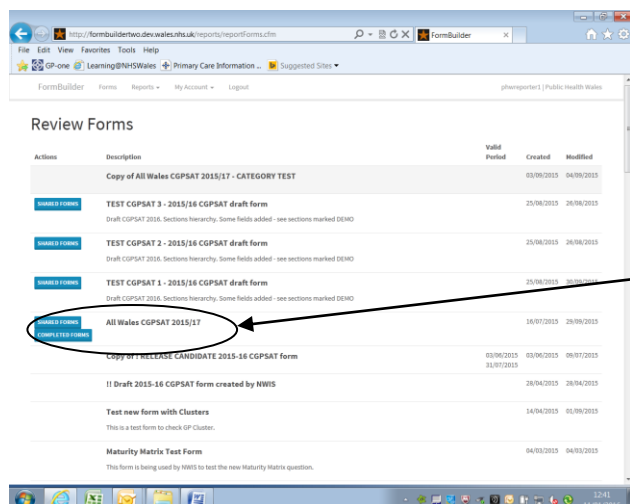
On the 'Review Forms' page click on 'My Account'

To change the password, choose a new password of 6 characters or more, enter it again to confirm and click on 'change'.
To change the email address, enter the new address and click on 'change'

1.2 Forgotten password

A password reminder can be obtained by using the 'forgotten password' option on the login page. You will be asked to enter your email address and if this matches the one on file, an email will be sent to you with a link directing you to reset your password. Note that this option relies on your email address being kept up to date (see section 1.1). If your email address is not up to date you will receive an error message and your password will have to be reset. Contact [Digital Health and Care Wales](#) / Tel: 0333 200 8048

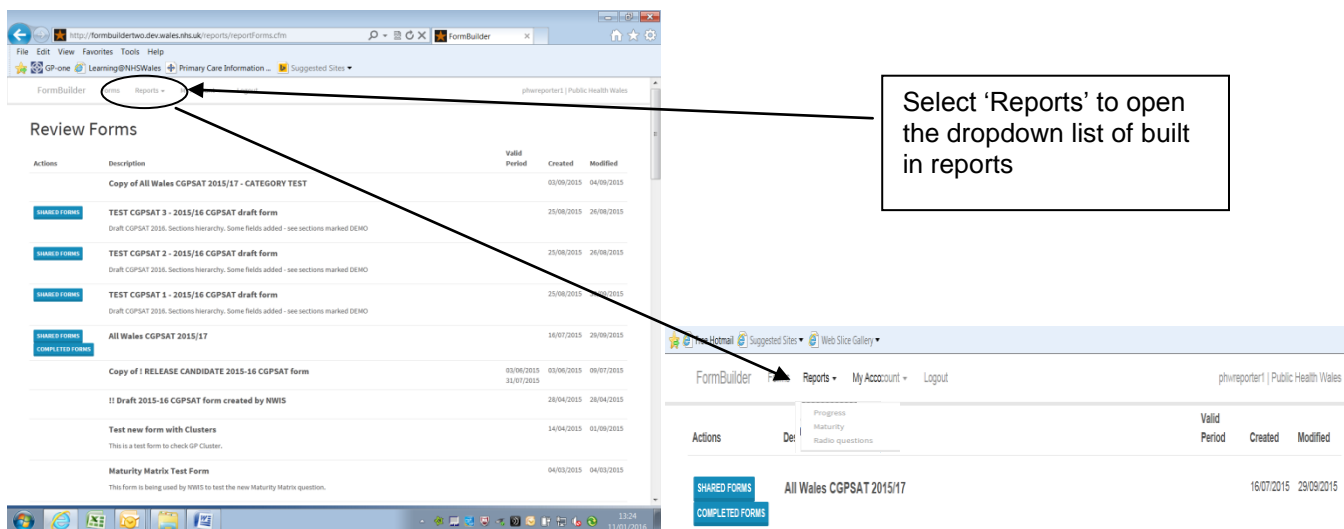
2. Review Forms



On the 'Review Forms' page you will see all the forms available for reporting. Currently only the All Wales CGPSAT 2017/18 is available.

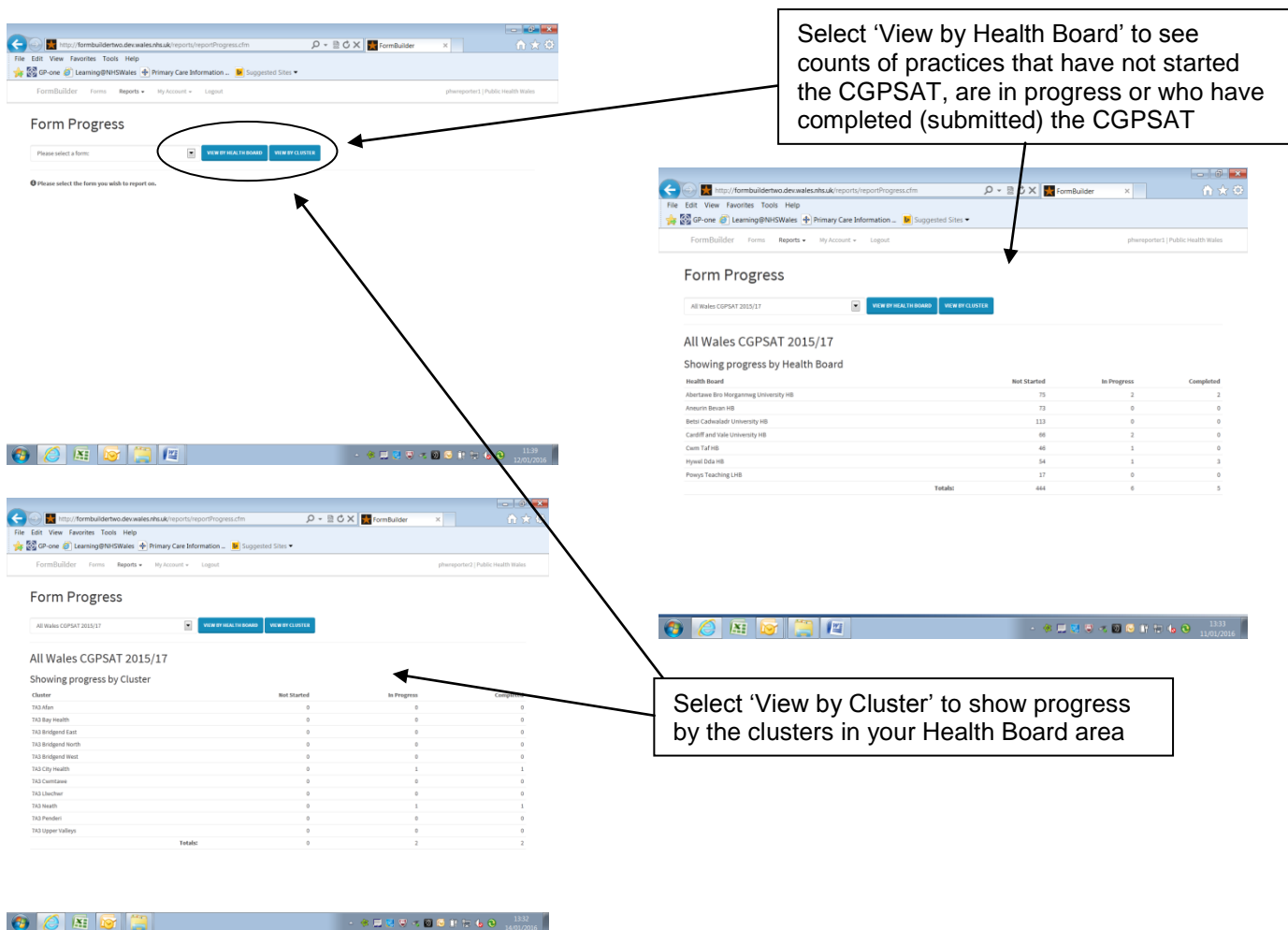
3. Reporting

There are three built in reports: progress, maturity, and option questions. There is also a tool for 'custom' reporting.



3.1 Reporting on progress and submission

Select 'Progress' to open the 'Form Progress' screen where you can choose the form for you wish to view progress. Currently only the All Wales CGPSAT 2017/18 is available.



3.2 Reporting on Maturity

(from practices that have submitted or opted to share prior to submission only)

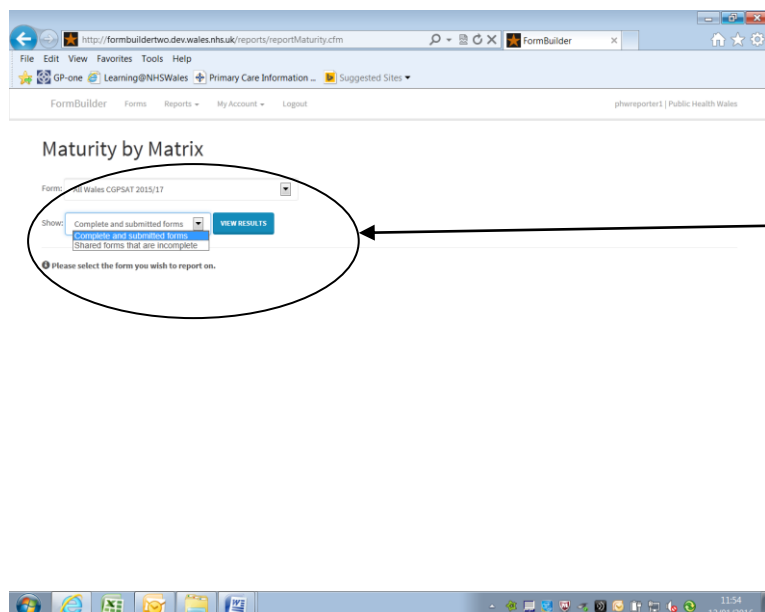
Maturity levels are described individually for each topic in the CGPSAT but the following table shows their generic meaning:

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.

The [PCOne web page](#) provides more information

3.2.1 Numbers of practices at each level of maturity

Select 'Maturity' to open the 'Maturity by Matrix' page. Select 'View by Health Board' to view a report showing the level of maturity at which practices have assessed themselves, from 0 to 5.



You can select either complete and submitted forms
or
those forms that are incomplete where the practice has opted to allow sharing while in progress (see Annex A for information about the new practice sharing option)

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

Maturity by Matrix

Form: All Wales CGPSAT 2015/17

Show: Complete and submitted forms [VIEW RESULTS](#)

Matrix	Level 0	Level 1	Level 2	Level 3	Level 4	Level 5
Matrix 1	0	0	0	1	1	0
Matrix 2	0	0	0	1	1	0
Matrix 3	0	0	0	1	1	0
Matrix 4	0	0	0	1	1	0
Matrix 5	0	0	0	1	1	0
Matrix 6	0	0	0	1	1	0
Matrix 7	0	0	0	1	1	0
Matrix 8	0	0	0	1	1	0
Matrix 9	0	0	0	1	1	0
Matrix 10	0	0	0	1	1	0
Matrix 11	0	0	0	1	1	0
Matrix 12	0	0	0	1	1	0
Matrix 13	0	0	0	1	1	0
Matrix 14	0	0	0	1	1	0
Matrix 15	0	0	0	1	1	0

[EXPORT TO EXCEL](#)

Annotations:

- If you place the cursor over the matrix number its topic will appear.
- You can export the results to Excel

3.2.2 Viewing which practices assessed themselves at each level

All Wales CGPSAT 2015/17

Matrix	Level 0	Level 1	Level 2	Level 3	Level 4	Level 5
Matrix 1	0	0	0	1	1	0
Matrix 2	0	0	0	1	1	0
Matrix 3	0	0	0	1	1	0
Matrix 4	0	0	0	1	1	0
Matrix 5	0	0	0	1	1	0
Matrix 6	0	0	0	1	1	0
Matrix 7	0	0	0	1	1	0
Matrix 8	0	0	0	1	1	0
Matrix 9	0	0	0	1	1	0
Matrix 10	0	0	0	1	1	0
Matrix 11	0	0	0	1	1	0
Matrix 12	0	0	0	1	1	0
Matrix 13	0	0	0	1	1	0
Matrix 14	0	0	0	1	1	0
Matrix 15	0	0	0	1	1	0
Matrix 16	0	0	0	1	1	0
Matrix 17	0	0	0	0	0	0
Matrix 18	0	0	0	0	0	0
Matrix 19	0	0	0	0	0	0

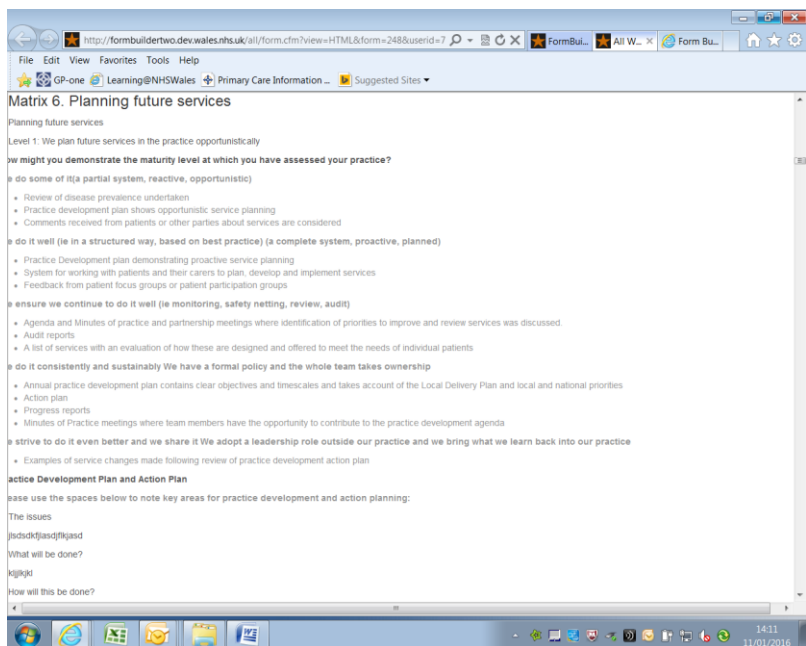
Annotation: If you place the cursor over one of the level numbers highlighted in blue and click, a window will pop up showing the practices at that level

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 Practice Development and Action Plan.

The following users answered Level 3 for Matrix 5:

Username	Health Board	Cluster	Action
ghm01	Hywel Dda HB	Taf, Taff & Tyfi	VIEW FORM

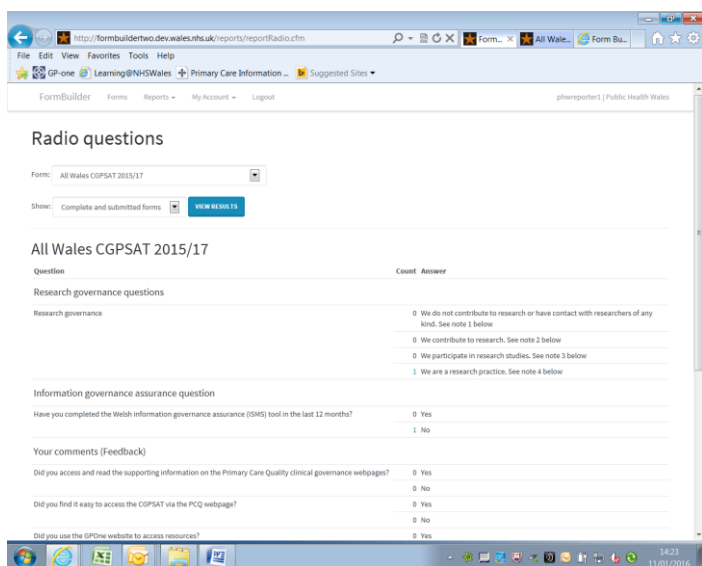
[CLOSE](#)



3.3 Reporting on answers to option questions

(from practices that have submitted or opted to share prior to submission only)

Apart from the maturity matrix sections the CGPSAT also contains sections with questions. These are sections 31 Research governance and 33 Information governance assurance.



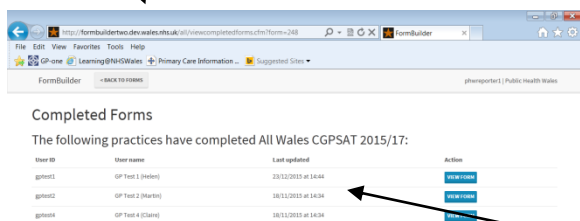
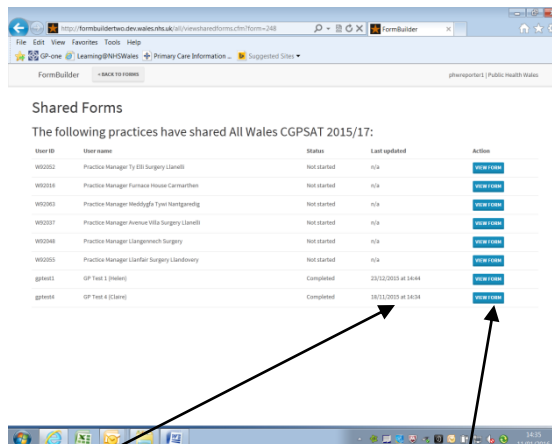
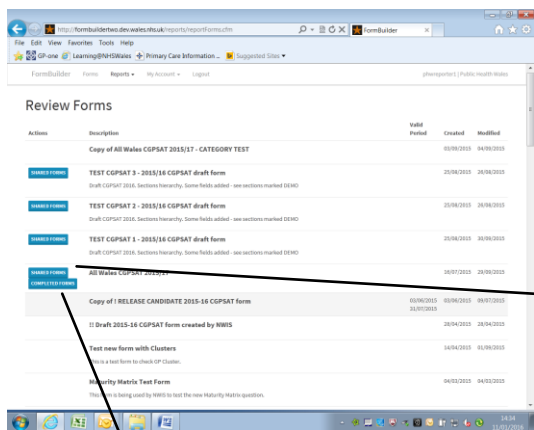
This provides the number of practices answering to the appropriate option. You can link through to the shared forms by clicking on the blue highlighted numbers as in the other sections.

4. Viewing Practice forms

(from practices that have submitted or opted to share prior to submission only)

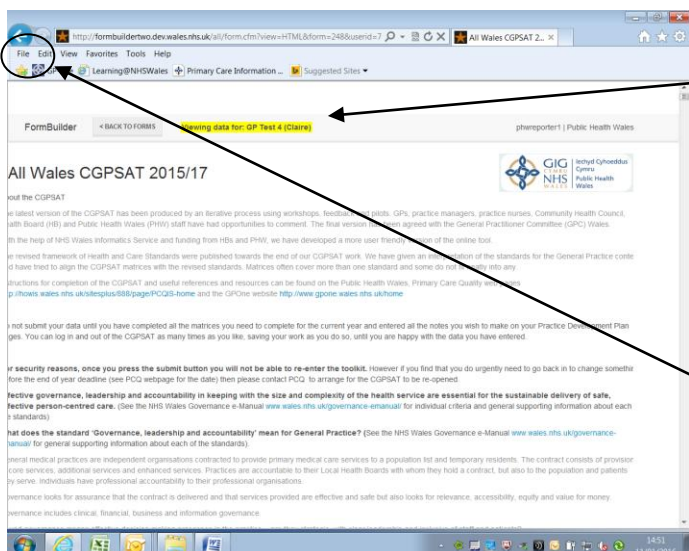
You can also view a practice’s CGPSAT data in its entirety from the ‘Review Forms’ page provided the form has been submitted or the practice has decided to share its form prior to submission.

Check the status of a shared form - if it is not complete the form is subject to change.



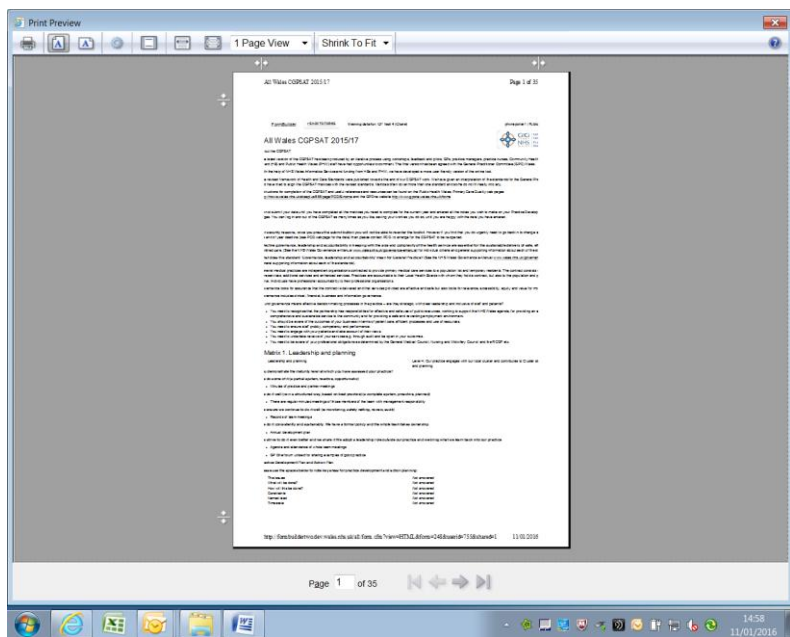
The 'last updated' column will give you the date and time when the form was last worked on.

Select the 'view form' button and a copy of the practice form will be generated.



The w code of the practice whose data you are viewing is highlighted

To print choose 'file' and 'print preview' from the menu bar, and check before you print as the report may be many pages long and you may wish to select and print certain pages only.



5. Timeout

Note that if you have not moved about within the CGPSAT for over 25 minutes you will receive a prompt asking you action. If you do not do so within the next 5 minutes you will be automatically logged out of the toolkit. This is a security feature to stop others from viewing reports if you should leave your computer without logging out.

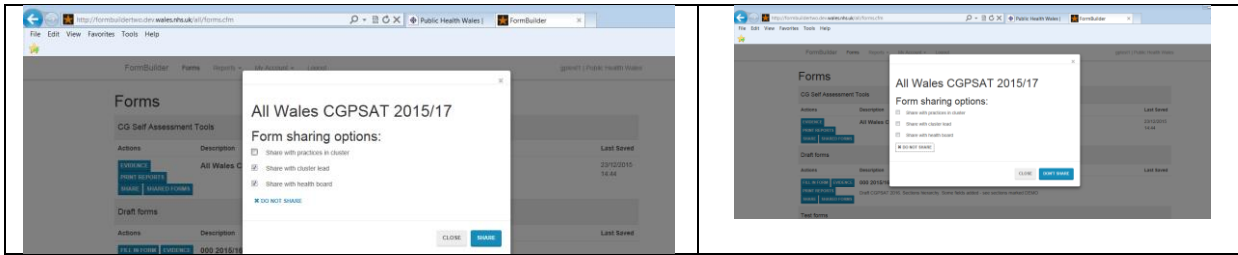
Annex A – GP practice sharing option

The CGPSAT now includes a voluntary option that allows practices to share their CGPSAT with other practices in the same cluster and/or share with their cluster and Health Board reporter leads. The can opt to share before they submit their work rather than just sharing when they have submitted. Practices have 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 once only selection - 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. The 'Share' button is defaulted to 'Do not share' and practices can change back to it at any time

Please note that for practices that have not chosen to share, pressing 'Submit' will make the form available to their Health Board as in previous years.

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>



Once the practice has selected, a confirmation message is shown

