Extendable Audit Round 6
Entering your casenote audit data on CaseCapture byNetsolving
Guidance 2023

Contents

IMPORTANT:

BROWSER: CaseCapture works on all modern browsers. This includes Chrome, Firefox and Edge. Chrome and Firefox are the most recommended.

Internet Explorer is no longer supported by Microsoft and should be avoided.

Overview

This guidance will explain how to sign in and activate your Netsolving account, as well as how to submit your data. There are also guidance documents for looking at your dashboard and exporting and importing data to the platform.

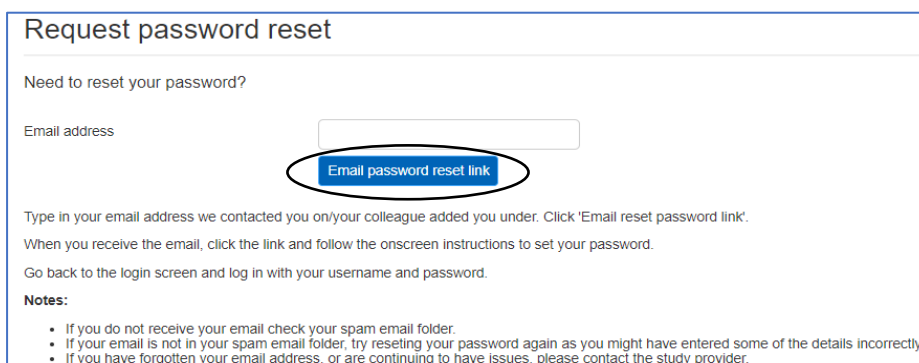If anything is unclear or unexpected, please contact us and let us know at nad@rcpsych.ac.uk

Logging In

When you are first added to Netsolving, you will receive a welcome email explaining how to login. This email will contain your username and the link you need to reset your password.

- Click the login button.
- Click 'Forgotten your password?'
- Type in your email address
-


Click 'Email password reset link'

- You will be sent an email with a reset password link, click the link
- Enter your username (usually your email address)
- Enter a password, making sure to follow the password rules shown
- Click Reset. You have now set your password
- Click the login button on the page
- Enter your username and password
- Click Login

Landing Page

When you login you will be on the record management page for the NAD 23.

You may wish to bookmark the page for ease of access.

At the top-left side of the page, there are several tabs including: Study Records, dashboard, export, import and users (please note these may vary slightly depending on your user permissions)
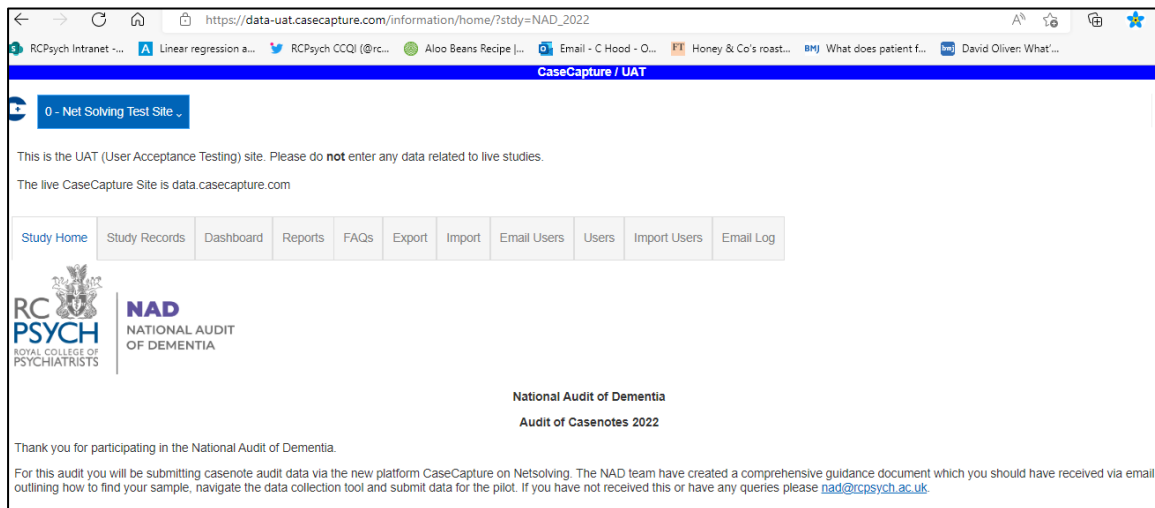

If you hover over the icon on the top right side of the landing page it shows your username, with links to; My studies, My profile, and link to Logout of the site.
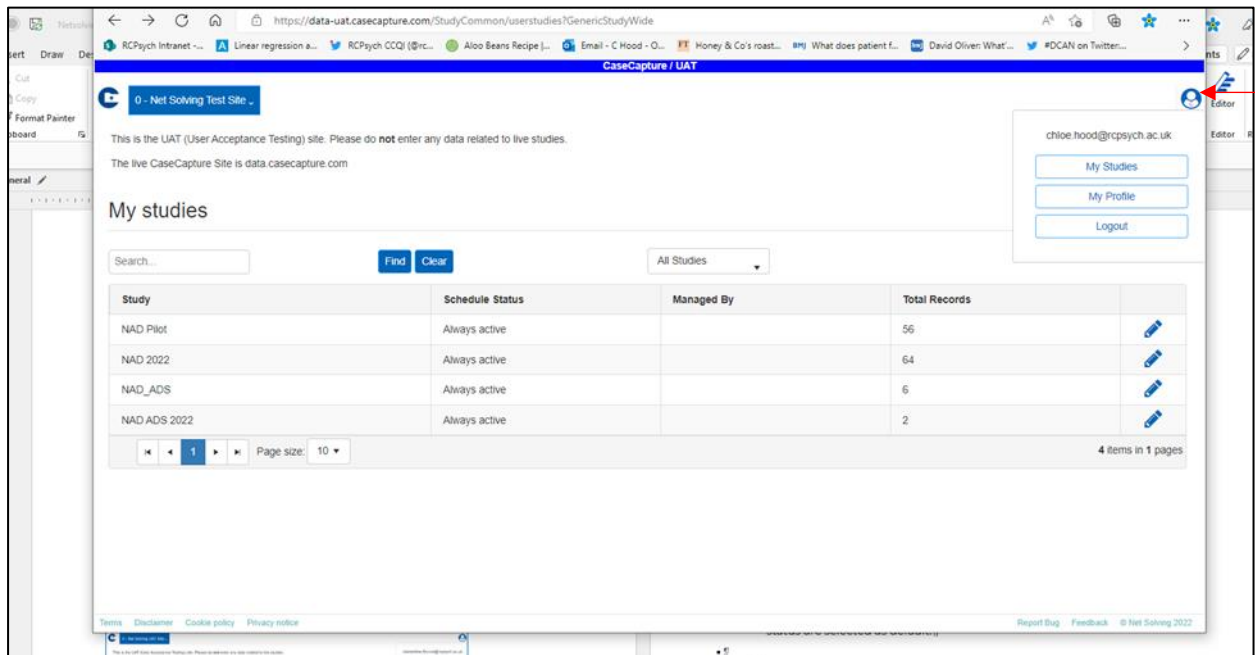
Adding Users

If you have been setup as a site admin you will be able to manage the users at your hospital. Click the 'Users' button on the study toolbar to get to the user management page.

This page is where you can view user details, add, edit, and delete users.
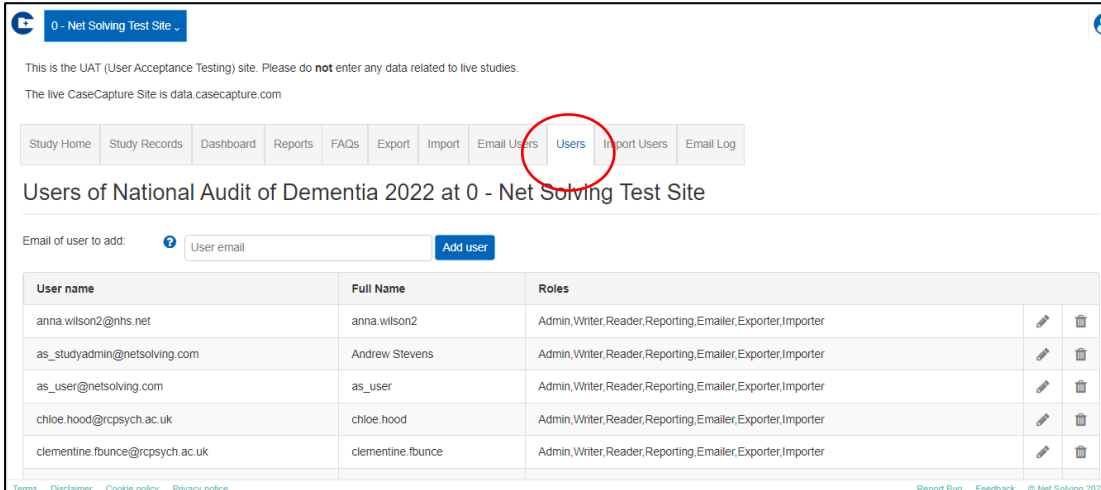
To add a user:
1. Type the email of the user
2. Click the Add user button
3. Amend the name shown in the Name box, if required
4. Select the permissions for the user and click insert. **Writer and Reader status are selected as default.**
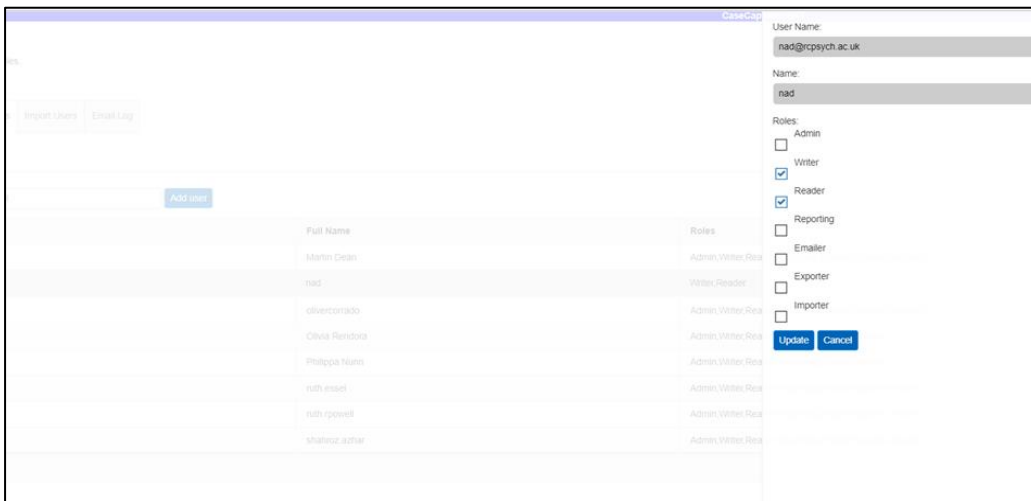
To edit a user, click the edit (pencil) button next to a user, select the permissions you want to change and click update.

Below shows permissions added. Admin gives the person admin privileges for the hospital site, Emailer allows emailing from the platform to other users, and Export allows you to export your data.

To remove a user from a study you will need to click the delete button next to the user.

Study records

The 'Study Records' tab is where the audit tool and previous submissions are found.

Add record – select this to access the audit tool and start entering data.

Show search - search for previous submissions, edit or delete an existing submission by clicking the relevant buttons next to the submission.

You can search records by case ID, user, status and locked status.
For example, to filter your submissions by user:
- Select the down arrow on the user tab
- Select your username
- Then select search.

Your username will now appear in the User box, with a list of cases/records related to you.

Entering data

The audit tool is made up of 3 sections:

1. Part One: Sample for Audit data collection, including demographics and admission information (Questions 1.1 – 1.15)
2. Part Two: Assessment and Planning (Questions 2.1 – 2.13)
3. Part Three: Discharge Information (Questions 3.1 – 3.8)

For Part One, you will be entering some demographic and admission details for <u>all</u> patients prospectively identified during the specified identification period, 14 August- 10 September. Parts 2 and 3 relate to your full sample for audit, which is <u>variable based on your sampling requirements, please see</u> guidance.

Please note: The audit tool will ask you for your locally allocated number for each record (case) you enter, for each part of the tool. E.G NAD 1, NAD2 etc. CaseCapture will also allocate a **unique** case number for each record, and we recommend that you note this alongside the number you have allocated for audit, to keep track of patients in your sample and of which of your colleagues is entering which information.

The four tabs at the top relate to each section of the audit tool. These are colour coded to display the completion status of each section.

Green – Section has been completed. To complete each section, you must select 'save'.

Orange – Section is incomplete, indicating you have missed some questions. You can save an 'Incomplete' section and return to it later if you do not have all the information at present.

Red – Highlights errors in the section (e.g., incorrect dates). If there is an error in the section, you will not be able to continue to the next section until it is corrected.

Blue - Indicates the section has not been saved.

Saving – You can save the entry at any point (press Save and Validate) and return to it later if you do not have all the information available at the time of submission **but** you will not be able to save a section if there are errors. Each section/record is only complete once all the fields have been filled out and there are no errors.

The tool highlights where errors have been identified (For example, in the screenshot below, the age entered is invalid).

If you go to save a section and have **missed questions**, these will be highlighted for you to review.

You may continue to the next section without completing the previous section (unless there are errors in red), and the tab will become orange to remind you of the status.

Exit - Once a record is completed, save, and click the 'Exit' button. Once you have completed a section, the tab will become green.

A **session time-out** warning box will appear on your screen if you have not used the Netsolving portal for a while. You will be given the option to either save your work or to sign out.

Reviewing submissions

After saving and exiting a record submission, you will be taken back to the **record management** page where you will be able to see a list of your previous submissions. Here you can search for previous submissions, edit or delete an existing submission.
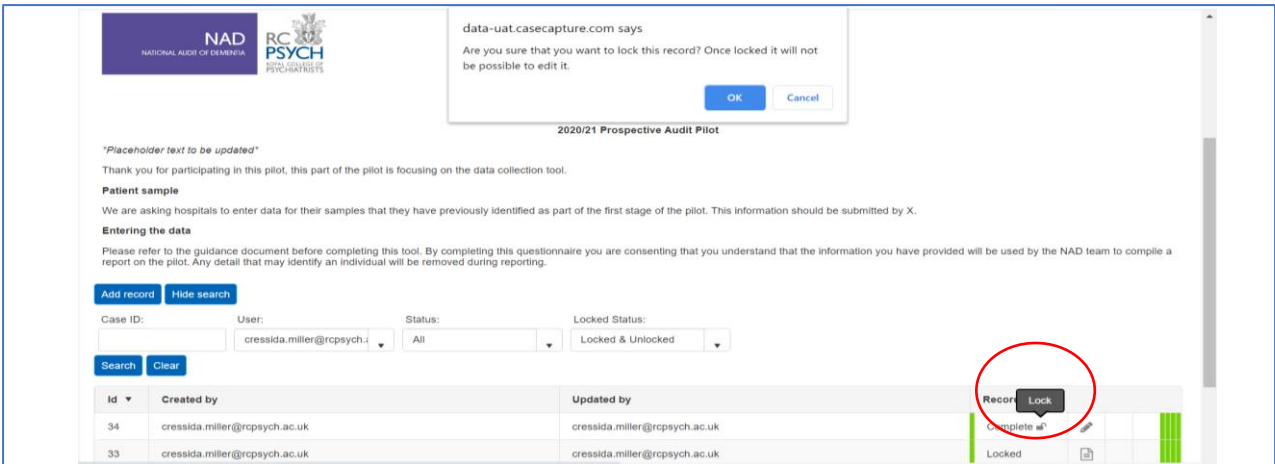
Modify an existing submission

Selecting the pencil icon ✏️ will allow you to go in and modify your record. You can modify both complete and incomplete records.

Locking a submission

Once the record is complete and the responses are checked, click on the lock 🔒 to lock the record. This will restrict any further modifications without being unlocked by an administrator.

Once you click 'lock', a pop-up box will appear asking for you to confirm if you would like to lock your record. When you select OK the status of the case/record will change from 'Complete' to 'Locked'.

Figure 1