

## Extendable Audit Round 6

### Entering your casenote audit data on CaseCapture byNetsolving Guidance 2023

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#### **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](mailto:nad@rcpsych.ac.uk)

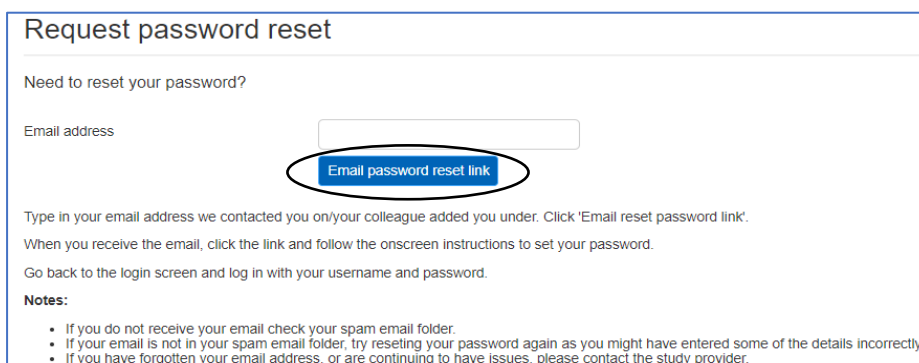
## Logging In

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'

A screenshot of the 'Request password reset' form. The form has a title 'Request password reset' and a question 'Need to reset your password?'. Below this is an 'Email address' input field. A blue button labeled 'Email password reset link' is circled in red. Below the input field, there are instructions: 'Type in your email address we contacted you on/your colleague added you under. Click 'Email reset password link'. When you receive the email, click the link and follow the onscreen instructions to set your password. Go back to the login screen and log in with your username and password.' There is also a 'Notes' section with three bullet points.

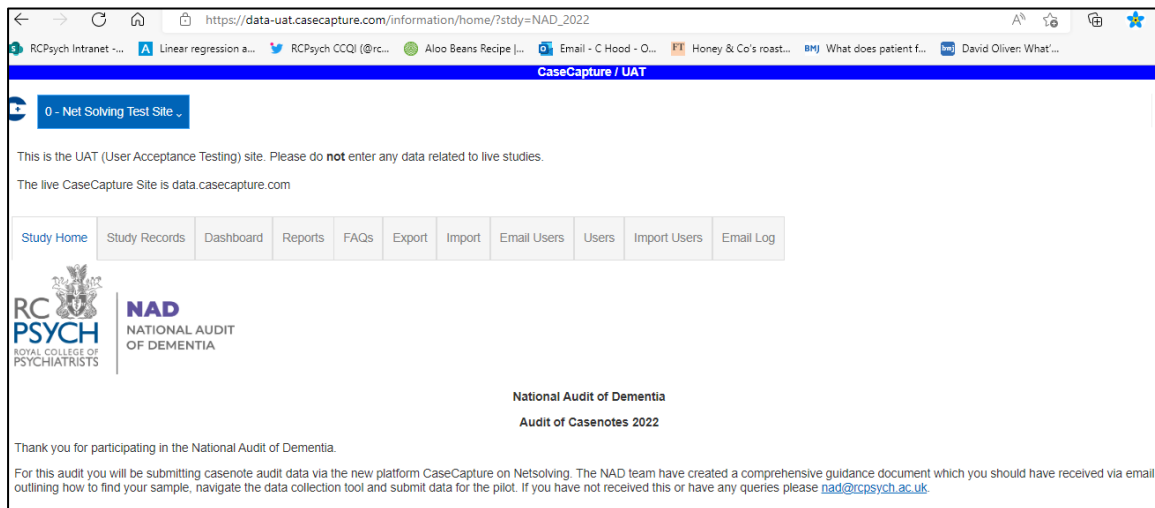
- You will be sent an email with a reset password link, click the link
- Enter your username (usually your email address)
- Enter a password, making sure to follow the password rules shown
- Click Reset. You have now set your password
- Click the login button on the page
- Enter your username and password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

## Landing Page

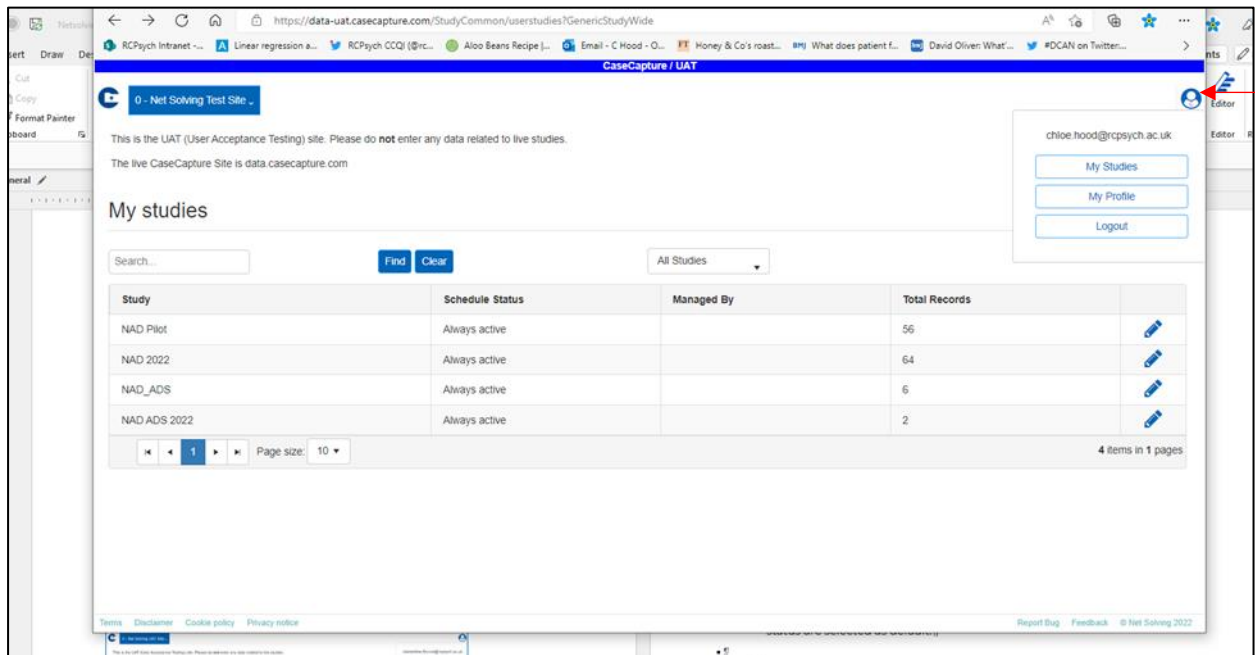
When you login you will be on the record management page for the NAD 23.

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)



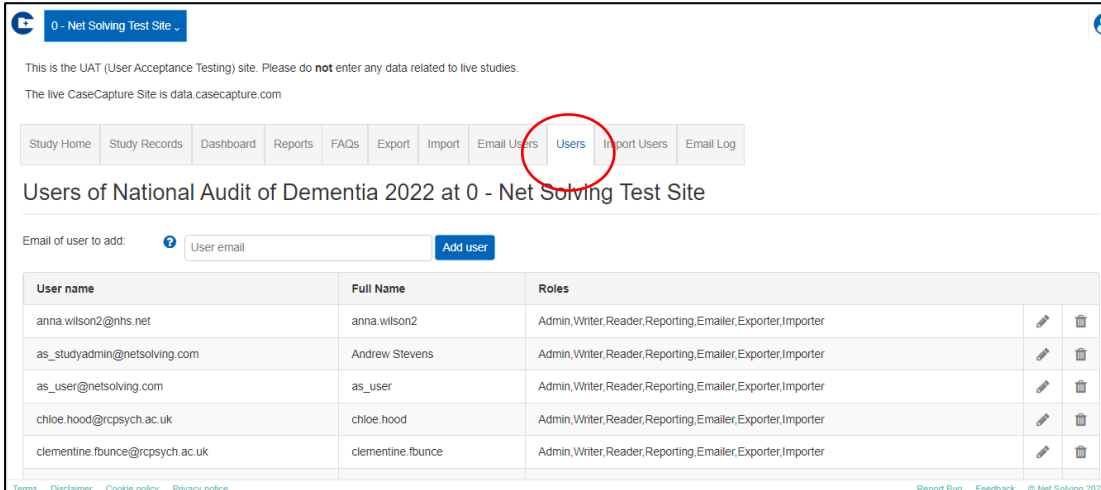
If you hover over the icon on the top right side of the landing page it shows your username, with links to; My studies, My profile, and link to Logout of the site.



# Adding Users

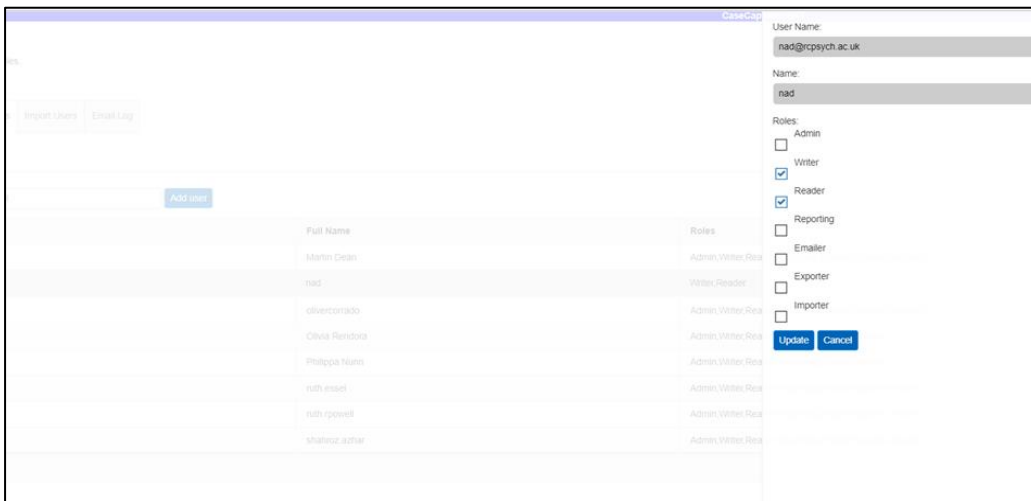
If you have been setup as a site admin you will be able to manage the users at your hospital. Click the 'Users' button on the study toolbar to get to the user management page.

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.

The screenshot shows the 'Users' management interface. On the left, there is a table of existing users with columns for 'User name' and 'Full Name'. On the right, there is a form to add a new user. The 'User Name' field contains 'c.hood@hotmail.co.uk' and the 'Name' field contains 'c.hood'. The 'Roles' section is expanded, showing checkboxes for 'Admin', 'Writer', 'Reader', 'Reporting', 'EMailer', 'Exporter', and 'Importer', all of which are checked. The 'Add user' button is highlighted in blue.

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

The screenshot shows the 'Users' management interface for the '0 - Net Solving Test Site'. It features a table of users with columns for 'User name', 'Full Name', and 'Roles'. The 'Roles' column for the first user, 'anna.wilson2', is circled in red, and the delete button (trash icon) next to it is also circled in red. The 'Add user' button is highlighted in blue.

User name	Full Name	Roles	
anna.wilson2@nhs.net	anna.wilson2	Admin, Writer, Reader, Reporting, EMailer, Exporter, Importer	
as_studyadmin@netsolving.com	Andrew Stevens	Admin, Writer, Reader, Reporting, EMailer, Exporter, Importer	
as_user@netsolving.com	as_user	Admin, Writer, Reader, Reporting, EMailer, Exporter, Importer	
chloe.hood@rcpsych.ac.uk	chloe.hood	Admin, Writer, Reader, Reporting, EMailer, Exporter, Importer	
clementine.fbunce@rcpsych.ac.uk	clementine.fbunce	Admin, Writer, Reader, Reporting, EMailer, Exporter, Importer	

## 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.

The screenshot shows the 'Study Records' page with a navigation menu at the top: Study Records, Dashboard, Reports, FAQs, Export, Import, Email Users, Users, Import Users, Email Log. Below the menu, the page title is 'NAD 2022'. A message reads: 'Thank you for participating in the National Audit of Dementia. For this audit you will be submitting casenote audit data via the new platform CaseCapture on Netsolving. The NAD team have created a comprehensive guidance document which you should have received via email outlining how to find your sample, navigate the data collection tool and submit data for the pilot. If you have not received this or have any queries please contact [nad@rcpsych.ac.uk](mailto:nad@rcpsych.ac.uk).' Below the message are two buttons: 'Add record' and 'Show search', both highlighted with a red circle. Below the buttons is a table with the following data:

ID	Owner	Age	Gender	Gender	Admission Date			Record Status
85	chloe.hood@rcpsych.ac.uk	75	Female	Female	20/09/2022 00:00:00			Incomplete
86	shahroz.azhar@rcpsych.ac.uk	69	Male	Male	21/09/2022 00:00:00			Incomplete
84	chloe.hood@rcpsych.ac.uk	69	Male	Male	21/09/2022 00:00:00			Incomplete
83	chloe.hood@rcpsych.ac.uk	75	Female	Male	20/09/2022 00:00:00			Incomplete

At the bottom of the page, there are links for 'Terms', 'Disclaimer', 'Cookie policy', 'Privacy notice', 'Report Bug', 'Feedback', and '© Net Solving 2022'.

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 all 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 variable based on your sampling requirements, please see [guidance](#).

The screenshot shows the 'Sample For Audit Data Collection' section of the audit tool. At the top, there are buttons for 'Save & validate', 'Exit', and 'ID: 85'. A status bar at the top right indicates the completion status of sections: 'Complete' (green), 'Incomplete' (orange), 'Errors' (red), and 'Not saved' (blue). The main content area is titled 'SAMPLE FOR AUDIT DATA COLLECTION' and contains instructions for data entry. Question 1.1 asks for the audit number, with 'NAD90' entered in the text box. Question 1.2 asks if the patient has been in hospital for 24 hours or longer, with 'Yes' selected. Question 1.3 is partially visible at the bottom.

**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).

1.2 Has the patient been in hospital for 24 hours or longer?  Yes  No  
This record will be deleted if 'No' is selected

1.3 Age at admission

1.4 Sex  Female  
 Unknown/Not documented

1.5 Gender  Male  
 Female  
 Non-binary/Other  
 Unknown/Not documented

**!** Value must be less than or equal to 110.

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.

Save & validate Exit ID: 85 Complete Incomplete Errors No

1. Sample For Audit Data Collection 2. Assessment And Planning 3. Discharge Information

### ASSESSMENT AND PLANNING

This is Part TWO of the casenote audit. For this part of the audit you will take the first 80\* patients admitted to your hospital over the 4 week period 19 September – 14 October and submit information about assessment and planning. Deadline for all data entry for Part Two is 3 January 2023.

\*If you intend to split your sample between this data collection period and the optional March period you may take 40 patients. Please see guidance.

Entering the data: You can save and return to each record entered.

2.1 What is the audit number allocated for this patient?   
Required

Have any of the following screening assessments been carried out for this patient to identify recent changes or fluctuation in behaviour that may indicate the presence of delirium?

2.2.a Single Question in Delirium (SQID)  Yes, within 24 hours of admission  
 Yes, more than 24 hours after admission  
 No  
Required

2.2.c 2.2.d 2.2.e 2.2.f 2.8 2.10 2.11 2.12 2.1




**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

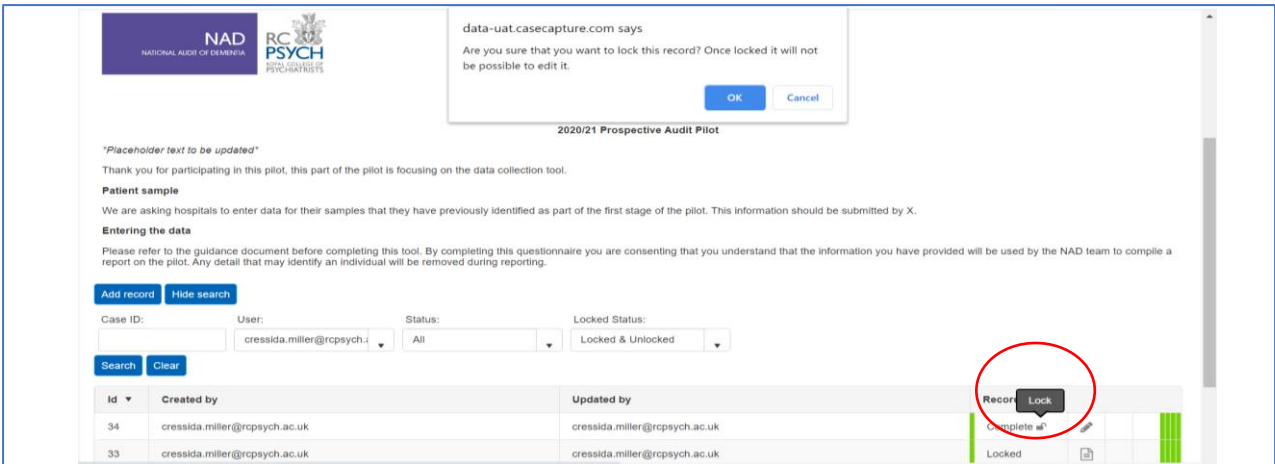
Selecting the pencil icon  will allow you to go in and modify your record. You can modify both complete and incomplete records.

## 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



The screenshot displays the '2020/21 Prospective Audit Pilot' interface. At the top, there are logos for NAD (National Audit of Dementia) and RC PSYCH (Royal College of Psychiatrists). A confirmation dialog box is open, asking: "data-uat.casescapture.com says: Are you sure that you want to lock this record? Once locked it will not be possible to edit it." with 'OK' and 'Cancel' buttons. Below the dialog, the page title is "2020/21 Prospective Audit Pilot". There is a placeholder text: "\*Placeholder: text to be updated\*". A message says: "Thank you for participating in this pilot, this part of the pilot is focusing on the data collection tool." Under "Patient sample", it says: "We are asking hospitals to enter data for their samples that they have previously identified as part of the first stage of the pilot. This information should be submitted by X." Under "Entering the data", it says: "Please refer to the guidance document before completing this tool. By completing this questionnaire you are consenting that you understand that the information you have provided will be used by the NAD team to compile a report on the pilot. Any detail that may identify an individual will be removed during reporting." There are buttons for "Add record" and "Hide search". Below that, there are search filters for "Case ID:", "User:" (with a dropdown showing "cressida.miller@rcpsych.ac.uk"), "Status:" (with a dropdown showing "All"), and "Locked Status:" (with a dropdown showing "Locked & Unlocked"). There are "Search" and "Clear" buttons. At the bottom, there is a table with columns: "Id", "Created by", "Updated by", "Record", and "Lock". The table has two rows. The first row has "34" in the "Id" column, "cressida.miller@rcpsych.ac.uk" in "Created by", "cressida.miller@rcpsych.ac.uk" in "Updated by", and "Complete" in "Record". The second row has "33" in the "Id" column, "cressida.miller@rcpsych.ac.uk" in "Created by", "cressida.miller@rcpsych.ac.uk" in "Updated by", and "Locked" in "Record". A red circle highlights the "Lock" button in the "Record" column of the first row.