

Extendable Audit Round 5

Entering your casenote audit data on CaseCapture byNetsolving Guidance 2022

Contents

Overview	2
Logging In	2
Landing Page	3
Adding Users.....	4
Study records	5
Entering data	6
Reviewing submissions.....	8
Modify an existing submission	8
Locking a submission	8

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'

Request password reset

Need to reset your password?

Email address

Email password reset link (circled)

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.

Notes:

- If you do not receive your email check your spam email folder.
- If your email is not in your spam email folder, try resetting your password again as you might have entered some of the details incorrectly.
- If you have forgotten your email address, or are continuing to have issues, please contact the study provider.

- 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 National Audit of Dementia 2022.

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)

This is the UAT (User Acceptance Testing) site. Please do **not** enter any data related to live studies.
The live CaseCapture Site is data.casecapture.com

[Study Home](#) [Study Records](#) [Dashboard](#) [Reports](#) [FAQs](#) [Export](#) [Import](#) [Email Users](#) [Users](#) [Import Users](#) [Email Log](#)

National Audit of Dementia
Audit of Casenotes 2022

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 nad@rcpsych.ac.uk.

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.

My studies

Study	Schedule Status	Managed By	Total Records
NAD Pilot	Always active		56
NAD 2022	Always active		64
NAD_ADS	Always active		6
NAD ADS 2022	Always active		2

4 items in 1 pages

chloe.hood@rcpsych.ac.uk
[My Studies](#) [My Profile](#) [Logout](#)

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.

This screenshot shows the 'Users' management page for the National Audit of Dementia 2022. At the top, there is a message: 'This is the UAT (User Acceptance Testing) site. Please do **not** enter any data related to live studies. The live CaseCapture Site is data.casecapture.com'. Below this is a navigation bar with links: Study Home, Study Records, Dashboard, Reports, FAQs, Export, Import, Email Users, **Users**, Import Users, and Email Log. The 'Users' link is highlighted with a red circle. The main content area is titled 'Users of National Audit of Dementia 2022 at 0 - Net Solving Test Site'. It contains a table with columns: User name, Full Name, and Roles. The table lists several users with their respective details and edit/delete icons. At the bottom of the table, there are links for Report bugs, Feedback, and © Net Solving 2022.

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.

This screenshot shows the 'Add user' dialog box. It has fields for User Name (nad@rcpsych.ac.uk), Name (nad), and Roles. The Roles section includes checkboxes for Admin, Writer, Reader, Reporting, Emailer, Exporter, and Importer. The 'Writer' and 'Reader' checkboxes are checked. At the bottom right are 'Update' and 'Cancel' buttons.

To edit a user, click the edit button next to a user, select the permissions you want to change and click update.

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.

The screenshot shows the 'Study Records' page. At the top, there is a navigation bar with links: Study Records, Dashboard, Reports, FAQs, Export, Import, Email Users, Users, Import Users, and Email Log. Below the navigation bar, the title 'NAD 2022' is displayed. A message says 'Thank you for participating in the National Audit of Dementia.' and provides instructions for submitting casenote audit data via CaseCapture on Netsolving. Two buttons are highlighted with a red circle: 'Add record' and 'Show search'. Below these 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 2023.

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, 19 September – 14 October. Parts 2 and 3 relate to your full sample for audit, which is the first 80 patients in order of admission (or less than 80 if you are splitting your sample – please refer to guidance on [website](#) for more about this).

SAMPLE FOR AUDIT DATA COLLECTION

This is Part ONE of the casenote audit. For this part of the audit you will prospectively identify all patients with dementia (or probable dementia wherever possible) who are admitted to your hospital over the 4 week period 19 September – 14 October and record demographic and admission details. The deadline for all data entry for Part One is 28 October.

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

If the record is one of your first 80 patients for full audit please tick YES to question 1.15

If the record is for a patient who is not one of your first 80 patients please tick NO to question 1.15. This will show that this record is complete and enable you to lock the record

1.1 What is the audit number allocated for this patient?

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

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).

This screenshot shows a form section with the following fields:

- 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: 175 ! Value must be less than or equal to 110.
- 1.4 Sex:
 - Female
 - Unknown/Not documented
- 1.5 Gender:
 - Male
 - Female
 - Non-binary/Other
 - Unknown/Not documented

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.

This screenshot shows the 'ASSESSMENT AND PLANNING' section of the casenote audit tool. The top navigation bar includes 'Save & validate', 'Exit', 'ID: 85', and tabs for 'Complete', 'Incomplete', 'Errors', and 'No'. The main content area has three tabs: '1. Sample For Audit Data Collection' (selected), '2. Assessment And Planning' (orange, indicating incomplete status), and '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

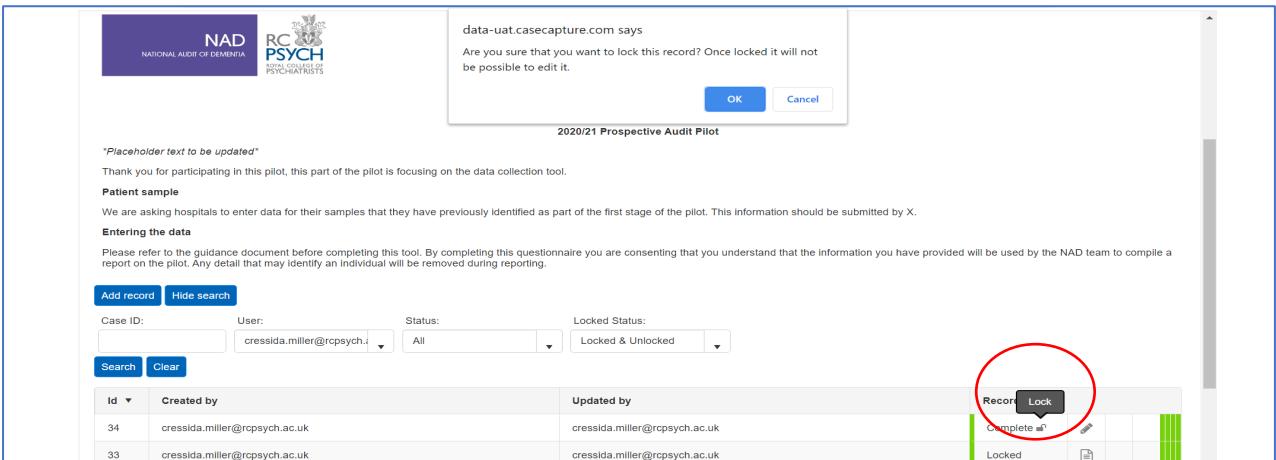
Selecting the pencil icon  will allow you to go in and modify your record. You can modify both complete and incomplete records.

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 shows a web-based application interface for the National Audit of Dementia (NAD) and Royal College of Psychiatrists (RC Psych). At the top left is the NAD logo and the RC Psych logo. A central modal dialog box is open, asking '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 modal, the text '2020/21 Prospective Audit Pilot' is visible. The main content area contains sections for 'Placeholder text to be updated', 'Patient sample', and 'Entering the data'. It includes input fields for 'Case ID', 'User' (set to 'cressida.miller@rcpsych.ac.uk'), 'Status' (set to 'All'), and 'Locked Status' (set to 'Locked & Unlocked'). Buttons for 'Add record', 'Hide search', 'Search', and 'Clear' are present. A table lists two records with columns for 'Id', 'Created by', 'Updated by', and 'Locked Status'. The first record (Id 34) has 'Locked Status' set to 'Locked'. A red circle highlights the 'Lock' button in the 'Locked Status' dropdown menu for the second record (Id 33). A tooltip for the 'Lock' button says 'Record Complete & Locked'.