

Prospective Audit Pilot

Netsolving Guidance 2021

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Overview

The guidance will explain how to sign in and activate your Netsolving account, as well as how to submit and interpret your data. In addition to this document we have also created some short video tutorials for each section which we will circulate.

Please note this is the first time we have used this data entry platform and this guidance document. If anything is unclear or not working, please contact us and let us know at nad@rcpsych.ac.uk as this is all part of the pilot process.

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

Figure 1



Click 'Email password reset link'

Figure 2

- 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

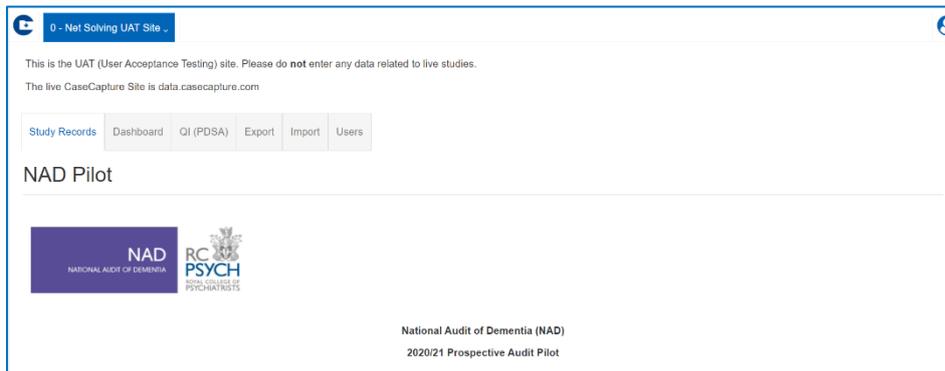
Landing Page

When you login you will be on the record management page for the National Audit of Dementia (NAD) 2020/21 Prospective Audit.

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

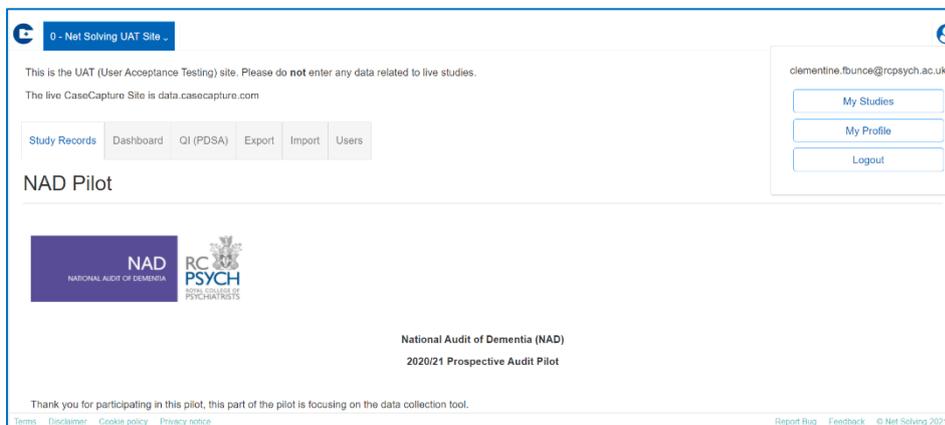
At the top-left side of the page, there are several tabs including: Study Records, dashboard, export, import and users (please note these may vary slightly depending on your user permissions)

Figure 3



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.

Figure 4

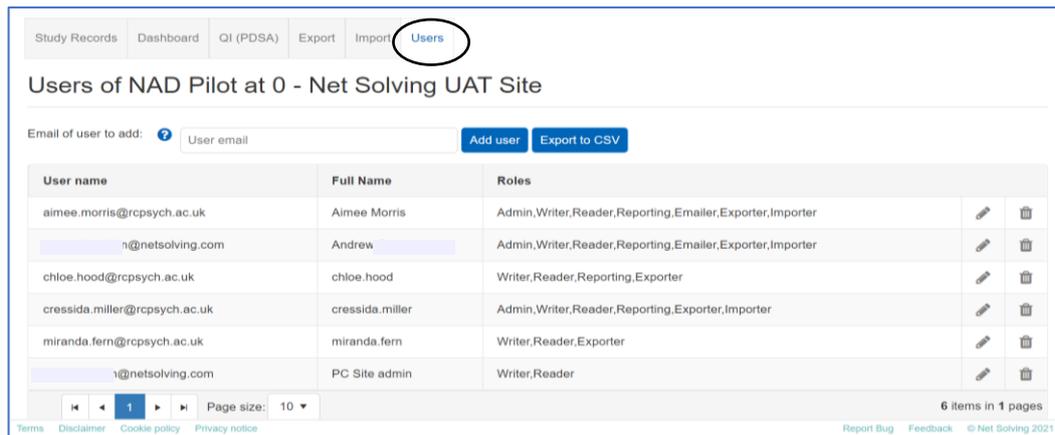


Adding Users

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.

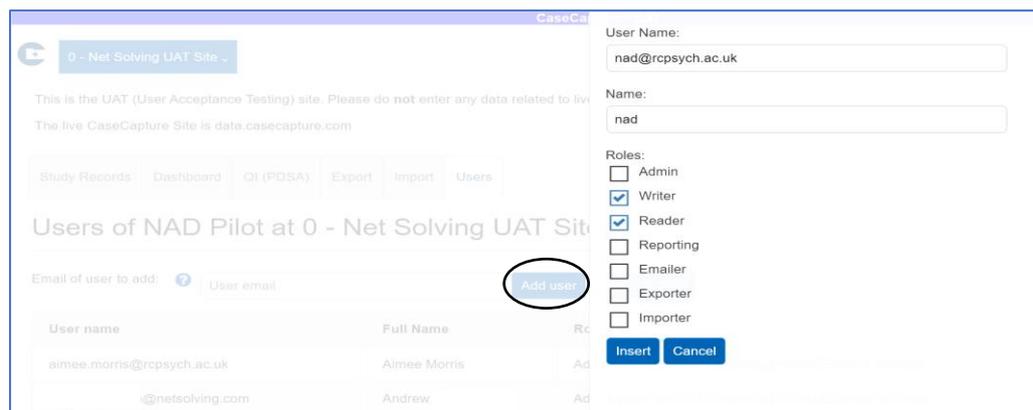
Figure 5



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.

Figure 6



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.

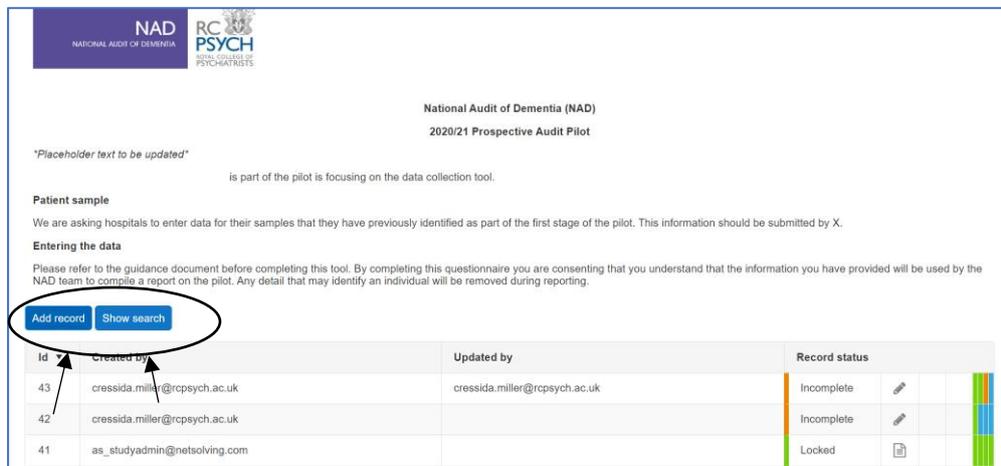
1. Study records

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.

Figure 7



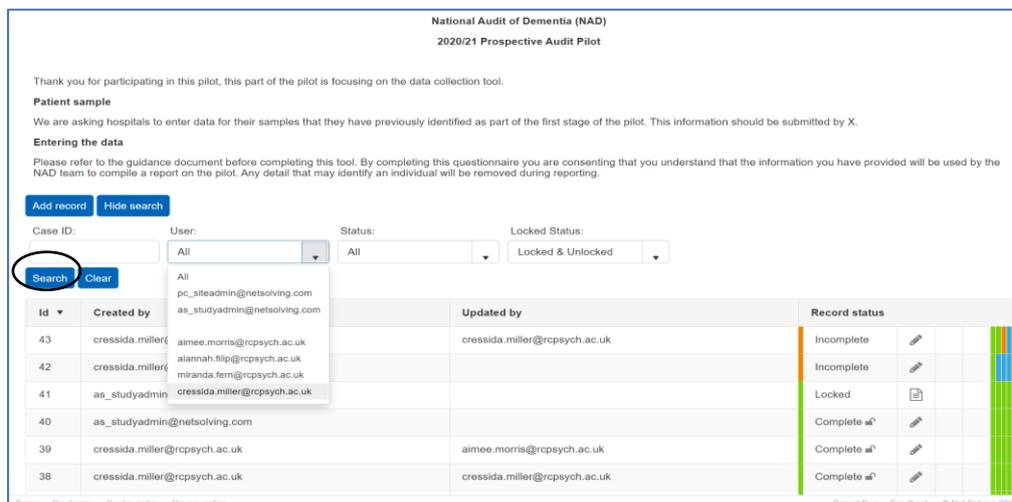
You can search records by case ID, user, status and locked status.

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, as shown below:

Figure 8



Entering data

There are four sections to the audit tool:

1. Demographics & Admission (Questions 1.1 – 1.13)
2. Screening (Questions 2.1 – 2.6)
3. Pain (Questions 3.1 – 3.2)
4. Discharge (Questions 4.1-4.8)

Figure 9

National Audit of Dementia

Once the record is complete and saved you can lock it. Once the record is locked you will be unable to edit the record further but will still be able to view it.

Site: 0 - Net Solving UAT Site

Complete Incomplete Errors Not saved

1. Demographics & Admission 2. Screening 3. Pain 4. Discharge

Demographics

1.1. Has the patient been in hospital for 24 hours or longer?

1.2. Age at admission

1.3. Gender

Male

Female

Non-binary/Other

Unknown/Not documented

1.4. Ethnicity

Asian or Asian British (Includes any Asian background e.g. Bangladeshi, Chinese, Indian, Pakistani)

Black, African, Black British or Caribbean (Includes any Black background)

Mixed or multiple ethnic groups (Includes any mixed background)

White (Includes any White background)

Other ethnic group (Includes any other ethnic group, e.g. Arab)

Unknown/Not documented

1.5. First language

English

Welsh

Save Exit

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.

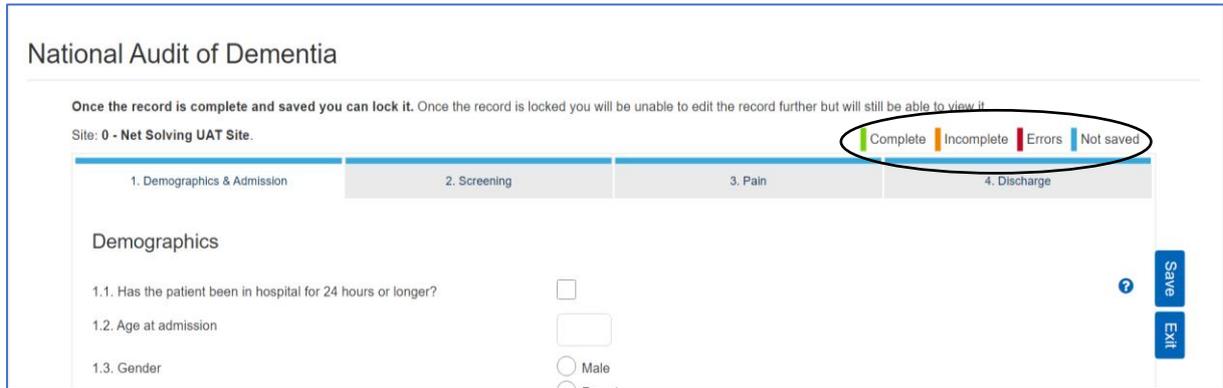
Green – Section has been completed. To complete each section, you must select 'save'.

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.

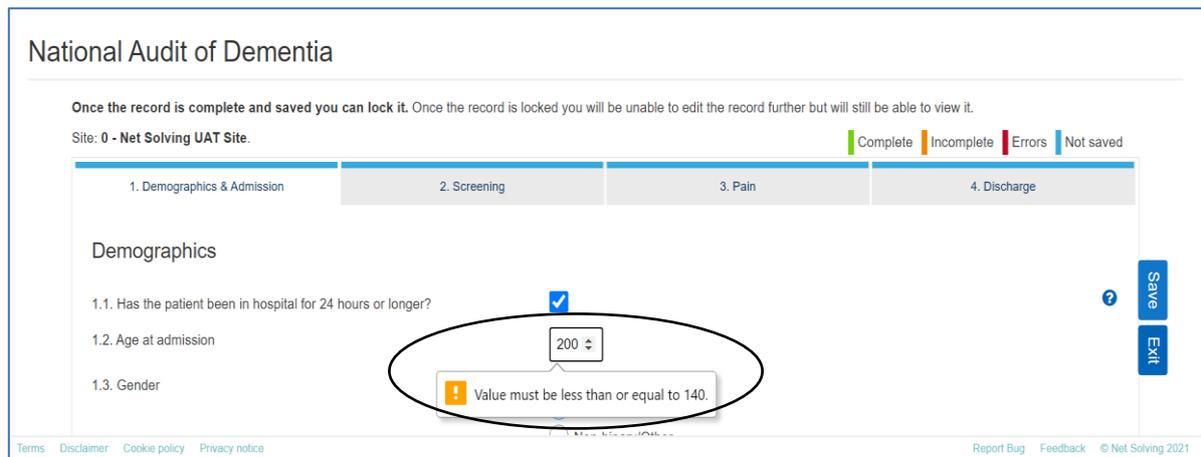
Figure 10



Save – You can save the entry at any point and return to it later if you do not have all the information available at the time of submission. 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 patient's age has is not valid).

Figure 11



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.

Figure 12

The screenshot shows a form for recording dementia admission details. It includes the following sections:

- 1.11. Place in which the person was living or receiving care before admission:** A list of radio button options: Own home, Respite care, Rehabilitation ward, Psychiatric ward, Carer's home, Intermediate/Community rehabilitation care, Residential care, Nursing home, Palliative care, Transfer to another hospital, Long stay care.
- 1.12. On the date of submission, what ward/unit is the person admitted to?:** A list of radio button options: Care of the elderly, Cardiac, Critical care, General medical, Nephrology, Obstetrics/Gynaecology, Oncology, Orthopaedics, Respiratory, Stroke, Surgical, Other medical, Other.
- 1.13. Is this patient outlying (not on 'base' ward):** Radio button options: Yes, No.

At the bottom of the form, there is a 'Save' button and an 'Exit' button. A red banner at the very bottom of the page reads 'PAGE SAVED - ERRORS OR INCOMPLETE FIELDS FOUND show errors'.

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

Figure 13

The screenshot shows the 'National Audit of Dementia' form. The top navigation bar indicates the record is complete and locked. The form is divided into four tabs: 1. Demographics & Admission (highlighted in green), 2. Screening, 3. Pain, and 4. Discharge. The 'Demographics' section includes the following questions and answers:

- 1.1. Has the patient been in hospital for 24 hours or longer?** Yes
- 1.2. Age at admission:** 78
- 1.3. Gender:** Female
- 1.4. Ethnicity:** White (Includes any White background)
- 1.5. First language:** Welsh

At the bottom of the form, there is a 'Save' button and an 'Exit' button. A green banner at the very bottom of the page reads 'PAGE SAVED - COMPLETE'.

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 14

The screenshot shows the user interface for the '2020/21 Prospective Audit Pilot'. At the top, there are logos for NAD (National Audit of Dementia) and RCPSYCH (Royal College of Psychiatrists). A confirmation 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 dialog, there is a search and filter section with fields for Case ID, User (cressida.miller@rcpsych.ac.uk), Status (All), and Locked Status (Locked & Unlocked). A table below shows two records:

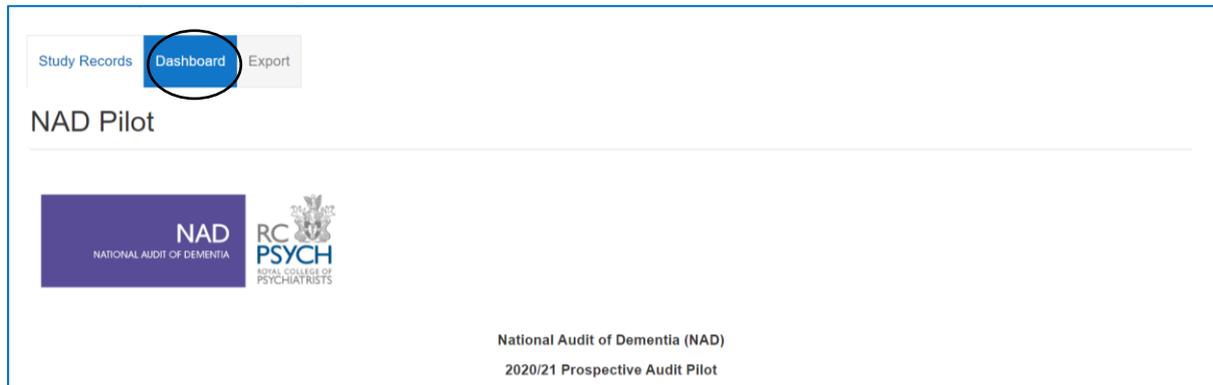
Id	Created by	Updated by	Record Status	Lock
34	cressida.miller@rcpsych.ac.uk	cressida.miller@rcpsych.ac.uk	Complete	✎
33	cressida.miller@rcpsych.ac.uk	cressida.miller@rcpsych.ac.uk	Locked	🔒

The 'Record Status' and 'Lock' columns are circled in red in the original image.

2. Dashboard

The dashboard provides an overview of key performance areas in the audit.

Figure 15



Data is displayed in three run charts:

1. Assessments
2. Delirium care
3. Discharge planning initiated within 24 hours of admission.

Please note you will only see this if you are logged into a site and the study has enabled dashboards for users.

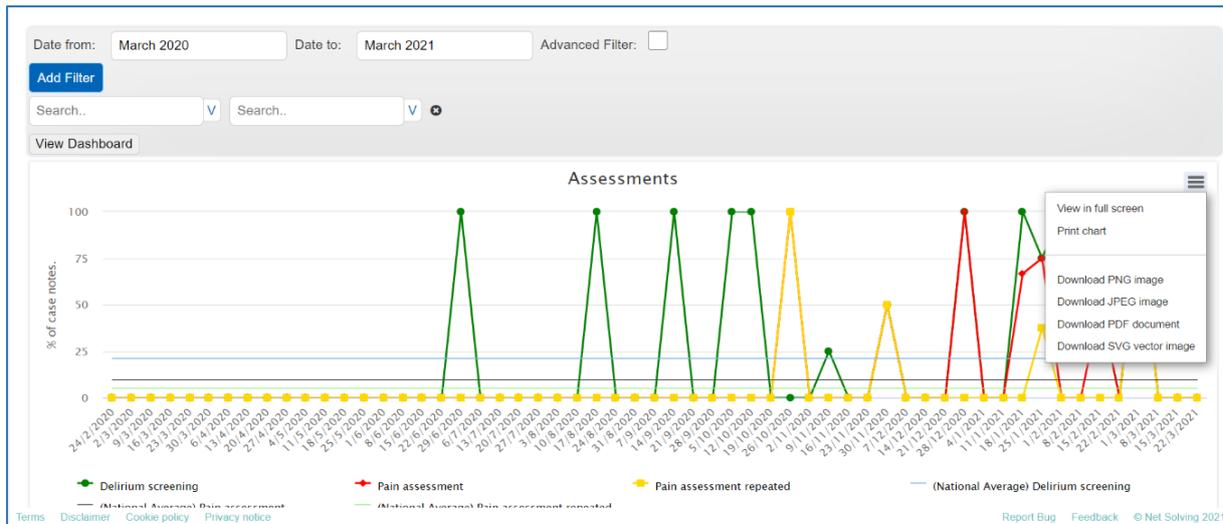
The chart display includes all locked and unlocked submissions.

On the top-right of each chart, there is an icon with three horizontal lines.

When you click on it, you have the option to:

- View the chart in full screen mode
- Print the chart
- Save the chart as an image
- Save the chart as a PDF document

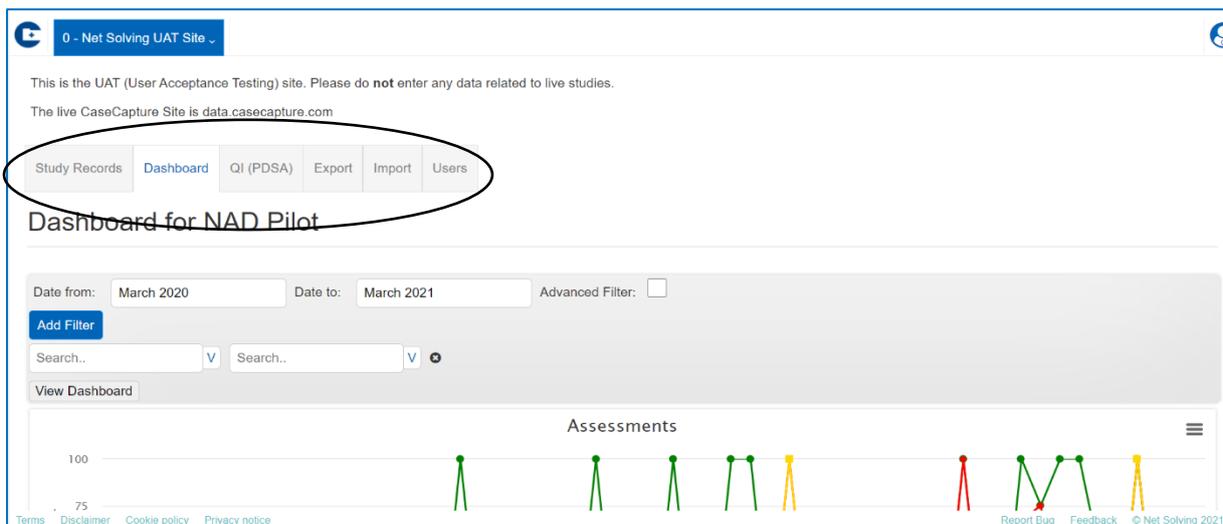
Figure 16



Dashboard search function

The Dashboard has a **search function** which allows you to set date parameters for data displayed in the graphs. Once the search parameters are added, select the View Dashboard tab to update the run charts.

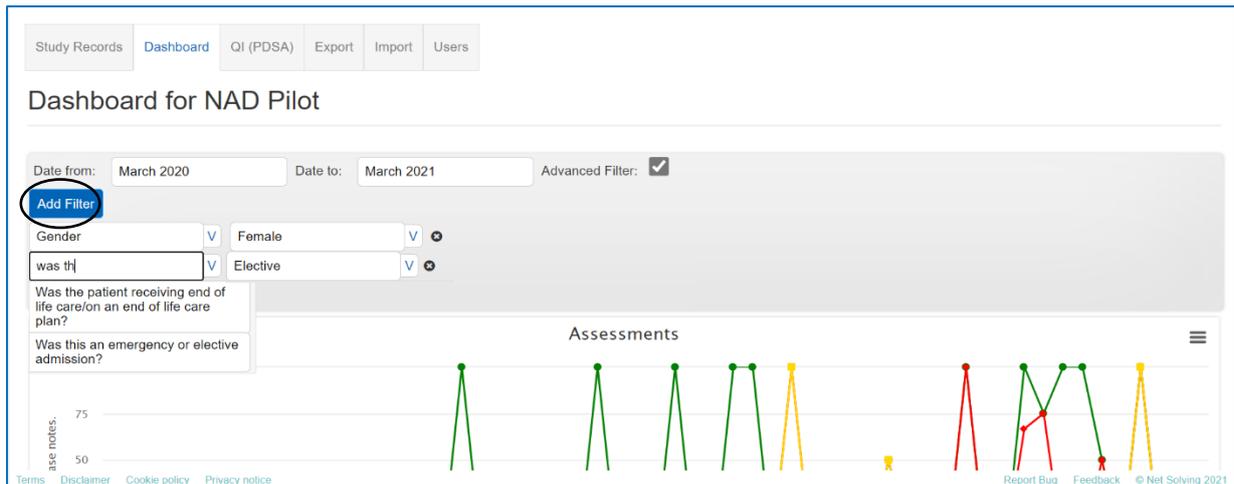
Figure 17



Advanced Filter – allows you to filter the data by specific responses. For example: if you wanted to see assessments completed by gender to explore whether females were more or less likely to receive an assessment.

You can add multiple filters by selecting on 'Add Filter'.

Figure 18



Once you have added any filters, select the View Dashboard tab to update the run charts.

Interpreting the run charts

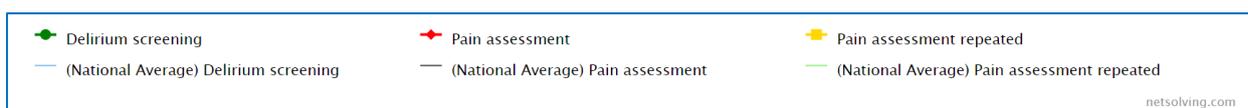
X axis – Weekly admission dates

Y axis – Percentage of casenotes (e.g., % of patients who had an assessment)

Legends – All the data points on the graph including the national average

Add/remove legends from view in the graph by clicking on the individual legends in the key underneath the graph (Figure 19). This is useful if you want to view data points in isolation (e.g., if you only want to view the delirium assessments you can select all other assessments to remove them from view)

Figure 19



National average – There will be a national average for each performance area to provide a benchmark. This will be calculated from all submissions across hospitals and this figure will automatically update throughout data entry.

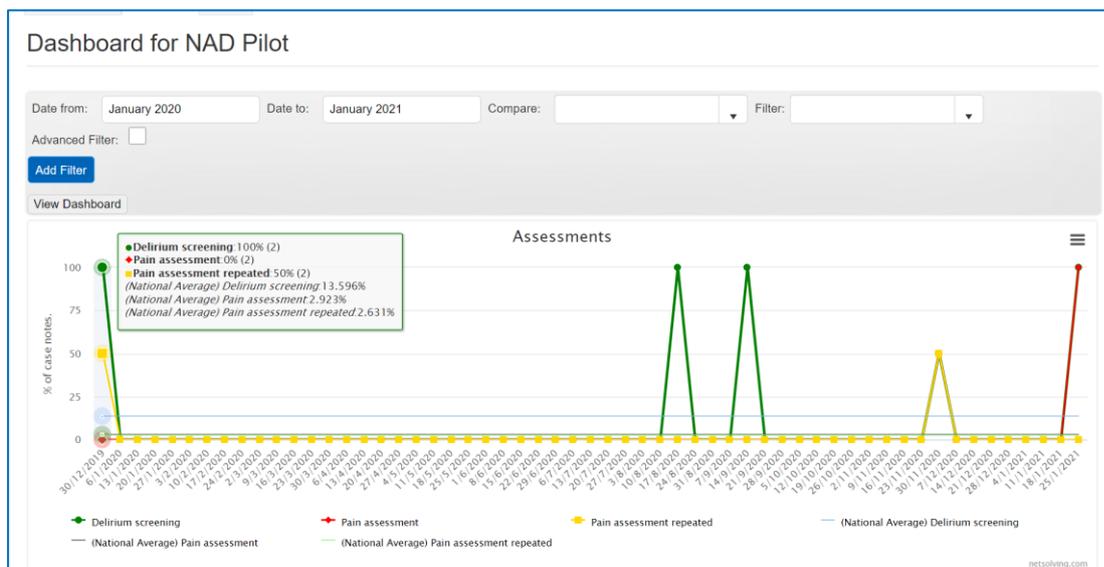
1. Assessment graph

This run chart provides data from 3 assessments:

- a. **Delirium assessment** – delirium noted as part of admitting condition or delirium screening assessments have been carried out within 24 hours of admission (question 1.8 or 2.1)
- b. **Pain assessment** – patient has been assessed for presence of pain within 24 hours of admission (question 3.1)
- c. **Pain assessment repeated** – Pain assessment repeated within 24 hours of first pain assessment (question 3.2)

Figure 20 shows the assessment graphs with all legends displayed:

Figure 20

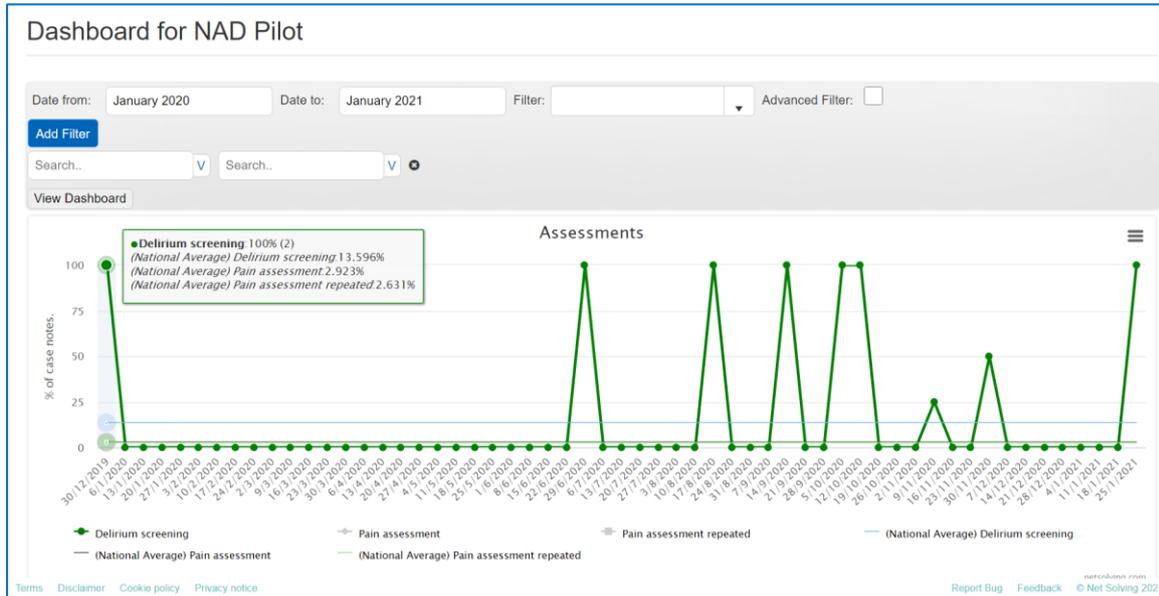


An example of how to interpret Figure 20:

- On the week of December 30th 2019, 2 people were admitted to hospital.
- The number in brackets refers to the total number of cases (N) entered on each admission day.
- Both people (100%) had a delirium screening assessment carried out within 24 hours of admission.
- None of them were assessed for presence of pain within 24 hours of admission.
- One person (50%) had their pain assessment repeated within 24 hours of first pain assessment.

Figure 21 below shows the assessments graphs with only Delirium screening selected (the legends for pain assessment and pain assessment repeated were unselected, and greyed out).

Figure 21



2. Delirium care

This run chart provides data from two questions in the audit tool

- Delirium management plan** – A management plan (for investigation and treatment) for delirium was put in place (question 2.5)
- Delirium care plan** – A care plan (for nursing care) for delirium was put in place (question 2.6).

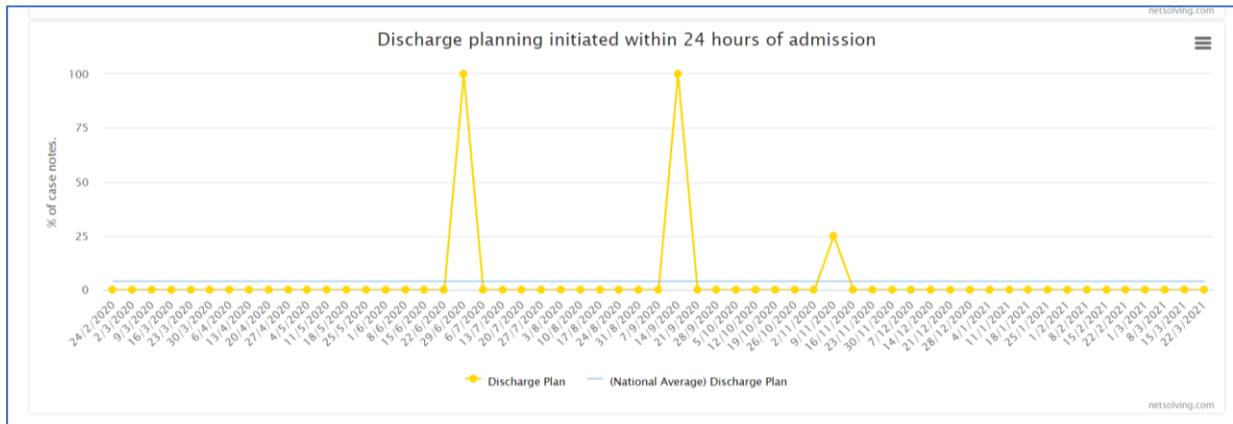
Figure 22



3. Discharge planning

Discharge planning was initiated within 24 hours of admission (question 4.1)

Figure 23



3. Exporting data

To view all your raw data you will need to export it.

Figure 24

Study Records Dashboard **Export**

NAD Pilot

NAD NATIONAL AUDIT OF DEMENTIA **RCPSYCH** ROYAL COLLEGE OF PSYCHIATRISTS

National Audit of Dementia (NAD) 2020/21 Prospective Audit Pilot

Thank you for participating in this pilot, this part of the pilot is focusing on the data collection tool.

Patient sample
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.

Entering the data
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.

[Add record](#) [Show search](#)

When you select the export tab you will be directed to the export data page.

Please note to export the data, you will need to install a tool like 7-zip, or another appropriate software, which allows for encrypted files to be opened.

You will be asked to enter a password of your choice which will be used to open the excel spreadsheet containing the data, as this is password protected.

More information explaining this can be found at the bottom of the export page under 'Exporting Information':

Figure 25

From date: 05/02/2020 To date: 05/02/2021

Export locked study data to csv

Export data item key

Exporting information.

Exports are password protected to help ensure the security of the data. It is required that you enter a password of at least 8 characters. This does not mean the data is secure however and the passworded file should not be placed on public machines or passed to insecure parties.

Passworded zip files are not always handled well by operating systems, to open them you will most likely need to use a tool such as 7-Zip on a windows machine or Unarchiver/iZip on a MAC. **It remains your responsibility to find and assess appropriate software we cannot take responsibility for 3rd party software or security.**

Define the data that you want to export using the 'Select the date field you want to compare against' drop down list (Date record was created, Date record was locked or Date of admission). You will then need to set the data parameters for the data that you want to export. The example in Figure 26 would export all records created from 1st December 2020 to 5th February 2021.

Please note you can only export locked entries.

Once you are ready to export the data, click on 'Export locked study data to csv' and 'Export data item key for the questions'.

The downloaded files can be found on the bottom left of your screen:

Figure 26

Export NAD Pilot data for 0 - Net Solving UAT Site

All files will be [encrypted](#) to the AES-256 standard and require a password. In order to open the file you will need to use a tool like 7-zip (www.7-zip.org) that allows AES-256 encrypted files to be opened (AES-256 zip files cannot be opened in windows). You will need to extract the files from the zip folder before opening them in order to view them.

Please enter a password below of at least 8 characters

.....

Select the date field you want to compare against

Date record was created

From date: 01/12/2020 To date: 05/02/2021

Export locked study data to csv

Export data item key

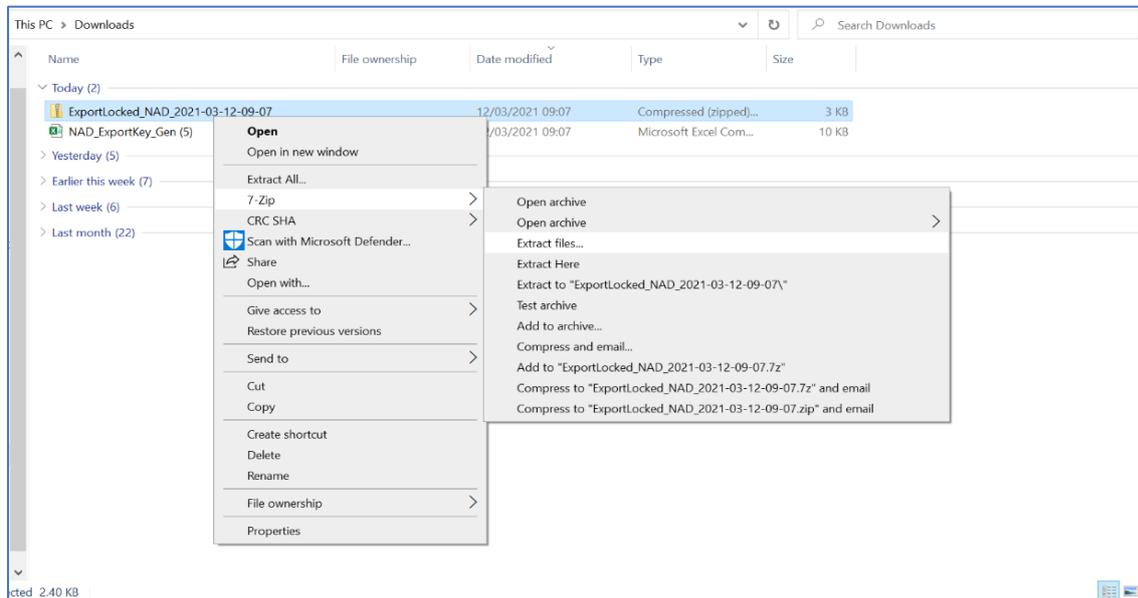
Disclaimer Cookie policy Privacy notice Report Bug Fe

NAD_ExportKey_Gen...csv ... ExportLocked_NAD_2...zip ...

Open file Open file

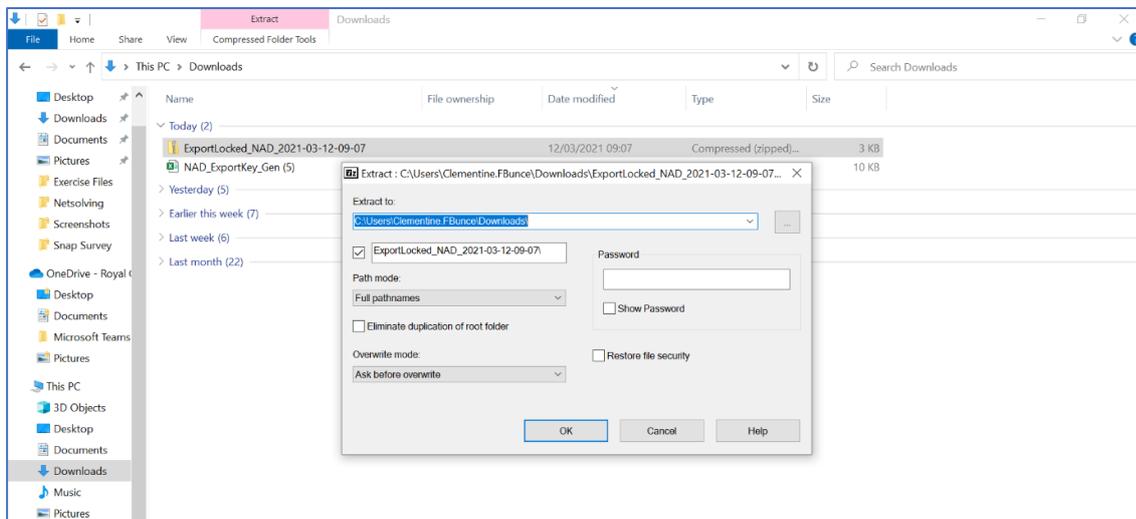
To open the file, locate the zip file in your downloads. Right click the file and go to 7-zip> Extract Files.

Figure 27



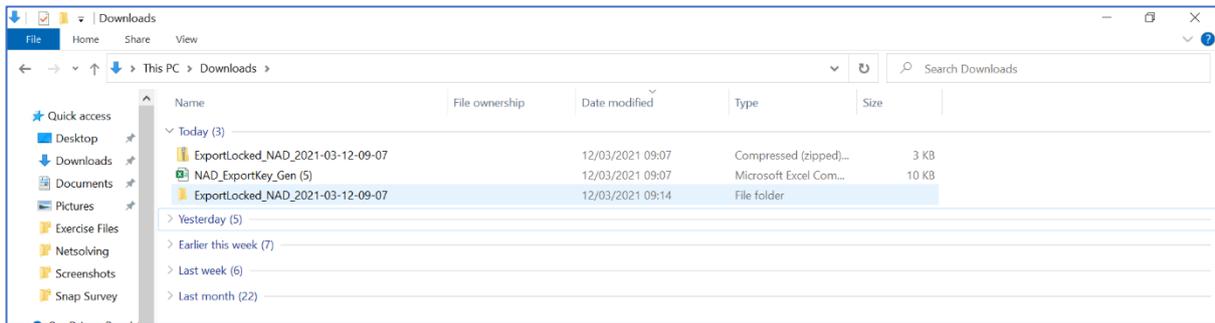
You will then be asked to enter the password that you [set earlier](#).

Figure 28



Once you have entered your password, a new unzipped folder will appear in your downloads which will contain the exported data in an excel file.

Figure 29



The figure below is an example of a successfully exported excel file:

Figure 30

The screenshot shows an Excel spreadsheet with the following data:

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
SiteName	Caseld	SiteCode	ImportId	ImportIdE	CreatedD	CreatedUs	UpdatedD	UpdatedU	Locked	LockedDal	LockedUse	RecordSta	Closed	S01Sector	S0124Hrs	S01Age	S01Gende	S01Ethnic
0 - Net Sol	5	NS01	'-2147483648		#####	aimee.mo	#####	aimee.mo	TRUE	#####	aimee.mo	10	FALSE	10	1	10	NK	NK
0 - Net Sol	6	NS01	'-2147483648		#####	aimee.mo	#####	aimee.mo	TRUE	#####	aimee.mo	10	FALSE	10	1	87	M	AB
0 - Net Sol	8	NS01	'-2147483648		#####	aimee.mo	#####	aimee.mo	TRUE	#####	aimee.mo	10	FALSE	10	1	23	F	BB
0 - Net Sol	16	NS01	'-2147483648		#####	alannah.fi	#####	alannah.fi	TRUE	#####	alannah.fi	10	FALSE	10	1	60	M	WB
0 - Net Sol	19	NS01	'-2147483648		#####	alannah.fi	#####	alannah.fi	TRUE	#####	alannah.fi	10	FALSE	10	1	10	F	BB
0 - Net Sol	20	NS01	'-2147483648		#####	alannah.fi	#####	alannah.fi	TRUE	#####	alannah.fi	10	FALSE	10	1	14	NK	NK
0 - Net Sol	21	NS01	'-2147483648		#####	alannah.fi	#####	alannah.fi	TRUE	#####	alannah.fi	10	FALSE	10	1	10	NK	NK
0 - Net Sol	22	NS01	'-2147483648		#####	alannah.fi	#####	alannah.fi	TRUE	#####	alannah.fi	10	FALSE	10	1	10	F	O
0 - Net Sol	31	NS01	'-2147483648		#####	cressida.n	#####	cressida.n	TRUE	#####	cressida.n	10	FALSE	10	1	11	F	MB
0 - Net Sol	33	NS01	'-2147483648		#####	cressida.n	#####	cressida.n	TRUE	#####	cressida.n	10	FALSE	10	1	80	M	BB
0 - Net Sol	37	NS01	'-2147483648		#####	cressida.n	#####	cressida.n	TRUE	#####	cressida.n	10	FALSE	10	1	93	M	BB
0 - Net Sol	41	NS01	'-2147483648	325	#####	as studya	#####	as studya	TRUE	#####	as studya	10	FALSE	10	1	23	M	AB
0 - Net Sol	57	NS01	'-2147483648		#####	clementin	#####	clementin	TRUE	#####	clementin	10	FALSE	10	1	82	F	WB
0 - Net Sol	58	NS01	'-2147483648		#####	clementin	#####	clementin	TRUE	#####	clementin	10	FALSE	10	1	90	M	AB

4. Importing data

Only users assigned with importing permissions can import data. The exporter permission is also required so they can download the 'key' for the database.

To import data, you will also need your site code, which can be found by following the steps:

On the Welcome page, click on the button below:

Figure 31



This will reveal your site code, as shown below:

Figure 32



These users can now see the 'Import' & 'Export' tab (see figure 31)

1. Go to 'Export'
2. [Click 'Export data item key'](#).

In cell A1 type 'ImportIdentifier'.

In cell A2 type 'SiteCode'.

- An **import identifier** is unique to each record, and creating one is useful for matching records.
- Matching your imports by 'import identifier' allows you to update existing records on the system.
- This means you could have one large excel file containing all the records you have imported. You can amend or add to this as needed, for example with additional information, and then re-import. This will update the existing imported file with the new information.
- Here is an example format for an import identifier MAY21CFBNS01_1 (month and year, your initials and site code).
- Remember that each import identifier is unique, so increment each record by 1.
- You can find your **Site Code** [here](#).
It is important to make sure you include the site code for each case, otherwise the file will not import.
- To fill in the rest of the fields, you will need to use the 'Data item key' file you downloaded earlier to match the values in the database.
- (E.g., S01Gender you will need to enter 'M' or 'F' for male or female and for S01Ethnicity White British would be recorded as WB).

Figure 36

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	
1	ImportIdentifier	SiteCode	S0124Hrs	S01Age	S01Gende	S01Ethnici	S01FirstLa	S01Admissio	S01Primay	S01Primay	S01Admis	S01Deleric	S01Demer	S01Demer	S01Demer
2	MAY21CFBNS01_1	NS01	1	94 M	AB	E	19/05/2021	CAN			EM	Y	KD	ALZ	OH
3															
4															
5															

Once the file has been finished, save it as a CSV Comma delimited file. It is important that it is saved in this format or you will not be able to import the file into Netsolving.

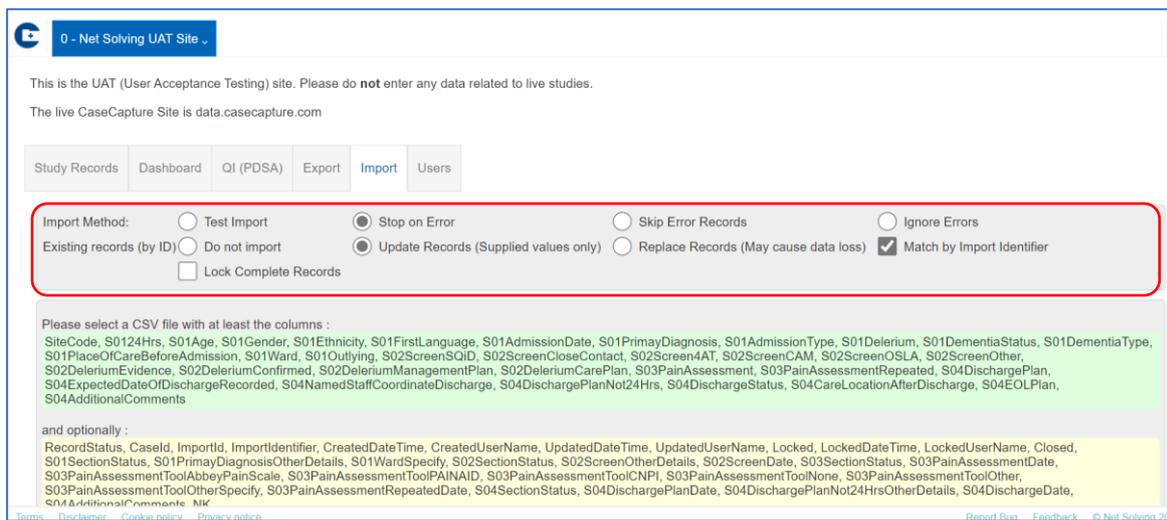
On the **import page** of Netsolving, select 'Choose file' and select your CSV file. The box shown below allows you to choose your import method. It also allows you to decide what you want to do with existing records if there are any in your file that match the database, [as explained above](#).

When you come to import, you can select the options; 'Stop on error', 'Update records' and 'Match by import id', this will import any new records and update any old ones.

(If you select 'Test Import' you will not import any data.)

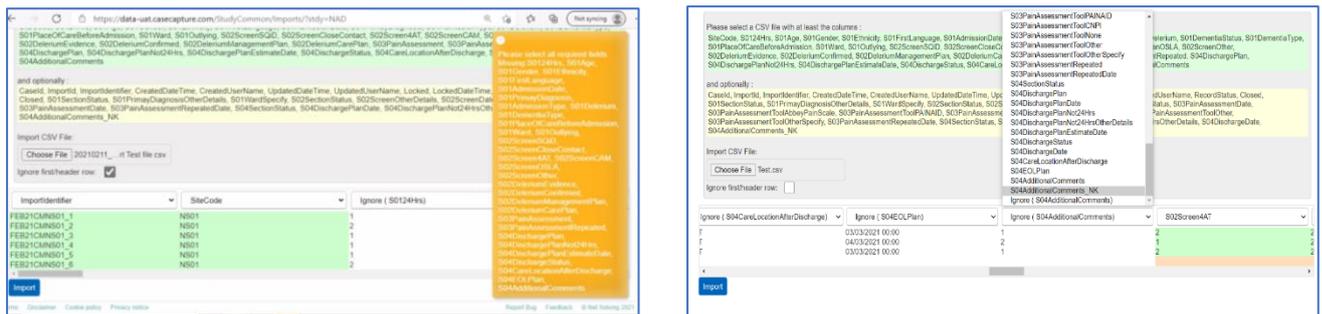
Click import.

Figure 37



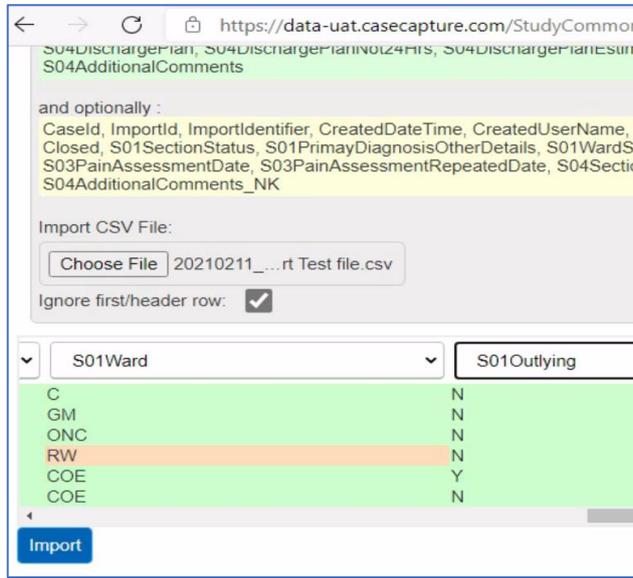
If an orange pop up box appears, you need to change the field names, by selecting the drop-down boxes, as show below.

Figure 38



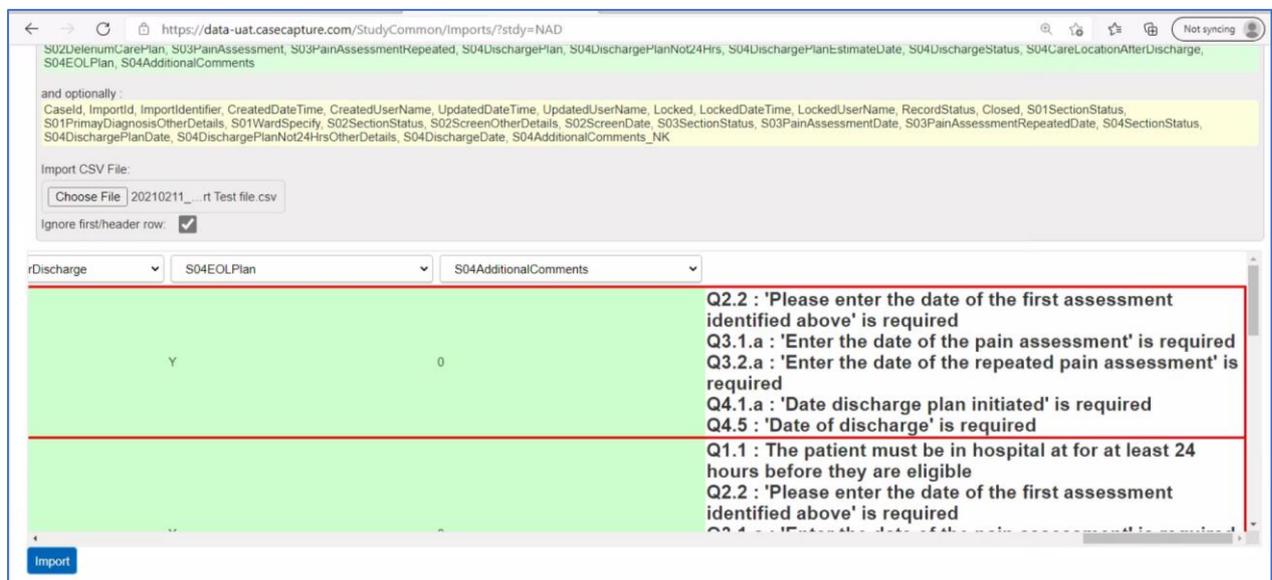
Any orange boxes that appear in the data fields, as shown below in Figure 39, indicate missing or incorrect fields and can be completed using the export data item key.

Figure 39



If there are any errors in the files, they will be explained. Usually it's because a required field has not been completed, as shown below in Figure 40:

Figure 40



Once a file has been successfully imported, you will see it under the 'Study Records' tab. It will have a new Case ID number, and the email address of the creator will be shown.

Study information

There is a tab in the study toolbar called 'Study information' which will take you to an overview of the study information entered by your study administrator.