Care Quality Dashboard User Manual

Introduction

This User Manual will help you navigate through the Care Quality Dashboard. It is organised in sections, with each section targeting different users.

Please read this introduction carefully to determine which areas of the guide are relevant to you.

The Care Quality Dashboard has several user groups/types. You will usually find yourself in **one** of these groups, however certain users may be an administrator in addition to another role.

If you are not sure what user type you are, please contact a system administrator who will guide you further.

Note that Sections: 2. Logging in / Registration Process and 6. Account settings are relevant to **all users**.

Please visit the following additional sections depending on what type of user you are:

- Clinician:
  - 3. Self-Reporting Page
  - 4. Statistics
- Department Manager:
  - 3. Self-Reporting Page
  - 4. Statistics
  - 5. Manage Page
- Hospital Manager:
  - 4. Statistics
  - 5. Manage Page
- Health Board Manager:
  - 4. Statistics
- Administrator:
  - 5. Manage Page

2. Logging in / Registration Process

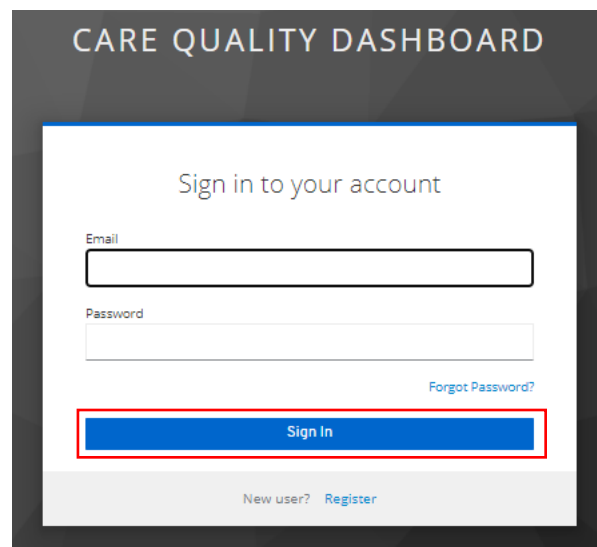*This section is relevant to **all** users.*

To login in you will need to navigate to the platform, by following this link: https://nhsw.sjain.dev/.

Once on the platform you can click either the "Log in" or "Login or Register" button to begin:
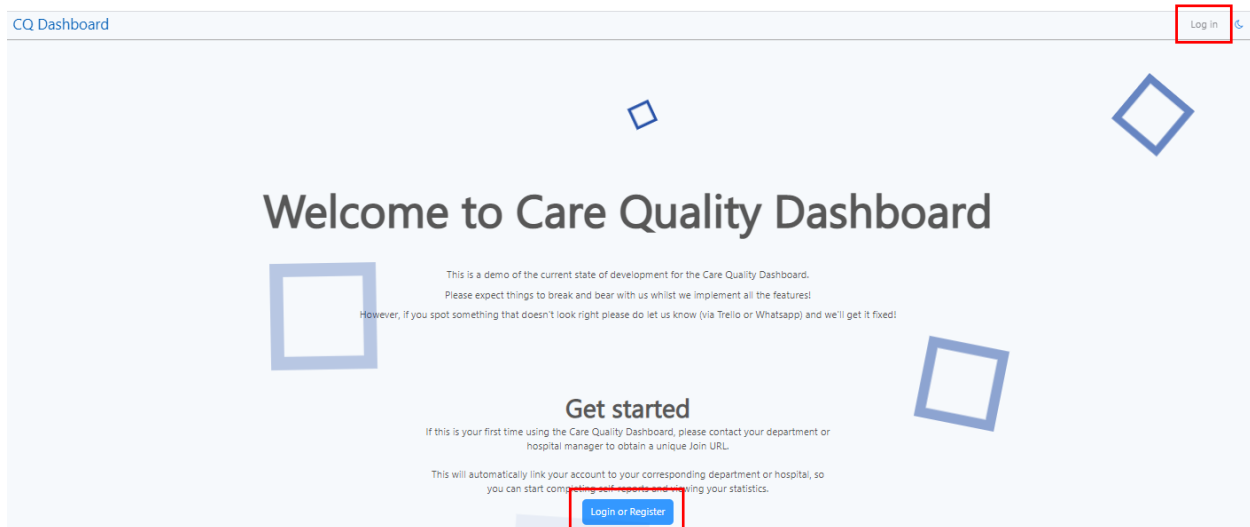
This takes you to the central login page. To login, simply enter your email address and password and then press the "Sign in" button:
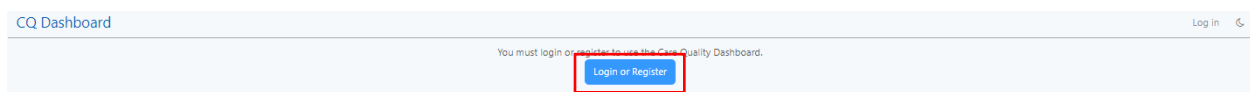
2.1. Registering as a Clinician

*This section is only relevant to **clinicians**.*

Your department manager should have provided you with a unique Join URL to join the platform, for example: "https://nhsw.sjain.dev/join/clinician/bbb-bbb-bbb". If you do not have such a link, please contact your department manager to ask for a Join URL.

This link is unique to your department and provides a simple way to automatically link your account to your department and hospital – this means your responses will be available for anonymous aggregated viewing by your department/hospital/health board.
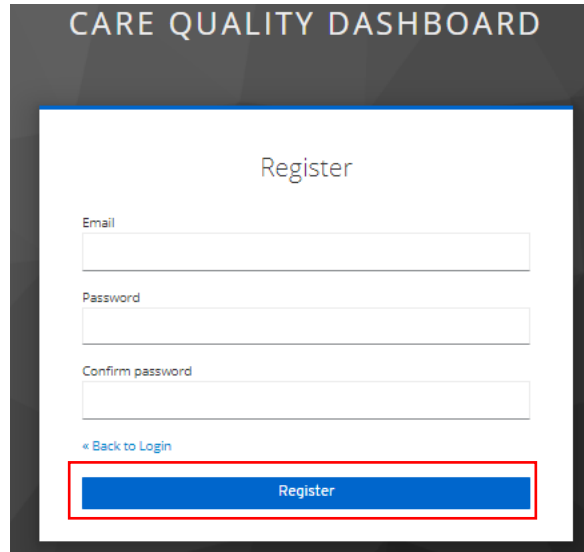
Paste your link into your chosen browser's address bar and press Enter. This takes you to the following page where you need to click the "Login or Register" button:

This should bring you to the sign in page. If you already have an account, but were not previously part of a department, you can simply login with your credentials. If you have never used the platform before, you will need to register a new account – click the "Register" link:
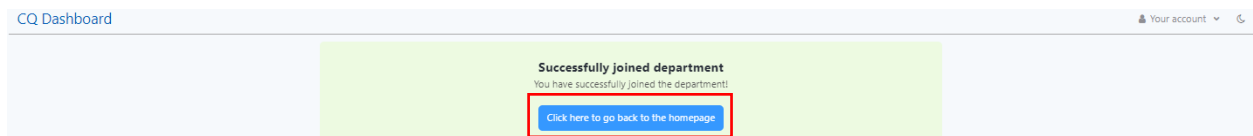
You can then enter your email address, create a password, and press the "Register" button:

Then you should be redirected to this page informing you that you have successfully joined your department. Now you can click the "Click here to go back to the homepage" button and start using the platform:
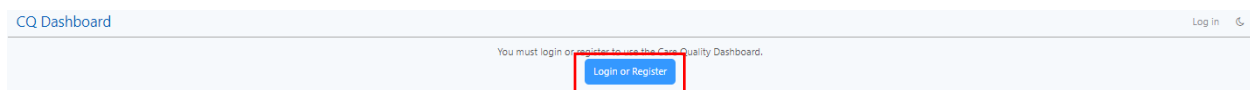
2.2. Registering as a Department Manager

*This section is only relevant to **department managers**.*

Your hospital manager should have provided you with a unique Join URL to join the platform, for example: "https://nhsw.sjain.dev/join/department_manager/aaa-aaa-aaa". If you do not have such a link, please contact your hospital manager to ask for a Join URL.
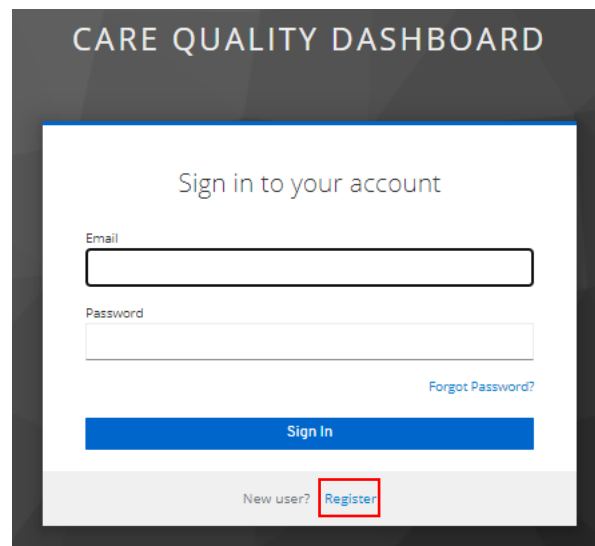
This link is unique to your department and provides a simple way to automatically link your account to your department and hospital – this means your responses will be available for anonymous aggregated viewing by your hospital/health board, and you will be able to view aggregated responses for clinicians in your department.

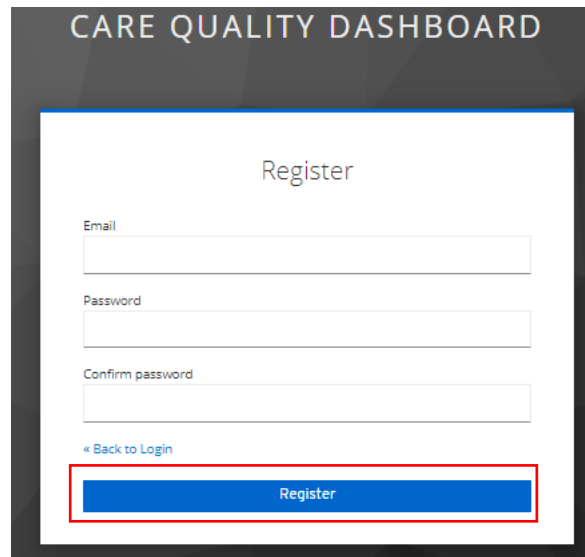viewing by your department/hospital/health board.

Paste your link into your chosen browser's address bar and press Enter. This takes you to the following page where you need to click the "Login or Register" button:

This should bring you to the sign in page. If you already have an account, but were not previously part of a department, you can simply login with your credentials. If you have never used the platform before, you will need to register a new account – click the "Register" link:
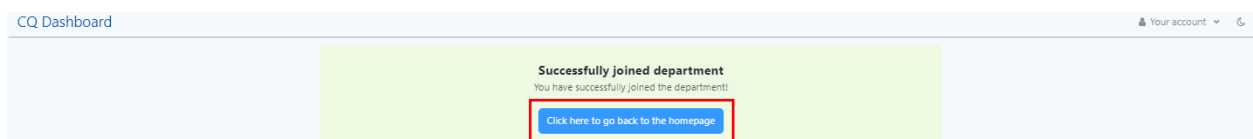
You can then enter your email address, create a password, and press the "Register" button:

Then you should be redirected to this page informing you that you have successfully joined your department. Now you can click the "Click here to go back to the homepage" button and start using the platform:

2.3. Registering as a Hospital Manager/Health Board/Administrator

*This section is only relevant to **health boards, hospital managers, and administrators.***

If you are an administrator, please contact an existing administrator to request them to setup an account for you.

If you are a health board or hospital manager, please contact a system administrator with your email address and the name of your Hospital/Health Board. They will then create an account for you and provide you with a temporary password, which you can use to login by following the steps in section 2. Logging in / Registration Process.

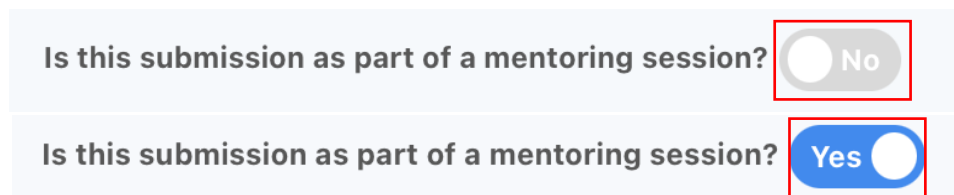You should also change your password when you first login – you can do this by following the steps in section 6.2. Updating your password.

3. Self-Reporting Page

*This section is only relevant to **clinicians and department managers***.

The Self Reporting page allows you to answer short questions about your experience, with questions relating to each of the Health & Care standards. It provides a series of Likert scale and short text-based questions to log your experience, each with corresponding training URLs. It is **mandatory to complete the Likert scale questions** and only **optional to complete the short text-based questions**.

At the top of the page, you are asked if this submission is part of a mentoring session or not. The default is that it is not part of a mentoring session. To change the mentoring session to yes, click on the button where you see "no", and it will become blue to say "yes" (meaning that you have said that this submission is part of a mentoring session).
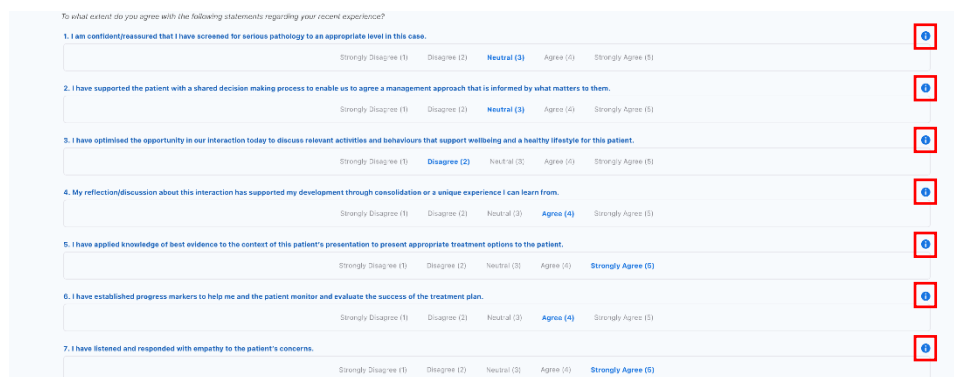
Following this, you are asked a series of Likert scale questions. For each of the questions, 5 options are presented to you: "Strongly Disagree", "Disagree", "Neutral", "Agree", "Strongly Agree", from which you must choose one.

If ever you are unclear about a question or need more information about the standard it is related to, a blue "information" icon is displayed on the right of the question. Click this to access a relevant training resource.


The last part of the self-reporting form are 2 short-text-based questions followed by a submit button. This section is **not mandatory** to complete. You may provide none or up to 3 words that you feel are suitable.

Once you have completed the short-text-based questions, click on the blue "submit" button to you're your response.

If you forget to answer one of the Likert Scale questions (mandatory section), when you press on the "submit" button, the following pop-up will appear, asking you to edit your responses (through the "Edit my responses" button) and complete the unanswered questions in your self-report.
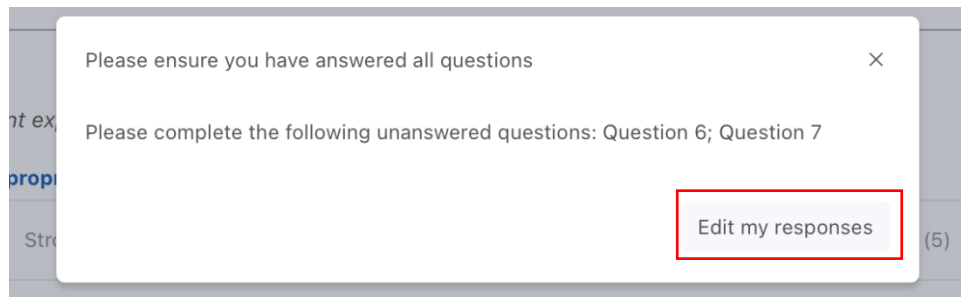
When validating an incomplete self-report, next to the questions that have not been answered, the following red sentence will appear: *"please choose an answer"*.

Once you have corrected your mistakes/if you have completed your self-report, click on "Confirm submission" to send in your self-report.
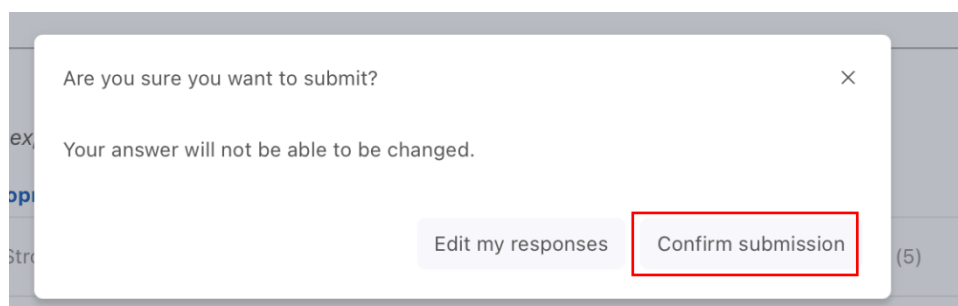
4. Statistics

*This section is only relevant to **clinicians, department managers, hospital managers, and health boards.***

The statistics page contains meaningful visualisations that enable mentoring, supervision and analysis of responses. The page allows you to visualise the answers from the self-reports as a line chart or word cloud. You can use the filters to control the visualisations. The top of the page also contains a quick summary showing your average to-date self-report scores.

To view a quick summary, click the "Quick Summary" dropdown at the top of the page. You will be able to visualise several circles that show the average 'score' to-date for each standard. **Note that the quick summary is *not* affected by the filters.**

This is a helpful tool to enable you to see in a quick glance what standards are doing well, and which ones need attention to elevate, without spending too much time on the line chart.

Below the quick summary is the visualisation section of the Statistics Page where the default view shows the line chart. To change visualisations, use the "Visualisation" filter on the left – a dropdown will appear where you can select the word cloud:
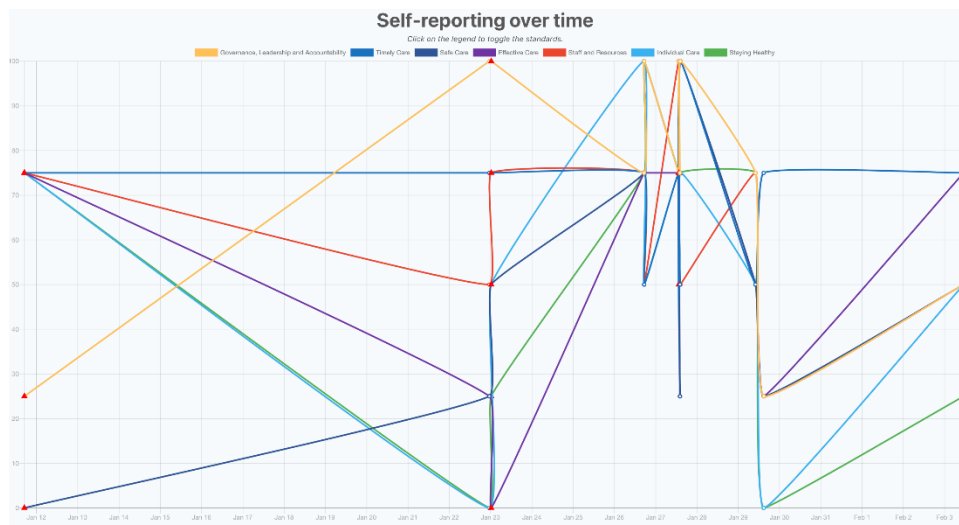
Here is the default view of the Line Chart. Each line represents a standard. The line chart is a graph representing the self-reporting over time with the X-axis being the time and the Y-axis being the 'score' of the Standards.

Clicking on the legend labels above the line graph allows you to toggle the standards. To hide a specific standard, click on its associated label.

The Mentoring Filter enables you to visualise data for non-mentoring sessions (click "No"), mentoring sessions (click "Yes) or for both mentoring sessions and non-mentoring sessions (click "Any").

To be easily distinguishable from non-mentoring sessions, mentoring sessions are represented by a red triangle.


Hovering over a triangle (symbol that represents a mentoring session) or a normal circle (non-mentoring session point) will show various information concerning the different scores for that date.

Below is the word cloud, that you can access through the visualisation filter explained above. This shows you the different words that have been submitted in the single word questions in the self-report.

The bigger the words, the more times they have been mentioned. Hovering over each individual word will show you the exact number of times they have been mentioned inside your selected date-range and filters.

In this example: time and rapport seem to be the most submitted words whereas equipment seems to have only been submitted once.
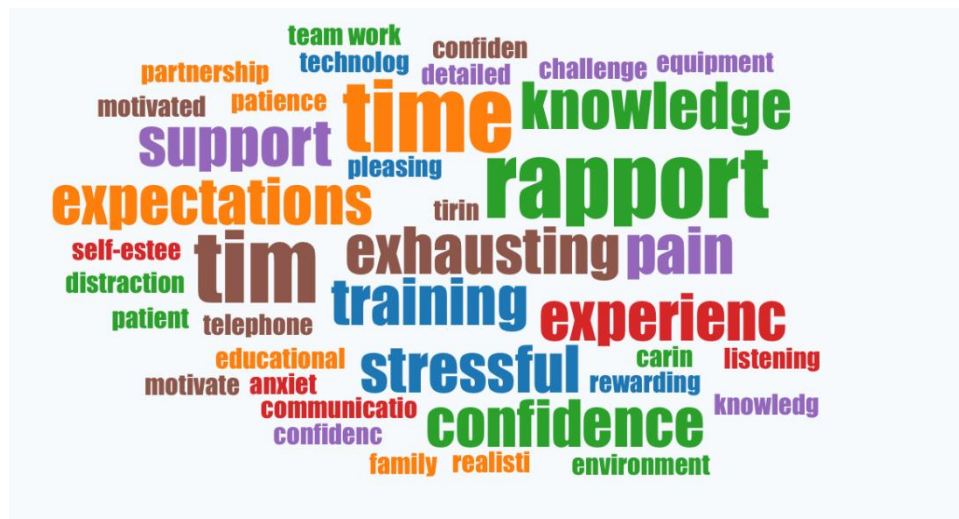
To change the date range for the visualisation that you are analysing, simply click on "Date Range" and the following drop down will appear – select the date range that you want and click "OK" to view your changes.

Depending on your user type, you will have access to different filters. Please visit the following subsections to learn more about the different filters available to you:

- 4.1. Clinician user filters
- 4.2. Department manager user filters
- 4.3. Hospital manager user filters
- 4.4. Health board user filters

4.1. Clinician user filters

*This section is only relevant to **clinicians.***

As a clinician, you can **only visualise your own data.** You hence have access to the date range filter, the visualisation filter and the mentoring filter.

Date Range

| 2021-01-04 ~ 2021-02-03 | 🗓 |

Visualisation

| Line Chart | ⌄ |

Mentoring?

| Any | ⌄ |
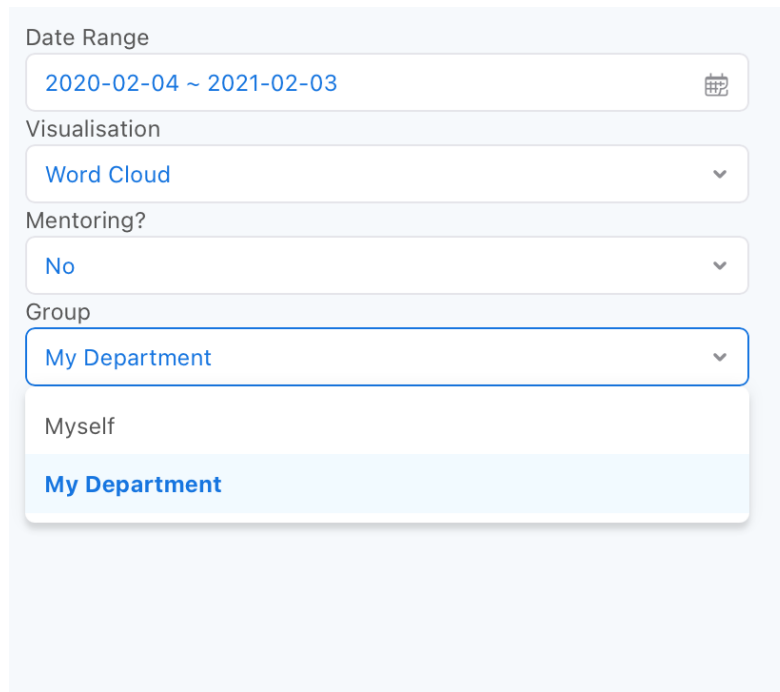
Triangles represent a mentoring session point

4.2. Department manager user filters

*This section is only relevant to **department managers.***

As a department manager, you can **visualise your own data** and/or the **data from your department**. You hence have access to the date range filter, the visualisation filter, the mentoring filter, and the "group" filter.

In the "group" filter, click on "My Department" to view the data from all the clinicians within your department or on "Myself" to view only your data.

4.3. Hospital manager user filters

*This section is only relevant to **hospital managers.***

As a hospital manager, you can **visualise the aggregated data from your hospital**, as well as **the aggregated data for each individual department in your hospital**. You hence have access to the date range filter, the visualisation filter, the mentoring filter, and the "group" filter.

In the "Group" filter, click on "My Hospital" to view the data from all the departments within your hospital or on one of the options under the "Department" toggle. For example, click "Radiology" to view the data of the Radiology department in your hospital specifically.

4.4. Health board user filters

*This section is only relevant to **health board managers.***

As a health board user, you can visualise **the aggregated data from your health board**, as well the **aggregated data for each individual hospital and/or departments in your health board**. You hence have access to the date range filter, the visualisation filter, the mentoring filter, and the "group" filter.

In the "group" filter, click on "My Health Board" to view the data from all the hospitals within your health board or on one of the options under the "Department" toggle or "Hospital Toggle". For example, click "Radiology" to view the data of the Radiology department specifically of your health board.

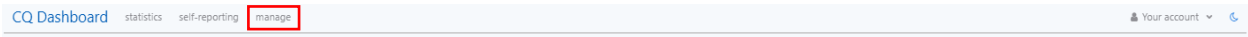## 5. Manage Page

*This section is only relevant to **department managers, hospital managers, and administrators**.*

You can navigate to this page directly via this link: https://nhsw.sjain.dev/manage or by using the "manage" navigation menu option:

CQ Dashboard   statistics   self-reporting   manage   👤 Your account ⌄ ☾

This will show you the manage page relevant to you. Please visit the relevant subsection for your user type:

- 5.1. Department Manager Manage Page
- 5.2. Hospital Manager Manage Page
- 5.3. Administrator Manage Page

5.1. Department Manager Manage Page

*This section is only relevant to **department managers.***

This page allows you to manage Join URLs so that clinicians can join your department. It also allows you to manage the Training URLs of each question, to tailor them to your department.

Clinicians are assigned to your department in the system via a unique Join URL. This link is unique to the department and provides a simple way to automatically link clinician accounts to their respective department and hospital – this means you will be able to view anonymous aggregated responses for clinicians in your department, and similarly your hospital/health board will be able to view these.

You need to share this URL with clinicians to enable them to join the department.

To obtain your unique Join URL, press the "Copy to clipboard" button. This should trigger a notification that informs the URL has been copied for you to send to your clinicians by pasting it into your preferred way of communication (e.g., email or WhatsApp):
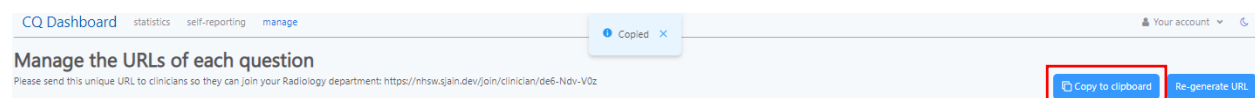
I f there are any security or general issues with a Join URL, you can re-generate it via the "Re-generate URL" button. Remember however that this means that the previous URL will no longer be valid, and the new one will need to be redistributed.:
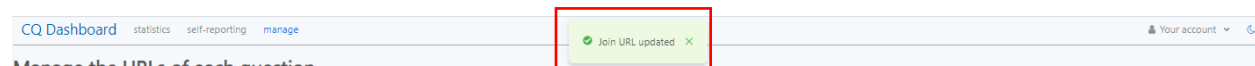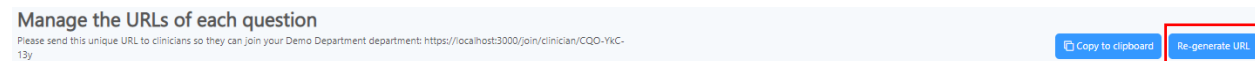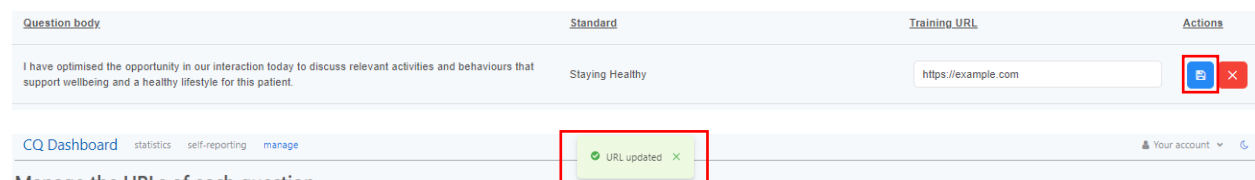

The rest of the Manage Page allows you to edit the Training URLs of each question to tailor it towards your department. To edit the Training URL, press the blue pencil icon button:


Here you can change or input a new URL. Click the blue save icon button to save your changes. This should trigger a notification that informs you the Training URL has been updated:

If you decide you do not want to save your changes, you can press the red cross icon button which will discard your changes:

Question body	Standard	Training URL	Actions
I have optimised the opportunity in our interaction today to discuss relevant activities and behaviours that support wellbeing and a healthy lifestyle for this patient.	Staying Healthy	https://example.com	

Lastly if you would just like to reset the Training URL of a question to the system default (a generic URL set by a system Administrator), press the "Set to Default" button. This should trigger a notification indicating this has been successful:

Question body	Standard	Training URL	Actions
I have optimised the opportunity in our interaction today to discuss relevant activities and behaviours that support wellbeing and a healthy lifestyle for this patient.	Staying Healthy	https://example.com	Set to Default

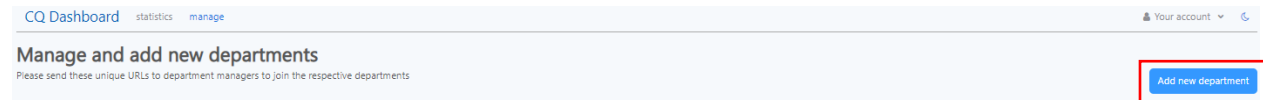CQ Dashboard   statistics   self-reporting   manage

✔ URL set to default suggested URL ✕

👤 Your account ⌄ ☾

5.2. Hospital Manager Manage Page

*This section is only relevant to **hospital managers.***

This page allows you to manage the departments in your hospital. To add new departments, press the "Add new department" button:

This should bring a pop up where you can input the new department's name. Press the "Add" button to save the new department to the system:

If you decide you do not want to add the new department you can click the cross button in the top right or the "Cancel" button:

If needed, you can delete departments using the "Delete" button for each respective department. This triggers a pop up to confirm the deletion:

Department Managers are assigned to their department in the system via a unique Join URL. This link is unique to the department and provides a simple way to automatically link department manager accounts to their respective department and hospital – this means they will be able to view anonymous aggregated responses for their department.

You need to share this URL with department managers to enable them to join the department.

To obtain the Join URL, you can use the blue copy icon button in the table. Once pressed this should trigger a notification informing you that the URL has been successfully copied:

Department Name	Join URL	Actions
Demo Department	https://localhost:3000/join/department_manager/aaa-aaa-aaa	[copy] Re-generate URL Delete

CQ Dashboard   statistics   manage   ⓘ Copied ✕   👤 Your account ∨ ☾

If there are any security or general issues with a Join URL, you can re-generate it via the "Re-generate URL" button. Remember however that this means that the previous URL will no longer be valid, and the new one will need to be redistributed.

Department Name	Join URL	Actions
Demo Department	https://localhost:3000/join/department_manager/aaa-aaa-aaa	[copy] Re-generate URL Delete

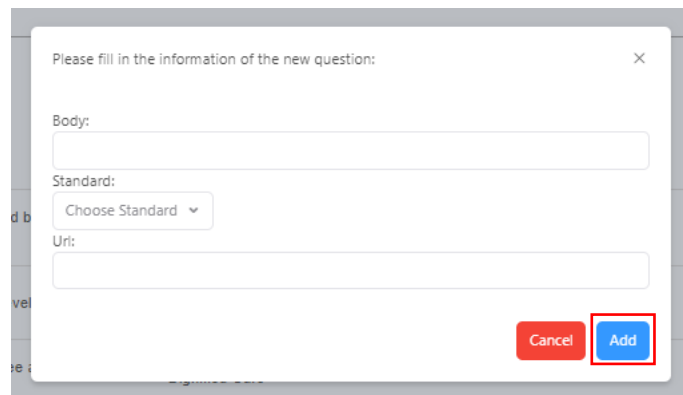CQ Dashboard   statistics   manage   ✓ Join URL updated ✕   👤 Your account ∨ ☾

5.3. Administrator Manage Page

*This section is only relevant to **administrators**.*

This page allows you to manage the questions used in the system's self-reporting page. To add a new question, you can press the "Add new question" button:
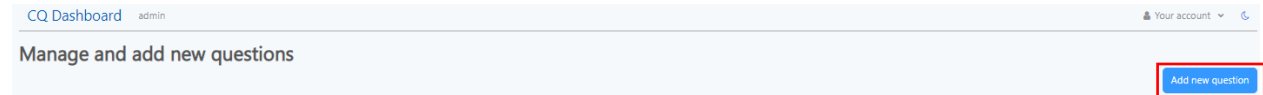
This will trigger a pop up where you can enter the new questions details. Press the "Cancel" button at any time to stop creating a new question, or the "Add" button to save the question in the system:

You can also delete questions by using the "Delete" button linked to each question in the table:

Lastly you can edit the details of each question by pressing the blue pencil icon:

This will allow you to edit the details. Press the blue save icon button to save your changes, or press the red cross button to cancel your changes:
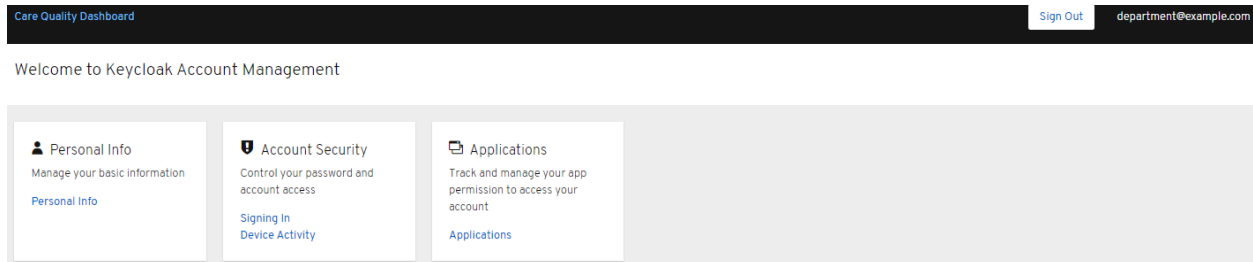
6. Account settings

To navigate to your account settings, click the "Your account" dropdown and then "Account settings":

This should bring you to the Account Management Console where you can manage your account (note: "Keycloak" is the authentication system being used):
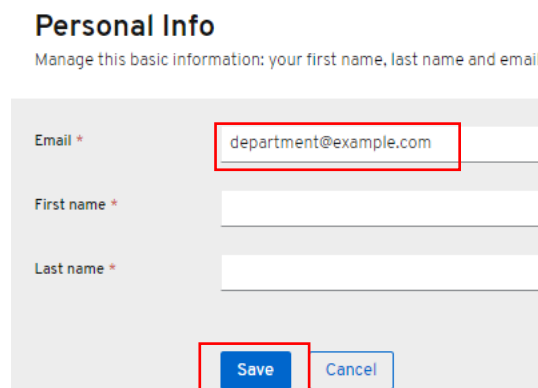

6.1. Updating your email address

To update your account's email address, click on the "Personal info" option, found in two places:
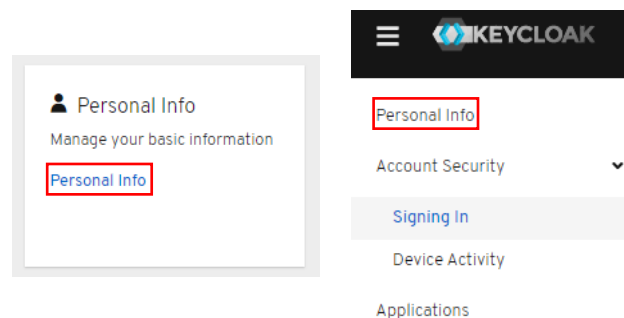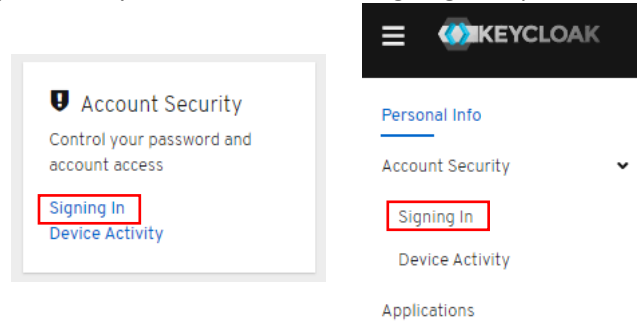

Here you can input a new email address and click the save button to confirm you changes:
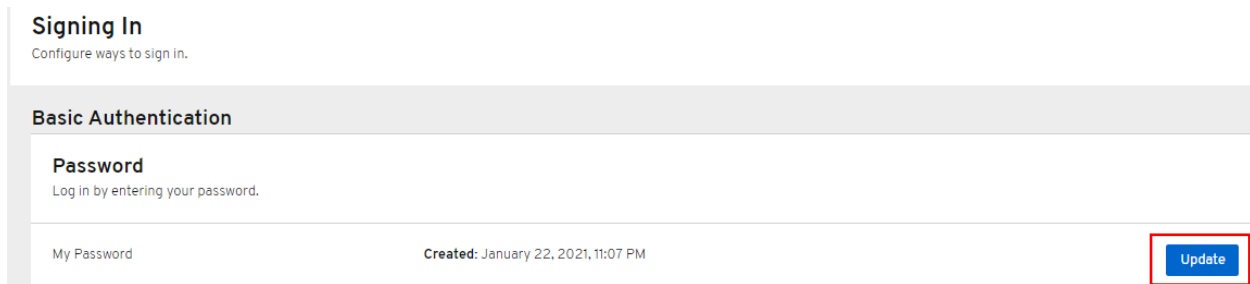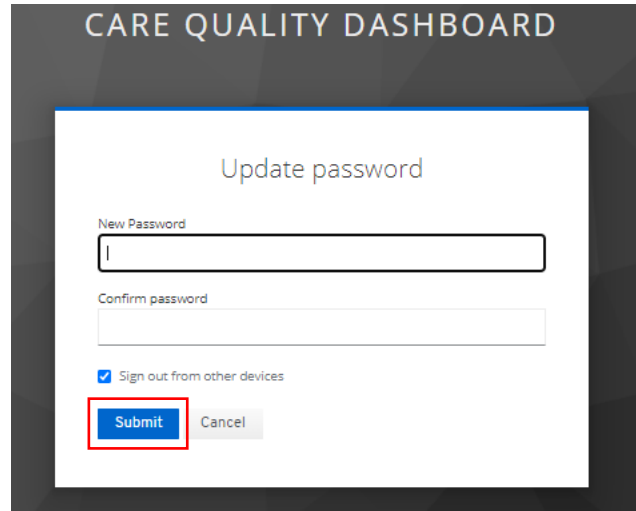
6.2. Updating your password

To update your account's password you can click on the "Signing in" option, found in 2 places:

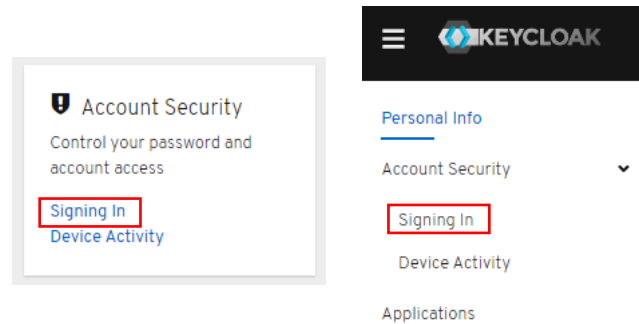Click the "Update" button to update your password:

Then you can enter a new password and press submit to save your new password:

6.3. Setting up Two-factor Authentication (2FA)

To set up two-factor authentication for your account you can click on the "Signing in" option, found in 2 places:

Click on the "Set up Authenticator Application" link and follow the on-screen instructions to finish setting up 2FA: