**Streamlined Quality Data Analyst Guide**

**Core Data Sources**

1. **Incident Report Submissions.xlsx** - <https://nationalcaregroup.sharepoint.com/sites/IncidentReportGroup/Shared%20Documents/Incident%20Report%20Submissions.xlsx>  
   * *Root folder:* [*https://nationalcaregroup.sharepoint.com/sites/IncidentReportGroup/Shared%20Documents/*](https://nationalcaregroup.sharepoint.com/sites/IncidentReportGroup/Shared%20Documents/)
2. **ABC Report Submissions** - <https://nationalcaregroup.sharepoint.com/sites/IncidentReportGroup/Shared%20Documents/ABC%20Reports/>
3. **Radar Healthcare** - <https://nationalcaregroup.radarhealthcare.net/>  
   * *Navigation: Dashboard → Analytics tab for data downloads*
   * *Key sections: Actions, Audits, Events (Complaints\_live2, Events\_live2), Risk\_Register (for scorecard)*
   * *Tasks section: For weekly audit assignments*
   * *Download capability available via menu dropdown*
4. **Email Inboxes**:
   * CQC-NCG mailbox
   * Safeguarding-NCG mailbox
   * STOMP mailbox
5. **STOMP Data** (STOMP mailbox submissions)

**Daily Tasks**

* **Monitor incident reports** → Check for errors, notify David.swann@NCG if needed
  + *Data source:* [*Incident Report Submissions*](https://nationalcaregroup.sharepoint.com/sites/IncidentReportGroup/Shared%20Documents/Incident%20Report%20Submissions.xlsx)
  + **Steps:**
    1. Open incident report submission data
    2. Check for any error emails from services or RMs
    3. If error found, email David.swann@NCG to remove from database or fix yourself

**Weekly Tasks (All Fridays except Staff Assault - Mondays)**

**Data Collection & Processing**

* **Extract & sort emails** from CQC and Safeguarding inboxes by month/region
* **Download Radar data** for audits and actions

**Reports to Send**

* **Monday**: Staff assault/injury report (HR + Mike)
  + *Data source:* [*Incident Report Submissions*](https://nationalcaregroup.sharepoint.com/sites/IncidentReportGroup/Shared%20Documents/Incident%20Report%20Submissions.xlsx)
  + **Steps:**
    1. Filter incident data for past week
    2. Filter type of incident to "Staff Injury"
    3. Read antecedent and summary to determine if staff assault or injury
    4. Save file in [Staff Assault Weekly](https://nationalcaregroup.sharepoint.com/:f:/r/sites/qualityteamsurveys/Shared%20Documents/Staff%20Assault%20Weekly?csf=1&web=1&e=mXR1Bo)
    5. Send excel sheet to HR and copy Mike
* **Friday Package**:
  + Audit checks (RMs by region: Central/North → Natalie, SE/SW/Wales → Claire)
    1. *Data source: Radar Healthcare*
    2. **Steps:**
       1. Go to Quality team Documents/Audits/Weekly audit/2024
       2. Look for last audit report and copy template for current week
       3. Open report and delete old data
       4. Login to Radar Dashboard → [UserTasksBeta](https://nationalcaregroup.radarhealthcare.net/Dashboard/UserTasksBeta?userId=6042)
       5. Extract weekly report and paste data in spreadsheet
       6. Send two emails: Central/North (RMs + copy Natalie), SE/SW/Wales (RMs + copy Claire)
  + Safeguarding log update (spreadsheet only)
    1. *Data source: Safeguarding-NCG email inbox*
    2. **Steps:**
       1. Go to Safeguarding-NCG mailbox, sort emails by month/region
       2. Create new month folder if needed
       3. Update [Safeguarding Referrals Log](https://nationalcaregroup.sharepoint.com/:f:/r/sites/qualityteamsurveys/Shared%20Documents/Safeguarding%20Referrals%20Log?csf=1&web=1&e=HeuaRY) based on emails
  + CQC notifications update + executive summary
    1. *Data source: CQC-NCG email inbox*
    2. **Steps:**
       1. Go to CQC-NCG mailbox, sort emails by month/region
       2. Create new month folder if needed
       3. Update Board Data spreadsheet: Go to Quality team Documents/Board Data, create new file for respective month
       4. Update data according to columns based on emails received in CQC-NCG mailbox
       5. Copy new data to: C:\Users[Username]\National Care Group\Quality Team - Documents\Data Reporting\Board Report preparing data\Board data\CQC spreadsheet for Power BI Dashboard update
       6. Dashboard will automatically update graphs after refreshing
       7. Write summary of each notification in separate sheet
       8. Save in [Notifications Summary](https://nationalcaregroup.sharepoint.com/:f:/r/sites/qualityteamsurveys/Shared%20Documents/Board%20Data/2024/Notifications%20Summary?csf=1&web=1&e=cDqwtc)
       9. Send summary table and files to executives
  + ABC + Unplanned intervention reports (QBP/PBS team)
    1. *Data sources:* [*ABC Report Submissions*](https://nationalcaregroup.sharepoint.com/sites/IncidentReportGroup/Shared%20Documents/ABC%20Reports/) *+* [*Incident Report Submissions*](https://nationalcaregroup.sharepoint.com/sites/IncidentReportGroup/Shared%20Documents/Incident%20Report%20Submissions.xlsx)
    2. *Note: ABC = Antecedent-Behavior-Consequence behavioral analysis forms. Used to track challenging behaviors: Antecedent (trigger), Behavior (what happened), Consequence (response). Helps identify patterns to improve care plans and reduce incidents.*
    3. **ABC Steps:**
       1. Go to Incident Report group Documents/ABC submission
       2. Open ABC report and filter data for past week
       3. Paste into Shared folder/ABC/Weekly
    4. **Unplanned Intervention Steps:**
       1. Open [Incident Report Submissions](https://nationalcaregroup.sharepoint.com/sites/IncidentReportGroup/Shared%20Documents/Incident%20Report%20Submissions.xlsx)
       2. Add filter and select column "was the Physical intervention used?"
       3. In filter select YES, then go to column "Is the physical intervention used part of the individual we support's care and support plan?"
       4. In that filter select NO
       5. Copy data and paste in new workbook
       6. Save in: Quality team Documents/unplanned physical intervention/unplanned weekly report as current week
       7. Send both reports to QBP and PBS teams

**Monthly Tasks**

**Data Preparation (1st-5th of month)**

1. **Process previous month's data**:
   * Filter incident reports by month
   * Extract medication errors from incidents
   * Download Radar audit/action data
   * Compile CQC notifications from emails
2. **Create regional breakdowns** for all data types

**Monthly Report Distribution Schedule**

**5th of Month**:

* Incident reports (ROMs via SharePoint + individual RMs via email)
  + *Data source:* [*Incident Report Submissions*](https://nationalcaregroup.sharepoint.com/sites/IncidentReportGroup/Shared%20Documents/Incident%20Report%20Submissions.xlsx)
  + **Steps:**
    1. Filter data by "date of incident" (column M) for reporting month
    2. Copy to new workbook, add "region" column
    3. Filter by region individually and save to: Document share - quality and compliance/\_ Governance report\_/region/incidents/[create new folder for reporting month]
    4. Do the same for all regions
    5. Email to ROMs and QBP team
    6. Filter data by RM and send incidents to each SM individually
* ABC reports (ROMs via SharePoint)
  + *Data source:* [*ABC Report Submissions*](https://nationalcaregroup.sharepoint.com/sites/IncidentReportGroup/Shared%20Documents/ABC%20Reports/)
  + *Note: ABC = Antecedent-Behavior-Consequence behavioral analysis forms. Used to track challenging behaviors: Antecedent (trigger), Behavior (what happened), Consequence (response). Helps identify patterns to improve care plans and reduce incidents.*
  + **Steps:**
    1. Filter ABC data by "date of incident" for reporting month
    2. Copy to new workbook, add "region" column
    3. Filter by region individually and save to: Document share - quality and compliance/*governance report*/region/ABC/[create new folder for reporting month]
    4. Do the same for all regions
    5. Email to ROMs and QBP team
* CQC notifications summary (RODs + QBP)
  + *Data source: CQC-NCG email inbox*
  + **Steps:**
    1. Read past month's submitted notifications
    2. Write summary of each notification
    3. Save in [Notifications Summary](https://nationalcaregroup.sharepoint.com/:f:/r/sites/qualityteamsurveys/Shared%20Documents/Board%20Data/2024/Notifications%20Summary?csf=1&web=1&e=cDqwtc)
    4. Send file to RODs and QBP

**7th of Month**:

* STOMP data analysis (Karen Douglas)

**8th-11th of Month**:

* Non-incident report (11th - ROMs)
  + *Data source:* [*Incident Report Submissions*](https://nationalcaregroup.sharepoint.com/sites/IncidentReportGroup/Shared%20Documents/Incident%20Report%20Submissions.xlsx)
  + **Steps:**
    1. Go to Quality team Documents/Incidents/Monthly Email Incident Report/Non-Incident Report/2024/
    2. Create copy of last month report and rename with reporting month, then open
    3. Go to Quality team Documents/Incidents/Monthly Email Incident Report/Incident Report/2024 and open reporting month workbook
    4. Copy company and service names from the data and paste in non-Incident report (Incidents VLOOKUP tab), remove duplicates
    5. Go to non-incidents tab and make VLOOKUP to data from Incidents VLOOKUP tab data
    6. Add filter and select #N/A and in Type of service select RC and SL
    7. Separate data as per sheet names next to non-Incident tabs
    8. Copy data sets to: National Care Group\Document Share - Quality and Compliance\_Governance Reports\_\Central Region\Non-Incidents (based on region)
    9. Send email to ROM/RODs (see previous month email for non-incidents)
* Medication error analysis (Mike + "NICOLA AIREY")
  + *Data source:* [*Incident Report Submissions*](https://nationalcaregroup.sharepoint.com/sites/IncidentReportGroup/Shared%20Documents/Incident%20Report%20Submissions.xlsx)
  + **Steps:**
    1. Filter incidents by "primary type of incident" = Medication (from column: "Please select the primary type of incident, multiple can be applied")
    2. Add "Error type" column beside the above-mentioned column
    3. Read Antecedent and Summary of each incident and describe type of medication error in that column
    4. Create new workbook of Medication Errors: C:\Users[Username]\National Care Group\Quality Team - Documents\Medication report\ROM- ROD Monthly medication report folder\2024
    5. Based on attachment header copy paste data in respected columns
    6. Update figures based on data in each sheet region wise
    7. Copy 3 months report from previous month data and update the report
    8. Send 3-month report to Mike and "NICOLA AIREY"
* STOP medication error report (Mike)
  + *Data source:* [*Incident Report Submissions*](https://nationalcaregroup.sharepoint.com/sites/IncidentReportGroup/Shared%20Documents/Incident%20Report%20Submissions.xlsx)
  + **Steps:**
    1. Get Word document template from Mike
    2. Add error type numbers from monthly medication report
    3. Send completed STOP report to Mike
* League table (ROMs + QBP separately)
  + *Data source:* [*Incident Report Submissions*](https://nationalcaregroup.sharepoint.com/sites/IncidentReportGroup/Shared%20Documents/Incident%20Report%20Submissions.xlsx)
  + **Steps:**
    1. Copy previous month league table from: C:\Users[Username]\National Care Group\Quality Team - Documents\League Table
    2. Change name to current month and paste data from medication report
    3. Filter only 3 data types: Incorrect Dose, Missed Medication, Missed Signature
    4. Add data for each region in each tab found in spreadsheet
    5. On main page paste figures based on columns
    6. Copy data sets to: National Care Group\Document Share - Quality and Compliance\_Governance Reports\_\Central Region\League Table
    7. Send email to ROM/RODs (see previous month email for League Table)
    8. Send separate file to QBP team and RODs
* Monthly audits (RMs, ROMs, RODs, QBP)
  + *Data source: Radar Healthcare*
  + **Steps:**
    1. Go to Radar Analytics, download data accordingly (for weekly select weekly, for monthly select as per report)
    2. For submitted month: for weekly select 1st Monday as start of month and Sunday as closing, for monthly select whole month
    3. Go to Quality team Documents/Audits/Monthly audit/2024 and create new folder for reporting month
    4. Copy and paste reports from previous month to current month folder
    5. Open new saved report and clean the data
    6. Login to Radar to extract data to template and map data with your template
    7. Create regional breakdowns
    8. Paste copy of each region report in: National Care Group\Document Share - Quality and Compliance\_Governance Reports\_\Central Region\Audits (based on region)
    9. Send email to all RMs, ROMs, RODs and QBP
    10. Send Audits board report to QBP and Karen Lewis
    11. Send Audits external report to QBP, James Allen and Karen Lewis
* Falls data analysis (QBP + Karen Douglas)
  + *Data source:* [*Incident Report Submissions*](https://nationalcaregroup.sharepoint.com/sites/IncidentReportGroup/Shared%20Documents/Incident%20Report%20Submissions.xlsx)
  + **Steps:**
    1. Filter incidents for falls, add "Witnessed/Unwitnessed" and "Type of Fall" columns
    2. Read antecedent/summary to classify fall types
    3. Update 6-month data and Abbeyvale falls analysis
    4. Save in [Fall Analysis](https://nationalcaregroup.sharepoint.com/:f:/r/sites/qualityteamsurveys/Shared%20Documents/Fall%20Analysis?csf=1&web=1&e=YBYAp6)
    5. Send to QBP team and Karen Douglas
* Action reports (by region)
  + *Data source: Radar Healthcare*
  + **Steps:**
    1. Go to Radar > actions and extract data in Excel format
    2. Insert two columns: One beside created date and select current month date from created, update as current month
    3. Break filter and go to deadline date, select previous date from today and in new column say "Past"
    4. Go to Quality team Documents/Action/region/
    5. Copy and paste reports from previous month to current month
    6. Open new saved report and clean data
    7. Go back to downloaded report and insert pivot, follow template columns
    8. Copy paste latest data into report
    9. Do for all regions and save in shared folders
    10. Send email according to last sent email distribution
* RRN data (Karen Douglas)
  + *Data source:* [*Incident Report Submissions*](https://nationalcaregroup.sharepoint.com/sites/IncidentReportGroup/Shared%20Documents/Incident%20Report%20Submissions.xlsx)
  + **Steps:**
    1. Extract RRN data from monthly incidents
    2. Create new folder in [RRN Monthly](https://nationalcaregroup.sharepoint.com/:f:/r/sites/qualityteamsurveys/Shared%20Documents/RRN%20Monthly?csf=1&web=1&e=fG7EiU)
    3. Create graphs to visualize data
    4. Send to Karen Douglas
* IWS high-incident analysis (Karen Douglas, copy Natalie/Claire)
  + *Data source:* [*Incident Report Submissions*](https://nationalcaregroup.sharepoint.com/sites/IncidentReportGroup/Shared%20Documents/Incident%20Report%20Submissions.xlsx)
  + **Steps:**
    1. Create pivot table from monthly incidents data
    2. Filter top 15 IWS with highest incident numbers
    3. Send report to Karen Douglas, copy Natalie and Claire

**21st-22nd of Month**:

* Scorecard (Executive team + Quality team)
  + *Data sources: Multiple - QBP data, financial listings, HR data, training data, Radar audits/actions/risks,* [*Incident Report Submissions*](https://nationalcaregroup.sharepoint.com/sites/IncidentReportGroup/Shared%20Documents/Incident%20Report%20Submissions.xlsx)*, complaints/compliments*
  + **Steps:**
    1. Collect data from columns B-I (QBP team)
    2. Column J: Download financial listings for agency usage (contact Simon Doe)
    3. Columns K-L: Get HR data (ready by 3rd Thursday)
    4. Column M: Get training team data
    5. Column N: Use monthly audits access compliance (ready by 8th)
    6. Column O: Add citation data
    7. Column P: Use actions report from Radar
    8. Column Q: Use risk register from Radar
    9. Columns R-Z: Compile incidents, medication, complaints/compliments data
    10. Send scorecard with services of concern to James Allen, Karen Lewis, QBPs, RODs
* Outstanding support action plans (RMs/ROMs by region)
  + *Data source: Nourish BI dashboard*
  + **Steps:**
    1. Download outstanding action plans data from Nourish BI by region
    2. Send each region's file to respective RMs and ROMs

**Monthly/Quarterly As Needed**:

* Board data compilation + Mike's board report (monthly)
  + *Data sources: CQC notifications,* [*Incident Report Submissions*](https://nationalcaregroup.sharepoint.com/sites/IncidentReportGroup/Shared%20Documents/Incident%20Report%20Submissions.xlsx)*, medication data, Radar audits, complaints/compliments*
  + **Steps:**
    1. Go to Quality team Documents/board data/board data/2024/ and update tabs in Board data template
    2. Once all reports are ready, collect figures into board data template
    3. Collate figures from CQC report, incident report, medication, audit percentages, complaints & compliments
    4. Go to: C:\Users[Username]\National Care Group\Document Share - Quality and Compliance\Quality Board Reports\Board Reports\Quality Board Reports
    5. Copy previous month's report and change name to respective month
    6. Collect figures into Mike's board pack report
    7. Send board report + 3-month medication data + monthly audits board data to Mike
    8. Copy Karen Douglas, Natalie, and Claire
* CQC analysis with Power BI refresh (monthly)
  + *Data source: CQC website ratings + internal CQC mapping*
  + **Steps:**
    1. Download latest rating spreadsheet from CQC website
    2. Go to: C:\Users[Username]\National Care Group\Quality Team - Documents\CQC Mapping and add latest data to this file
    3. Save file and go to Power BI file in the folder
    4. Refresh it and share updated link with Mike
* CQC and Safeguarding comparison table (monthly - 1st of month)
  + *Data sources: CQC-NCG and Safeguarding-NCG mailboxes*
  + **Steps:**
    1. Create list of submitted safeguardings and CQC notifications
    2. Send comparison by region to respective RODs
* Complaints and compliments report (monthly)
  + *Data source: Radar Healthcare Events section*
  + **Steps:**
    1. Extract events data for complaints and compliments from Radar
    2. Format for Mike's board report usage
* R&G data pack (quarterly)
  + *Data sources: All monthly reports compiled*
  + **Steps:**
    1. Compile all monthly reports according to Risk and Governance timescales
    2. Save to: Document share/quality and compliance/Governance Reports/[region]/R&G data/[quarter folder]
    3. Distribute to RODs by region
* KIA report data updates (monthly)
  + *Data sources: All previous reports + Riddor inbox*
  + **Steps:**
    1. Go to: C:\Users[Username]\National Care Group\Karen Lewis - NCG - Quality Documents\MC Docs\Misc\Project Kea
    2. Update data in each folder within Project Kea every month
    3. Most data taken from all previous reports mentioned above
    4. Riddor report data taken from Riddor inbox folder

**Key Efficiency Notes**

**Batch Processing Opportunities**

* **All incident-based reports** can be created from single monthly data pull
* **Regional distributions** can be automated with filters
* **Email sorting** (CQC/Safeguarding) should be done weekly to avoid month-end bottlenecks

**Template Management**

* Maintain current month templates in dedicated folders
* Copy previous month → rename → clear data → populate with current data
* Save all attachments with consistent naming conventions

**Stakeholder Groups**

* **Executives**: Mike, Karen Douglas, James Allen, Karen Lewis
* **Regional**: ROMs, RODs, RMs (by region)
* **Quality Teams**: QBP, PBS, Natalie, Claire
* **Compliance**: HR, CQC notifications

**Critical Deadlines**

* **Every Monday**: Staff assault reports
* **Every Friday**: 5 weekly reports package
* **5th**: Regional monthly reports
* **7th**: STOMP data
* **11th**: Non-incident reports
* **21st-22nd**: Scorecards
* **Month-end**: Board reports

**QUALITY DATA ANALYST REPORTS**

**DAILY REPORT**

***Daily incident report monitoring***

* Go to share folder, under share folder, select Incident Report group -Documents/incident report submission.
* [Incident Report Submissions.xlsx](https://nationalcaregroup.sharepoint.com/:x:/r/sites/IncidentReportGroup/Shared%20Documents/Incident%20Report%20Submissions.xlsx?d=w3d876cb52d154ea3bae0ff782d8cbebe&csf=1&web=1&e=Bdwwoy)
* Open incident report submission data.
* Check if there are any error emails received from services or RM’s. If there is an error, send an email to [David.swann@NCG](mailto:David.swann@NCG) to remove it from the database or change it yourself.

**WEEKLY REPORTS**

***Weekly Staff assault and Staff Injury Report***

**This report is sent every Monday**

Emails sent to CQC- NCG mailbox, on every Friday, go to this email box and sort it into month/region. If it is a new month create a new folder as last month.

* Copy the incident report submission file from this file
* Open this file [Incident Report Submissions.xlsx](https://nationalcaregroup.sharepoint.com/:x:/r/sites/IncidentReportGroup/Shared%20Documents/Incident%20Report%20Submissions.xlsx?d=w3d876cb52d154ea3bae0ff782d8cbebe&csf=1&web=1&e=Bdwwoy) filter the data for past week and filter the type of incident to **Staff Injury.**
* Read antecedent and summary of each incident to describe whether it was a staff assault or staff injury.
* Once the report is completed save the file in [Staff Assault Weekly](https://nationalcaregroup.sharepoint.com/:f:/r/sites/qualityteamsurveys/Shared%20Documents/Staff%20Assault%20Weekly?csf=1&web=1&e=mXR1Bo) and send the excel sheet to HR and copy Mike in.

***Weekly audits Checks***

**This report to be sent out every Friday morning to the RM’s and QBP team- for quality audits checks.**

[**Tasks - Radar Healthcare**](https://nationalcaregroup.radarhealthcare.net/Dashboard/UserTasksBeta?userId=6042)

* Go to share folder, under share folder, select Quality team -Documents/Audits/Weekly audit/2024 and then look for the last audit report and copy and save a copy of the template of the current week working on.
* Open the report and delete the data
* Now login to RADAR to extract weekly report. Paste the data in the spreadsheet.
* Send two emails
  + Central & North Region – Every RM of these regions and copy Natalie in.
  + Southeast, Southwest and Wales– Every RM of these regions and copy Claire in.

***Safeguarding updating from email to spreadsheet***

**This log is to be updated every Friday.**

Emails sent to safeguarding- NCG mailbox, on every Friday, go to this email box and sort it into month/region. If it is a new month create a new folder as last month.

* On every Friday this has to be update in a template: Go to share folder, under share folder, select Quality team -Documents/Safeguarding referral log/referral log excel sheet and open it.
* [Safeguarding Referrals Log](https://nationalcaregroup.sharepoint.com/:f:/r/sites/qualityteamsurveys/Shared%20Documents/Safeguarding%20Referrals%20Log?csf=1&web=1&e=HeuaRY)
* Now update the data according to the columns in the database based on the email received in safeguarding- NCG mailbox.

***CQC updating from email to spreadsheet***

**This log is to be updated every Friday.**

Emails sent to CQC- NCG mailbox, on every Friday, go to this email box and sort it into month/region. If it is a new month create a new folder as last month.

* On every Friday this has to be update in a template: Go to share folder, under share folder, select Quality team -Documents/Board Data and create a new file for respective month.
* Now update the data according to the columns in the database based on the email received in safeguarding- NCG mailbox.
* Once this data is updated copy and paste the new data in C:\Users\ZohaibRafique-NCG\National Care Group\Quality Team - Documents\Data Reporting\Board Report preparing data\Board data\CQC spreadsheet 2020-2021/ CQC data 2021-2022 latest - Power BI for POWER BI DASHBOARD update. Dashboard will then automatically update the graphs after refreshing.

***CQC notifications summary to Executives***

**This needs to be sent out every Friday.**

* On each Friday, read past weeks submitted notifications, write the summary of each notification in a sheet other than board data.
* Save the file in [Notifications Summary](https://nationalcaregroup.sharepoint.com/:f:/r/sites/qualityteamsurveys/Shared%20Documents/Board%20Data/2024/Notifications%20Summary?csf=1&web=1&e=cDqwtc) and send the table and the saved files to executives.

***ABC and Unplanned intervention***

**This report to be send out every Fridays to the QBP and PBS team.**

**ABC**

* Go to share folder, under share folder, select Incident Report group -Documents/ABC submission.
* Open ABC report filter the data for past week and paste it into Shared folder/ABC/Weekly.

**UNPLANNED INTERVENTION**

* Go to share folder, under share folder, select Incident Report group -Documents/incident report submission.
* Open incident report submission data.
* Add a filter and select column “**was the Physical intervention used?”**
* In the filter select **yes** then go to column (“**Is the physical intervention used part of the individual we support’s care and support plan?”**) and in the filter select **no**.
* Copy the data and paste it in a new workbook and save it in (Go to share folder, under share folder, select Quality team -Documents/unplanned physical intervention/unplanned weekly report) and save it as current week.
* Once this is done send both reports to QBP and PBS team.

**MONTHLY REPORTS**

***Monthly incident report to ROMs and RM***

The monthly incidents will be shared to ROMS Via shared folder and emails will be sent to RM’s individually every 5TH of each month.

* Go to share folder, under share folder, select Incident Report group -Documents/incident report submission.
* Open incident report submission data and filter data and click on “date of the incident” which is in M for the reporting month.
* Copy and paste into a new workbook and add a column in to the spreadsheet name as region.
* Then filter the by region individually and save then in to Go to share folder, under share folder, select document share - quality and compliance/\_ Governance report\_/region/incidents/create a new folder for reporting month and save it. Do the same for all the regions.
* Once this is done email needs to be send to ROMS and QBP team.
* Filter the data by RM and Send the incidents to each SM.

***Monthly ABC report to ROMs and RM***

The monthly incidents will be shared to ROMS Via shared folder and emails will be sent to RM’s individually every 5TH of each month.

* Go to share folder, under share folder, select Incident Report group -Documents/ABC report submission.
* Open ABC report submission data and filter data and click on “date of the incident” for the reporting month.
* Copy and paste into a new workbook and add a column in to the spreadsheet name as region.
* Then filter the by region individually and save then in to Go to share folder, under share folder, select document share - quality and compliance/\_governance report\_/region/ABC/create a new folder for reporting month and save it. Do the same for all the regions.
* Once this is done email needs to be send to ROMS and QBP team.

***Monthly non- incident report to ROMs***

This report is sent out 11th of every month and saved in shared drive.

* Go to share folder, under share folder, select Quality team -Documents/Incidents/Monthly Email Incident Report/ Non-Incident Report/ 2024/
* Create a copy of last month report and rename it with reporting month and then open the report.
* Go to share folder, under share folder, select Quality team -Documents/Incidents/ Monthly Email Incident Report/ Incident Report/ 2024 Incident report open reporting month workbook.
* Copy company and service name from the data and paste it in non-Incident report (Incidents VLOOKUP tab) and remove duplicates.
* Go to non-incidents tab and make a VLOOKUP to the data from Incidents VLOOKUP tab data. Add filter and select #N/A and in Type of service select RC and SL
* Separate the data as per the sheets name next to non-Incident tabs.
* Once this done copy a set of data into National Care Group\Document Share - Quality and Compliance\\_Governance Reports\_\Central Region\Non – Incidents (Based on the region)
* Once this is done send an email to ROM ROD’s (see previous month email for non-incidents)

***Monthly CQC notifications summary***

* On 1st of each month, read past months submitted notifications, write the summary of each notification in a sheet other than board data.
* Save the file [Notifications Summary](https://nationalcaregroup.sharepoint.com/:f:/r/sites/qualityteamsurveys/Shared%20Documents/Notifications%20Summary?csf=1&web=1&e=LIsT6Q) in and send the file to RoD’s and QBP.

***Monthly CQC and Safeguarding comparison Table***

* On 1st of each month, read past months submitted notifications and safeguardings.
* Create a list of submitted safeguardings and CQC notifications and send it for each region to respected ROD’s.

***Monthly IWS with higher number of incidents***

* After completing the monthly incidents report, create a pivot table for IWS with highest number of incidents.
* Filter the top 15 IWS with higher numbers of incidents and send the report to Karen Douglas and Copy in Natalie and Claire.

***Medication report***

* This report is taken from incidents report from the column (Please select the primary type of incident, multiple can be applied.) and search for Medication and copy paste the results.
* Add a new column beside the above-mentioned column and name it Error type.
* Read Antecedent and Summary of each incident and describe the type of medication error in that column.
* Create a new workbook of Medication Errors C:\Users\SaiDasari-NCG\National Care Group\Quality Team - Documents\Medication report\ROM- ROD Monthly medication report folder\2024.
* Based on the attachment header copy paste data in respected columns.
* Update the figures based on the data in each sheet region wise.
* Copy the 3 months report from previous month data and update the report.

Send the 3 months report to mike in “**NICOLA AIREY**”.

***STOP Medication error***

* Ask mike for Word document for this report.
* Once the monthly meds report is finished, just add the number of type of errors in this report and send it to Mike.

***Monthly League Table***

* This report is taken from the monthly medication report.
* Copy the previous month league table from this folder “C:\Users\ZohaibRafique-NCG\National Care Group\Quality Team - Documents\League Table”.
* Change the name to current month and paste the data from medication report.
* Filter only 3 Data types i.e. Incorrect Dose, Missed Medication, Missed Signature.
* Add data for each Region in each tab that can be found in the spreadsheet.
* On the main page paste the figures based on the columns.
* Once this done copy a set of data into National Care Group\Document Share - Quality and Compliance\\_Governance Reports\_\Central Region\League Table.
* Once this is done send an email to ROM ROD’s (see previous month email for League Table.
* Send a file separately to QBP team and RODS.

***Monthly Audit to ROD’s, JA, KL and QT***

National Care Group\Document Share - Quality and Compliance\\_Access Reports\_\Central Region\ Audits\Monthly Audits\2024 (Based on the region)

To get the raw data go to Radar Analytics. Download the data accordingly (for weekly select weekly, and from monthly select as per the report) and for submitted month (**for weekly make sure we select 1st Monday as the start of the month and Sunday is the closing of the month, and for monthly select whole month**)

* Go to share folder, under share folder, select Quality team -Documents/Audits/Monthly audit/2024 and create a new folder for the reporting month.
* Copy and paste the reports from previous month to current month folder.
* Open the new saved report and clean the data.
* Now login to Radar to extract the data to the template and map the data with your template.

**Paste a copy of each region report in National Care Group\Document Share - Quality and Compliance\\_Governance Reports\_\Central Region\Audits.**

**Send an email to All the RM’s, ROM’s, ROD’s and QBP.**

**Send the Audits board report to QBP and Karen Lewis.**

**Send the Audits External report to QBP, James Allen and Karen Lewis.**

***CQC extraction from email to Spreadsheet***

**This data is updated from the email we receive to spreadsheet. 5th of every month starts for the last month.**

We get emails sent to CQC Notifications- NCG mailbox, on every month we go to this email box and sort it into month/region. If it is a new month create a new folder as last month.

* On every month this has to be update in a template: Go to share folder, under share folder, select Quality team -Documents/data reporting/Boarding report preparing data/Board data/Board data/2022 board data copy and paste the last month report and rename it as per reporting month name.
* Clean the data and work along with columns. And the sample from the previous month.
* Once you copy and paste each email attachment data in the excel file, you have to read the attachment update the data.
* Save each attachment in Quality team -Documents/board data/board data/2022/Create a new folder, rename with reporting month, and save it there.
* And link the attachment in working sheet.
* Share the monthly file to Natalie and Claire to update their bits.

***COMPLAINTS AND COMPLIMENTS REPORT***

* Go to Radar and extract the events data for complaints and compliments.
* Paste the in new file for complaints and compliments.
* This data is used in Mike’s board report.

***Board Data and Mike’s Board Report***

This report is collection of CQC report, incident report, medication, Audits % and is required to complete the **MONTHLY BOARD REPORT**

* Go to Quality team -Documents/board data/board data/2024/ update the tabs in Board data template.
* Once all the reports are ready, we collect the figures into the board data template
* Board report This report is collection of CQC report, incident report, medication, Audits % and complaints & complements.
* Collate the figures from This report, Medication report and Complaints and Compliments report and collect the figures into Mike’s board pack report. Which can be found C:\Users\ZohaibRafique-NCG\National Care Group\Document Share - Quality and Compliance\Quality Board Reports\Board Reports\Quality Board Reports copy previous months report, change the name to respective month.
* Once report is completed send this report, 3 months medication data and Monthly Audits Board data to Mike and Copy Karen Douglas, Natalie and Claire in.

***Falls Data***

* This report is taken from incidents report, create two columns beside antecedent and name them “Witnessed/Unwitnessed and Type of Fall”
* Read Antecedent and Summary of each incident and describe the type of Fall in that column.
* Create a new workbook of Falls data in folder [Fall Analysis](https://nationalcaregroup.sharepoint.com/:f:/r/sites/qualityteamsurveys/Shared%20Documents/Fall%20Analysis?csf=1&web=1&e=YBYAp6)
* Update 6 months data, Abbeyvale falls analysis and current month report.
* Send the report to QBP team and Karen Douglas.

***RRN DATA To KAREN DOUGLAS***

* This report has to be extracted from Monthly incidents form.
* Go to [RRN Monthly](https://nationalcaregroup.sharepoint.com/:f:/r/sites/qualityteamsurveys/Shared%20Documents/RRN%20Monthly?csf=1&web=1&e=fG7EiU)
* Create new folder for current month, paste the respective data from monthly incidents and create graphs to show the data.
* Send this to Karen Douglas

***PRN / STOMP data to Karen Douglas***

**This data is to be updated once in a month**

We get emails sent to the data analyst, and the deadline to send this data is 7th of each current month.

* This has to be update in a template: National Care Group\Quality Team - Documents\Stomp\Medication monitoring and medication review Log\2024
* Mark each service who sent their STOMP in this file [Stomp Completion Services November Update.xlsx](https://nationalcaregroup.sharepoint.com/:x:/r/sites/qualityteamsurveys/Shared%20Documents/Stomp/NEW%20STOMPS%2022%20-%2023/2024/Stomp%20Completion%20Services%20November%20Update.xlsx?d=wb97a2076d2794b19aa95772a016c5073&csf=1&web=1&e=e2SazQ)
* Create a copy of last month report and rename it with reporting month. And open the report clean the data.
* Copy the data from the attachments email received from each service and update the report at a time and save it.
* Once the report is done, send this to Karen with percentage of received STOMPS.

***Monthly Action Report***

National Care Group\Document Share - Quality and Compliance\\_Access Reports\_\Central Region\ Actions\Monthly Actions\2024 (Based on the region)

* This report is taken from Radar

To get the raw data go to Radar> actions and extract the data in excel format.

Once the report is downloaded, insert two columns

One beside created date and select current month date from created and update it as current month. Break the filter and go to deadline date select previous date from today and in the new column say Past.

* Go to share folder, under share folder, select Quality team -Documents/Action/region/
* Copy and paste the reports from previous month to current month.
* Open the new saved report and clean the data
* Go back to the downloaded report and insert a pivot. And follow the template columns.
* Copy pastes the latest data into the report.
* Do it for all the regions and save it in shared folders.
* Send an email to according to the last sent email

***Scorecard***

Frequency of this report is monthly once (Should be distributed to executive team and quality team between 21 or 22 of reporting month)

* Go to share folder, under share folder, select quality team-documents/scorecard/2024/current month file.
* Open the report from column B to I data will be collected from QBP.
* Column J is “Has agency been used within the month?” go to remote applications and download financial listings of agency used. Contact Simon Doe to show you around on how to get this report.
* Column K and L from HR data and is not ready until 3rd Thursday of each month.
* Column M from Training team.
* Column N is from monthly audits Access compliance will be ready by 8th.
* Column O citation.
* Column P from actions report.
* Column Q from Radar risk register.
* Column R to Z needs to be completed from other reports like, Incidents, medication, complaints and compliments.

Once whole scorecard is completed send the scorecard to James Allen, Karen Lewis, QBPs and ROD’s with the services that are of concerns.

***Outstanding Support Action Plan***

* Download the data from Nourish BI dashboard for outstanding action plans for each region.
* Send each region’s file to the respective RM’s and RoM’s.

***Monthly CQC Analysis***

* Download the latest rating spreadsheet from CQC website.
* Go to C:\Users\ZohaibRafique-NCG\National Care Group\Quality Team - Documents\CQC Mapping add the latest data in this file.
* Save the file and go to power bi file in the folder. Refresh it and share the link with Mike.

***R & G Report Data pack***

* To create this report, we need all the reports that were created for whole month.
* This report is sent quarterly as per Risk and Governance timescales document.
* Go to document share - quality and compliance/\_governance report\_/region/R&G data/create a new folder for reporting month and save it. Do the same for all the regions.
* Copy and paste the data accordingly to each tab and share the data with ROD’s for each region.

***KIA Report***

* Go to C:\Users\ZohaibRafique-NCG\National Care Group\Karen Lewis - NCG - Quality Documents\MC Docs\Misc\Project Kea
* Update the Data in each folder within Project Kea every month.
* Most of the data is taken from all the previous reports mentioned above and Riddor report will be taken from Riddor inbox folder.