Standard operating procedure: Updating the outpatient transformation benchmarking report

You will need:

* R studio and a current version of R (at the time of writing the report was written in version 4.2.3 – "Shortstop Beagle"
* Access to the NCDR
* Access to the waiting list data in UDAL

1. Go to the outpatient benchmarking report folder: [op\_benchmarking](https://nhsengland.sharepoint.com/:f:/r/sites/CFO/ofp/pat/Restricted%20document/SE/Analysis/Outpatients/op_benchmarking?csf=1&web=1&e=aIepUN)
2. In the data folder copy base\_data\_noRTT and base\_data\_RTT,
3. Paste the copies into the archive folder, then rename them to add \_x<yyyymmdd> to indicate the date that you archived that data.
4. In the archive folder create a subfolder with today’s date on it, then move your copied files into that new subfolder
5. In the NCDR, open the combined metrics script (currently version 0\_3\_0) from op\_benchmarking>SQL
6. Update the report period and reporting month variables at the top of the script to get the latest freeze month of data
7. Run the script (*took around 4.5 mins on 05/12/23*)
8. In the op\_benchmarking>data folder open base\_data\_noRTT
9. Delete all rows of data except the headings
10. Go to NCDR and copy the output from the combined metrics script
11. Paste it into the base\_data\_noRTT workbook
12. Save and close
13. Go to UDAL desktop
14. Open SSMS on the UDAL desktop
15. Open the op\_benchmarking folder on UDAL desktop, go to the SQL folder then open the waiting list script (at time of writing it’s wl\_values\_2\_0\_0). This should open in SSMS if it doesn’t copy the script and paste it into a new query in SSMS.
16. Run the script (*took less than a minute on 05/12/23*)
17. Still in UDAL, go to op\_benchmarking > data then open the base\_data\_RTT.csv
18. Delete everything except the header row
19. Copy the data from the wl\_values script
20. Paste it into the base\_data\_RTT workbook
21. Save and close.
22. Make sure that the updated file has synced with sharepoint
23. Back on your normal desktop, use File Explorer to go into op\_benchmarking folder **(do not navigate to this folder via Sharepoint as step 28 will not work if you open the folder and file via Sharepoint)**
24. In the main folder is an op\_benchmarking R project file. If you open this it should automatically launch R studio with that project open. Failing that open R studio then open the project via R studio.
25. Once you’re in the op\_benchmarking project, use R studio to navigate to the op\_benchmarking folder, then click on the parent\_main\_v4.Rmd file (the RScripts subfolder should be the default for the files window in the so you will need to navigate up to the op\_benchmarking folder using the file path at the top of the bottom right hand box)
26. Once this is open, scroll, to line 45 in the top left hand box and amend dates in the following line to reflect the latest periods included in the refresh:

*All metrics in this dashboard reflect the latest SUS or EROC reported position for the month commencing 01-09-2023 apart from waiting list validation data which is from the WLMDS submission for the week ending 26-11-2023*

1. Save the parent\_main\_v4.Rmd file
2. Use R studio to navigate to the RScripts subfolder. This should be the default for the files window in the project but you might need to open the subfolder.
3. Run “knit\_dashboard.R”
4. This will put a version of the dashboard with today’s date in the filename into the outputs folder.
5. That is the version to send out for QA

QA Notes

All metrics except mean time to first and waiting list validation should be available in the outpatient’s compartment of model hospital. The team that produce model hospital sometimes use last year’s data to replace current actuals if there are concerns about data quality. If there are big disparities between the benchmarking tool and model hospital it would be wise to check the numerator and denominator within model hospital and see if either has been replaced with the same month from last year (e.g. December 2022 in place of the December 2023 data)