

Clinical Assessment Portal Training Manual

[© This is an extract from the complete manual, which is 119 pages long. It is part of the online Portfolio for writer Mary Higgins, see <http://maryhigginswriter.com> for more information]

Introduction

This manual is intended to be used as part of your training on the use of the Clinical Assessment Portal. If you have any questions during the training please ask. We will review at the end of each section. At the end of the training we ask that you take time to complete the short Evaluation Form.

The Clinical Assessment Portal is a useful, interactive tool. It provides you with the analysis, service models and support to kick start this process by focusing on outpatients in your health economy.

Clinical Assessment Portal Training Objectives

Section 1: Logging on, navigation, clusters and types of user

Objectives:

1. Log onto the portal individually
2. Navigate around the portal and return to the home page
3. Create a cluster and name a cluster
4. Identify the different types of user

Section 2: Standard Analysis and Clusters

Objectives:

1. Delete a cluster
2. Navigate through and create a Standard Analysis chart series
3. Create and save a Standard Analysis Chartbook, Word Report and Powerpoint Report
4. Compare charts and reports from different clusters

Section 3: Demand Flow Analysis

Objectives:

1. Select a cluster
2. Navigate through and create a Demand Flow Analysis chart series
3. Create and save a Demand Flow Analysis Chartbook, Word Report and Powerpoint Report
4. Compare charts and reports from different clusters

Section 4: Referrals Review

Objectives:

1. Prepare and download documents for a referrals review
2. Complete a short referrals review
3. Prepare a Scenario Planning Estimates sheet

Section 5: Scenario Planner and Viewer

Objectives:

1. Navigate through, create and save a new Scenario using Scenario Planning Estimates
2. Create and save a Scenario Chartbook, Word Report and Powerpoint Report
3. Compare charts and reports from different specialities/clusters
4. Submit a scenario to be authorised

Section 6: Service Specification

Objectives:

1. View and discuss the Generic Speciality business case
2. View and discuss the Generic Service Specification Template

Section 7: Home: Forum, Project Planner, Repository, Info and Support

Objectives:

1. Post a comment on the Forum
2. Create a new Project in the Project Planner
3. Identify own reports in repository
4. Download the draft Manual from Info and Support

Section 8: Extended roles: Commissioners and Membership managers

Objectives:

Commissioners

1. Set a standard cluster
2. Set and amend a standard scenario
3. Approve a submitted scenario
4. Approve reports in Repository

Membership Managers:

1. Add and authorise a new user
2. Moderate a comment on the Forum

Section 1: Logging on, types of user and navigation

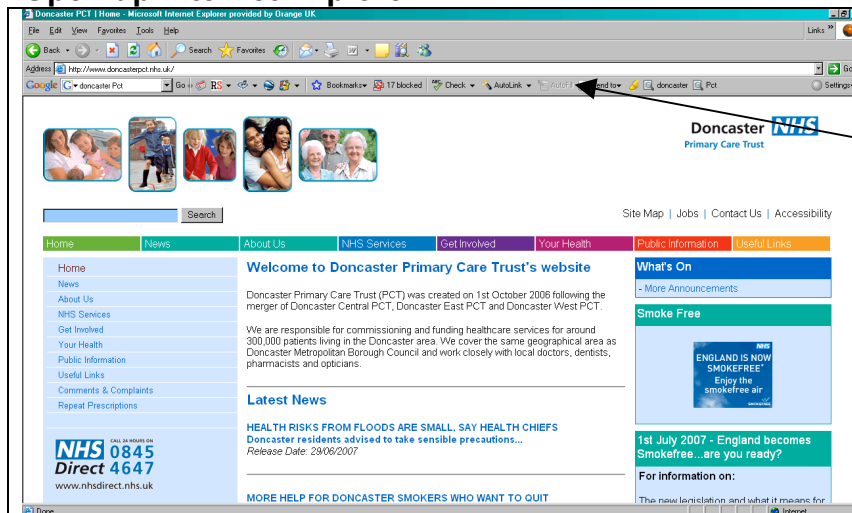
Objectives:

1. Log onto the portal individually
2. Navigate around the portal and return to the home page
3. Create a cluster and name a cluster
4. Identify the different types of user

In this first section we will each log into the system and take a quick tour around the portal.

Step 1 – logging in

Open up Internet Explorer:



Internet Explorer will open up and display your default home page.

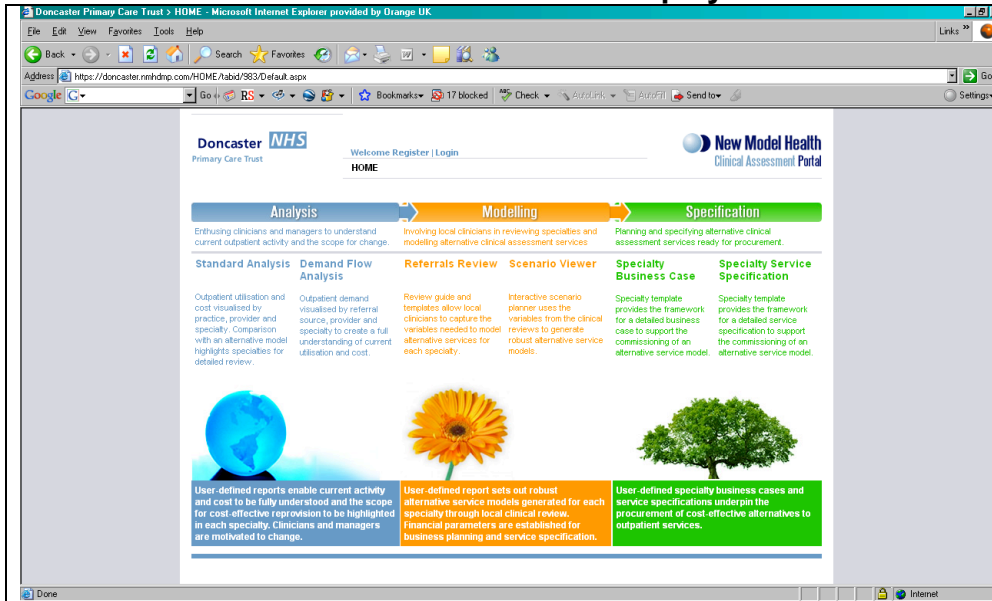
To access the Clinical Assessment Portal you have to type in a new address (or URL) into the address bar.

Delete the contents of the address bar (highlight the contents and click 'del') and then type in this address:

<https://doncaster.nmhdmp.com/>

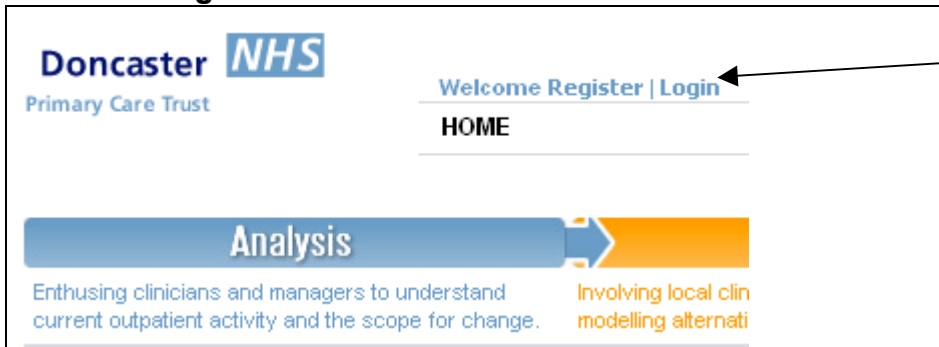
<https://doncasterpct.nmhdmp.com>

The Clinical Assessment Portal is now displayed:



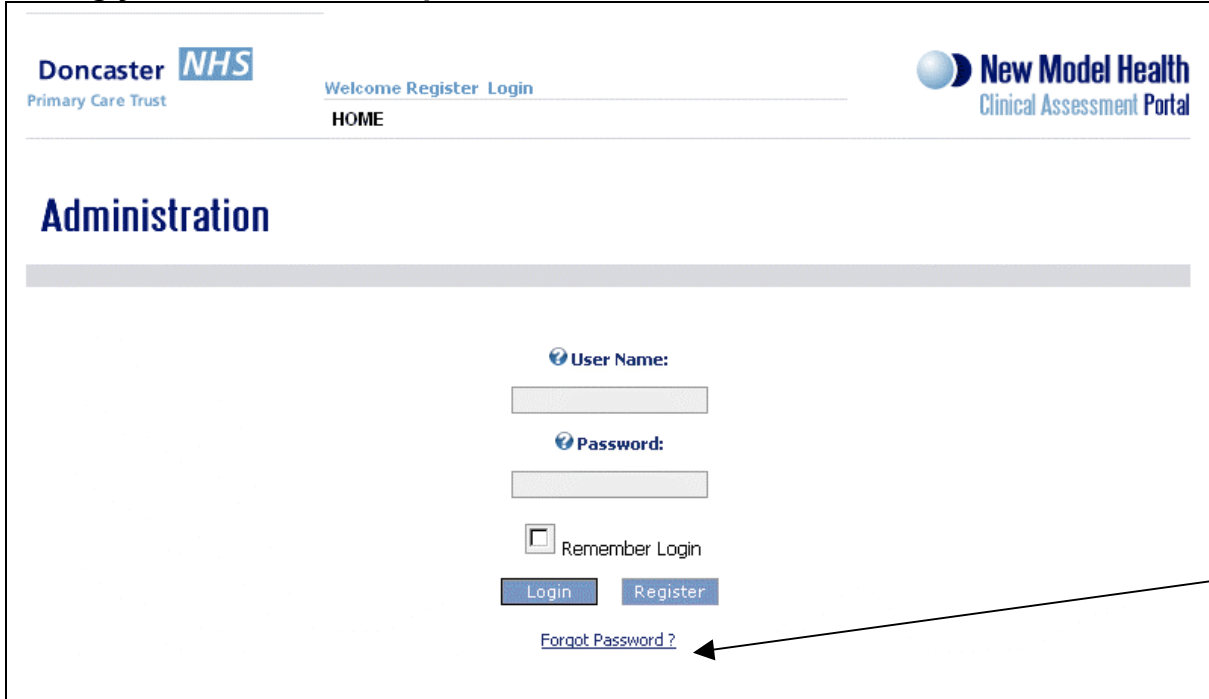
This is the home page of the Clinical Assessment Portal. Before you can use the Portal you need to log in.

Where to log in:








At the top of the home page is a link that says 'Login'.
Click on this and you will then be asked to enter you username and password.

Using your username and password:

	<p>You will have received your username and password through an email (if you haven't had it we will be able to tell you what it is at the training session).</p> <p>Put your details into the boxes provided and then click the box that says 'Login'.</p> <p>Note: You can choose to remember to save you login BUT please only do this if your PC is secure and password protected and that you never leave you PC logged on and unattended.</p> <p>If you forget your password you can click the link at the bottom, put in your username and an email will be sent to you with your details on it.</p>
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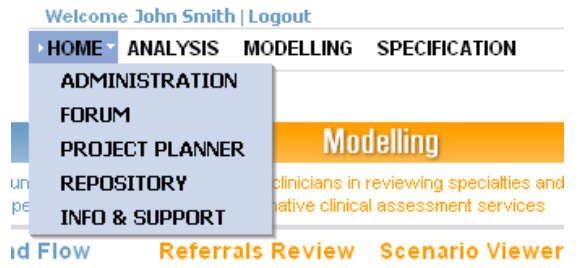
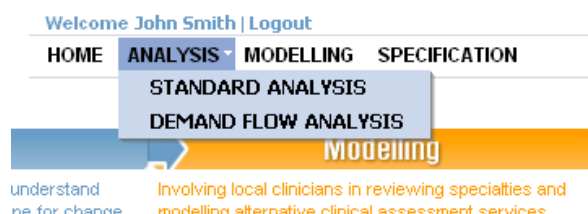
You are now logged into the portal:

		<p>Welcome John Smith Logout</p>			
<p>HOME ANALYSIS MODELLING SPECIFICATION</p>					
<p>Analysis</p> <p>Enthusing clinicians and managers to understand current outpatient activity and the scope for change.</p>		<p>Modelling</p> <p>Involving local clinicians in reviewing specialities and modelling alternative clinical assessment services</p>		<p>Specification</p> <p>Planning and specifying alternative clinical assessment services ready for procurement.</p>	
<p>Standard Analysis</p> <p>Outpatient utilisation and cost visualised by practice, provider and specialty. Comparison with an alternative model highlights specialties for detailed review.</p>	<p>Demand Flow Analysis</p> <p>Outpatient demand visualised by referral source, provider and specialty to create a full understanding of current utilisation and cost.</p>	<p>Referrals Review</p> <p>Review guide and templates allow local clinicians to capture the variables needed to model alternative services for each specialty.</p>	<p>Scenario Viewer</p> <p>Interactive scenario planner uses the variables from the clinical reviews to generate robust alternative service models.</p>	<p>Specialty Business Case</p> <p>Specialty template provides the framework for a detailed business case to support the commissioning of an alternative service model.</p>	<p>Specialty Service Specification</p> <p>Specialty template provides the framework for a detailed service specification to support the commissioning of an alternative service model.</p>
					
<p>User-defined reports enable current activity and cost to be fully understood and the scope for cost-effective reversion to be highlighted in each specialty. Clinicians and managers are motivated to change.</p>		<p>User-defined report sets out robust alternative service models generated for each specialty through local clinical review. Financial parameters are established for business planning and service specification.</p>		<p>User-defined specialty business cases and service specifications underpin the procurement of cost-effective alternatives to outpatient services.</p>	

Your name is displayed at the top of the screen and you can now start to use the Portal.

Step 2 – basic navigation

There are four main areas to the portal: HOME, ANALYSIS, MODELLING and SPECIFICATION. Whatever part of the Portal you are in the top navigation button will always be visible.

	<p>This is displayed when hovering over the HOME button</p>	<p>Hover over the top navigation bar (HOME, ANALYSIS, MODELLING, SPECIFICATION).</p> <p>As the mouse hovers over the contents or each area is displayed. Hover over each area and then click one of the links.</p>
	<p>This is displayed when hovering over the ANALYSIS button</p>	