

EQM Ltd

the people involved

Referral to Installation Log

User Manual



External Quality
Management Ltd

Installation Log User Manual

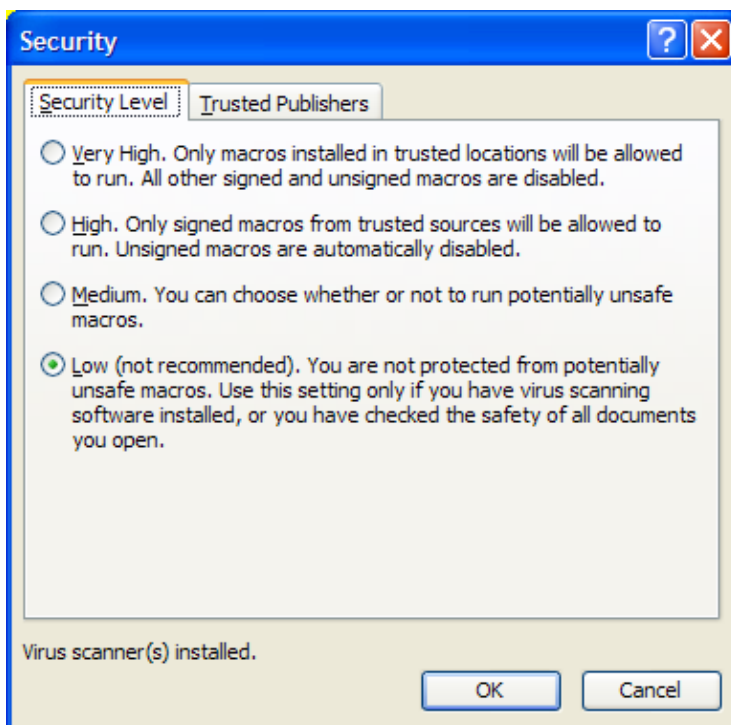
Introduction

The Installation Log.xls is a macro driven spreadsheet that will calculate the statistics of Referrals to Installations received in any given month. This User Manual gives instructions on how to use the spreadsheet to obtain the required reporting functionality.

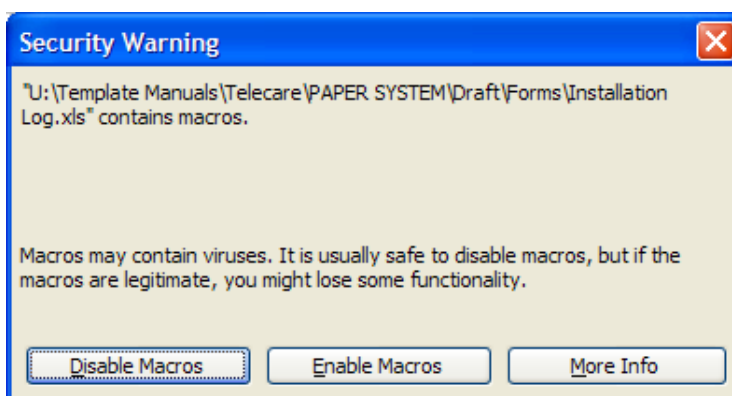
Getting Started

The spreadsheet is macro driven. However, Excel sees running macros as a potential threat to the integrity of the system and would rather macros were disabled i.e. not allowed to run. You have two choices:

1. Permanently enable macros. To do this, in Excel go to the "Tools" menu, select "Macros" and from the sub-menu select "Security". On the "Security Level" tab, select the "Low" option and press "OK".



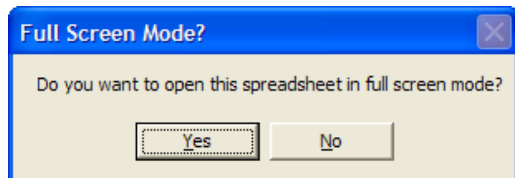
2. Enable macros on a session by session basis. To do this, leave the security setting at "Medium" and you will be presented with a warning screen when you open the Installation Log file. Then just select "Enable Macros" in the warning message.



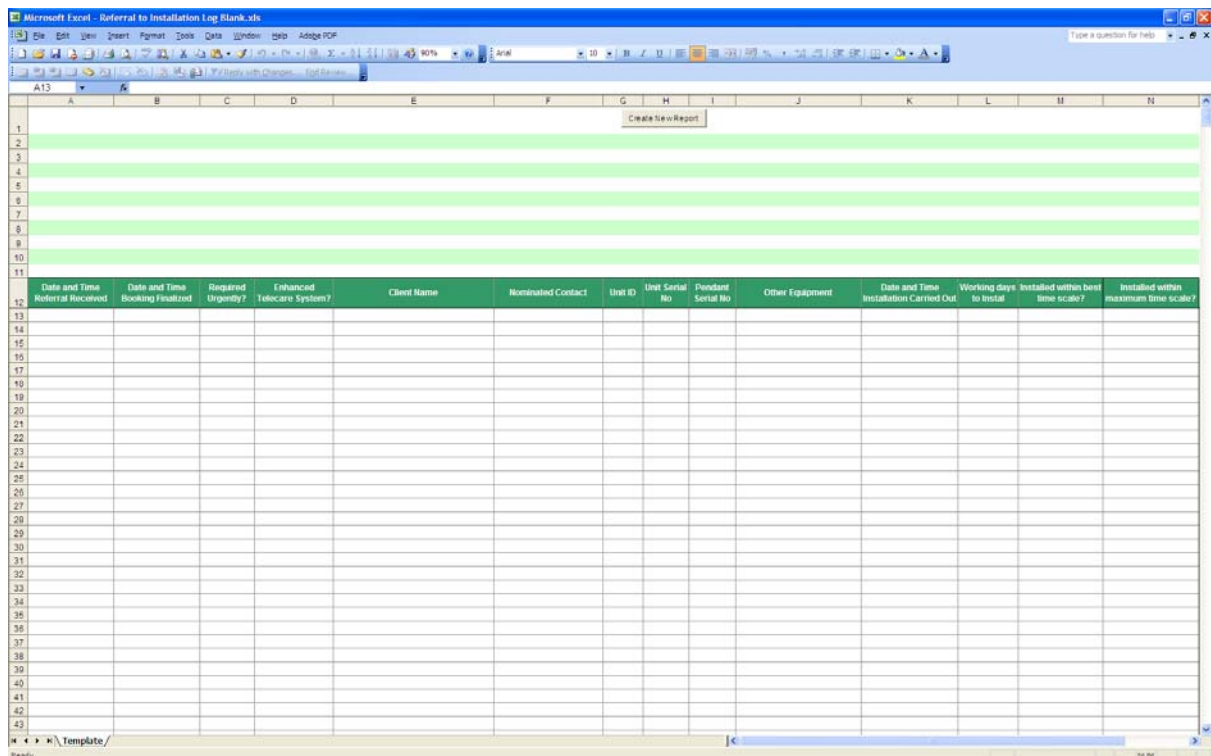
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Note - Do not select the “High” or “Very High” security settings for the macros in your version of Excel as that would disable the macros and the functionality that you require in the Installation Log would not be available.

When you first open the spreadsheet you will be asked if you want to show the spreadsheet in full-screen mode. If your screen resolution is very high, it will look better in reduced screen mode so click “No”. Otherwise click “Yes”. Also, in reduced screen mode, the tabs may not appear at the bottom of the screen.



When the spreadsheet opens it will look like this:

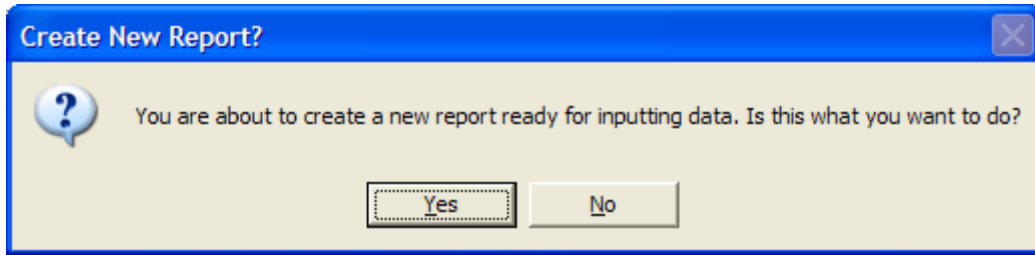


You cannot enter any information in the various cells as they are protected. All you can do is click on the button marked “Create New Report”.

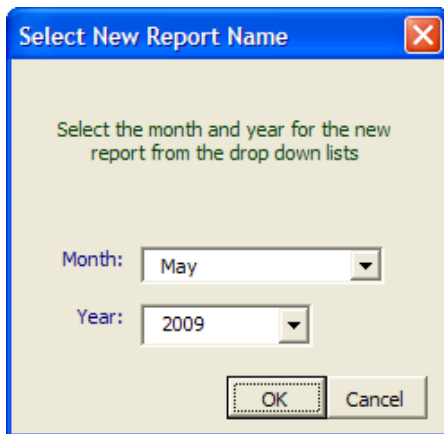
Creating a New Report

Clicking on the button “Create New Report” will allow you to create a similar sheet where you can enter all of the Installation Log information. You will be asked whether you actually want to create a report:

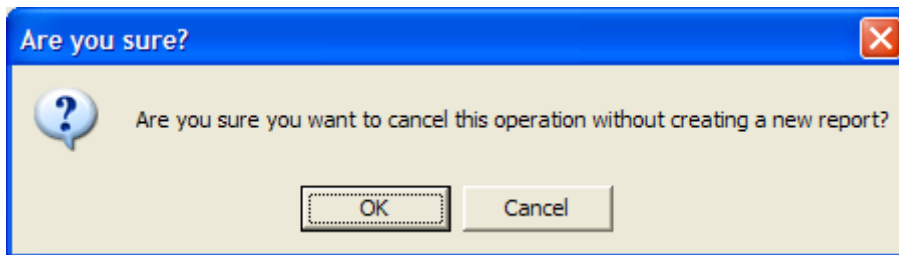
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Clicking "No" cancels the operation (in case the button was pressed in error). Clicking "Yes" takes you to a screen where you can denote the name of the "tab" for this report. It is envisaged that a new report will be started each month, so the tabs will be named by month and year. The system will always select the month and year of the following month, but this can be changed from the drop down boxes.



Clicking on Cancel will cause a prompt to ask whether you really meant to cancel the operation.



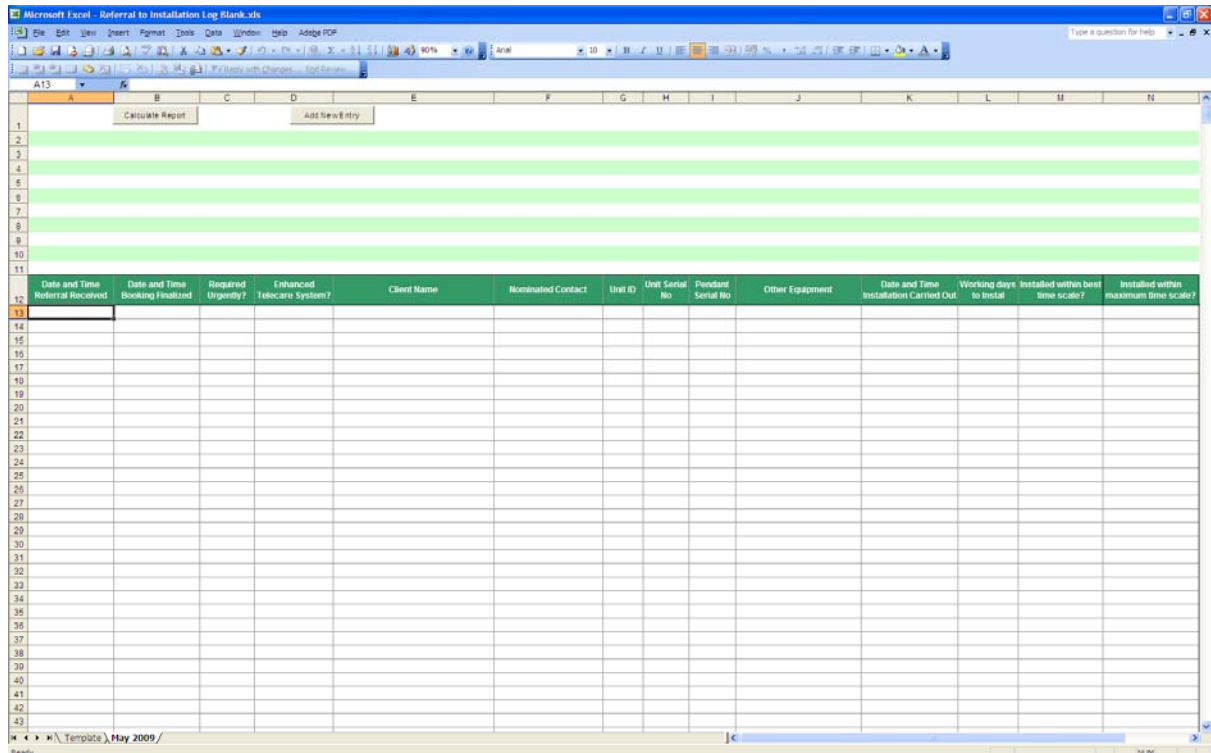
Clicking on "OK" cancels the "Create New Report" operation and returns you to the "Template" tab. You will receive confirmation that the operation was cancelled. Clicking on the "Cancel" button cancels the cancelling operation and leaves you with the "Select New Report Name" box open.

With the "Select New Report Name" box open insert a Month and Year into the two boxes and click on "OK". This will create a new report and place it directly behind the "Template" sheet. Over time, this has the effect of pushing older reports further to the right. You have now created a new Installation Log Report to track all installations requested in the specified month.

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Using the New Report

The new report looks like:



You can now populate the sheet with data in preparation for calculating the report analysis. As installations are requested, it is very important that you enter the date and time into the “Date and Time Request Received” column in the format “dd/mm/yyyy hh:mm”. This should be the date and time that the Installation Request was made.

If there things to be done that will require input from someone else i.e. instal a telephone line or fit an electrical socket in the hall, or if the prospective Service User will not be available for quite a while, you can enter the date in the second column of when all arrangements had been made. This might be following installation of the additional equipment or the client being back from holiday. It is this date that will be used to calculate compliance.

You have a button to assist you with entering data into the sheet, the “Add new Entry” button.

“Add New Entry” Button

Creating a New Entry

With the cursor in any cell, clicking on the “Add New Entry” button adds the current date and time, in the correct format, into the next empty cell in the “Date and Time Request Received” column.

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	A	B	C	D	E	F	G	H	I	J	K	L	M	N	
1		Calculate Report		Add New Entry											
2															
3															
4															
5															
6															
7															
8															
9															
10															
11															
12		Date and Time Referral Received	Date and Time Booking Finalized	Required Urgently?	Enhanced Telecare System?	Client Name	Homebased Contact	UHRI ID	User Serial No	Pendant Serial No	User Equipment	Date and Time Installation Carried Out	Working days to install	Installed within base time scale?	Installed within maximum time scale?
13	13	17/05/2011 20:30		Yes	Yes							21/05/2011 12:03	2.65	Yes	Yes
14	14	17/05/2011 20:30		Yes	No							22/05/2011 12:03	2.65	No	Yes
15	15	17/05/2011 20:30		Yes	Yes							23/05/2011 12:03	3.65	Yes	Yes
16	16	17/05/2011 20:30		Yes	No							24/05/2011 12:03	4.65	No	Yes
17	17	17/05/2011 20:30		Yes	Yes							25/05/2011 12:03	5.65	Yes	Yes
18	18	17/05/2011 20:30		Yes	No							26/05/2011 12:03	6.65	No	No
19	19	17/05/2011 20:30		Yes	Yes							27/05/2011 12:03	7.65	Yes	Yes
20	20	17/05/2011 20:30		No	No							28/05/2011 12:03	7.65	Yes	Yes
21	21	17/05/2011 20:30		No	Yes							29/05/2011 12:03	7.65	Yes	Yes
22	22	17/05/2011 20:30		No	No							30/05/2011 12:03	8.65	Yes	Yes
23	23	17/05/2011 20:30		No	Yes							31/05/2011 12:03	9.65	Yes	Yes
24	24	17/05/2011 20:30		Yes	No							01/06/2011 12:03	10.65	No	No
25	25	17/05/2011 20:30		Yes	Yes							02/06/2011 12:03	11.65	Yes	Yes
26	26	17/05/2011 20:30		No	No							03/06/2011 12:03	12.65	Yes	Yes
27	27	17/05/2011 20:30		No	Yes							04/06/2011 12:03	12.65	Yes	Yes
28	28	17/05/2011 20:31		No	No							05/06/2011 12:03	12.65	Yes	Yes
29	29	17/05/2011 20:33													
30	30														
31	31														

Click on the "Add New Entry" button to enter the current system date and time in the next available row or scroll to the bottom of the data and place the cursor in the next available row and enter the date and time the installation request is being logged. (It is important to add the date in the format: "dd/mm/yyyy" then press the space bar twice to add two spaces and then add the time in the format: "hh:mm").

Determine whether the installation request is urgent or not and enter "Yes" or "No" into the next column accordingly. The TSA Code of Practice 2009 defines an Urgent request as a telecare installation required to support the service user e.g. discharge from hospital/care home or the imminent collapse of the existing care package. If this request fits this description, enter "Yes" in the "Required Urgently?" column. Otherwise, enter "No" to indicate that it is a non-urgent request.

Determine whether the installation will be for a Basic Telecare System (base unit and pendant(s)) or an Enhanced System (base unit, plus pendants plus additional devices). If an Enhanced System is required enter "Yes" in the fourth column otherwise enter "No".

Complete all other columns in that row by pressing the tab button to move to the next column and add the required data.

Updating an Entry

Once all arrangements have been made and an Installation Date can be offered to the Service User, the date on which all arrangements have been made is entered into the second column "Date and Time Booking Finalized" in the format "dd/mm/yyy HH:mm"

Once the actual date and time that the installation was carried out (start time) is available, find the correct entry and input that data into the relevant column. The spreadsheet automatically calculates whether the system was installed in the correct time scales.

If the "Date and Time Installation Carried Out" column has an entry and the last 3 columns remain blank, check your data on that row. Typos can prevent the spreadsheet from working i.e. if you enter a date as "02.03.2009 17:40", Excel will not recognize this format as a date. Similarly, adding spurious characters to the date (extra "/" or spaces for example) will cause the spreadsheet not to process the data correctly. Check the data carefully as this accounts for 100% of all errors with this spreadsheet.

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As soon as the data is correctly entered, the spreadsheet will calculate whether the system was installed within the "Best Time Scale" or not. This is the threshold level for the "9 out of every 10 cases" for that type of system. If so, the "Installed Within Best Time Scales" column is marked with "Yes". If not, the column is marked as "No" and the entry is highlighted in yellow. This does not signify a problem on its own, but indicates where to start looking should one of the percentage statistics not be achieved when the report is calculated.

Similarly, the "Installed within maximum time scale?" column is updated to show whether the maximum time allowed to instal that type of system was achieved or not. A "No" is highlighted in red and will be one of the items to raise an "Exception Report" about, following the calculation of the report.

"Calculate Report" Button

The purpose of the foregoing data entry regime is so that you can track your compliance with regard to the number of installation requests that get installed within certain time scales. To achieve that, simply press the "Calculate Report" button. A small program will run and will compare the entries in column "A" (or "B") with those in column "K", considering the effect of the information in columns "C" and "D" and present the results of various analyses at the top of the report.

The screenshot shows a Windows desktop environment. In the foreground, Microsoft Excel is open to a spreadsheet titled "Referral to Installation Log Blank.xls". The spreadsheet has a summary section at the top (rows 2-9) and a detailed data table below (rows 12-30). The summary section includes percentage-based statistics for urgent basic and enhanced referrals, with some cells highlighted in green (OK) and others in yellow (Investigate why the target of 85.71% was not achieved). The detailed data table has the following columns: Date and Time Referral, Date and Time Banking Finalized, Required Urgently, Enhanced Telecom Service?, Client Name, Noncontact Contact, Unit ID, Unit Serial No, Pending Serial No, Other Equipment, Date and Time Installation, Working days to Install, Installed within best time scale?, and Installed within maximum scale?.

12	Date and Time Referral	Date and Time Banking Finalized	Required Urgently	Enhanced Telecom Service?	Client Name	Noncontact Contact	Unit ID	Unit Serial No	Pending Serial No	Other Equipment	Date and Time Installation	Working days to Install	Installed within best time scale?	Installed within maximum scale?
13	27/05/2011 11:44	Yes	No	Yes							27/05/2011 15:32	0.1593	Yes	Yes
14	27/05/2011 11:44	Yes	No	Yes							29/05/2011 15:32	0.1593	Yes	Yes
15	27/05/2011 11:44	Yes	No	Yes							29/05/2011 15:32	0.1593	Yes	Yes
16	27/05/2011 11:44	No	Yes	Yes							30/05/2011 15:32	1.1593	Yes	Yes
17	27/05/2011 11:44	No	No	Yes							31/05/2011 15:32	2.1593	Yes	Yes
18	27/05/2011 11:44	Yes	No	Yes							01/06/2011 15:32	3.1593	No	Yes
19	27/05/2011 11:44	Yes	No	Yes							02/06/2011 15:32	4.1593	No	Yes
20	27/05/2011 11:44	No	Yes	Yes							03/06/2011 15:32	5.1593	Yes	Yes
21	27/05/2011 11:44	No	No	Yes							04/06/2011 15:32	5.1593	Yes	Yes
22	27/05/2011 11:44	Yes	Yes	Yes							05/06/2011 15:32	5.1593	Yes	Yes
23	27/05/2011 11:44	Yes	No	Yes							06/06/2011 15:32	6.1593	No	No
24	27/05/2011 11:44	Yes	No	Yes							07/06/2011 15:32	7.1593	No	No
25	27/05/2011 11:44	No	No	Yes							08/06/2011 15:32	8.1593	Yes	Yes
26	27/05/2011 11:44	Yes	Yes	Yes							09/06/2011 15:32	9.1593	Yes	Yes
27	27/05/2011 11:44	No	Yes	Yes							10/06/2011 15:32	10.1593	Yes	Yes
28	27/05/2011 11:44	Yes	No	Yes							11/06/2011 15:32	10.1593	No	No
29	27/05/2011 11:44	No	No	Yes							12/06/2011 15:32	10.1593	Yes	Yes

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The 8 elements to the report are:

1. Percentage of urgent basic referrals installed within 2 working days.
2. Percentage of urgent enhanced referrals installed within 15 working days.
3. Percentage of non-urgent basic referrals installed within 15 working days.
4. Percentage of non-urgent enhanced referrals installed within 15 working days.
5. Percentage of urgent basic referrals installed within 5 working days.
6. Percentage of urgent enhanced referrals installed within 20 working days.
7. Percentage of non-urgent basic referrals installed within 20 working days.
8. Percentage of non-urgent enhanced referrals installed within 20 working days.

Those elements that are not relevant to this month's report are grayed out. The second column (in gray) advises what the compliancy requirements are based on the number of referrals of that type received in that month.

The third column will indicate if there is any rectification or corrective action necessary. This column will state "OK" if there are no rectification actions required and will give a comment about the analyses in red if there are. Each exception report relates to the highlighted entries in the spreadsheet.

Any items showing up in red are to be investigated and the reasons for the shortfall should be explained in writing to the satisfaction of the Control Room Manager. (You may have a separate form for this purpose called an "Exceptions Report".) The explanation should also indicate what needs to be done to prevent a recurrence of this shortfall in the future. These recommendations may be by action plan, corrective actions, list of things to do, written into the explanation document (exception report) or just appended to the Installation Log by hand. The key thing is that correct control is exercised to ensure that the rectification actions are carried out and verified later as having been effective in closing down the original problem.

This explanation should be attached to the printed copy of the report and filed with it. The explanation should be signed and dated by the Control Room Manager to show that it has been reviewed satisfactorily. Then, it should be filed in a folder or drawer that is specifically for these reports. This makes the records easily retrievable for audit and review purposes.

IMPORTANT NOTE

The formulae in this spreadsheet are dependent upon the Analysis Toolpaks being enabled in Microsoft Excel 2003. Go to the "Tools" menu, select "Add Ins" select the "Analysis Toolpak" and the Analysis Toolpak for VBA then press OK. Do not save the work sheet until after this has been done.

Other versions of Microsoft Excel may already have this feature enabled, but probably not.

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OTHER NOTES

WHY THE VARYING TARGET PERCENTAGES?

The TSA Code of Practice states that the analysis should be carried out to ensure you are responding to installation requests to determine that you have enough resources available to support the Service Users using your service. It states "in 9 out of every 10 cases", which has commonly been accepted as 90%. However, that is not the case. If you only have one installation requested in a given month and your target is "9 out of every 10", this means that you could legitimately not achieve that target time and still be compliant. To achieve compliance with two requests, you must hit the target at least once and so the percentage skyrockets to 50%. The sliding scale for percentage achievement against actual numbers for fault requests is shown at Appendix A. These are the percentages that are taken as the targets for the monthly achievement figures and to determine compliance.

A GOOD ROUTINE

It is recommended that you create a copy of the "Installation Log Blank.xls" and rename it to "Installation Log Live.xls". Then follow the routines below on the live version of the spreadsheet.

After a period of time, when there are thousands of entries in it, the spreadsheet will take longer and longer to open. At that point, simply rename the existing live file to include "Archive 01" in the file name or dates such as "2010 to 2012". Then create a copy of the "Installation Log Blank.xls" and rename it to "Installation Log Live.xls". Then follow the routines below on the new live version of the spreadsheet.

PROTECT ME

This spreadsheet needs to be protected in order for the automated functionality to work correctly. However, as it is your spreadsheet, you may have a need to change the spreadsheet from time to time. To access this spreadsheet's protected areas, unprotect the worksheets using the password "12345qwertasdfgzxcvb". When finished with your changes go to the "Template" page and press the "Add New Report" button. This applies all of the protection to the worksheet and the workbook. When asked if you want to create a new report, click on the "No" button and then save the worksheet to save your changes.

Copyright Notice

This User Manual and the spreadsheet to which it refers is the work of Andy Galloway of External Quality Management Ltd, Southampton SO19 4DJ, England. T: 023 8044 0866.

Please feel free to share this spreadsheet with friends and colleagues. However, please also ensure that a copy of this User Manual always accompanies the associated spreadsheet.

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Appendix A - Achievement Targets

Actual Quantity of Events	Min Target to comply	Compliant %	Actual Quantity of Events	Min Target to comply	Compliant %
1	0	0.00%	31	27	87.10%
2	1	50.00%	32	28	87.50%
3	2	66.67%	33	29	87.88%
4	3	75.00%	34	30	88.24%
5	4	80.00%	35	31	88.57%
6	5	83.33%	36	32	88.89%
7	6	85.71%	37	33	89.19%
8	7	87.50%	38	34	89.47%
9	8	88.89%	39	35	89.74%
10	9	90.00%	40	36	90.00%
11	9	81.82%	41	36	87.80%
12	10	83.33%	42	37	88.10%
13	11	84.62%	43	38	88.37%
14	12	85.71%	44	39	88.64%
15	13	86.67%	45	40	88.89%
16	14	87.50%	46	41	89.13%
17	15	88.24%	47	42	89.36%
18	16	88.89%	48	43	89.58%
19	17	89.47%	49	44	89.80%
20	18	90.00%	50	45	90.00%
21	18	85.71%	51	45	88.24%
22	19	86.36%	52	46	88.46%
23	20	86.96%	53	47	88.68%
24	21	87.50%	54	48	88.89%
25	22	88.00%	55	49	89.09%
26	23	88.46%	56	50	89.29%
27	24	88.89%	57	51	89.47%
28	25	89.29%	58	52	89.66%
29	26	89.66%	59	53	89.83%
30	27	90.00%	60	54	90.00%

To demonstrate percentage target to maintain compliance based on a criterion of “in 9 out of 10 cases”. This only equates to 90% when the total number of events is wholly divisible by 10 as highlighted above in yellow.

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NOTES