

EQM Ltd

the people involved

Referral to Re-Evaluation Log

User Manual



External Quality
Management Ltd

Referral to Re-evaluation Log User Manual

Introduction

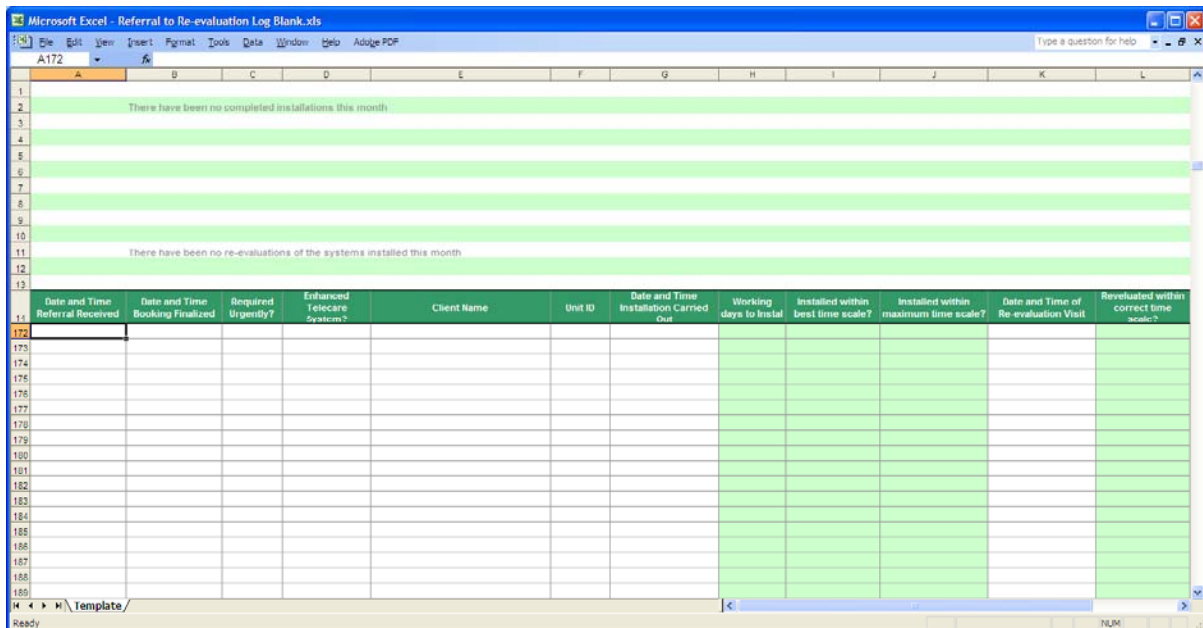
The "Referral to Re-evaluation Log.xls" is a spreadsheet that will calculate the statistics of Referrals to Re-evaluations received in any given month. This User Manual gives instructions on how to use the spreadsheet to obtain the required reporting functionality.

Getting Started

The spreadsheet requires an "Add-In" to be enabled in any instance of Excel that wants to use this spreadsheet. The reason for this is that the calculations in the spreadsheet use a function called "Networkdays". This function is available by enabling the Add-In called "ATPVBAEN.XLA". To do this talk to your ICT Department or read the Excel help files.

It is recommended that you keep this original file in a safe place and create a copy for use. When the copy contains a large amount of data, the loading time will increase and you can make another copy file from the original "blank" version. This spreadsheet is set up so that you can create a single work sheet per month and a new workbook every year. It is recommended that you create each of the monthly work sheets from the "Template" sheet.

When the spreadsheet opens it will look like this:

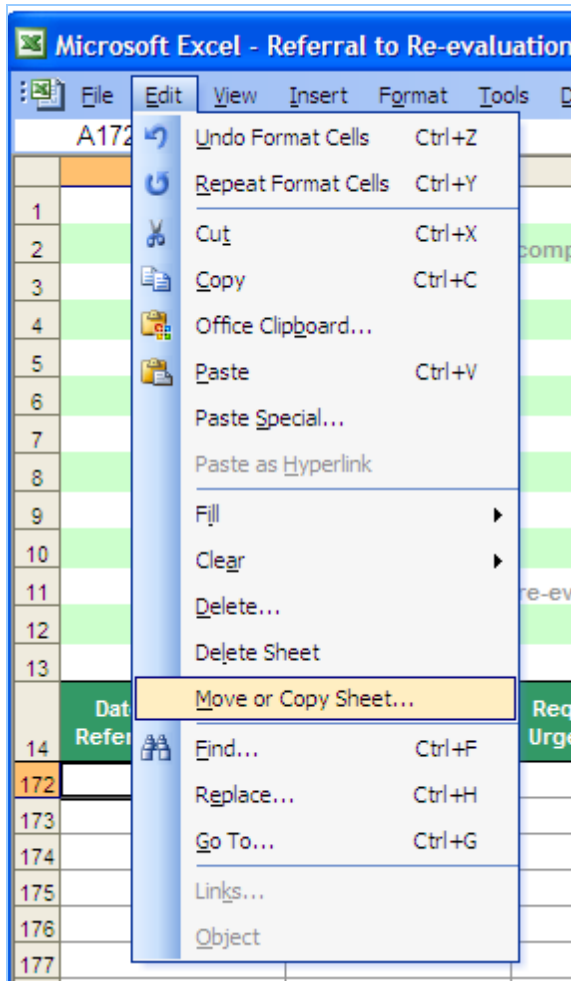


You cannot enter any information in the "Report Area" above the column title bar or in the 4 green columns, as they are protected.

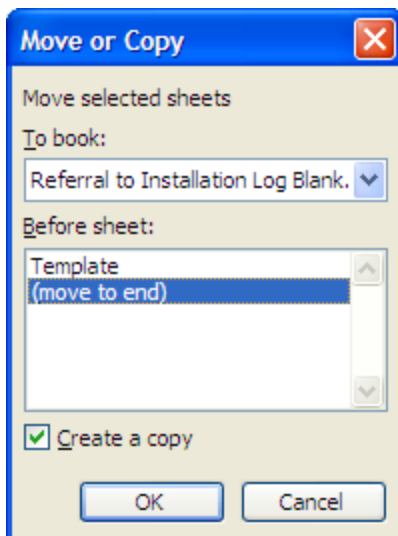
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Creating a New Report

Create a new report in Excel by selecting “Move or Copy sheet . . .” from the Edit menu.

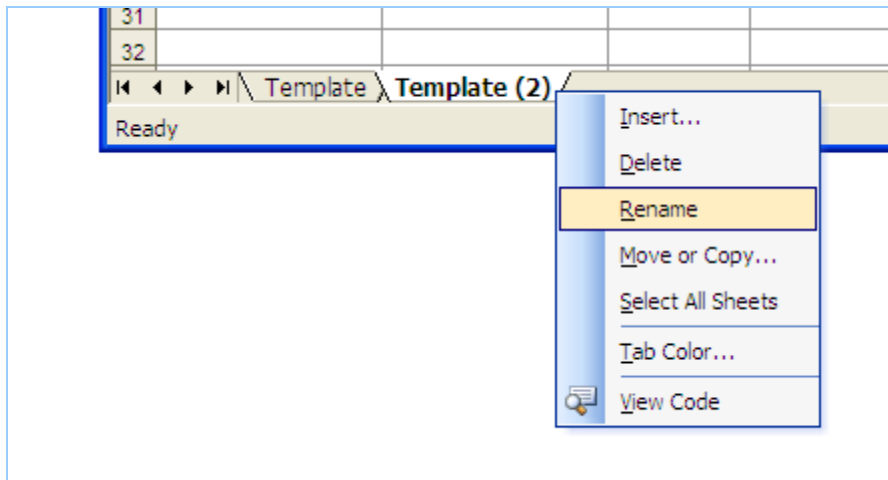


If this is a new workbook, in the next form, select (move to end). Select the box “Create a copy” and click on “OK”.



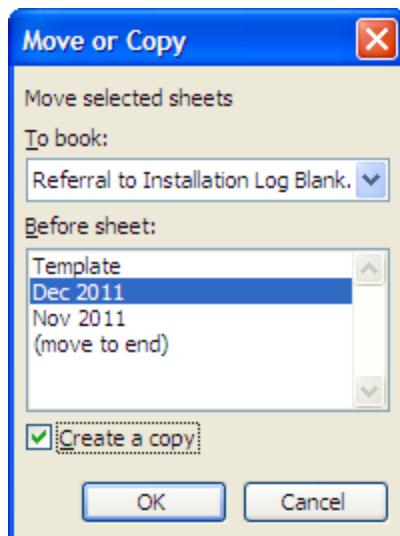
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Change the tab name of the new sheet from "Template (2)" to the month and year of the log i.e. "Nov 2011". Do this by right clicking on the tab and selecting "Rename" from the pop up menu.



Enter the required text and press enter on your keyboard.

If you already have spreadsheets in the workbook, it is recommended that you create the next new one just after the "Template" form.



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Using the New Report

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 Referral Received" column in the format "dd/mm/yyyy hh:mm". This should be the date and time that the Installation Request was made. If the second column does not contain a date and time entry, this date and time will be used to calculate compliance.

If there are 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 must be in the format "dd/mm/yyyy hh:mm". 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. Otherwise, leave this column blank.

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.

The 3 green columns remain blank until a date and time is entered into the "Date and Time Installation Carried Out" column in the correct format. The report section at the top of the spreadsheet is blank until at least one entry is completed with calculated entries in the first three green columns. Similarly, the green "Re-evaluation" column will not be calculated until a date and time in the correct format has been entered into the "Date and Time of Evaluation Visit" column has been entered. The Re-evaluation Report section at the top of the spreadsheet remains blank until at least one entry has been updated with the re-valuation date and time in the correct format.

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/yyyy HH:mm". If this occurred at the same time as the initial referral, leave this column blank.

Once the actual "Date and Time Installation Carried Out" column has been updated, again with the time and date in the correct format, 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 columns 8, 9 and 10 (green) remain blank, check your data on that row. Typos can prevent the spreadsheet

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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.

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 (see the table at Appendix A). 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 will update 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.

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. The spreadsheet will compare the entries in column "A" (or "B") with those in column "G", considering the effect of the information in columns "C" and "D" and present the results of various analyses at the top of the report.

Date and Time Referral Received	Date and Time Booking Finalized	Required Urgently?	Enhanced Telecare System?	Client Name	Unit ID	Date and Time Installation Carried Out	Working days to Instal	Installed within best time scale?	Installed within maximum time scale?	Date and Time of Re-evaluation Visit	Re-evaluated within correct time scale?
01/01/2012 13:27		Yes	No	Jones	1234	08/01/2012 13:12	3.8882	No	Yes		
02/01/2012 08:19		Yes	No	Smith	1235	07/01/2012 13:12	4.2033	No	Yes		
03/01/2012 03:10		No	Yes	Evans	1236	10/01/2012 13:12	5.4175	Yes	Yes		
03/01/2012 22:02	03/01/2012 22:02	No	Yes	Cooper	1237	12/01/2012 13:12	6.6317	Yes	Yes		
04/01/2012 18:54	04/01/2012 18:54	No	Yes	Peters	1238	15/01/2012 13:12	8.8459	Yes	Yes		
05/01/2012 11:45		Yes	No	Hawthorne	1239	08/01/2012 13:12	1.9501	Yes	Yes		
06/01/2012 08:37		No	Yes	Cardiff	1240	09/01/2012 13:12	1.2743	Yes	Yes		
07/01/2012 01:20		No	Yes	Bary	1241	10/01/2012 13:12	1.4805	Yes	Yes		
07/01/2012 20:20		No	No	Fleming	1242	11/01/2012 13:12	2.2000	Yes	Yes		
08/01/2012 15:11		No	No	Nash	1243	12/01/2012 13:12	3.0835	Yes	Yes		
08/01/2012 10:03		No	Yes	Keale	1244	13/01/2012 13:12	4.1311	Yes	Yes		
09/01/2012 11:45	09/01/2012 11:45	No	No	Shakespeare	1245	14/01/2012 13:12	5.0801	Yes	Yes		
09/01/2012 08:37		Yes	No	Fortain	1246	15/01/2012 13:12	5.2743	No	No		
07/01/2012 01:28		No	No	Peys	1247	16/01/2012 13:12	5.4885	Yes	Yes		
07/01/2012 20:20		No	Yes	Harrison	1248	17/01/2012 13:12	6.2860	Yes	Yes		
08/01/2012 15:11		Yes	No	Carter	1249	18/01/2012 13:12	7.0835	No	No		
08/01/2012 10:03		No	No	Bonneck	1250	19/01/2012 13:12	8.1311	Yes	Yes		

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.

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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.

Updating Entries after Re-evaluations

The TSA Code of Practice requires that all newly installed systems should be "re-evaluated" within 10 weeks of the original installation date. Once this has been carried out, the spreadsheet should be updated with the date and time of the re-evaluation visit. Ensure it is in the format "dd/mm/yyyy HH:mm".

Once the first re-evaluation date has been entered, the next part of the report opens up, reporting on the statistics of re-evaluations.

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Microsoft Excel - Referral to Re-evaluation Log Blank.xls												
K23 16/03/2012 07:12:14												
	A	B	C	D	E	F	G	H	I	J	K	L
1												
2		Percentage of Urgent Basic Systems installed within 2 days was 20%				The target was 80%	Raise 1 Exception Report					
3		There were no Urgent Enhanced installation referrals received this month										
4		Percentage of Non Urgent Basic Systems installed within 15 days was 100%				The target was 80%	OK					
5		Percentage of Non Urgent Enhanced Systems installed within 15 days was 100%				The target was 85.71%	OK					
6		Number of Urgent Basic Systems taking longer than 5 days to instal was 2				Should be 0	Raise 2 Exception Reports					
7		There were no Urgent Enhanced installation referrals received this month										
8		Number of Non Urgent Basic Systems taking longer than 20 days to instal was 0					OK					
9		Number of Non Urgent Enhanced Systems taking longer than 20 days to instal was 0					OK					
10												
11		Percentage of re-evaluations carried out within 10 weeks was 94.12%				The target was 100%	Raise 1 Exception Report					
12		Number of re-evaluations taking longer than 10 weeks to complete was 1				Should be 0	Raise 1 Exception Report					
13												
14	Date and Time Referral Received	Date and Time Booking Finalized	Required Urgently?	Enhanced Telecare System?	Client Name	Unit ID	Date and Time Installation Carried Out	Working days to Instal	Installed within best time scale?	Installed within maximum time scale?	Date and Time of Re-evaluation Visit	Reevaluated within correct time scale?
15	01/01/2012 13:27		Yes	No	Jones	1234	08/01/2012 13:12	3.8882	No	Yes	08/03/2012 07:12	Yes
16	02/01/2012 08:19		Yes	No	Smith	1235	07/01/2012 13:12	4.2033	No	Yes	09/03/2012 07:12	Yes
17	03/01/2012 03:10		No	Yes	Evans	1236	10/01/2012 13:12	5.4175	Yes	Yes	10/03/2012 07:12	Yes
18	03/01/2012 22:02	03/01/2012 22:02	No	Yes	Cooper	1237	12/01/2012 13:12	6.8317	Yes	Yes	11/03/2012 07:12	Yes
19	04/01/2012 18:54	04/01/2012 18:54	No	Yes	Peters	1238	15/01/2012 13:12	8.8459	Yes	Yes	12/03/2012 07:12	Yes
20	05/01/2012 11:45		Yes	No	Hawthorne	1239	08/01/2012 13:12	1.9501	Yes	Yes	13/03/2012 07:12	Yes
21	06/01/2012 08:37		No	Yes	Cartwright	1240	09/01/2012 13:12	1.2743	Yes	Yes	14/03/2012 07:12	Yes
22	07/01/2012 01:20		No	Yes	Berry	1241	10/01/2012 13:12	1.4805	Yes	Yes	25/03/2012 07:12	No
23	07/01/2012 20:20		No	No	Fleming	1242	11/01/2012 13:12	2.2000	Yes	Yes	16/03/2012 07:12	Yes
24	08/01/2012 15:11		No	No	Naah	1243	12/01/2012 13:12	3.0235	Yes	Yes	17/03/2012 07:12	Yes
25	08/01/2012 10:03		No	Yes	Keala	1244	13/01/2012 13:12	4.1311	Yes	Yes	18/03/2012 07:12	Yes
26	09/01/2012 11:45	09/01/2012 11:45	No	No	Shakespeare	1245	14/01/2012 13:12	5.0801	Yes	Yes	19/03/2012 07:12	Yes
27	09/01/2012 08:37		Yes	No	Fontain	1246	15/01/2012 13:12	5.2743	No	No	20/03/2012 07:12	Yes
28	07/01/2012 01:28		No	No	Pepps	1247	16/01/2012 13:12	5.4885	Yes	Yes	21/03/2012 07:12	Yes
29	07/01/2012 20:20		No	Yes	Harrison	1248	17/01/2012 13:12	6.2860	Yes	Yes	22/03/2012 07:12	Yes
30	08/01/2012 15:11		Yes	No	Carter	1249	18/01/2012 13:12	7.0835	No	No	23/03/2012 07:12	Yes
31	09/01/2012 10:03		No	No	Bonneck	1250	19/01/2012 13:12	8.1311	Yes	Yes	24/03/2012 07:12	Yes
32												

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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.

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 "12345". When finished with your changes switch to a different spreadsheet and switch back again to enable the protection. 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.

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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