How to Guide for General Practices

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What is Smartsheet?

Smartsheet is a cloud-based work management tool, allowing users to share information and work collaboratively within a central hub. It combines some of the functionality of Microsoft Project, Excel, Access and SharePoint.

Why Smartsheet?

The College chose Smartsheet as an assessment tool due to its visual and functional simplicity. It was first trialled during the Foundation and Cornerstone pilot assessments in 2019 to positive feedback.

Smartsheet has proven to be intuitive and user-friendly for both practices and assessors, as well as acting as a useful tool for the College for tracking, analysing and moderating information within an assessment. The College will continue to use this software for Foundation Standard and a selection of Cornerstone module assessments beginning 1 April 2020.

How to use Smartsheet

As a general practice, you will use Smartsheet to monitor the progress of your self-assessment, complete your assessment and liaise with your assessor.

An assessment is split into two components. The first is known as the 'assessment sheet' and is your self-assessment. The second component, called the 'assessment dashboard', is a viewable summary of the progress of your assessment.

## Accessing Smartsheet – Quality website login

The College will notify you when your assessment sheet and dashboard are ready via email. Please keep your contact details up to date with the College to ensure that future assessments and College communications are sent to the correct email address.

To access the assessment visit www.rnzcgp.org.nz/quality and log into your quality account. Once logged in, click on the 'Programmes' button. For each quality programme you are enrolled in there will be a link to that specific assessment on Smartsheet.

Note: The first time you click on any link you will be asked to create a Smartsheet login and password. Once you have created your log in, you can access the self-assessment and dashboard.

Smartsheet home page

Logging on displays your Smartsheet home page allowing you to view any sheets that have been shared with you by the College. Both the assessment sheet and assessment dashboard will appear listed within the Sheets section as in the screenshot below.
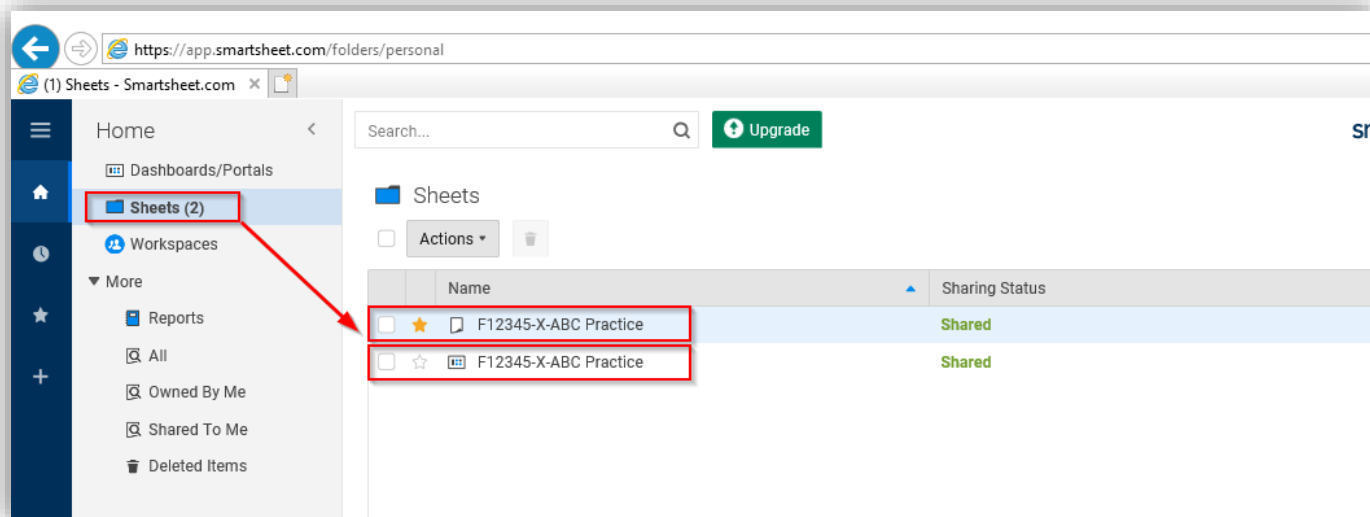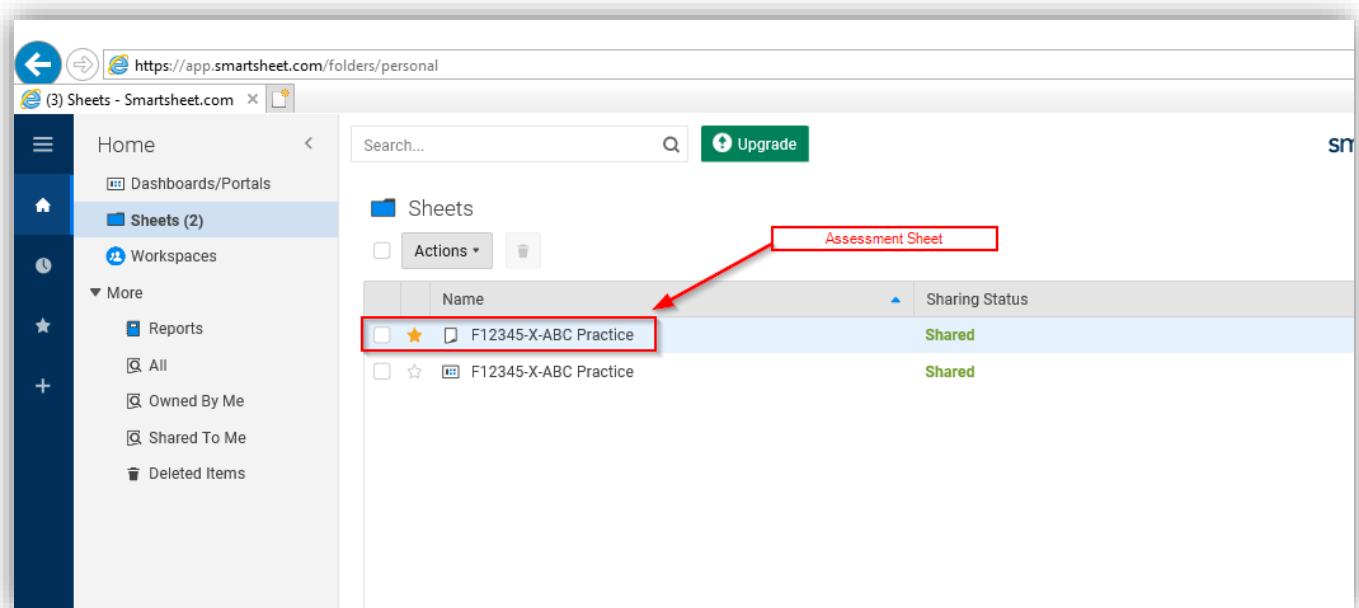

Smartsheet Assessment evidence overview

After logging into Smartsheet, your assessment sheets can be accessed via the home icon, followed by 'Sheets' section found on the menu to the left of the screen. This section displays your assessment sheet(s) and assessment dashboard(s).
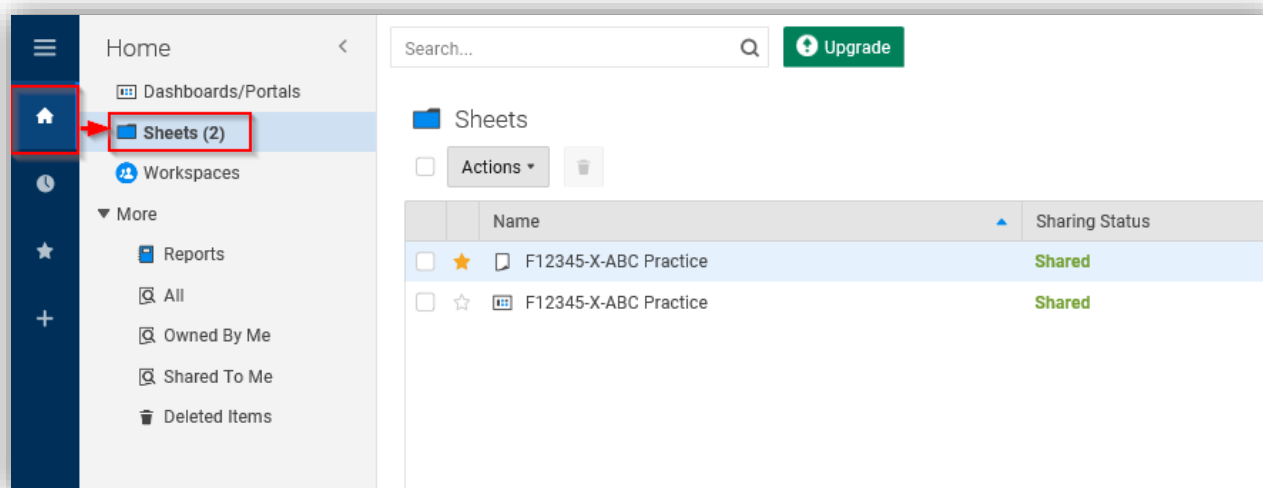
## Sheet 1 – The self-assessment sheet

To begin working on your self-assessment, select your self-assessment sheet as indicated above. An example of a Foundation Standard self-assessment sheet is displayed below. Cornerstone Modules, whilst still completed in Smartsheet, differ slightly from the Foundation examples as shown below. For specific guidance on Cornerstone Modules please see Appendix 1 – Cornerstone Modules
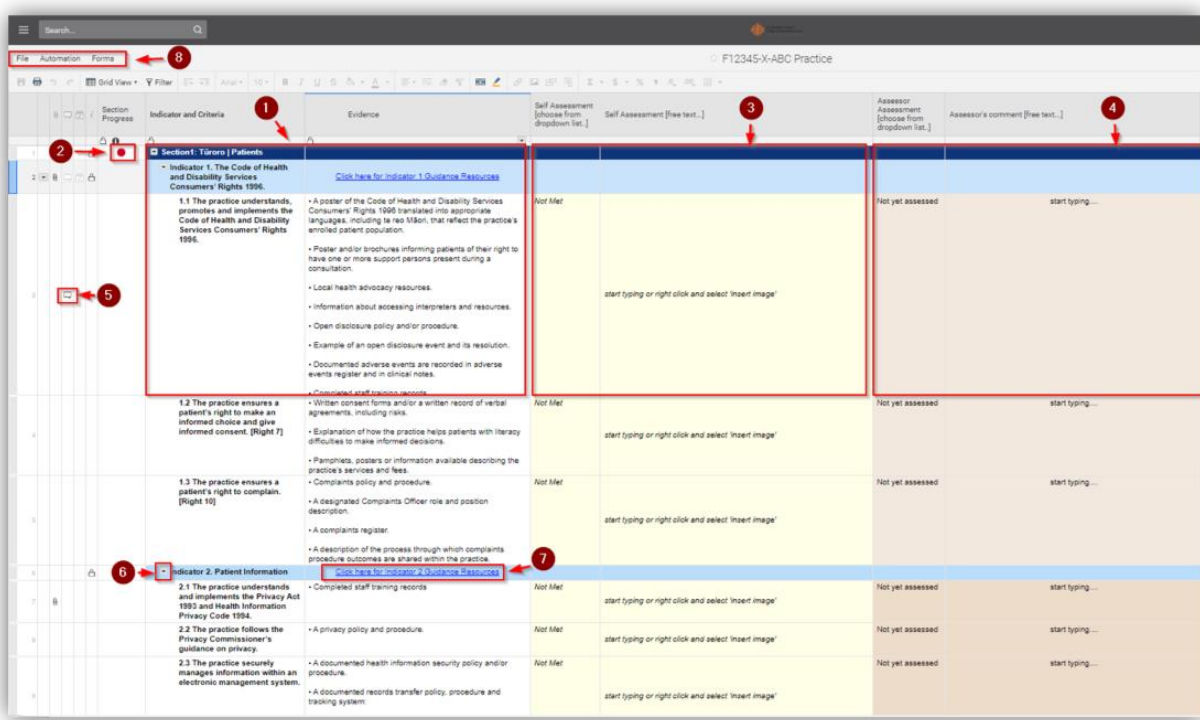
1. **Indicator and indicator evidence** – This section provides information on the name of each section, indicator and criteria. The second column provides evidence for the benefit of the practice and assessor.
2. **Status** – The traffic light symbol displays the status of the assessment based on the indicators that you have selected. A separate status symbol is used for each of the six Foundation Standard sections:
   a. 🟢 Green indicates that you have selected 'Met' for <u>all</u> indicators within that section
   b. 🟡 Yellow indicates that you have selected 'Partially Met', or 'Not Applicable' for <u>at least one</u> of the indicators within that section.
   c. 🔴 Red indicates that you have selected 'Not Met' for <u>at least one</u> of the indicators within that section.
3. **Practice self-assessment columns (Yellow cells)–** This section consists of two columns that are required to complete as a practice:
   a. **Self-assessment dropdown** – The first column requires you to select whether you believe that the current indicator status is met, not met, partially met or not applicable. This will show 100% completion on the assessment dashboard only once you have selected all 53 indicators on all sections as 'Met'. By default, each indicator is set as 'Not Met' until manually changed. Should you also want a visualisation of the current count of each of these indicator states, this can be viewed and tracked at any time within the assessment dashboard. Please note that typically an assessor will expect all indicators to be marked as 'Met' before approaching them to assess your practice.
   b. **Self-assessment free text** – The second column displays your comments to the corresponding indicators. These cells also support uploading a photo instead of writing a comment for indicators in cases where this would be more appropriate than a comment, such as indicators relating to a poster or signs. Within the cell, press ALT+Enter to begin a new line without going to the next cell.
4. **Assessor self-assessment (orange cells)** – This section consists of two columns that form the assessors review of the practice self-assessment and onsite visit.
   a. **Assessor assessment dropdown** – The first column requires the assessor to indicate whether the current indicator status has been 'Met', 'Not Met', 'Partially Met', 'Not Yet Assessed', or 'Not Applicable'. Should you also want a visualisation of the current count of each of these indicator states, this can be viewed and tracked at any time within the assessment dashboard.
   b. **Assessor comments free text** – The second column allows for the assessors to make comments against each indicator. Within the cell, press ALT+Enter to begin a new line without going to the next cell.
5. **Comment section** – Clicking on the speech bubble icon allows the practice and the assessor to leave messages to each other throughout the assessment.
6. **Expand/Collapse function** – Each section and each indicator can be expanded and collapsed.
7. **Resource links** – Each indicator includes a link to the respective guidance page on the College's Quality website. Other useful links can also be found on the assessment dashboard.
8. **Toolbar** – Selecting 'File' within the toolbar allows for saving and printing of the sheet in its entirety for your records and provides you with the option to export the entire sheet into excel, PDF or Google Sheets.

Important note – *Whilst the College has provided practices with control over their assessment sheet and dashboard, it is strongly recommended to not edit your assessment sheet in any way other than completing the designated self-assessment sections. Never select 'delete' on a row or column, and do not change any formula within the sheet. If you believe you have deleted/modified anything that is affecting sheet functionality, please contact the College quality@rnzcgp.org.nz.*

Sheet 2 – Assessment Dashboard
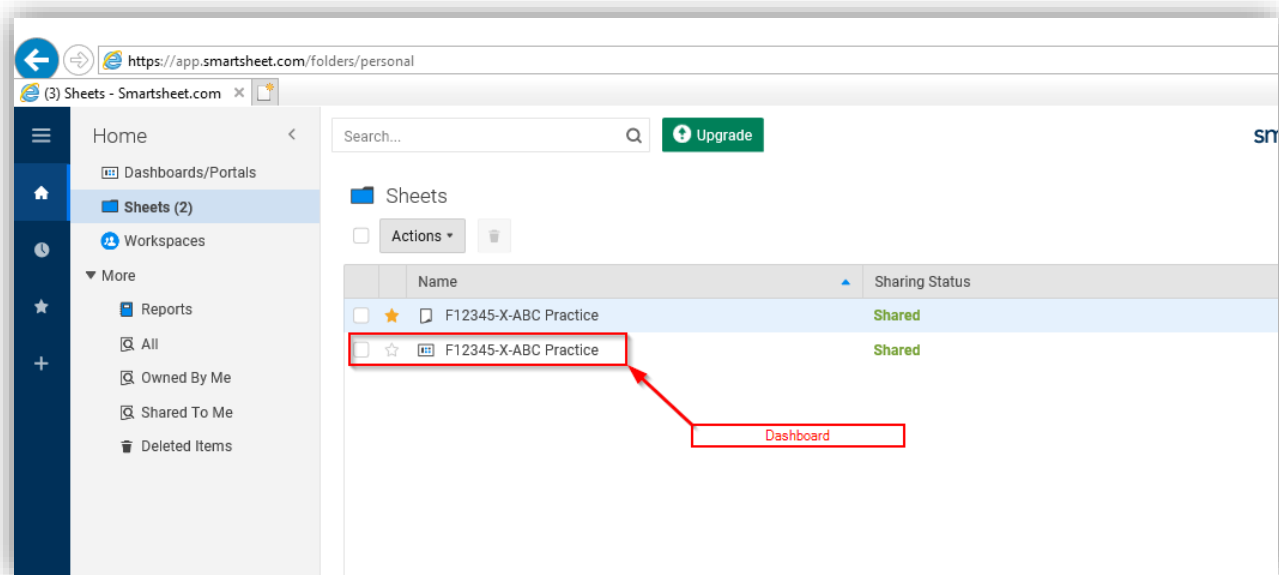
The assessment dashboard is a visual representation of the current status of an assessment. This is useful for keeping track of which sections have outstanding criteria and as a central source of useful resource links.

You will be provided access to your assessment dashboard alongside your assessment sheet. If you are unable to see your assessment dashboard please contact the College at quality@rnzcgp.org.nz.

There are two halves to your assessment dashboard: The top section relates to the indicator state of those selected by yourself as the practice, and the bottom section displays indicator state of those as selected by the assessor. Both sections also provide clickable links on the right of the screen to various resources.

1. **Indicator Chart (Practices)** – This chart shows the current indicator state as chosen by your practice, by percentage. This chart will show 100% only if all indicators show 'Met'. Please note that in the case that the assessment is completed with any indicators showing as 'Not Applicable' then this chart will not show 100% regardless of whether the assessment is complete.
2. **Indicators status by section (Practices)** - These boxes indicate the specific count of indicators selected within each of the six sections within the Foundation Standard, as selected by your practice.
3. **Clickable shortcuts** – Displays a list of various practice applicable resources within the College website.
4. **Indicator Chart (Assessors)** - Chart showing the current indicator state as chosen by the assessor, by percentage. This chart will show 100% only if all indicators show 'Met'. Please note that in the case that the assessment is completed with any indicators showing as 'Not Applicable' this chart will not show 100% regardless of whether the assessment is complete.
5. **Indicators status by section (Assessors) -** These boxes indicate the specific count of indicators selected for each of the six sections within the Foundation Standard, as selected by the assessor.
6. **Clickable shortcuts** – Displays a list of various assessor applicable resources within the College website.

Important note – Do not edit your dashboard in any way. Your dashboard has been set up as a visual tool only to assist you with your assessment. By selecting 'edit' and changing anything within your dashboard, you may inadvertently delete or modify links or formulas that link to your assessment. If you believe you

have deleted/modified anything that is affecting sheet functionality, please contact the College quality@rnzcgp.org.nz.

Sharing your sheet with others within your practice

Once you have access to Smartsheet you will have control over who you wish to share your assessment with. Sharing will require two steps:

1. **Sharing your dashboard**

Within your dashboard, select 'Share' at the top right of the screen.
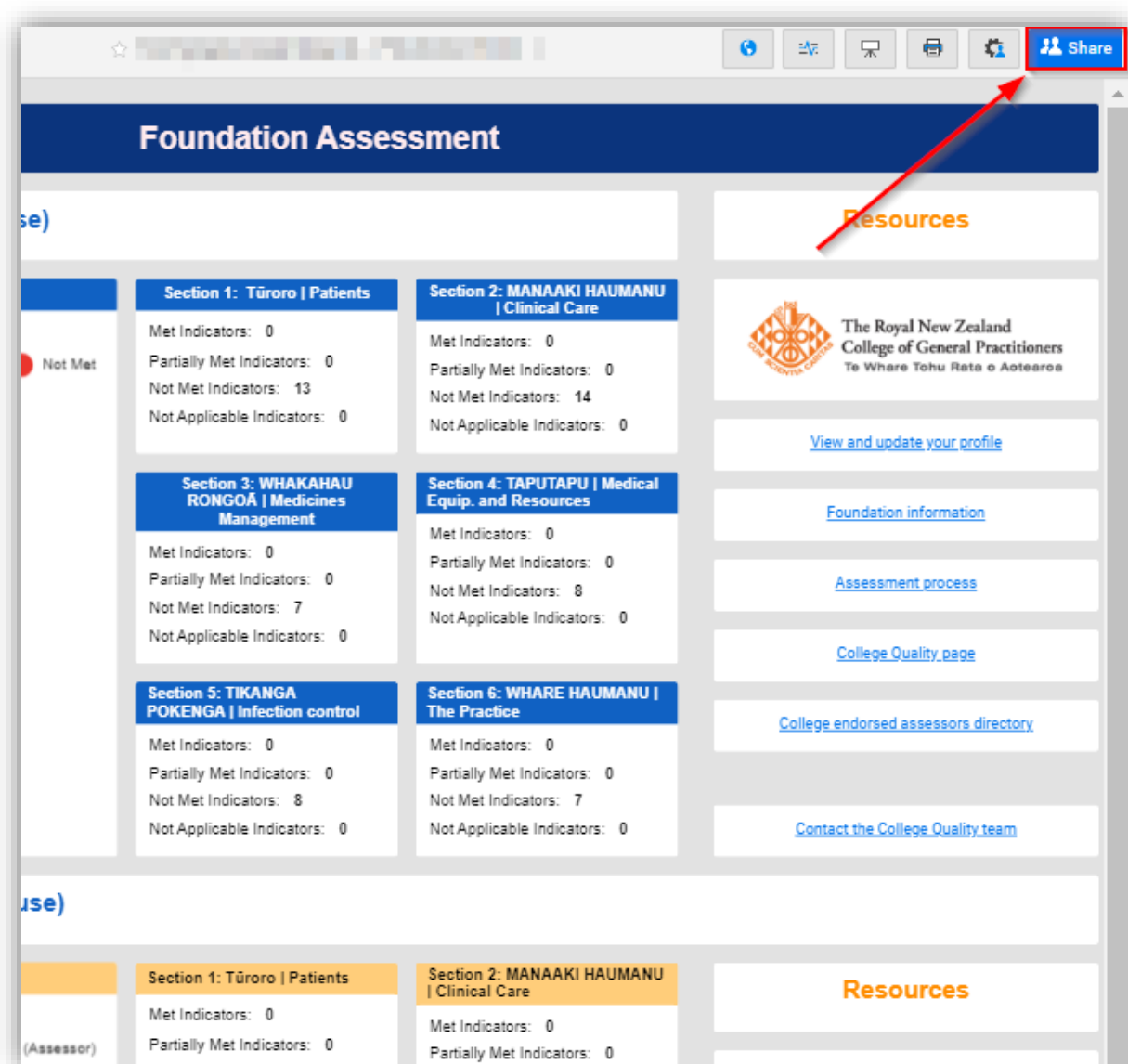
When the 'Dashboard Sharing' box appears, enter the email address of the intended person of which you wish to share your sheet.

Select 'Admin' under permissions should you wish to provide them with the same rights as yourself.

Ensure that 'notify people' is checked to ensure that the intended user receives an email inviting them to access your assessment.

Finally, select 'share dashboard'.

1. **Sharing your assessment sheet**

If you also want another user to have editing access to your self-assessment you must also share your assessment sheet with them. Within your assessment sheet select 'Share' at the top right of the screen.
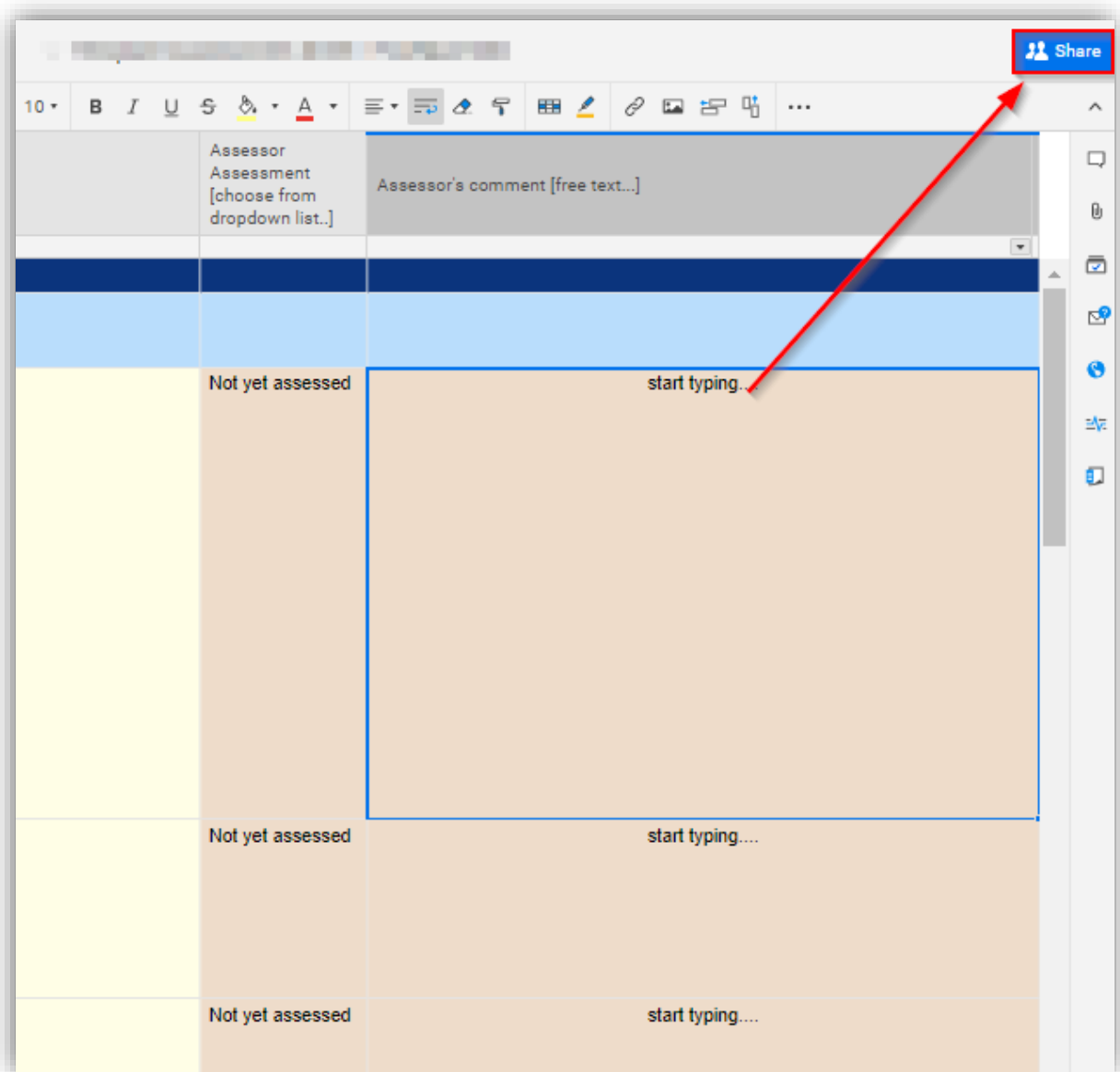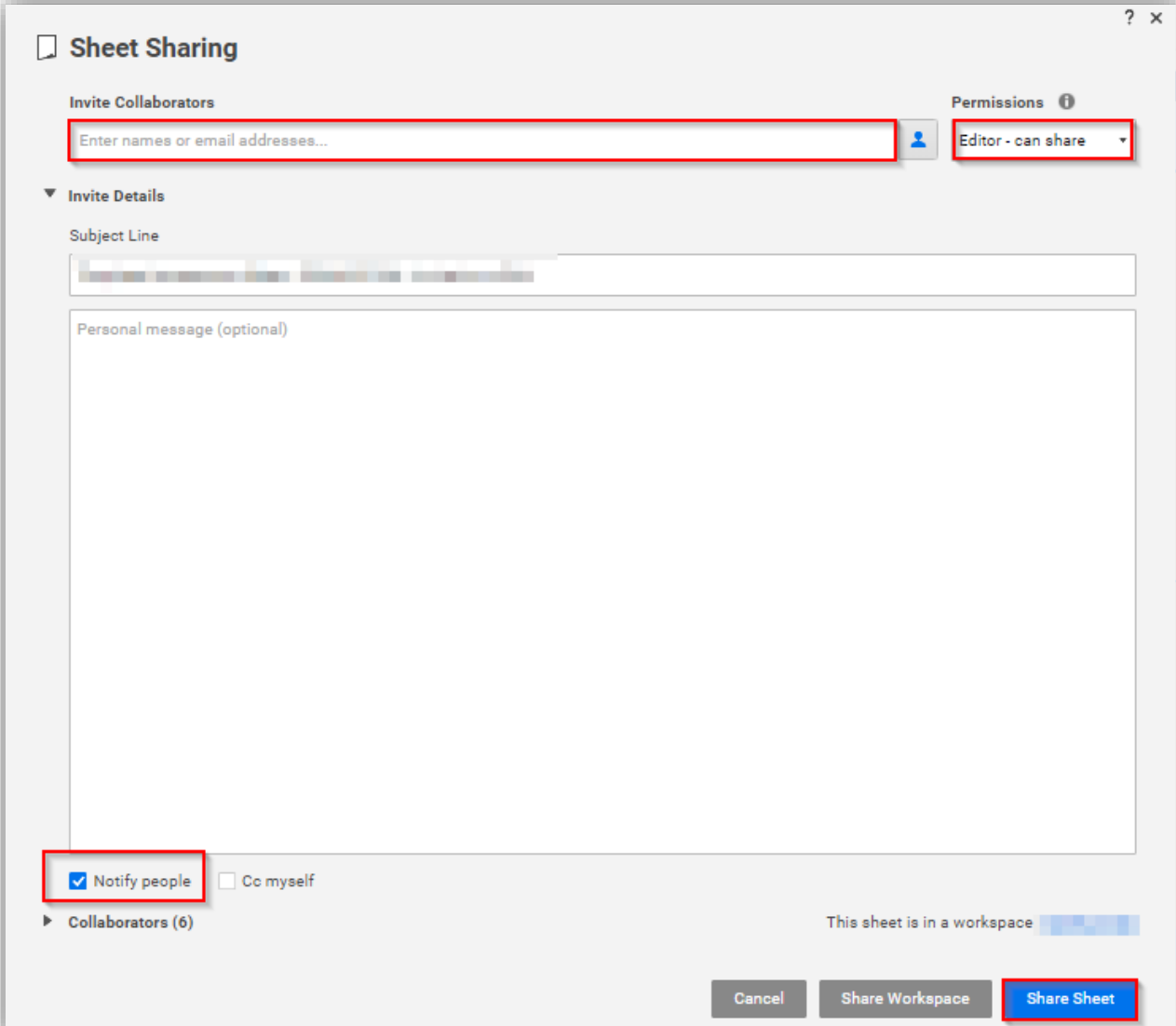
When the 'Sheet Sharing' box appears, enter the email address of the intended person of which you wish to share your sheet.

Select 'Editor-can share' under permissions should you wish to provide them with the same rights as yourself.

Ensure that 'notify people' is checked to ensure that the intended user receives an email inviting them to access your assessment.

Finally, select 'share Sheet.

Completing your self-assessment

The practice self-assessment section (yellow) includes two columns:

1. **'Self-Assessment [choose from dropdown list]'** allows you to choose the current state of each indicator as per your practice's self-assessment.
2. **'Self Assessment [free text]'** is the assessment text. This is where you should explain why you believe your practice has 'Met' respective indicator.

This free text self-assessment column is also capable of showing photographic evidence in the cell if applicable.

Attaching a photo can be achieved by right clicking a cell and selecting 'Insert image', as below. Please note that this is used when a single photo will satisfy meeting the criteria. If multiple photos are needed, these will have to be attached via the paperclip icon.
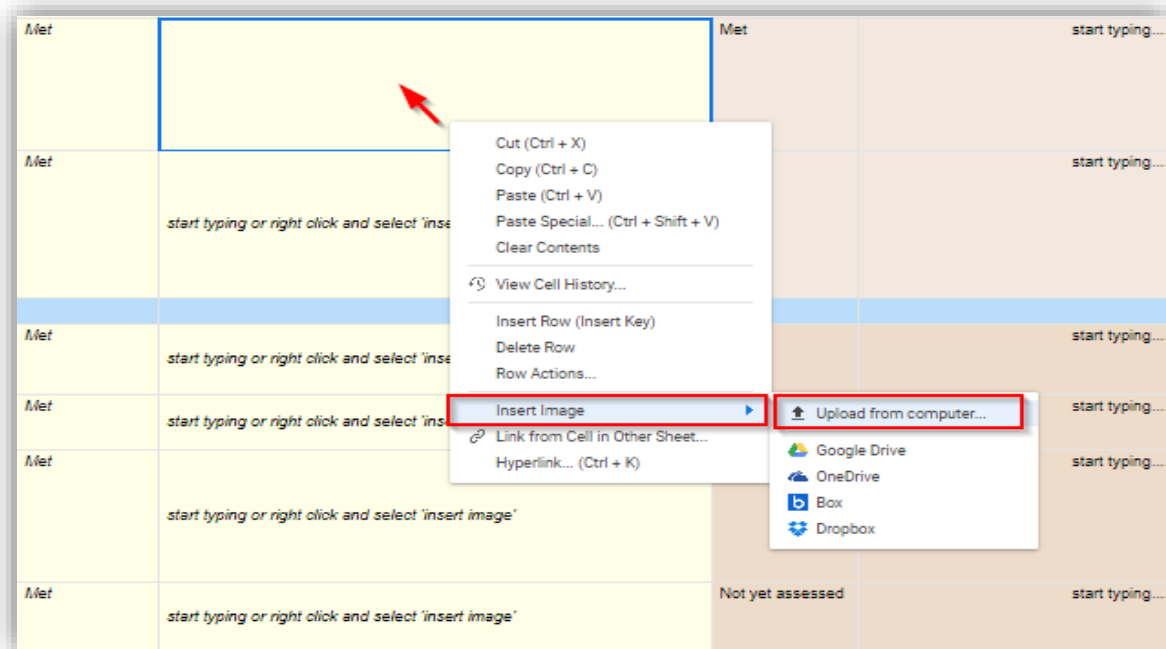
Should the need arise for your practice or assessor to mark an indicator as 'Not Applicable' then this has also been made available as a selection. Please note that it is normal practice that under the Foundation Standard and Cornerstone modules all indicators are required to be met. Do not submit your assessment with any indicators marked as 'Not Applicable' unless this is on direction from your assessor.

Attaching evidence

In order to be assessed, you must also attach evidence alongside your self-assessment demonstrating you have met each indicator within the Foundation Standard or Cornerstone module.

To attach a file, select the paper clip icon that can be found to the left of each indicator row.

In the screenshot below, clicking the paperclip will add evidence to Indicator 1.1 (row 3).

Once a file is attached to an indicator, hovering your mouse over this indicator will display the number of files currently attached.

To view a list of all current attachments within your assessment, navigate to the right of the screen and select the paperclip icon on the right toolbar.

This summary view also provides the locations of each attachment within the sheet. Selecting an attachment in this section will take you directly to the applicable row.

An attachment can be previewed by clicking on the attachment icon or downloaded by clicking the 3 vertical dots and selecting 'Download File'.
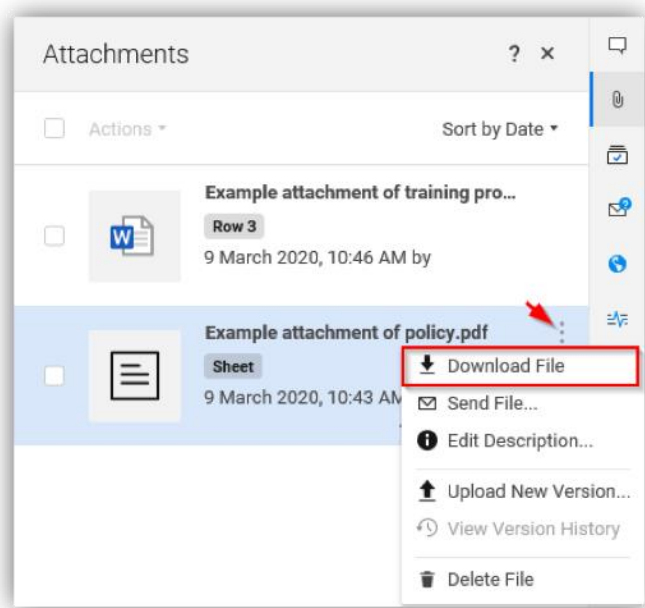
Finally, all attachments can be downloaded at once by ticking the box next to the 'Actions' button, then choosing to download all files.
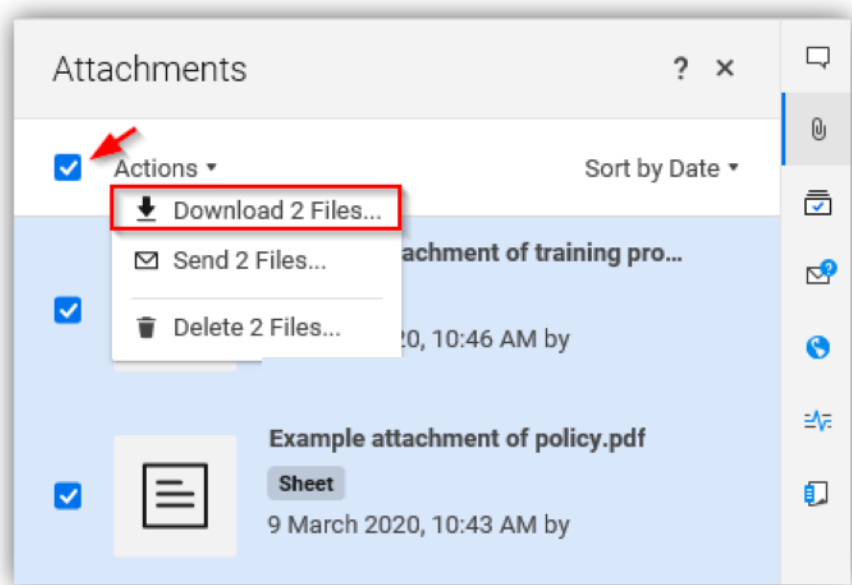
Advanced functions

Tracking changes

Smartsheet provides a change tracking option that marks any changes that have been made to the sheet at any time. It does so by highlighting any cells that have been modified in yellow, as below:

This proves useful for monitoring whether your assessor has made any changes since you last viewed your assessment. A yellow highlighted cell indicates that changes have been made to a cell.

This function can be toggled on or off at any time by selecting the 'Highlight Changes' button at the top of the toolbox, as per the screenshot below:

Should you wish to track changes that have occurred over a different time period, you can do so by changing this within the 'Highlight Changes' drop down.
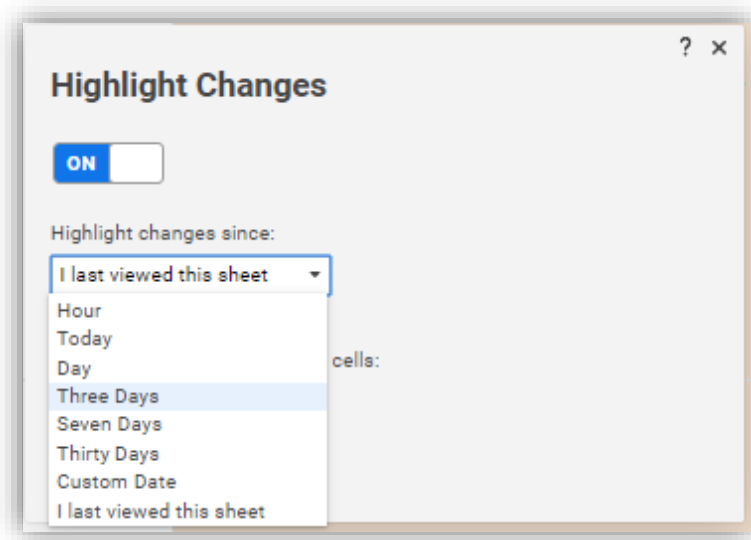
This function is explained further here.

Contacting your assessor

Once you have completed your self-assessment and are confident that all indicators have been met you will be required to contact an assessor and begin the assessment process.

The assessor that you choose <u>must</u> be listed on the College endorsed assessor register. The assessors on this list have completed College training, and have been subsequently endorsed and approved as an assessor of the Foundation Standard or Cornerstone module. Choosing an assessor not currently on this list will result in the College being unable to further your assessment.

To view the College endorsed assessor link, visit the [College's quality website](#).

Once an assessor has been contacted and has agreed to assess your practice, you must share your Smartsheet assessment and assessment dashboard to allow them to begin their review. This must be shared prior to your onsite visit (if applicable) to allow the assessors to begin online preparation.

To do so, select 'Share' at the top right of the screen from your self-assessment and assessment dashboard sheets, and type the College endorsed assessors email address in the 'Invite Collaborators' textbox.

Note: You can also share your assessment sheet and dashboard with your PHO and other members of your general practice team.

1.   Sharing the **Assessment sheet.**

Ensure that 'Editor-cannot share' is selected to control access to your assessment. You are also free to send an invitation message to the assessor in the 'personal message' box.
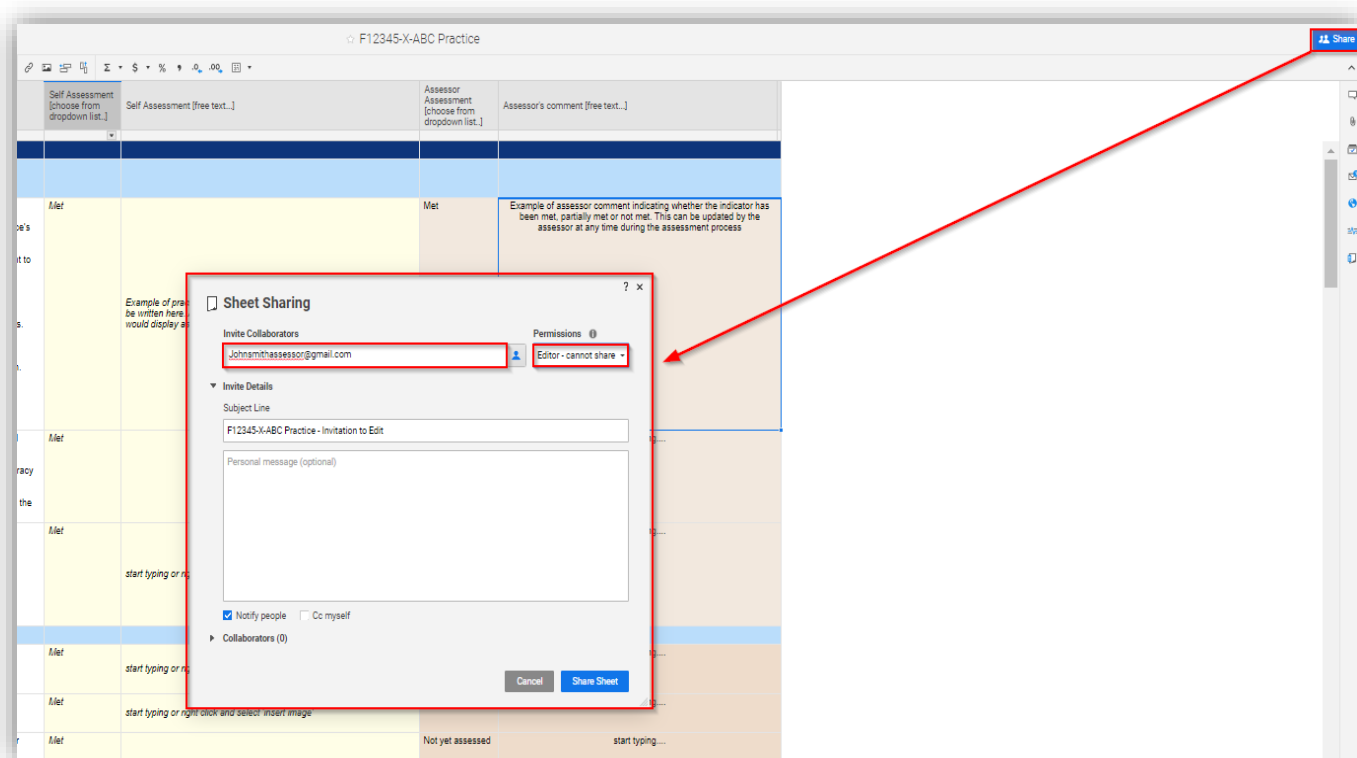
2.   Sharing the **Assessment Dashboard**

When sharing the assessment dashboard, select 'Viewer' under permissions to allow the assessor viewing only privileges for this section.
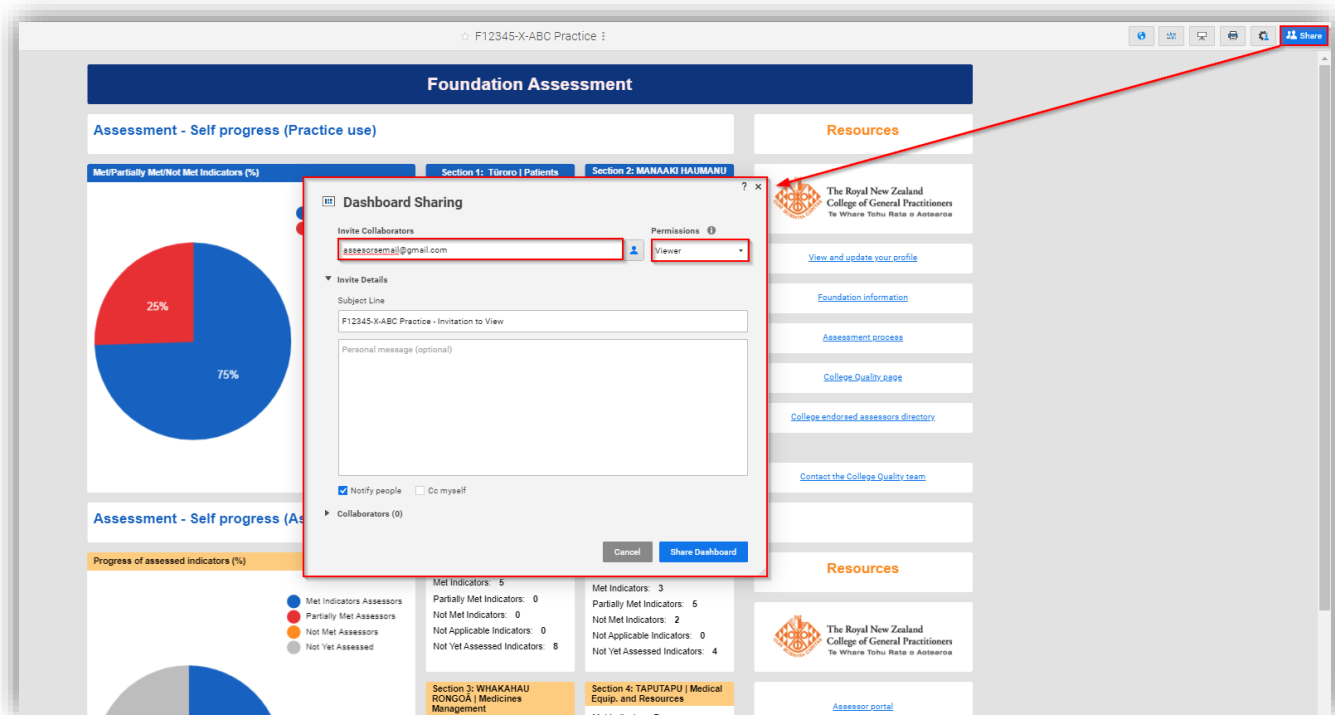
Once your assessor has access to your assessment sheet and assessment dashboard, they are able to begin their assessment of your practice.

This will include marking indicators that can be reviewed online as 'met' and writing comments in the orange assessor section to the right of your assessment sheet against each indicator. Any indicators that are not yet met or are not able to be assessed remotely will be marked as 'Not yet assessed', 'Partially Met', or "Not Met".

In the case that a practice has been unable to meet all indicators during the pre-visit online review and onsite visit (if applicable), the practice and assessor will engage in a post-assessment dialogue process to discuss further actions needed. This will continue until the assessor completes the assessment by marking all indicators as 'met'.

Communicating with your assessor

During the assessment process you can leave comments to your assessor via a chat function separate from the assessor comment section. Whilst this is an optional feature, this function is useful for tracking purposes and as a means of keeping the assessor-practice conversation on the assessment more concise.

Comments can be written directly within each row by selecting the speech bubble icon on the left side of the indicator row in which the comment relates.

The comment section summary can be accessed by selecting the comment icon on the toolbar at the right side of the screen. This displays all conversations in a single and easy to access place within the assessment.

When writing a comment, select the @ symbol at the bottom of the chat box followed by the assessor's email to send your assessor an immediate notification email that a comment has been made.

Assessor report

After your assessment has been completed and all indicators have been met, you should keep a copy of your assessment report for your records. To do so, navigate to 'File' within the top left toolbar and then select 'Export' to obtain an offline copy of the complete assessment.
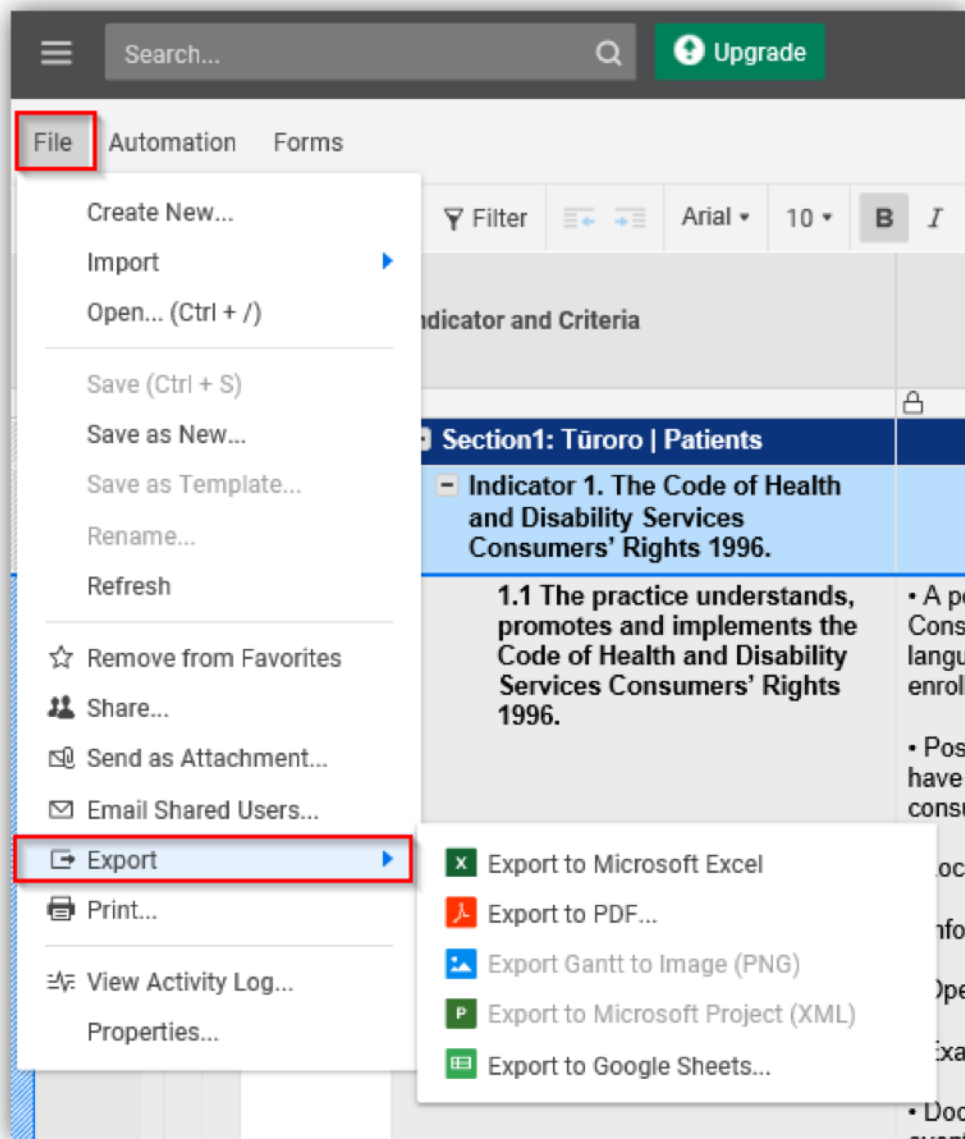
When exporting, Smartsheet provides various options of what will be recorded in your report. It is recommend that all options are ticked to ensure that all information is made available for future reference.

Closing your assessment

To complete your assessment, you must first un-share your assessment with your assessor. This will ensure they no longer have access to edit any information following the completion of your assessment.

To un-share, select the Share button at the top right of both your assessment sheet. This must be completed for both your self-assessment sheet and again for your assessment dashboard.

Select 'Collaborators,' followed by the assessors' name that has access to your sheet. Finally select the 'x' on the corresponding assessor to remove their access to your assessment. Close this box once you have removed your assessor, and only your own practice collaborators are showing on this list.

Once confirmation has been provided by your assessor that all indicators have been met they will contact and send a recommendation to the College. This will close off your assessment.

Hints and Tips

- Refer to the [assessment dashboard](#) to track your progress and ensure that you have marked all indicators are 'Met' before contacting an assessor.
- To begin writing on the assessment sheet double-click to enter the text cell. Press Alt+Enter for a new line within the cell.
- Ensure that you only use the 'Share' button within Smartsheet to share your assessment sheet with someone else. This will send them the correct email to create an account.
- Use the [comment](#) section to communicate with your assessor rather than via email. If you want the assessor to be notified of your comment immediately, select the '@'symbol at the bottom of the comment toolbar and begin typing the email of your assessor.
- Don't forget to export your assessment at the end of the process to retain a copy. You are also given the option to include your comments with your export, which we recommend.
- Utilise the [tracking](#) feature should you want to quickly identify any change the assessor has made since you last viewed their assessment.
- The smartsheet app can be downloaded onto your [Android](#) or [Apple](#) phone or tablet for easy viewing and editing of an assessment on the go.

For further information on Smartsheet, please review the various learning resources below:

- [Getting started as a free user](#)
- [Logging in](#)
- [User types and permissions](#)
- [Navigating the Smartsheet UX](#)

Alternatively, the College Quality team can be reached at quality@rnzcgp.org.nz

Appendix 1 – Cornerstone Modules

Cornerstone modules also have an assessment sheet associated with them, just like the Foundation Standard. Whilst most Cornerstone modules share a similar assessment sheet format with the Foundation Standard (i.e. having indicators and criteria), the format of the other modules may vary slightly. These variations are detailed below.

Continuous Quality Improvement (CQI) – The CQI module does not have indicators or criteria to complete. Practices are required to upload a final report describing the practice's quality improvement project. The Yellow sections of the sheet explain the elements required within the final report.

To upload a CQI final report, select the paper clip within the Smartsheet toolbar to the right side of the screen, and select 'Attach files to this sheet'.

Please note that the CQI Module does not have an accompanying assessment dashboard.

Information on CQI can be found on the College CQI Module webpage here. Further guidance will also be provided to your practice after purchasing the CQI module.

Teaching Module – The Teaching Module has an assessment dashboard and sheet. The Teaching module is similar to the Foundation Standard in that practices upload evidence against a set of indicators and criteria. At the beginning of each section is a worksheet that assists in putting a practice in context with the indicators and criteria and help a practice to identify appropriate evidence to upload.

1. **Section Context summary** – Take note of the section context displayed at the beginning of each section which provides important information against each respective section.
2. **Suggested evidence** – Within the section context, this column includes instructions on how to download the associated worksheet. Next to criteria, the suggested evidence describes ways a practice can meet the requirements of the indicator. This column serves as a list of examples and does not include all the ways a practice can meet the requirements of the indicator.
3. **Attachments** – The report template can be found by selecting the paper clip to the left of the 'Scope of training', 'Business model', and 'Training role requirements' rows. These need to be downloaded and re-uploaded once completed.

   To download each report, select the paperclip on the corresponding row, followed by ticking the box to the left of the file name and selecting 'Download File'.

To upload, once again select the paperclip to the left of the row and select 'upload new version' to upload your completed report.
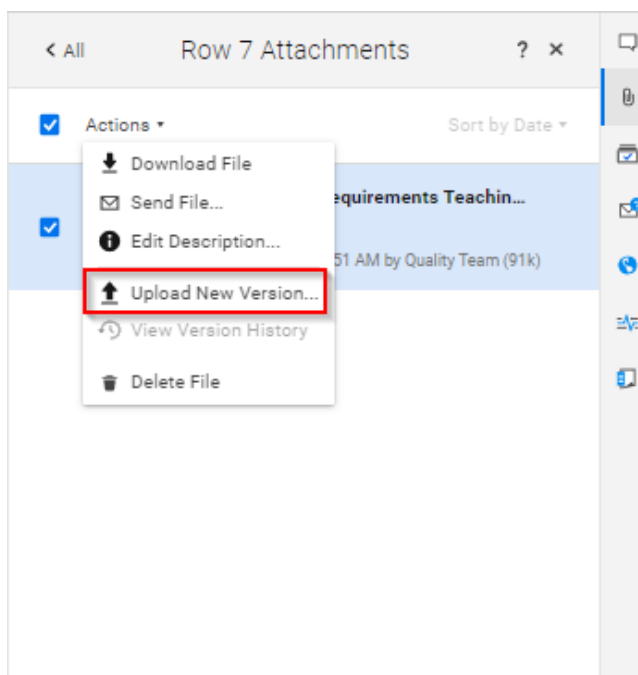
4. **Self-assessment dropdown** – Ensure to select 'Met' once you have uploaded the required documentation, as well as once you have completed each indicator for each section

Information on the Teaching module can be found on the College Teaching Module webpage here. Further guidance will also be provided to your practice after purchasing the module.