Decision-making tool for defining *Commissioner Requested Services & Location Specific Services*

Guide on how to use the Excel-based toolkit

28 March 2013

1 - Introduction

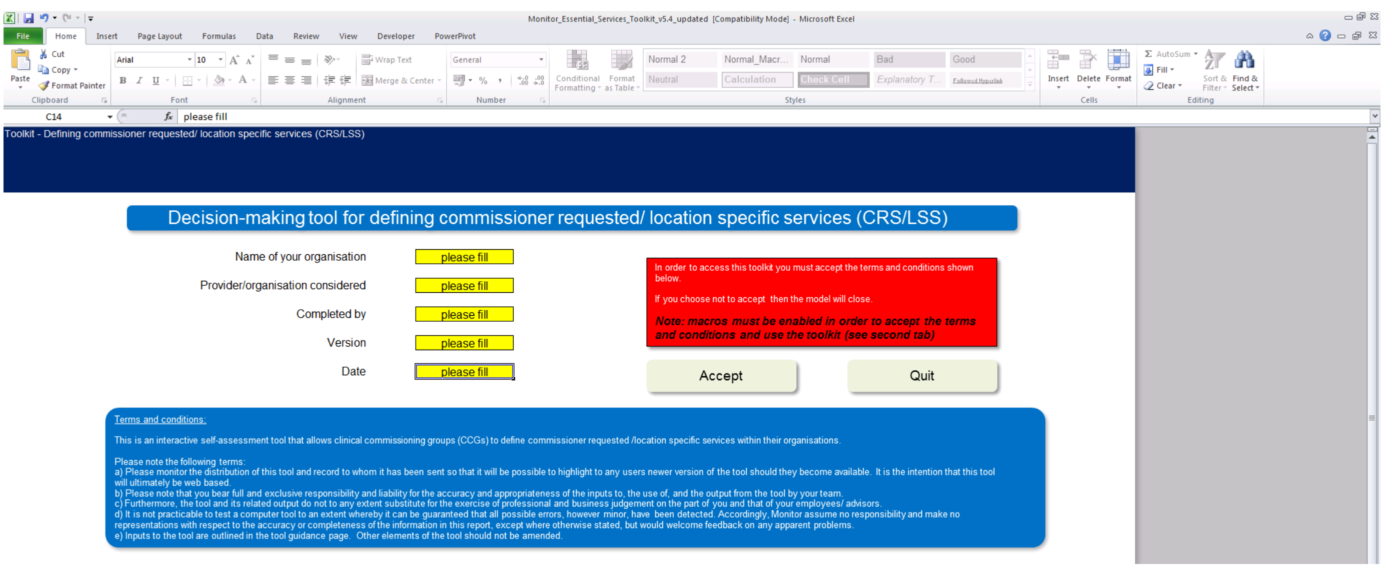
This document is a brief technical guide that outlines the structure and format of the toolkit.

2 - Cover page

Upon opening the toolkit you will be presented with a cover page as set out below. This page requests users to input information into yellow boxes, and sets out the terms and conditions (T&Cs).

The toolkit relies on a number of macros to function. Before accepting the T&Cs you must enable macros on your workbook. The details of how to do this have been set out below and can also be found on the second tab of the toolkit.

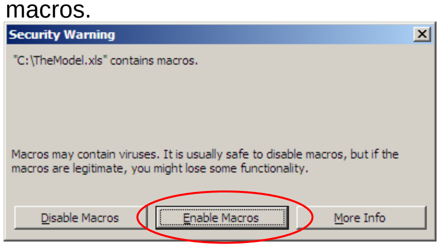
If you agree with the T&Cs set out ,please select 'Accept' to proceed. Selecting 'Quit' will exit the programme without saving.



Enabling Macros:

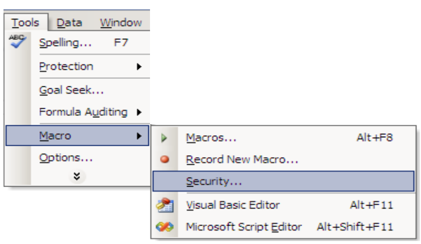
In Excel 2003 and earlier..

Depending on settings, macros may be enabled automatically.
Alternatively on opening, a dialog box may appear allowing you to enable macros.

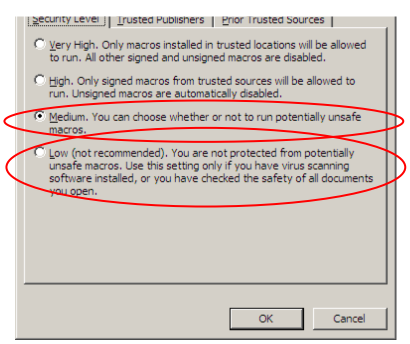


If macros are not enabled and the dialog box does not appear then macro settings need to be changed.

Go to Tools > Macro > Security...



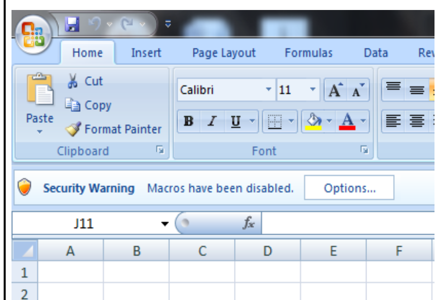
On the Security Level tab ensure macros are set to *'Medium'* or *'Low'*



You will need to close and re-open the model for these changes to take effect.

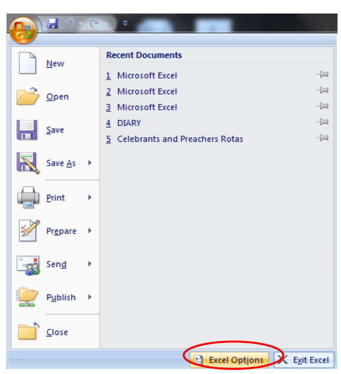
In Excel 2007...

On the security banner, select *Options*

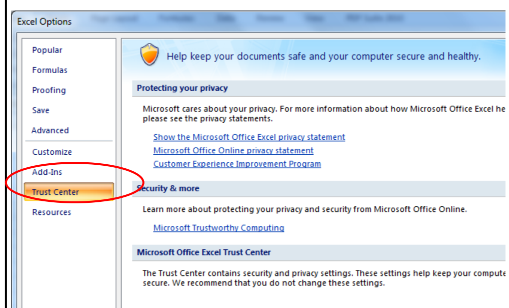


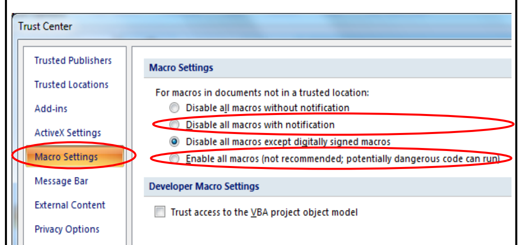
Select '*Enable the content'*

If the security banner is not visible then the macro settings need to be changed.
This is accessed through '*Excel Options'*



Select *Trust Centre* and then *Macro settings*.
Macros settings must be '*Disable all macros with notification*' or '*Enable all macros*'





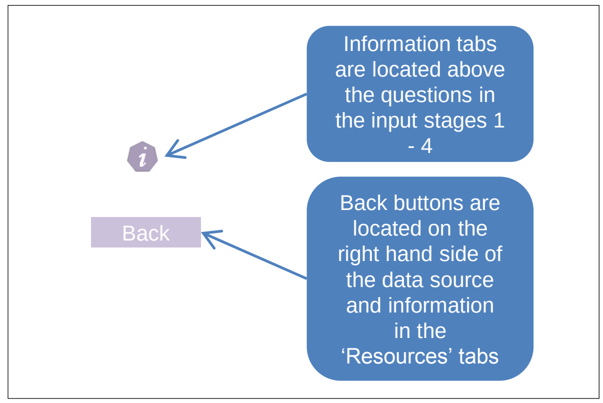
You will need to close and re-open the model for these changes to take effect.

3 - General navigation

The navigation bar:

The general navigation bar, located at the top of each tab, gives you the option of quickly moving to different parts of the toolkit. The arrows to the left and right allow you to move to the previous and next pages respectively, and the buttons allow you to access the various tabs within the toolkit.

Hovering the mouse over the buttons gives a short description. The buttons will turn grey when you click on them, indicating which section of the toolkit you are currently in.

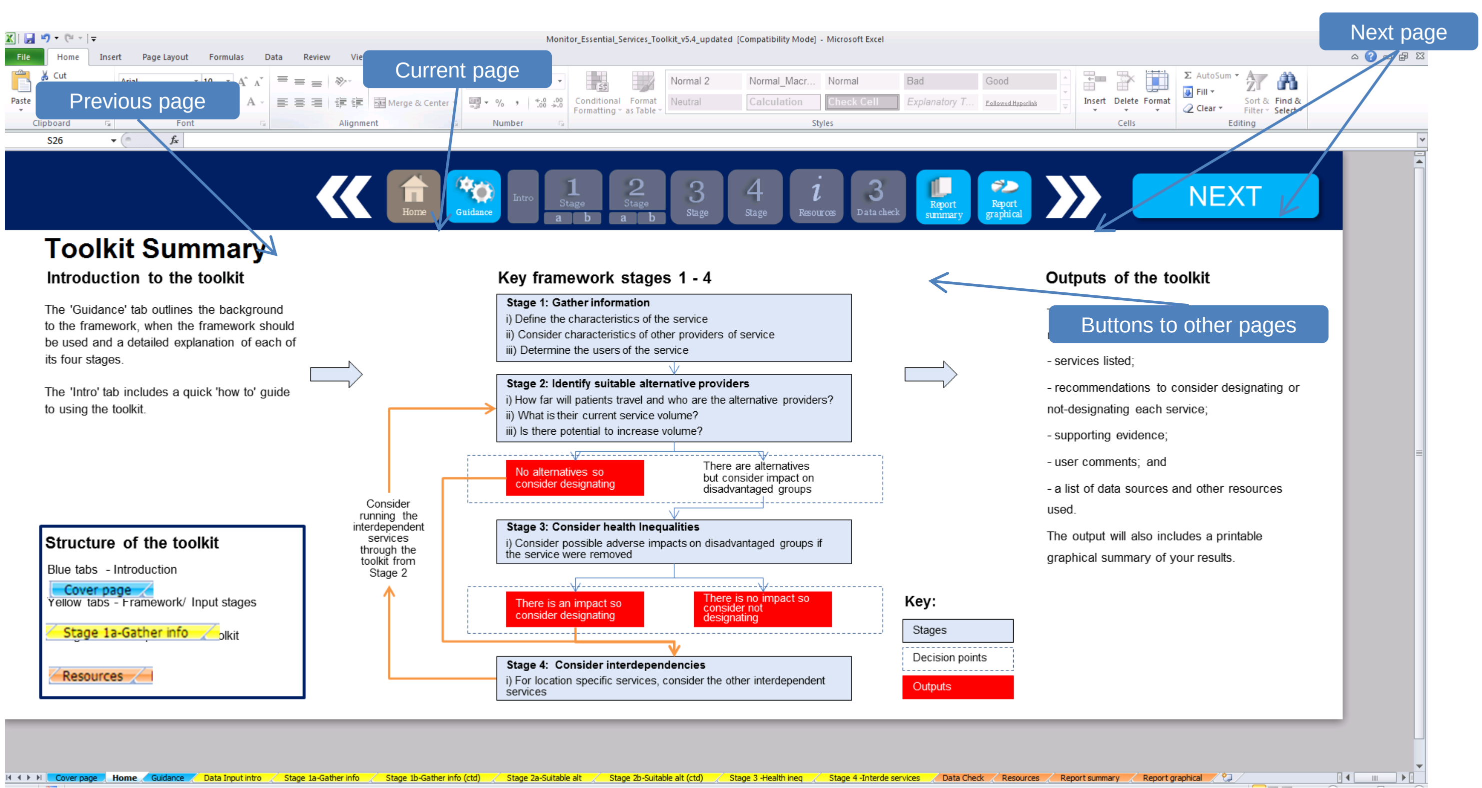


Other buttons:

The toolkit also contains information buttons that allow you to quickly move between the questions and the relevant information in the 'Resources' tab. These will come up as light purple 'info' buttons at the top of each question. There are also light purple 'back' buttons in the 'Resources' tab to take you back to the questions. (see below)

Colour coding:

Throughout the toolkit a colour coding system is in use. (Note: some local versions of excel may use variations on the colour palette, although they will be consistent throughout the toolkit).

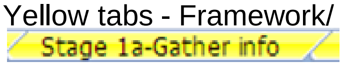


Structure of the toolkit:

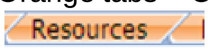
The toolkit is split into three sections;

1. Blue tabs are the introduction

2. Yellow tabs - Framework/ Input stages



3. Orange tabs – Outputs of the toolkit



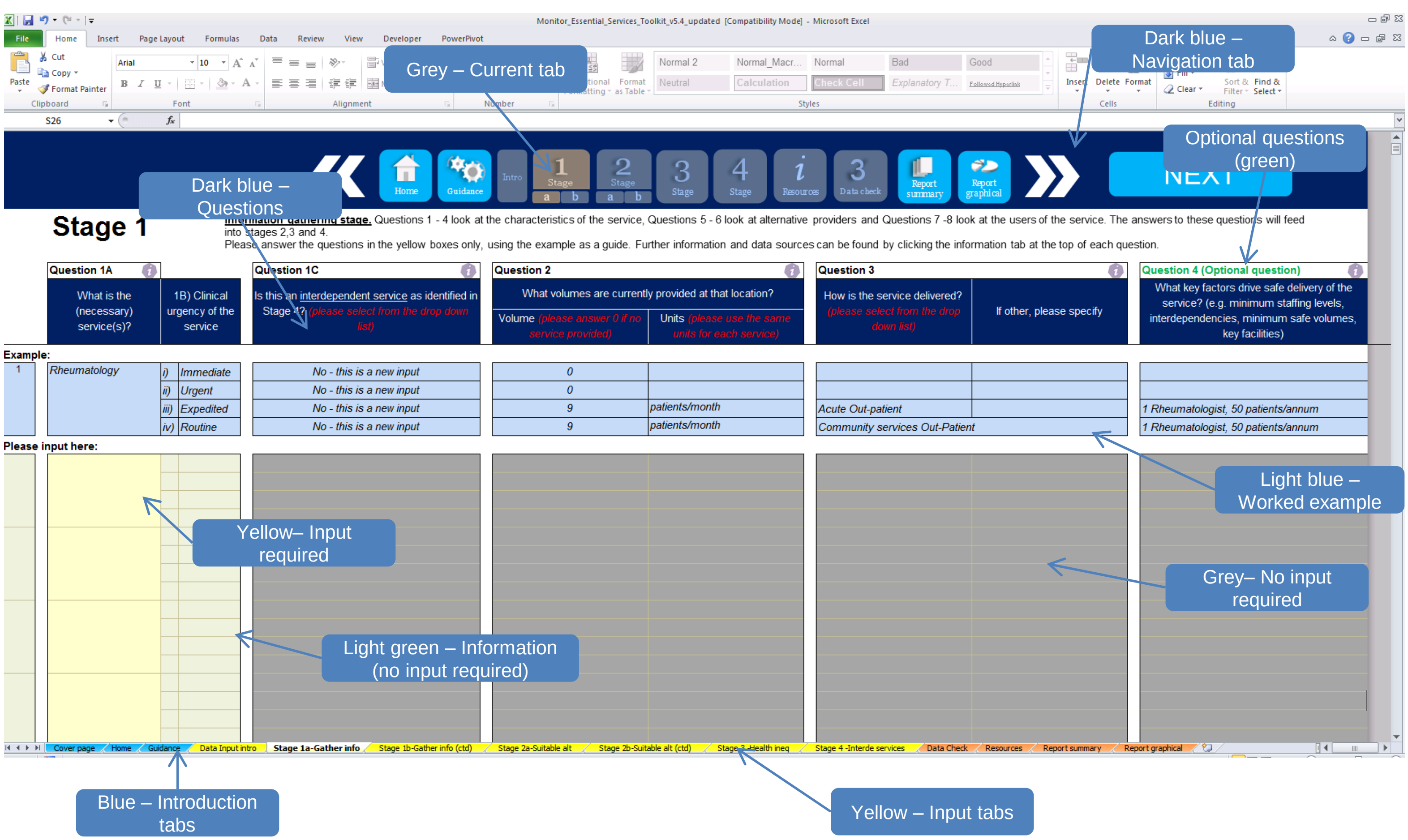
The questions themselves are colour coded in green, red or black (see below diagrams). The questions in;

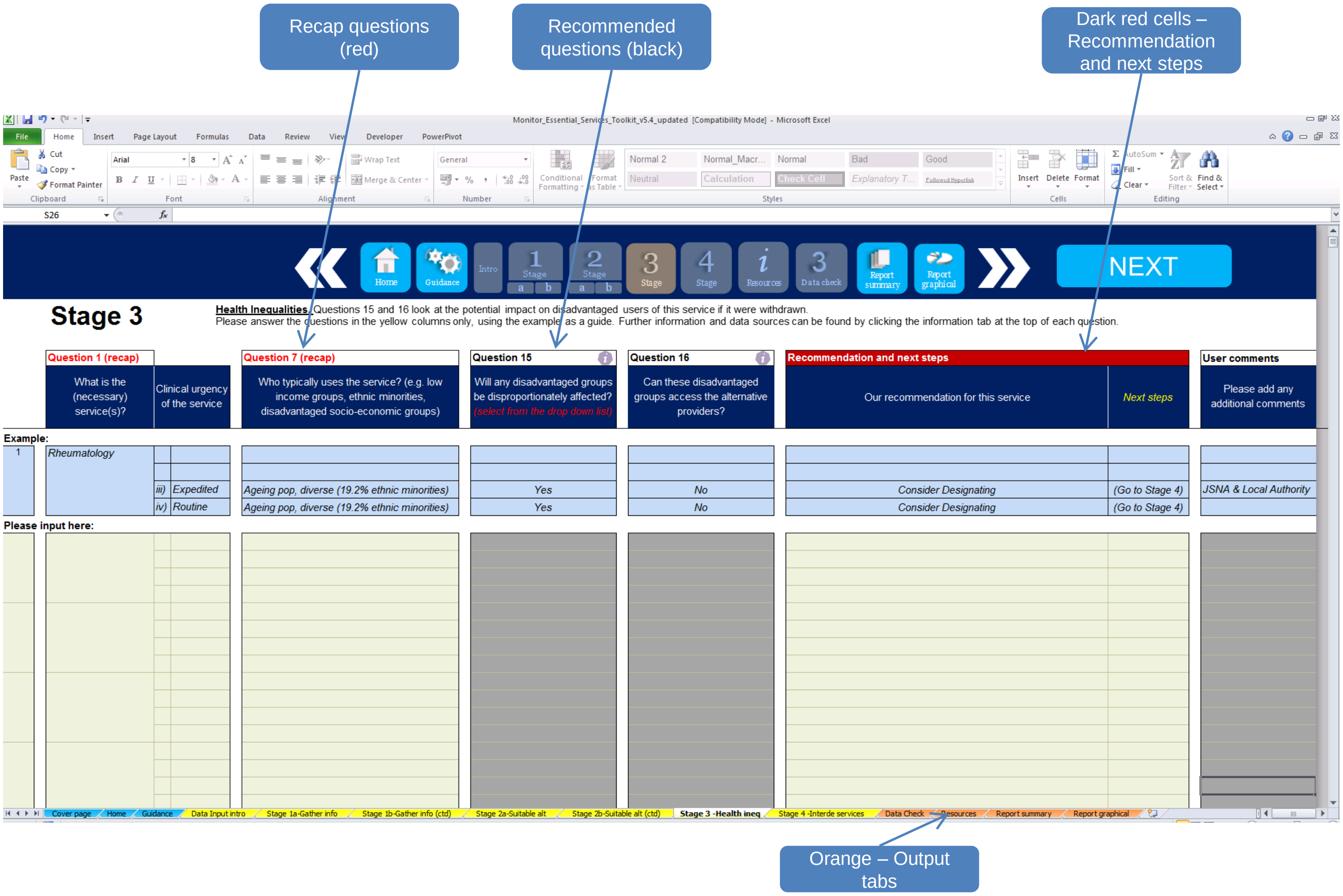
- Green are optional;
- Red are recaps of previously answered questions; and
- Black are recommended questions that the user can input into.

The Recommendations are in dark red boxes (see diagram on next page), and indicate important output information including next steps.

Only the *yellow* cells require input from the user. The light green cells display any relevant information or calculations and the light blue cells show a worked example. Depending on how the questions are answered the tabs may turn to grey. For grey cells, no further input is required.

Note: If any cell turns to grey as a result of changing an answer, you must go back and delete any previous inputs. In short, all grey cells must be blank.





4 - Homepage and guidance

The homepage gives you a quick overview of the toolkit and a detailed summary of the framework and input stages. The left hand side of the page summarises the introductory tabs of the toolkit and the right hand side summarises the outputs you can expect from the toolkit. The diagrams can be clicked to link you directly to the relevant tabs.

The 'Guidance' tab is a view only page that outlines the report, and includes background to the framework, when the framework should be used and a detailed explanation of each of its four stages.

5 - Data input introduction

The 'Intro' tab includes a quick 'how to' guide to using the toolkit and to completing the input stages.

You can begin by clicking on the START button at the bottom of the page.

6 - Stage 1

Stages 1 and 2 have been split into two tabs to make them user friendly.

Each stage includes an introductory information paragraph below the navigation bar.

The first question, as shown below, prompts the user to input a service.

Once the service has been listed, it's automatically divided into four clinical urgency levels. In question 2, you are required to input volume data for each clinical urgency level. If you input a non-zero volume, the tabs change from grey to yellow prompting you to answer further questions. You may require clinical input to answer these questions.

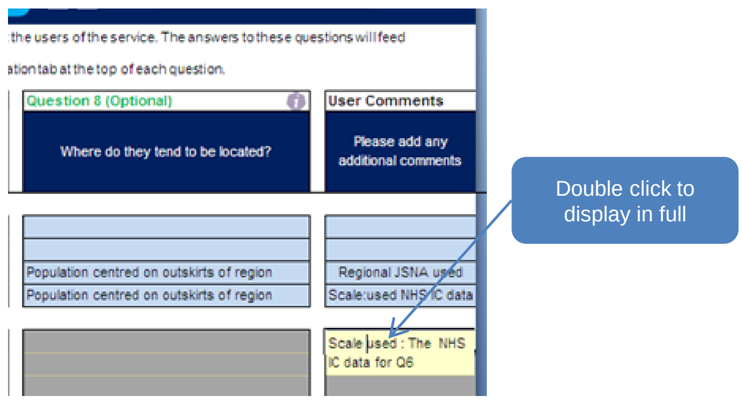
Information on how to answer these questions, including data sources, can be found by clicking the information button. Additional information on answering questions can be found in the 'Guidance' tab or supporting documents.

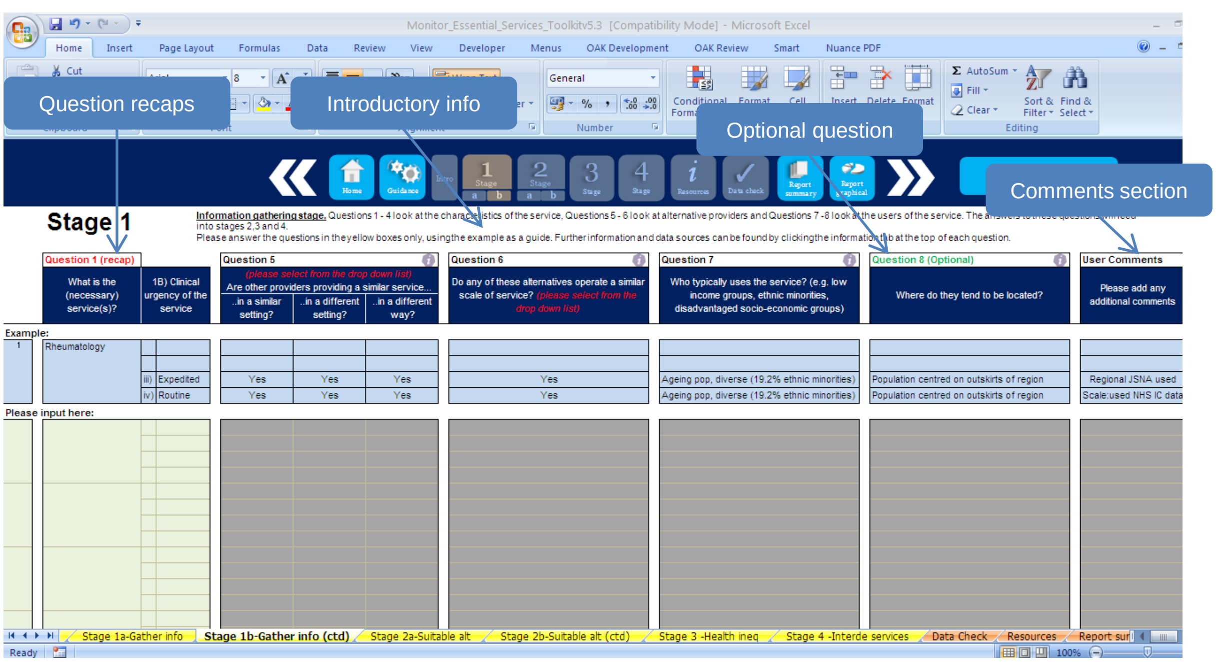
At the end of each stage there is a comments section where you can input free text including issues, clarifications and feedback (e.g. *Source: indep. clinicians for Q17*).

These comments will be displayed in the results summary for each service.

Some of the questions require free text input and some require selection from a drop-down menu. This information will be detailed in the questions themselves.

Note: In cases where text overflows out of view, please use the mouse to double click the area to display it in full (as shown below).





7 - Stage 2

This stage includes the first set of recommendations and next steps. As before the user should only answer questions in the yellow boxes, using the 'Guidance', 'Resources' (which includes data sources) and an in-built example (in light blue) as a guide.

Once the questions have been answered a recommendation, including next steps, will display for each service and urgency level. Stages 3 & 4 will automatically turn to grey based on the recommended next steps.

8 - Stage 3

The option to answer the questions in stage 3 is dependent on your inputs from previous sections. If the cell is yellow please answer 'yes' or 'no' from the drop down menus. Your answer will produce a recommendation and next step for this service. Stage 4 will automatically turn to grey based on the recommended next step.

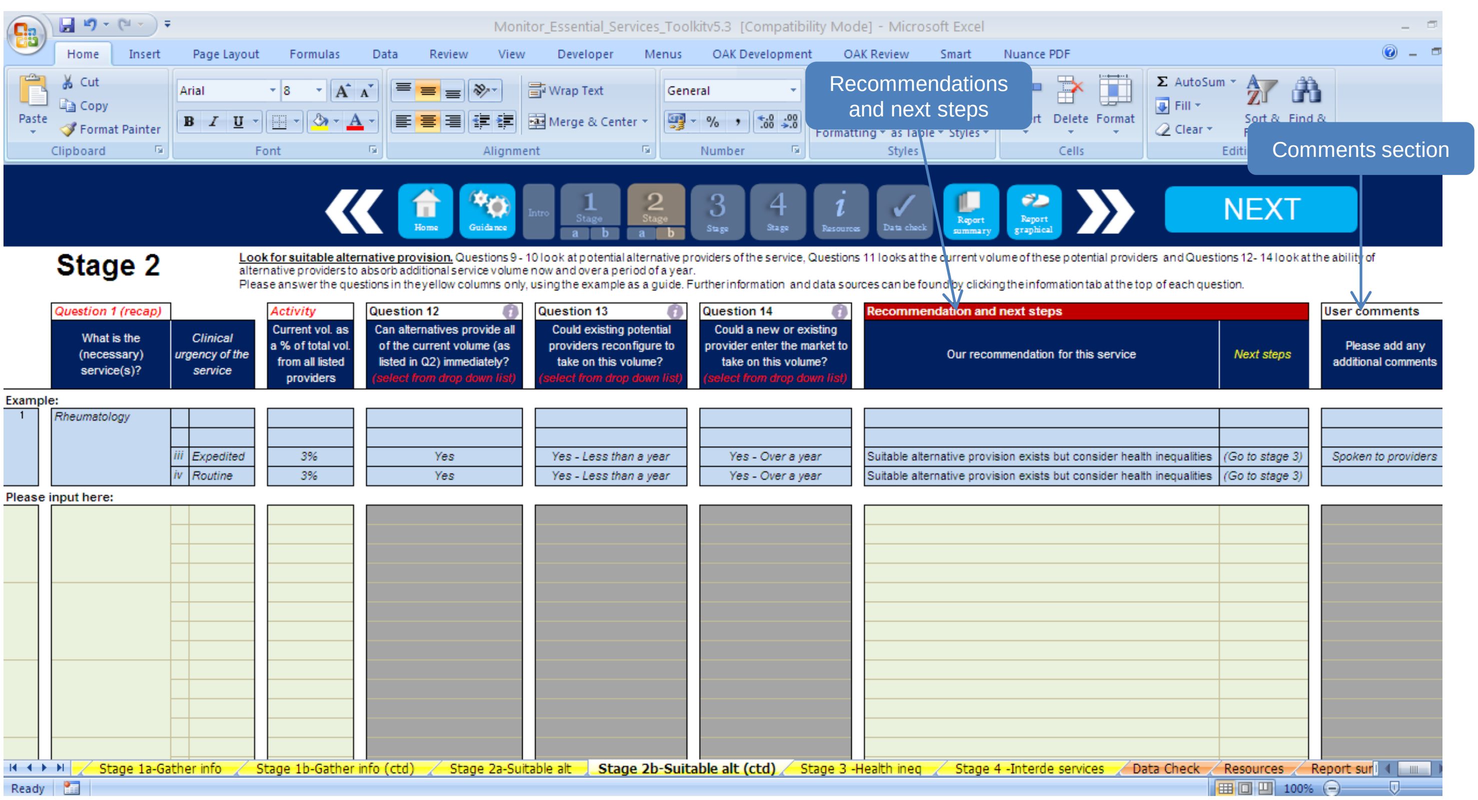
9 - Stage 4

The option to answer this question is dependent on your inputs from previous sections. If the cell is yellow please answer by listing the interdependent services (e.g. a,b,c,d,e... etc..). If there are no interdependent services, please type 'n/a'.

If you have listed any interdependent services the recommendation will prompt you to complete all of the questions for the service starting from stage 1 of the toolkit.

When you input in stage 1, you should answer 'Yes' to question 1C *('Is this an interdependent service?')*. This will automatically turn all questions to grey except for Q5 in stage 1 and Q12, 13 and 14 in stage 2. These questions are required to determine if interdependent services should also be considered for designation.

Note: The user comments section in stages 2, 3 and 4 is to the right hand side of the recommendations and next steps columns. If the 'Next steps' column displays 'end' this indicates that no further questions need to be answered for that service.



10 - Resources

This tab is accessed by clicking the ‘info’ button at the top of each question or the ‘Resources’ button in the navigation bar.

The purpose of this tab is to give a short brief of the question (the guidance will provide more detail) and a list of example data sources and links.

The data sources in green boxes represent external sources, and those in blue boxes represent internal sources.

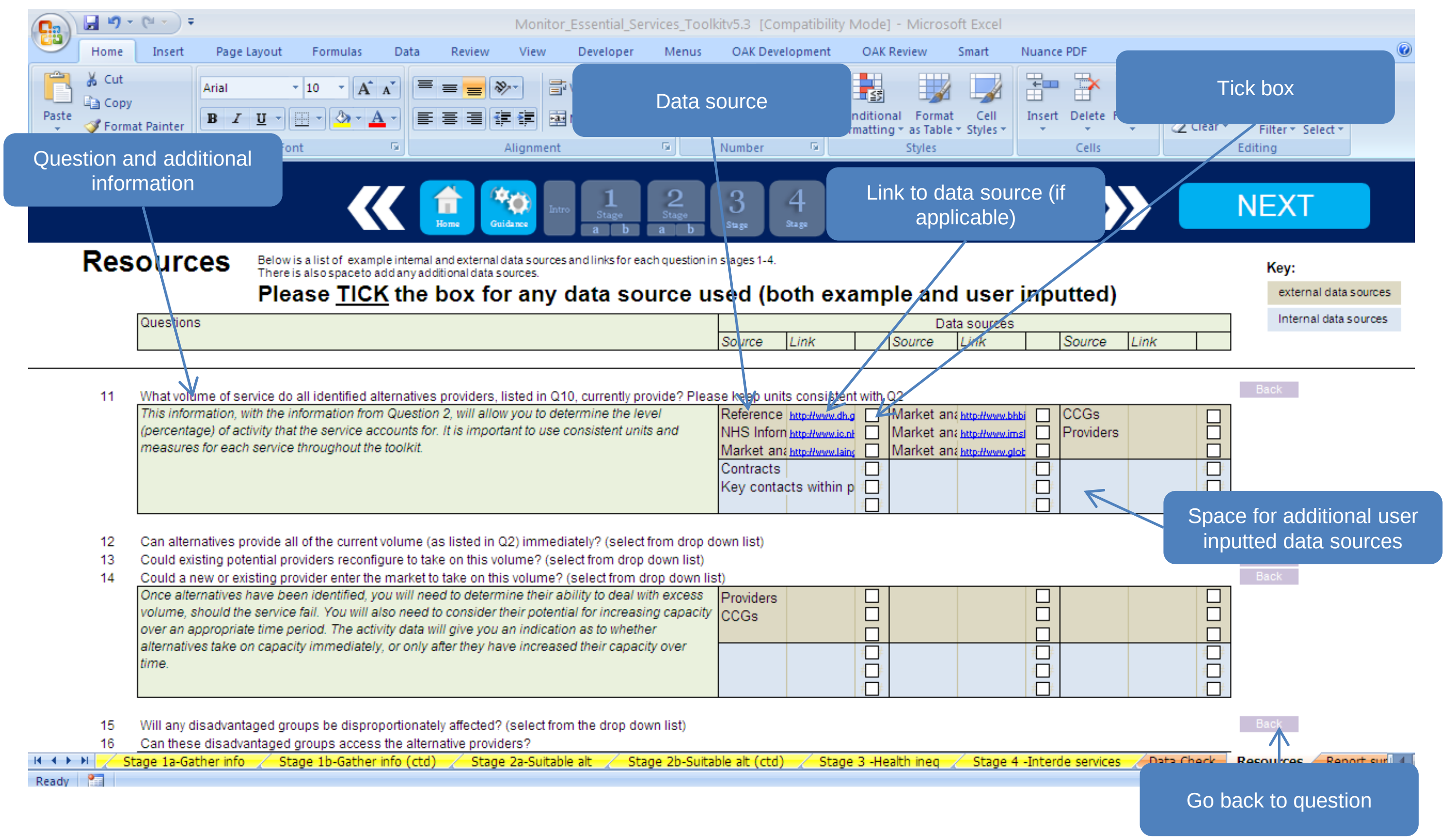
This section is designed for users to add their own data sources, which can be freely typed into the page.

Once a data source is used, the user can tick the box by clicking it with the mouse. Any box that has been ticked will be displayed in the output section of the toolkit.

11 - Data check

This section is a view only summary of the missing answers. You can use the summary table to see all the missing answers by question and the larger table to see all the missing answers by service and urgency (highlighted as x on the screen within the ‘Data check’ tab).

The user should complete all of the recommended questions before generating results (optional questions highlighted in green do not need to be completed).



12 - Results summary

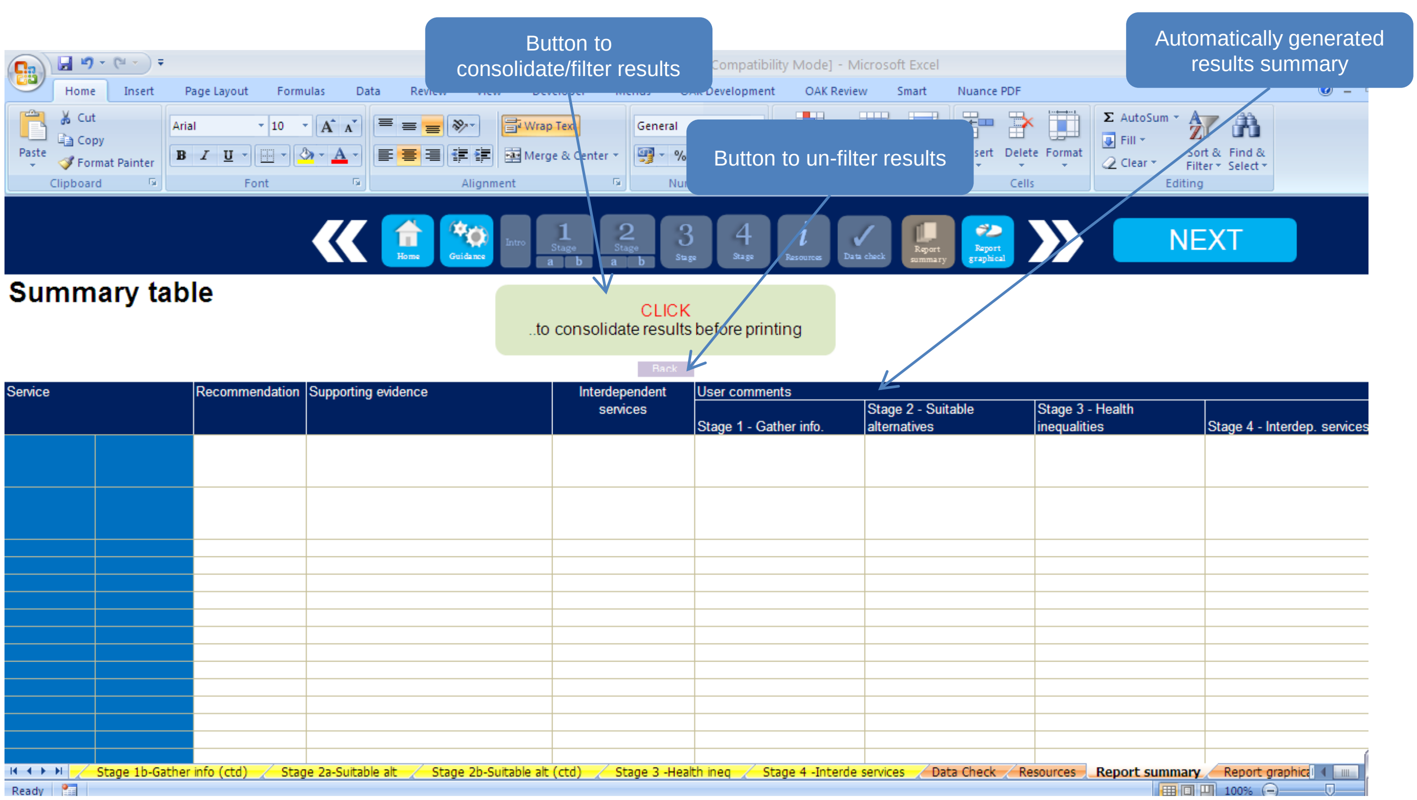
The output of this toolkit is a printable summary of recommendations by service. Once the data check is complete, clicking the green ‘Consolidate results before printing’ button (below) will generate a list of printable results. Clicking the ‘Back’ button will un-filter the results.

The results include:

- All services listed;
- Recommendations to designate/de-designate;
- Summary statements of the reason for the recommendation;
- Lists of your comments by stage;
- Interdependent services listed; and
- Lists of all data sources used by question.

13 - Results graphical

The graphical results is a view only summary of your outputs. The information can be printed.



Terms and conditions:

This is a guide to the interactive self-assessment tool that allows clinical commissioning groups (CCGs) to define Commissioner Requested Services and Location Specific Services within their organisations.

Please note the following terms:

a) Please only distribute part(s) of this report and monitor the distribution of this report and record to whom it has been sent so that it will be possible to highlight to any users newer versions of the tool should they become available.

b) Please note that you bear full and exclusive responsibility and liability for the accuracy and appropriateness of the inputs to, the use of, and the output from the tool and this report by your team.

c) Furthermore, the report and its related output do not to any extent substitute for the exercise of professional and business judgement on the part of you and that of your employees/ advisors.

d) It is not practicable to test a computer tool to an extent whereby it can be guaranteed that all possible errors, however minor, have been detected. Accordingly, Monitor assumes no responsibility and makes no representations with respect to the accuracy or completeness of the information in this report, except where otherwise stated, but would welcome feedback on any apparent problems.

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Publication code: IRG 09/13