e-360

Guide for Doctors

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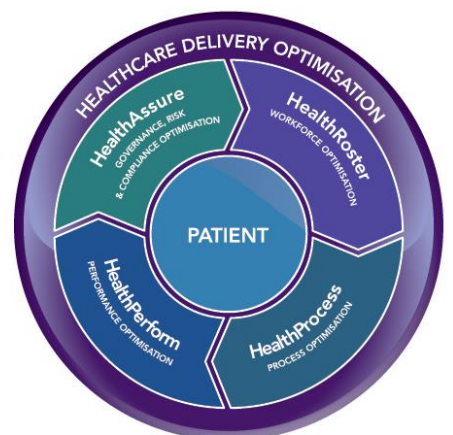
Allocate Software

HEALTHCARE DELIVERY OPTIMISATION

HealthAssure
GOVERNANCE, RISK & COMPLIANCE OPTIMISATION

HealthRoster
WORKFORCE OPTIMISATION

PATIENT

HealthPerform
PERFORMANCE OPTIMISATION

HealthProcess
PROCESS OPTIMISATION

Table of contents

e-360 – the background

The e-360 system is designed to help you gather and complete your Multi-Source Feedback (MSF) in line with the requirements of revalidation.

e-360 provides easy to complete questionnaires for completion by patients and colleagues as well as self-assessment surveys, these are based on the information provided by the GMC and can be accessed by individuals internally as well as externally to the system.

Underpinning the system is a powerful document management system that facilitates the sending, completion and collating of questionnaires that are required in a quick and secure way.

In addition, as part of the Consultant Portal it provides the ability for you to organise your medical HR administration relating to job planning, leave, appraisal & revalidation and 360 colleague & patient feedback all in one place.

Where and how is the information stored?

The e-360 software has a number of users roles built into it. Different users have different levels and rights to the information stored in the doctor's e-360 account. This manual is written for Doctor users. Doctors cannot view any surveys carried out on them, MSF reports need to be approved or rejected by the appraiser before the doctor is able to view them.

The supporting information is held on servers in Reading provided by 2E2, a recognised internet service provider (ISP) on the NHS Managed Services framework. The communication to and from the servers is encrypted by utilising Advanced Encryption Standard to encode its TCP/IP based client/server socket communications.

1 Getting Started

1.1   LOGGING IN

Once your e-Appraisal module has been activated, you will be sent an email with your username and password. If you already use another module within the Consultant Portal then you can continue to use your existing login details.

To log in to the Consultant Portal, open up your browser window and type in the following web address: www.zircadian.com. Towards the top left hand side of the screen, click **log in to your consultant portal**.
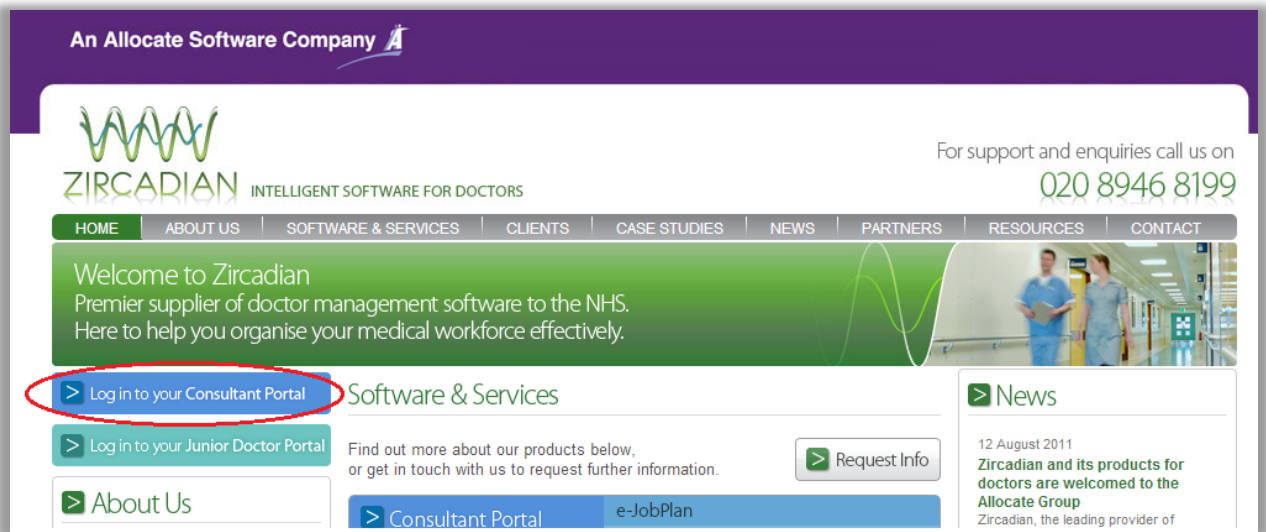
Enter your username and password into the appropriate fields, remembering that your password is case sensitive.

If you have logged in previously, you will need to enter the password you chose upon your first login.

## 1.2   1.2 LOGGING IN FOR THE FIRST TIME

When you login for the first time you will be asked to confirm your own personal details held in the system. Any personal details already held in the system for you would have been passed to Zircadian by your Trust during the implementation phase. Make any changes as necessary, and then enter a new password (minimum of 6 characters including 1 numeric) and click save.

1.3   1.3 ACCESSING THE E-360 MODULE

Once you have successfully logged in to the Consultant Portal, you will need to select e-Appraisal from the module menu bar running across the top of the screen.

2 Creating your MSF

The default tab displayed when logging in is the **Dashboard,** this is available to all users and gives an overview of any outstanding tasks or information relevant to the users' role. Doctors will have access to **Surveys** that they are required to complete on behalf of their colleagues and details of their own MSF (Multi-Source Feedback).
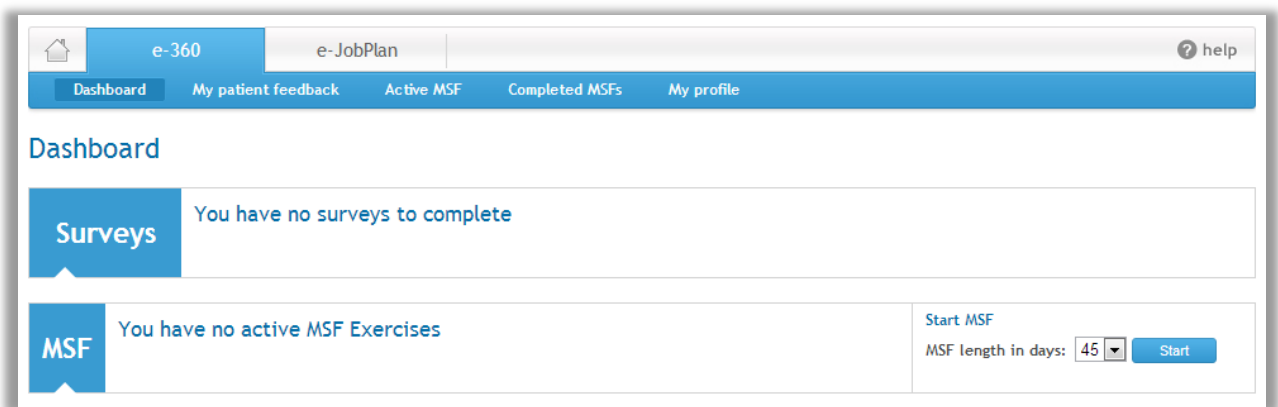

2.1   2.1 CREATING A NEW MSF

In order to start completing their MSF doctors will need to specify its length in days; this can be from 15-90 days long (in pre-defined intervals of 15, 30, 45, 60 and 90), once specified doctors will need to select **Start**.
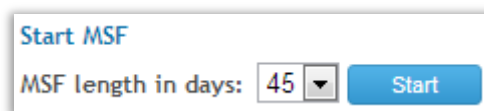
Doctors will then be asked whether they want to update their profile which will be featured at the top of the survey that colleagues and patients are asked to complete (please see section 2.4), this can be completed at a later date if necessary.
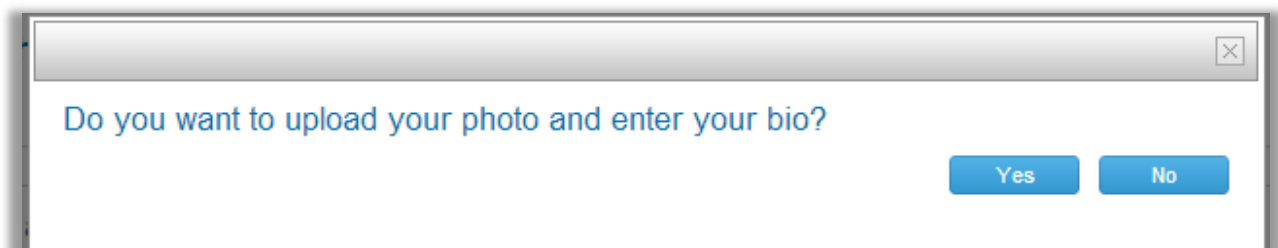
Once the MSF has been started the self-assessment questionnaire can be completed, to do this doctors will need to select the **Start** option to the right of the page.

Start self assessment   Start
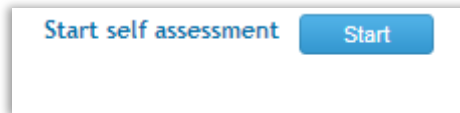
2.2   SELF ASSESSMENT QUESTIONNAIRE

The **Self-Assessment Questionnaire** can be Trust or Department specific, each of the questions used in a self-assessment are also used within the Colleague and Patient surveys. Colleague feedback cannot be requested until the self-assessment is complete.

All questions must be answered before submitting the self-assessment questionnaire, if the doctor is unsure of any of these they can answer **Don't know**.

Self Assessment Questionnaire

The questions below are from the colleague and patient questionnaires. Please rate YOURSELF for each of the following questions so that you can compare your assessment to that of your colleagues and patients.

Please rate your colleague in each of the following areas by selecting ONE option in each line.

	Poor	Less than satisfactory	Satisfactory	Good	Very good	Don't know
Clinical knowledge	⊙	⊙	⊙	⊙	⊙	⊙
Diagnosis	⊙	⊙	⊙	⊙	⊙	⊙
Clinical decision making	⊙	⊙	⊙	⊙	⊙	⊙
Treatment (including practical procedures)	⊙	⊙	⊙	⊙	⊙	⊙
Prescribing	⊙	⊙	⊙	⊙	⊙	⊙
Medical record keeping	⊙	⊙	⊙	⊙	⊙	⊙
Recognising and working within limitations	⊙	⊙	⊙	⊙	⊙	⊙
Keeping knowledge and skills up to date	⊙	⊙	⊙	⊙	⊙	⊙
Reviewing and reflecting on own performance	⊙	⊙	⊙	⊙	⊙	⊙
Teaching (students, trainees, others)	⊙	⊙	⊙	⊙	⊙	⊙
Supervising colleagues	⊙	⊙	⊙	⊙	⊙	⊙
Commitment to care and wellbeing of patients	⊙	⊙	⊙	⊙	⊙	⊙
Communication with patients and relatives	⊙	⊙	⊙	⊙	⊙	⊙
Working effectively with colleagues	⊙	⊙	⊙	⊙	⊙	⊙
Effective time management	⊙	⊙	⊙	⊙	⊙	⊙

Decide how far you agree with the following statements by selecting ONE option in each line.

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree	Don't know
This doctor respects patient confidentiality	⊙	⊙	⊙	⊙	⊙	⊙
This doctor is honest and trustworthy	⊙	⊙	⊙	⊙	⊙	⊙
This doctor's performance is not impaired by ill health	⊙	⊙	⊙	⊙	⊙	⊙

2.3   MSF DETAILS

Doctors can view details of their MSF on the **Dashboard** (please see section 4.1)

2.4   MY PROFILE

As mentioned previously, doctors will be asked whether they wish to update their profile when starting an MSF, this will take them straight to the profile for editing. Alternatively they may wish to come back to this at a later date and complete it in their own time; this can be done through the **My profile** tab at the top of the page.


Whenever a patient or colleague completes a survey they will be shown the doctor's profile at the top of the page, this makes it important to compile a profile prior to requesting any feedback.
The photo can be uploaded from any PC straight to the profile through the **Browse** option; this image can also be deleted or updated at any time. The bio part of the profile requires the doctor to enter details about themselves; each time this information is entered or edited it will need to be saved.

3 Feedback

3.1   REQUESTING COLLEAGUE FEEDBACK

In order to start requesting feedback doctors can navigate to the **Dashboard** and select the **Request** option next to **Request more colleagues**, this will take them directly to the relevant page.
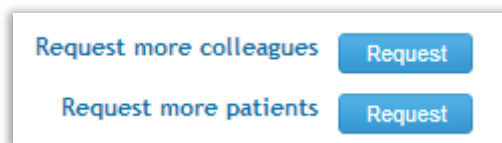
Feedback can be requested from colleagues whether they are using the e-360 system or not. The **Request Feedback** area will be divided into **System colleagues** and **Non-system colleagues**.
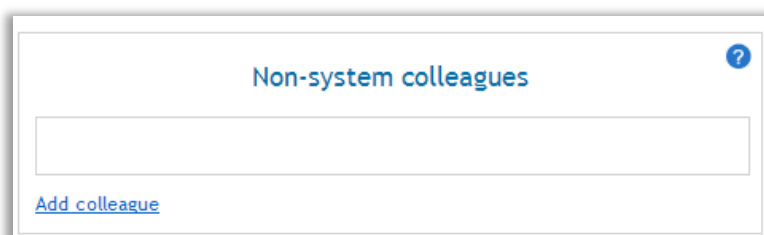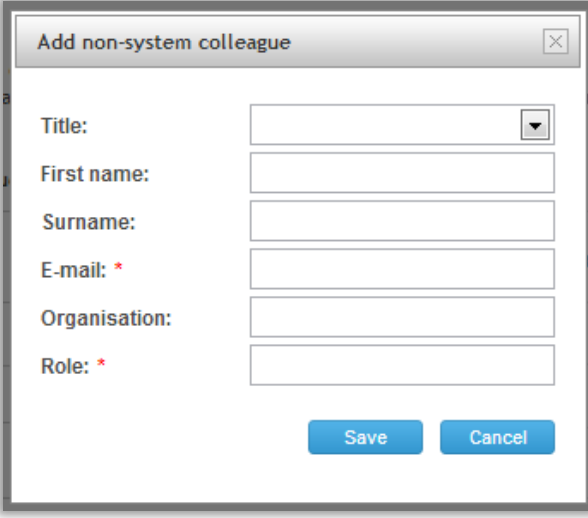
3.1.1   System colleagues
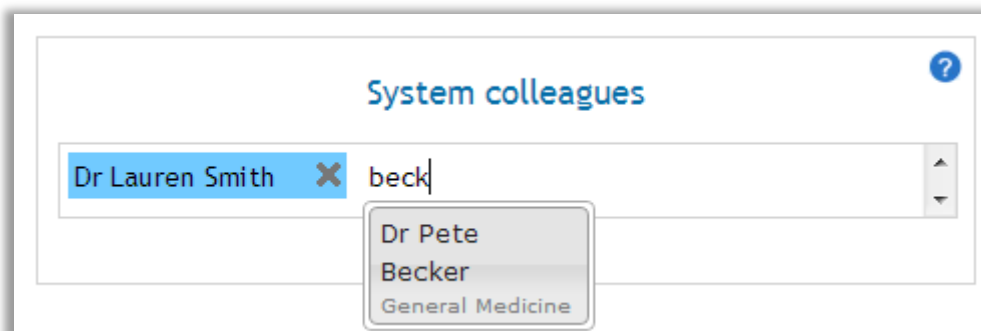
When you begin to type a name in the box provided for **System colleagues** a drop down menu will appear, you can choose the relevant colleague's name from here.
All successfully added colleagues will appear in blue, if the name entered does not relate to a user on the system then it will appear in red.

3.1.2   Non-system colleagues

When requesting colleagues who are not on the system more information is required. Select the **Add colleague** option to enter their details.

Complete the required fields with the colleague's information before selecting **Save**, this is to give the approver a better idea of who the colleague is.
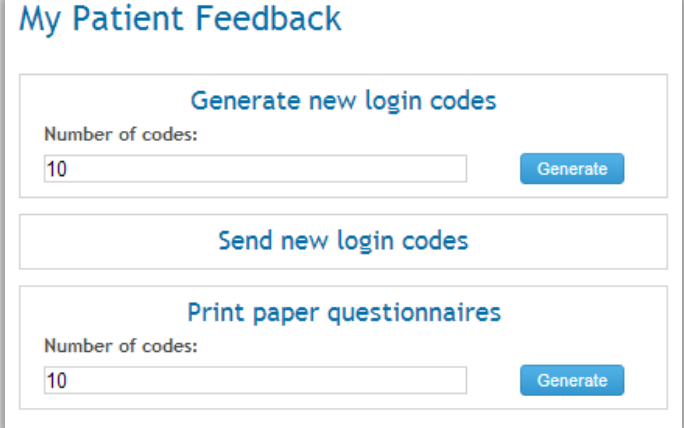

Once all colleagues' details have been entered and the **Request** button is selected, a notification may be sent to the Trust Administrator or Appraiser (depending on Trust settings) asking them to confirm the details for each assessor. A confirmation will appear on the Dashboard following successful submission of requests (as below).

3.2   PATIENT FEEDBACK

Patient feedback can either be given online or through a paper questionnaire. If the patient would prefer to complete the survey online then the doctor has two options to produce these, either by generating a login for them to use or providing a paper questionnaire.

3.2.1   Generate login codes and paper questionnaires

Both the **Generate new login codes** and **Print paper questionnaires** options will produce a PDF document. For each of these the doctor will need to choose the number of codes they want to generate then select **Generate**.

This will produce a new entry in the **Login Codes** area at the bottom of the page. From here the doctor will need to select the relevant PDF file, either for the questionnaires or login codes, which will then open up a new window with the PDF document.

The PDF document for login codes will contain information on the revalidation process, instructions to complete the online questionnaire, a link and a unique code which needs to be entered upon logging in.

Following are the instructions to complete the online questionnaire:
1. Enter the web site address (http://alldemosite.future-processing.com/e360/Guest/Login) into your web browser.
2. Enter the unique survey code.
3. Click the **Submit Code** button.
4. Follow the questionnaire instructions.

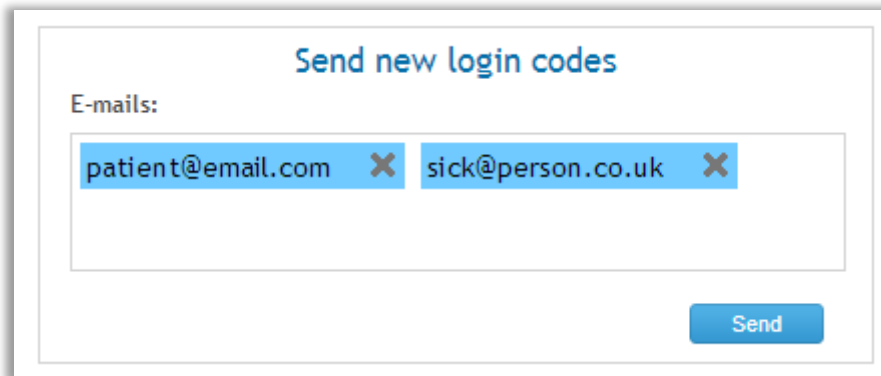| Web site	http://alldemosite.future-processing.com/e360/Guest/Login
Login Code:	b0577980-43a7-45fd-a145-d1de1dd31b5e

Your responses will be treated in the strictest confidence and cannot be traced to you.

The request to complete the online questionnaire will expire on 22 Dec 2012

The login codes and paper questionnaires will need to be printed off and handed to the relevant patients for their completion.

If Trust Settings allow then the patient's email address can be entered to allow the login code and link to be sent directly to them.


If the patient has completed a paper questionnaire this will need to be entered into the system on their behalf by the doctor, this can be done by using an existing login code to produce an online survey which is then used to enter details of the paper questionnaire.
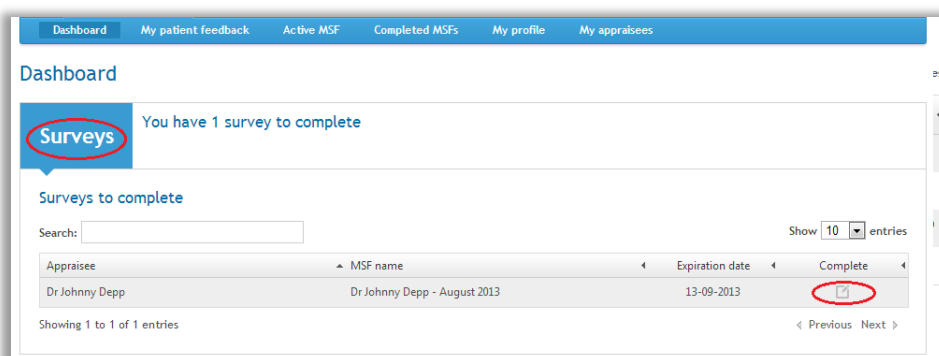
3.2.2   Progress

The **My Patient Feedback** tab also allows doctors to keep an eye on the number of surveys patients have completed, as well as how many have been generated or expired.
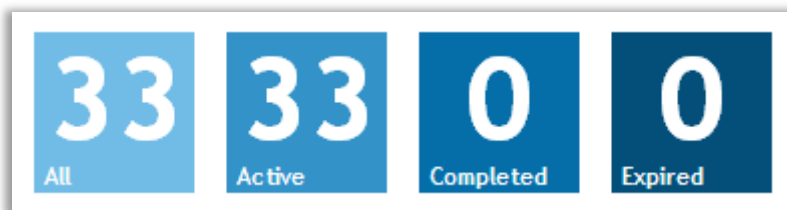
If a patient tries to enter their login code after the expiration date they will see an error message and no survey will appear, once the survey is complete they will see a thank you message which informs them that the login code is now disabled.

3.3   COMPLETING SURVEYS

As well as being assessed by colleagues doctors may be asked to provide feedback to others. If feedback is requested by a colleague through the system then it will appear on the **Dashboard** under **Surveys.**

By clicking into the Surveys section the doctor can view the name of the colleague who requires feedback and the expiration date of the survey, selecting the **Complete** icon takes the doctor to the profile and survey of the colleague they are being asked to assess.

Once completed, select Submit and this information will be fed back to the doctor's MSF.

4   MSF Exercises

4.1   ACTIVE MSF

Details on the progress of any active MSF can be found on the **Dashboard** and the **Active MSF** tab, these include the length and end date, number of colleagues and patients who have submitted surveys so far and how many are still to complete.

The **Requested colleagues** area within **Active MSF** allows doctors to keep track of confirmation requests. If Trust settings dictate that colleague requests require approval then each Assessor will have a Status of **Waiting** until they have either been **Approved** or **Rejected** by the Trust Administrator or Appraiser. Once approve, the colleague will receive an email or notification through the system to request completion of the survey.

If the Trust settings do not require approval of requested colleagues then they will receive the feedback request as soon as their details are submitted by the doctor.

Details of all MSFs which are complete on the system will be documented in the **Historical MSFs** tab, these include the start and end date as well as the amount of feedback which was received.

4.2   REOPENING AN MSF

An expired MSF can be reopened with 60 days of expiring if more responses are required; the option to do this appears when a doctor tries to start a new MSF on the Dashboard.

Selecting Start will prompt the doctor to choose between reopening their previous MSF or starting a new one, if the doctor chooses Yes then their most recent MSF will become active again and feedback can continue to be gathered.
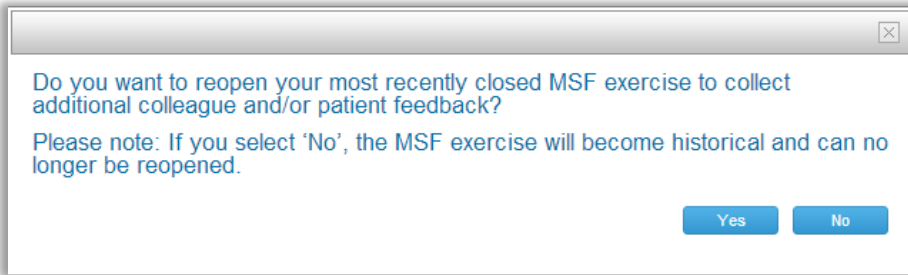
4.3   COMPLETED MSFs

Once an MSF has reached its end date it moves into the Completed MSFs tab, whether it has received the minimum number of surveys or not.

Once an MSF is completed with the minimum number of required responses the system can provide a full report. Depending on Trust settings appraisers may need to either reject or approve the report for viewing by the doctor. The report is generated by selecting the PDF icon in the **Report** column.

If a completed MSF has not received the minimum number of responses or it has not yet been approved then the PDF icon will have a red cross through it.

The report will appear in a new tab and can be exported into a document in a number of formats including Excel, PDF and Word, this is selected through the floppy disk icon at the very top of the report.
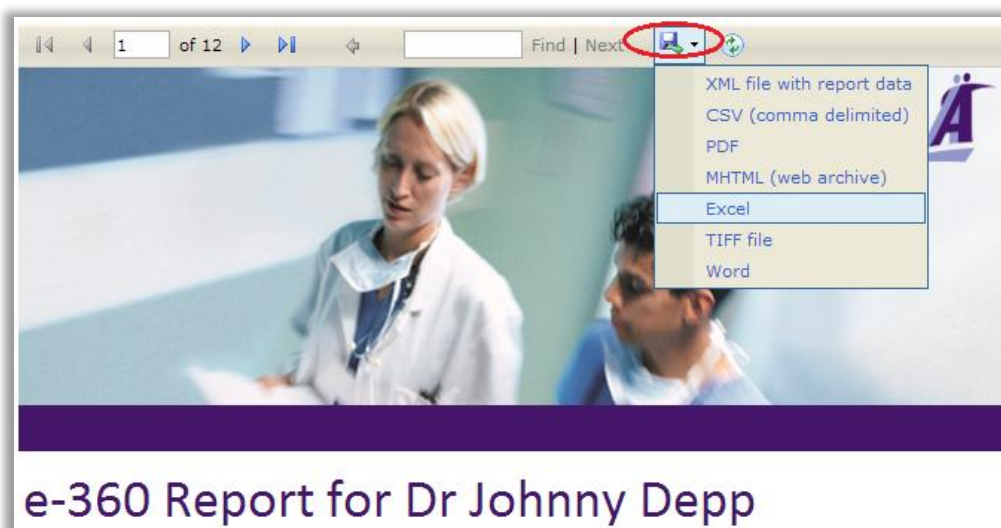
5 Additional Help

5.1 FROM YOUR TRUST

Your Trust will have appointed a primary Trust Administrator who will be familiar with the MSF process and the management of the e-360 module.

5.2 FROM ALLOCATE SOFTWARE

The Zircadian Medics Support Team are on-hand during normal office hours (0900-1730) to support users with any module of the Junior Doctor or Consultant portals. They can be contacted by phone on 020 8946 8199, or via email at support@zircadian.com.

5.3 PROVIDING FEEDBACK

We would very much appreciate your feedback about the e-360 module whether positive or negative. It is important for us to identify things that work well, but also things that might cause annoyance or frustration. We strive to take all feedback on board and consider any changes that might enhance user experience.

You can provide us with feedback at any time by emailing support@zircadian.com or by clicking the **Feedback** link at the foot of every screen.

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