Productives Module Impact Framework
User guide
(Updated August 2012)
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Introduction

The Productives Module Impact Framework is an online tool that helps NHS organisations to demonstrate the impact that The Productive Series has made for them on productivity, efficiency, staff experience and skills development. It gives organisations the robust evidence they need to demonstrate return on investment (ROI) when implementing a Productive programme.

Capturing module impact data and understanding the ‘before’ and ‘after’ is key to the evidence-based learning approach, adopted by The Productive Series. The framework is free to NHS organisations in England that have implemented any of the NHS Institute for Innovation and Improvement’s Productive programmes.

The key benefits are:

- provides robust evidence of ‘Releasing time to care™’ and productivity gains
- captures improvement stories of staff
- simple to use
- automatically creates reports at module, team and organisational level
- shows quantitative and qualitative impact across multiple teams
- boosts morale by demonstrating teams achievements
- captures data that allows success and changes in staff experiences to be shared.

Tailored reports

The reporting is based around specific modules, which allows you to be flexible in your approach to the selection of which Productive programme modules you record impact for.

Reports can be configured to suit the organisation’s requirements. Better control over the way information is shared enables teams to demonstrate their achievements to their managers and peers, leading to improved staff morale.

Capturing success in your local area, region or nationally

The impact data an organisation provides is aggregated anonymously at CCG, SHA and National level. Frontline teams benefit from this as they know that their data is being reported properly and their evidence is being captured at every level.

To capture staff experience more fully, the framework has the ability to record success stories and link them to the data submitted. With the permission of an organisation the NHS Institute may use this to create case studies to further highlight the benefits of undertaking a Productive programme. An organisation can choose to share their information with other organisations, their local CCG, SHA and at National level.

The framework will help to answer these common questions

Finance – “This staff engagement sounds great but what actual cost savings have been made?”

Quality – “The teams say everything is so much more organised, but how much time has this module actually saved them?”

Staff development - “The Team Leader feels that the team has developed amazingly, but what skills and knowledge do the team now have?”

Partners - “How much more efficient has the team become by doing this module? Show me how their care processes are more reliable and effective.”

This user guide aims to provide useful information to help you get the most out of this framework.
1. Getting started

1.1 Setting up your registered user
The framework can be accessed securely via the NHS Institute website. The first step is to ensure that your organisation has identified who is the lead for each Productive programme and who will register for the impact framework. These individuals will have a key responsibility as they will determine who within your practice accesses which element of the framework by setting access privileges. They will also provide access to other practices or organisations to enable shared learning including impact data.

Any individual using the framework will be required to be an existing registered user of the main NHS Institute website. You will need to do this before you register for this framework.

1.2 Getting started for those working in a General Practice
(please see 1.5 for Getting Started for all other types of organisations)

The first thing you will need to do is register a lead. To register select the type of organisation you represent and click ‘Submit’ button.

This will take you to the Productive module impact framework general practice lead registration screen. Enter your details and select your NHS England organisation by working through the pre-loaded dropdown box for your Region, CCG and Practice; and then click the ‘Submit’ button.

You will then be presented with a screen providing you with the following information.
‘Thank you for starting the registration process for the Productives Module Impact Framework. Your registration has been sent to a member of the NHS Institute for approval. Your approval will be sent to you by email.’

Once you have received NHS institute approval choose the ‘internal access settings’ and ‘external access settings’ to set up the required users and viewers of your organisations area of this tool.

1.3 Internal access settings
Once a lead has been set-up for your organisation they can set up other internal users with access rights.

The screen below is what is presented when you select ‘Internal access settings’ from the list on the right hand side.

From this section you can administer who can access the tool from your organisation and you can edit the type of elements they can access. You can use the ‘add new’ for new users or click on a name to edit an existing user.

Select the level of access from the options described below.

- **Full** – provides users with access to all areas including ability to input and edit data if required.
- **Report viewer** – provides users with access to previously created reports (except financial reports).
- **Delegated author** – this user will be able to input/edit data, but cannot view reports.
- **CCG Administrator** – this CCG user can view practice data and reports.
In addition to Access Levels there is an ‘Extra’ section which relates to additional rights including access to financial reports and to approve the new user. After completing all sections click the ‘Submit’ button.

1.4 External Access settings
From this section you can administer who can access the tool from outside your organisation and you can edit the type of elements they can access. The screen below is what you see when selecting this menu item.

The tables show who you have given permission to see your data and who has given you access to their data. You can change these settings anytime you require.

To create a new external user(s), click on the ‘Add new’ button or if you want to edit an existing user, click on the name of the user.
When adding a new user complete all the sections including the access level - access to all users or programme lead only, and click the ‘Submit’ button as shown below.

After clicking the ‘Submit’ button you will be presented with the screen which includes the new organisation you have chosen to share your data in the table as shown on the following pages. If you want to ‘edit the entry’ click on the name of the organisation or if you want to withdraw access rights, click on the red cross symbol to ‘delete’.
1.5 Getting Started for all organisations except General Practice

You can set up a lead for either one or more Productive programmes. To do this the NHS Institute will require permission by email from your executive sponsor. Once you have registered your executive sponsor will automatically receive an email requesting approval.

Please note:
If you are registering for a Strategic Health Authority you need to select ‘Organisation not applicable’ in the organisation drop down menu.

Once you are a registered lead you can choose the ‘internal access settings’ and ‘external access settings’ to set up the required users and viewers of your organisations area of this tool.

1.6 Internal Access settings

Once a lead has been set-up for your organisation they can set up other users with the following rights:

- **lead** – access to all areas including ability to input and edit data if required
- **report viewer** – access to reports created by the leads, but not the financial reports
- **author** – can input and edit data on behalf of leads on the site, cannot view reports
- **viewer** - has access to all reports, including the financial reports. These internal users can only be set-up if they are currently registered with the main NHS Institute website. If they are not currently registered they can do so by visiting the NHS Institute ‘Log in’ page at www.institute.nhs.uk/pmif.

The screen below is what is presented when you select this menu item.

From this section you can administer who can access the tool from your organisation and you can edit the type of elements they can access. You can use the ‘add new’ for new users or click on a name to edit an existing user.
1.7 External Access settings
From this section you can administer who can access the tool from outside your organisation and you can edit the type of elements they can access. The screen below is what you see when selecting this menu item.

The tables show who you have given permission to see your data and who has given you access to their data. You can change these settings anytime you require.

You can use the ‘add new’ for new users or click on a name to edit an existing user.

Clicking ‘add new’ presents the below.

If you want to give a CCG access then simply select the ‘organisation not relevant’ option in the Org drop-down menu. The access level decides if it is all users from that organisation or leads only.

If you want them to see financial data you will need to tick the box to allow this.
2. Productives Module Impact Measures homepage

Once you click on the ‘Get started’ page the following screen will appear.

From this page you can select which impact area you wish to input data for. Each impact area is represented by a blue button. Click on the button for the impact area you want to access and you will be presented with the following screen (accept for ‘Go to financial impact’ where you will be presented with an alternative screen).

You will need to provide all the information requested in the drop down menus on this page before you can start inputting your data.

Please note that you will need to repeat this process for each impact area you wish to input data for. We ask you to re-enter your project information each time. This reduces errors and ensures that all information is entered into the correct section of the measurement process.
2. Inputting data into impact areas

2.1 Staff experience and well being
When choosing this area you will be presented with the screen below.

From this screen you can have staff input data directly or you can print off the questionnaire template and ask staff to complete it so you can input data at a later date. You have the option of printing off a single template or multiple templates. Each of these measurements ie, Measurement 1, must consist of between 4 and 12 questionnaires.

The questionnaires need to be gathered over the duration of the time it takes to implement the module. It is important for the questionnaires to be recorded in chronological order so that the impact of the changes you are making can be shown over time.

You will need a minimum of 20 consecutively ‘Measurements’ recorded, with a minimum of one week’s gap between each. The period over which you collect each set of questionnaires is known as the ‘collection period’. The ward team will decide the time duration of the collection period eg, one day, one week, two weeks etc. The more questionnaires you are able to record the more you will be able to demonstrate the impact of your Productive programme on staff experience.

You do not need to ask the same staff to complete the questionnaires each time in every collection period. You can ask anyone who is working within the team or clinical area.

From here you can print templates to collect data and also input/edit data. The table will also show you the status of the questionnaire. If you save your work it will be classed as ‘in progress’ and allow you to make changes. Once submitted you will not be able to make any changes.
You can use the input/edit link to add new data or modify existing entered data. When you choose to input/edit data you will be able to input the answers for each staff member by clicking in the appropriate box for each answer. You will complete one questionnaire for each staff member as indicated in the screenshot below.

You can add further input screens (questionnaires) for staff members using ‘add more staff’. If you want to remove a particular questionnaire you have started you can delete this but you can only do this if you have not submitted the data. To remove a questionnaire select the staff number and choose ‘remove staff member’.

When you click ‘Submit data’ your results will be entered and you will not be able to make any changes to them. This function is consistent throughout the framework.
2.2 Linked improvement stories and lessons learned
In the staff experience and well being section you can record a linked improvement story or lessons learned to ensure you capture all of the qualitative impact from implementing the programme. This is available for all impact areas and allows you to link your improvement story to the relevant data helping to make it a more powerful statement.

You can print off a template to give to your team to complete and enter at a later data or enter directly onto the system. When you are ready to input you can select ‘add new’.

When you enter your story there are a number of boxes with headings for you to input text. The more information you input here the more effective your story will be. You can upload supporting images or other documents to the improvement story, both before and after the change.
2.3 Process improvements

This section is where you input data to demonstrate how you have improved efficiency around your processes eg, the meals round, the medicine round, time taken to find a prescription for a patient etc. This section collects data on the length of time it takes you to carry out your process(s), both before and after any changes you have made.

When choosing this area you will be presented with the screen below.

To input data click on ‘add new’ where you will be presented with a series of simple questions to help define the process. These questions are important as they will determine key calculations in future areas.

Once you have done this you will be presented with the Process improvements homepage. From here you will need to click the ‘Input/edit’ function to add your improvement measurements.
This will present you with the following table.

You can print off a template to give to your team to complete and enter at a later date or enter directly onto the system. You will need a new template for each process. Use the ‘add new’ button, to add more processes.

You must take a minimum of 10 timings before the change and 10 timings after the change in order for the calculations to work correctly. You can add more timings if you wish as this will give more confidence to your results and also give you more opportunity to show a positive impact.

To add more data points simply use the ‘add more’ button.

Please note after you have submitted data you can still add more process timings in either the ‘before’ or ‘after’ the change tables.

Please ensure the date of the ‘process change’ is accurate as this is important as it will affect the calculations.

To view the predicted reinvested saving from your new process click on the ‘show predicted savings’ bar adjacent to the ‘add new process savings’ bar.

The screen will change to show the table below.
In the table you will see information displayed about each of your processes. This information includes the predicted saving from each as well as all of your processes based on all of your staff following the new process, based on the number of times it is carried out.

By selecting your process and clicking on the link in the ‘insert compliance level’ column, you will be taken to a new screen (see below) where you will be able to enter your actual compliance or audit score for that process. This figure is used to calculate the actual reinvested saving for your process.

If you have previously submitted compliance data you will see two tables. If you have not previously entered any compliance data for that process you will see only one table. The top table shows the months for which compliance data has yet to be entered. The second table shows the months for which data has already been entered and submitted.

Please note: you must submit data in chronological order. You will not be able to go back and enter data for any missing months once the submit button has been clicked i.e. data entered for February and April but not for March will mean that March will have a 0% score registered. If the save button is clicked you can go back and enter data for missing months before submitting. To return to the previous screen click the ‘cancel’ button.

To view a chart of your ‘process reinvested saving’, select the process you wish to view and click on the ‘view chart’ link in the ‘predicted savings chart’ column of the table. A chart will appear. If you wish to print a copy of the chart, click on the ‘print’ button, save as a PDF to your desktop then print off.
2.4 Knowledge and skills

In this section you can print off knowledge and skills templates to collect data and also add data that is collected via these templates. Similar to the previous section there are three areas eg, chosen criteria, data templates and linked improvement stories. The criteria and linked improvement stories have the same functionality as the previous two sections.

When choosing this section you are presented with the below.

For this impact area the first step is to select the individual you are printing the template for. This is done by selected the ‘add new’ button. This presents the screen below.

You can input a name and role for identification purposes. However, the name will not appear on the report, to protect identity of the individual. Please enter Afc band which again is needed for calculations. Having entered this individual's name you see the screen below.
Click on ‘print template’. A box will appear to enable you to save or open a template. These templates are printed once for each staff member. The templates can be provided to the staff at the start of a module and they can record any skills development as they go along. Or they can be provided at the end, it is entirely up to the process you choose to adopt. Once the module is completed these records can be entered into the system.

Once you are ready to input the data or would like to edit existing data choose the input/edit icon.

This will bring up the screen below, where you are able to record that individual staff members answer to the questions in the template.

This icon provides users with access to top tips about activities that are often done with modules that can be used as evidence for skills development. These can be printed and given to staff to support the template in the beginning to get staff to start to think about what key skills they should be consciously capturing.

4. Financial Impact Measures homepage

This area allows you to capture the financial impact of the Productive programmes that you are implementing, including costs as well as savings. It will provide you with the robust evidence needed to demonstrate return on investment when implementing a Productive programme.

To access the financial impact measures homepage click on the ‘Get started’ page and select the ‘Go to financial impact’ button.
This will take you to the financial impact measures homepage where you will need to select your ‘Organisation’ and impact ‘Level’ before clicking on the ‘search’ button so you can see what financial data you have already entered.

Your financial data will then appear on the screen – see example below.

To view the costs for your programme click on the ‘show costs’ button

If you are have not yet entered any costs data then you will not have any entries in this section.

To enter information about any costs click on the ‘add new cost’ bar and complete the form that appears as shown below.

To view the savings for your programme click on the ‘show savings’ button.

Again if you have not entered any savings data then you will not have any entries in this section.

To enter information about any costs click on the ‘add new savings’ bar and complete the form that appears as shown below.
The screen above shows the key elements that you need to add when you are adding a cost.

**Selection 1:** This section is pre selected

**Selection 2:** Level drop-down
Here you need to decide if the cost/saving is to be attributed at the level of implementation eg, ward. Some cost/savings may need to be recorded at higher levels such as module, Productive programme or organisation. For example, if you employ a Productive project manager for a Productive programme throughout the organisation this cost should be recorded at Productive level. Otherwise you may get an implementation area eg, ward level, recording the cost this can lead to double-counting.

Depending on what level you choose you may need to enter more sub-level data to add required identifier information.

**Selection 3:** Sub-Level drop-down
Depending on what level you choose you may need to enter more sub-level data to add required identifier information.

**Selection 4:** Category drop-down
You will need to select a pre-populated category. If you want to add something that is not on the category then please contact us at productivesimpact@institute.nhs.uk, we will liaise with you about potentially adding this category.

**Selection 5:** Optional item description text box
If you want to add some more descriptor information this is the option to do this.

**Selection 6:** Start date
You will need to select a date from when the cost/saving started because this drives the formulas that calculate financial impact.

**Selection 7:** One-off amount
If the cost/saving has one-off element enter here.

**Selection 8:** Ongoing amount
If the cost/saving has an ongoing element enter it here. You may put in both a one-off and an ongoing cost/saving.
Selection 9: Classification

This is done automatically by the system, into the following:

- **cost**
- **reinvested saving** – these are savings that are good but cannot be taken off the bottom line
- **cashable saving** – savings that can actually be taken off the bottom line.

You can view a summary of your financial impact by clicking on the ‘view summary’ button outlined below from either the costs or the savings pages.

You can also add a linked improvement story in this impact area as you are able to do in the other impact areas. Just click on the ‘show lessons learned’ button on either the costs or savings pages.

You will be presented with a screen that will display a chart of your costs and savings together with a table below giving further information on those costs and savings. See screen shots below.
The chart has a bar on the bottom axis that will allow you to view data over a longer time span. Click on the bar with your cursor and move left or right to view the desired months.

Above the table is a summary of the costs, savings and reinvested saving for your programme.

You can download a PDF copy of your chart to print and display on your Knowing How We Are Doing board or inclusion in reports by clicking on the ‘Export to PDF’ button.

By clicking on the ‘Export to data’ button you can download and save an Excel CSV file of your data.

At the top of the page is a filter mechanism where you can select dates for which you wish to view your financial data. See screen shot below.
5. Deleting data

There is a delete function available within the framework. This function allows you to permanently remove data for your organisation that has either been entered incorrectly or is test data. The delete function can be accessed from the Productives Module Impact Framework menu as shown in the diagram below.

Once you click on the ‘delete’ data the screen below will appear.

If you are a delegated author you will only have option 2 available to you. If you are programme lead you will get option 1 and option 2. The options are described at the top of the page.

Option 1
This option will allow you to delete all data from a particular site or implemented area. Use the drop down menus to select the sites and implemented areas you wish to delete.

Option 2
This option allows you to delete data from a specific impact area ie, staff experience. On the PMIF Delete Form screen select the impact area from which you wish to delete the information and use the drop down menus to select the site and implemented area.

Using this same screen scroll down the page until you see the cancel and delete data buttons.
Once you have selected what you wish to delete you can delete all the information within that area by clicking on the **delete data** button. Please note this will delete **all** the data that has ever been entered.

Or, you can click on the **delete by dates** box and select the dates from which you want the data to be deleted. Please click on the blue information button next to the **delete by dates** box for information on how to enter your dates.

You have the option to save the data you are deleting to an excel file. The framework automatically defaults to saving your data unless you select **no** under the **Download the data before delete?** option (see screen below).

When you click on the **delete data** button you will be asked to confirm if you are sure you want to delete the data. Select **ok** if you are happy to proceed. If you select **ok** a second pop up box will appear asking if you wish to continue.
Select **ok** and the screen will change as follows. You will see a message in red at the top of the screen informing you if your deletion has been successful. By scrolling further down the page you will see an excel icon. Click on the excel icon to save the data you have just deleted to your computer in excel csv format. If you do not save this data you will not be able to retrieve it again.
6. Administer Organisational Reports homepage

To create a report from the data you have inputted select ‘Administer Organisational Reports’ from the drop down menu under the Productive Module Impact Framework tool.

The Administer Organisational Reports homepage allows you to present your organisation’s impact data in one report.

The first time you visit this page there will be no report available to you. You will need to create a report. To do this, select the ‘Add new report’ button.

You will be prompted with the following screen where you will need to select the Productive programme and the time period for which you would like to run the report for.

![Productive Series Impact - Organisational Summary Report](image)

You will then need to follow a series of steps which will allow you to start building your report.

Step 1 starts with the impact area ‘Staff experience and well being’. If you wish to include this in your report simply tick the box ‘include in report’. You can also include a graph in your report to represent this information by selecting the option ‘Include graph in report’.

![Step 1](image)
You will then need to work through a further seven steps which will show you all impact information that you can include in your report. If you wish to go back at any time and change your selection you can do this by selecting the ‘Previous’ button at the bottom of the screen.

Once you reach the final step (Step 8) you can create your report by selecting the ‘Preview & Publish’ button.

This will allow you to review the information you have included in your report – see following example.

If you are happy with your report select the ‘Publish PDF’ button at the bottom of the screen and this will create a ‘Saved’ version of the report. You will then be taken back to the Administer Organisational Reports homepage where all your reports are stored (see following example). If you would like to make any additions or changes to your report click on the icon in the ‘Publish & Generate’ column first and select ‘Unpublish report’. Once you have done this click on the pencil icon in the ‘Edit’ column and you will be able to make changes.
If you are happy with your report and would like to view the final version you will need to publish it first. You can do this by selecting the appropriate icon in the ‘Publish & Generate’ column.

To view the final report, select the relevant icon in the ‘View’ column. You will be able to download the report as a PDF and save it to your PC.

Each new report that you create will be added to the list that will appear on your Administer Organisational Reports homepage.

You can only have one current published report for each Productive programme. When you create and publish a new report for a Productive programme it will automatically archive the previous published report for that particular programme.

To view a report that has been archived click on the view report icon in the ‘View’ column.

To un-archive a report, click on the ‘generate and publish’ icon. Please note this will generate your report again and will appear in your list as a ‘published’ report.

If at any time you would like to delete a report simply select the delete icon.