

# Practice Manager | user manual v1.6

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### 1. Introduction

The Cervical Sample Taker Database has been designed for the quality assurance of cervical sample takers. All cervical sample takers in Cumbria, Greater Manchester and Lancashire will need to be registered on the system, which will hold up to date information on each sample taker's performance data and training.

### 2. Responsibilities

The success of the Cervical Sample Taker Database relies on the users accepting and undertaking their assigned responsibilities. All Practice Managers must ensure that any information they record on the database is accurate and updated as samples takers join or leave the practice. It is important that the database is accessed by users regularly to monitor sample taker performance, so any areas of concern can be highlighted and steps can be taken to resolve the problem quickly, reducing the risk to patients.

Practice Managers are responsible for the registration of already qualified sample takers and updating their training records when update training (including e-learning courses) has been completed.

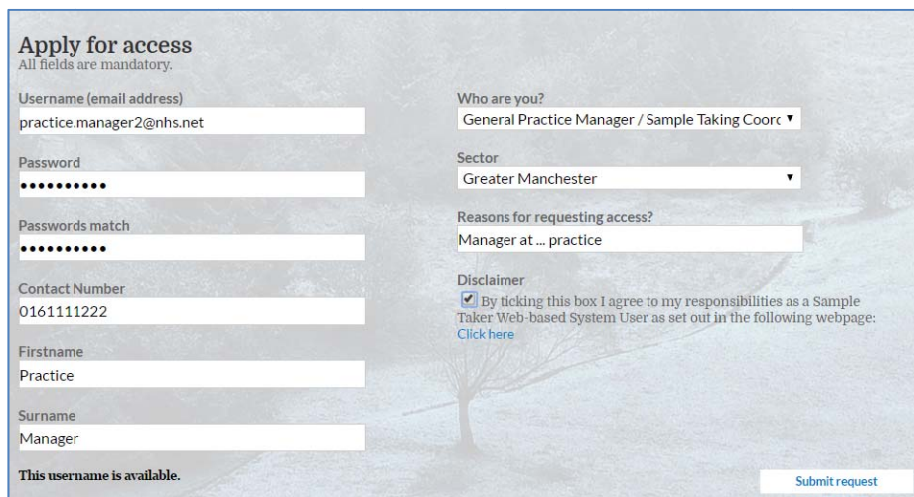
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## 3. Access and login instructions

### 3.1. Requesting access to CSTD Manchester for new users

Practice Managers will have to apply for administrative access to the CSTD Manchester before being able to use the system:

1. Complete the self-registration form on the login page: <http://cstd.mft.nhs.uk/admin>



The following fields are mandatory:

- Username (email address)
  - Password (eight characters long, one uppercase and one digit)
  - Contact Number
  - First name
  - Surname
  - Who are you? (select 'Practice Manager or Lead clinician' from the list)
  - Sector (the geographical sector you are working at)
  - Reasons for requesting access (we will use this to decide whether to accept your request, include your place of employment for location assignment)
  - Disclaimer – (select to confirm that you understand your **responsibilities**)
2. Click on 'Submit request'
  3. Please click on 'Select practice/departments' to associate your request with a specific location (this will have an impact on what/who you can access in the CSTD).
  4. Select the CCG(s) and the practice(s), once done just close the pop-up window.
  5. Click on 'click here' link to complete your registration and submit your request.

**Note:** You will be notified via email once your request for a new account has been approved.

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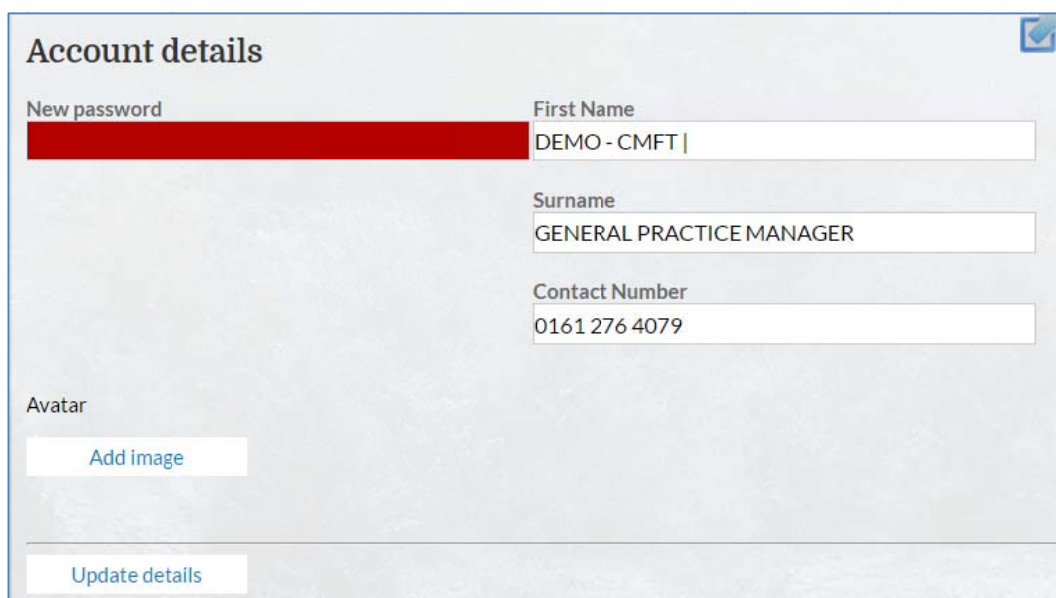
### 4. Sections explained

#### 4.1. Your CSTD user profile

It is vital that each Practice Manager keeps their personal records up to date at all times, especially after you have just started using the CSTD system.

The 'Your profile' section of the Cervical Sample Taker Database consists of the following:

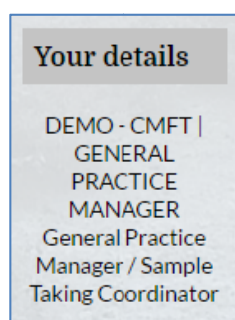
- Account details



The 'Account details' form contains the following fields and controls:

- New password:** A red rectangular field for entering a new password.
- First Name:** A text input field containing 'DEMO - CMFT |'.
- Surname:** A text input field containing 'GENERAL PRACTICE MANAGER'.
- Contact Number:** A text input field containing '0161 276 4079'.
- Avatar:** A section with an 'Add image' button.
- Update details:** A button at the bottom of the form.

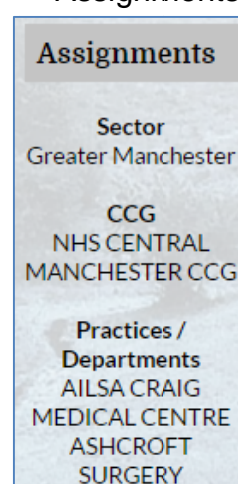
- Your details



The 'Your details' card displays the following information:

- DEMO - CMFT |
- GENERAL PRACTICE MANAGER
- General Practice Manager / Sample Taking Coordinator

- Assignments



The 'Assignments' card displays the following information:

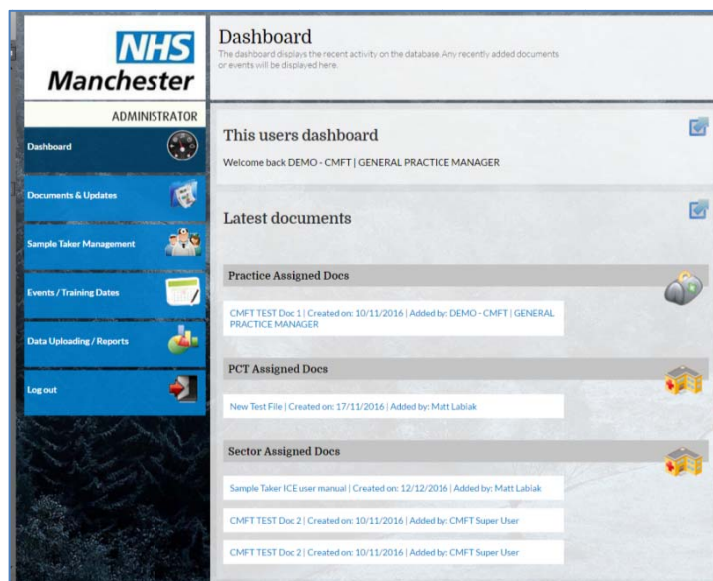
- Sector:** Greater Manchester
- CCG:** NHS CENTRAL MANCHESTER CCG
- Practices / Departments:** AILSA CRAIG MEDICAL CENTRE, ASHCROFT SURGERY

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## 4.2. Dashboard

The 'Dashboard' section on the Cervical Sample Taker Database lists any documents or updates and new events that have been added to the system.

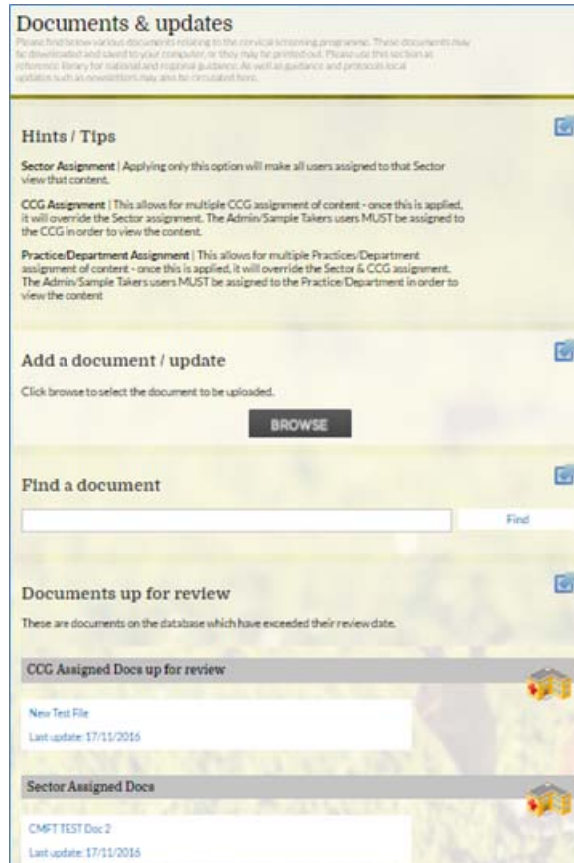
Please refer to this dashboard on a regular basis to keep up to date with local guidance and protocols.



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### 4.3. Documents & Updates

The 'Documents & Updates' section of the Cervical Sample Taker Database allows you to upload, view and manage various documents, manuals and guides uploaded for your convenience. Documents assigned to your sector and/or CCG will be available for you to view in respective subsections as shown below:



**Documents & updates**

Please find below various documents relating to the cervical screening programme. These documents may be downloaded and used to your computer, or they may be printed out. Please use this section as reference. Policy for national and regional guidance. As well as guidance and protocols local updates such as newsletters may also be circulated here.

**Hints / Tips**

**Sector Assignment** | Applying only this option will make all users assigned to that Sector view that content.

**CCG Assignment** | This allows for multiple CCG assignment of content - once this is applied, it will override the Sector assignment. The Admin/Sample Takers users MUST be assigned to the CCG in order to view the content.

**Practice/Department Assignment** | This allows for multiple Practices/Department assignment of content - once this is applied, it will override the Sector & CCG assignment. The Admin/Sample Takers users MUST be assigned to the Practice/Department in order to view the content.

**Add a document / update**

Click browse to select the document to be uploaded.

**BROWSE**

**Find a document**

**Find**

**Documents up for review**

These are documents on the database which have exceeded their review date.

**CCG Assigned Docs up for review**

New Test File  
Last update: 17/11/2016

**Sector Assigned Docs**

CMFT TEST Doc 2  
Last update: 17/11/2016

Refer to section [5.5](#) for instructions on searching for documents on the CSTD Manchester.



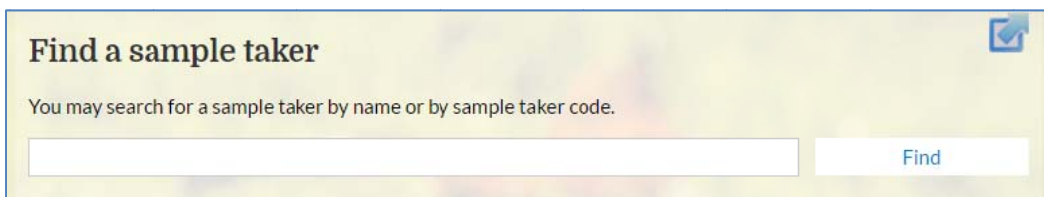
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### 4.4. Sample Taker Management

This allows for the management of new and existing sample takers. Here, new sample takers can be added to the database and allocated a unique sample takers code. Also, sample taker details, training history and performance reports can be accessed here.

Sample Taker Management section consists of the following:

1. Find a sample taker

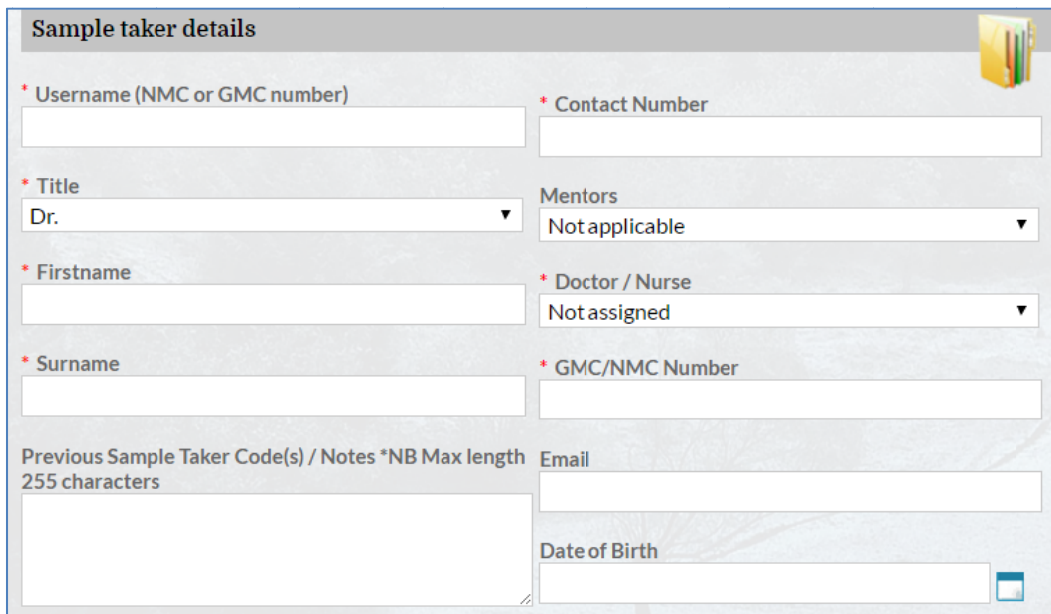


**Find a sample taker**

You may search for a sample taker by name or by sample taker code.

2. Request to add new sample taker

- Sample Taker details



**Sample taker details**

\* Username (NMC or GMC number)

\* Contact Number

\* Title

Mentors

\* Firstname

\* Doctor / Nurse

\* Surname

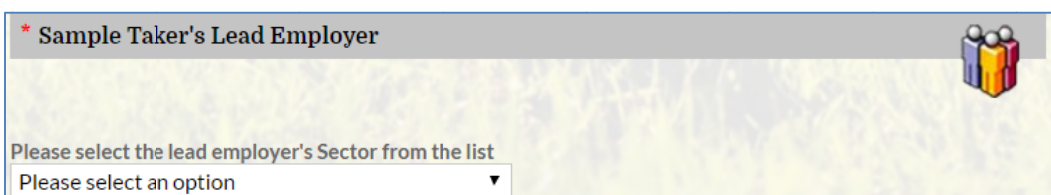
\* GMC/NMC Number

Previous Sample Taker Code(s) / Notes \*NB Max length 255 characters

Email

Date of Birth

- Sample Taker's Lead Employer

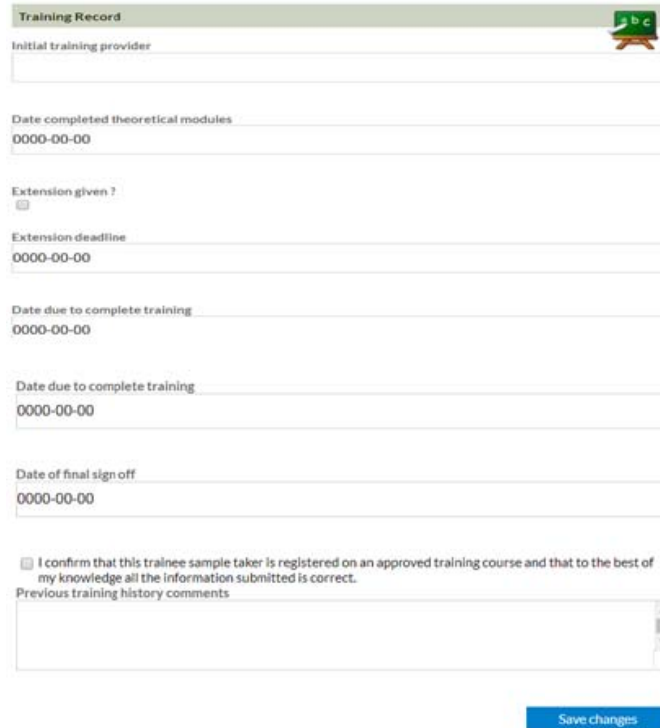


**\* Sample Taker's Lead Employer**

Please select the lead employer's Sector from the list

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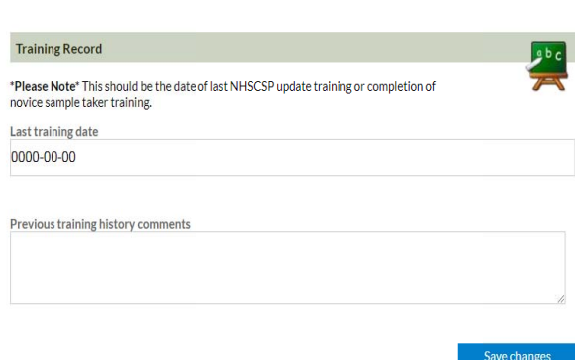
Training Record – For entering details of a trainee sample taker.



The screenshot shows a web form titled "Training Record" with a small icon of a green board with letters 'a', 'b', and 'c' on it. The form contains several input fields and a checkbox:

- Initial training provider: [text input field]
- Date completed theoretical modules: 0000-00-00 [date input field]
- Extension given ? ☐
- Extension deadline: 0000-00-00 [date input field]
- Date due to complete training: 0000-00-00 [date input field]
- Date due to complete training: 0000-00-00 [date input field]
- Date of final sign off: 0000-00-00 [date input field]
- ☐ I confirm that this trainee sample taker is registered on an approved training course and that to the best of my knowledge all the information submitted is correct.
- Previous training history comments: [text area]
- Save changes: [button]

3. Training Record – For Qualified sample takers.




The screenshot shows a web form titled "Training Record" with a small icon of a green board with letters 'a', 'b', and 'c' on it. The form contains the following elements:

- \*Please Note\* This should be the date of last NHSCSP update training or completion of novice sample taker training.
- Last training date: 0000-00-00 [date input field]
- Previous training history comments: [text area]
- Save changes: [button]

4. Reassign Sample Taker to your practice:



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**Reassign a Sample Taker to your practice** 

If a sample taker has joined your practice from another practice in the region and is already on the CSTD you may assign them to your practice using this function. If you cannot find the sample taker on the system, then you will need to add them to the system.

**Find**

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### 4.5. Events/Training Dates

This section of the Cervical Sample Taker Database allows you to preview various events and training sessions published for your sector, CCG and practice.

### Events / Training Dates

Please find below a list of courses and events that you may be interested in attending.

#### Find an event / training day

Using find an event / training day you can edit or delete your events. To assign a download to your event, click browse to search for the file you wish to attach.

Find event

#### View events

There are no events.

List of latest events is also available on the dashboard (see section 4.2).

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### 4.6. Data Uploading/Reports

This section of the Cervical Sample Taker Database allows for reports relating to the Sample Takers' data to be generated for the quality assurance of cervical sample takers. These reports can be produced for various date ranges and can be exported into Microsoft Excel.

### Data Uploading / Reports

This section allows sample taker data to be uploaded in batches and reports to be generated for the quality assurance of cervical sample takers. These reports can be produced for various date ranges and can be exported into Microsoft Excel.

#### Report Generation

Click on the name of the report you wish to generate.

REPORT:28   Sample Takers   Training Email Notifications
REPORT:27   Sample Takers   APR18 Export
REPORT:26   Admin Users   Certificates printed
REPORT:25   Sample Takers   Certificates with no date
REPORT:24   Sample Takers   Export System 1
REPORT:23   Sample Takers   Training Due
REPORT:22   Mentors   Refresher Training
REPORT:01   Laboratory   Inadequates & ZT
REPORT:02   Sample Takers   List via CCG
REPORT:03   Sample Takers   CCG
REPORT:04   RAG Ratings   Inadequates
REPORT:05   RAG Ratings   Sample Acceptance Policy

### 4.7. Log out

This section of the Cervical Sample Taker Database will terminate the current session logging you out of the system.

Please remember to save/update any changes before committing and pressing the button.

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### 5. 'How to' guides

#### 5.1. Update my personal details

To review and amend personal details (where possible):

1. Click on 'Your account' button located on the right side of the screen
2. Following fields can be amended by the Practice Manager- see section 4.1:
  - Password
  - First name
  - Surname
  - Contact Number
5. Once finished, click on 'Update details' button to save changes you've made.

Details such as your username/email address can only be updated by the Laboratory IT Helpdesk, see section 6 for contact details.

Please email your request, clearly stating your full name together with the details you wish to be updated.

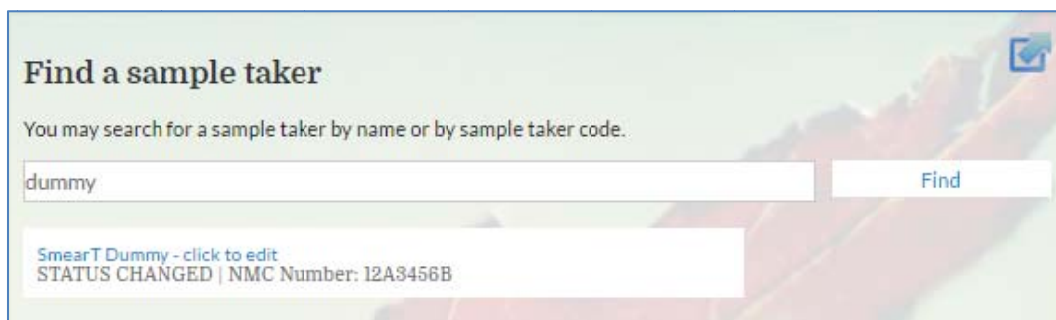
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### 5.2. Search for Sample Taker record

Before moving on to creating a brand new Sample Taker entry in the CSTD you should first ensure that they don't already have an account with us as the CSTD will not allow duplicate accounts to be created (based on the GMC/NMC number).

To search for existing Sample Taker's records:

1. Use the 'Find a sample taker' search engine located under the 'Sample Taker Management' of the CSTD to search for the Sample Taker record:



It is possible to search using the NMC or GMC code. You can also search by entering the Surname / Forename.

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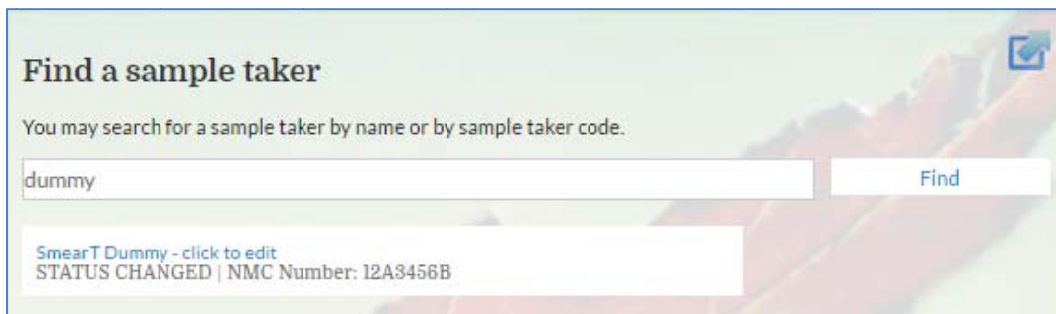
### 5.3. Manage a Sample Taker's profile

**Note:** Before you are allowed to edit an existing Sample Taker's record you will have to ensure that they are assigned to your practice, otherwise you won't be able to search and access that record. To assign Sample Taker to your practice please follow instructions from section 5.5.

As a part of your responsibilities as a Practice Manager or lead clinician, you are required to keep all the CSTD Sample Taker's records that are employed by your practice/hospital up to date.

These can include any combination of Sample Taker details as listed below:

- Sample Taker details
  - Lead employer
  - Practice/Department Assignment
  - Sample Taker details – Sample Taker Training Status
  - Initial Training – dates relating to the type of training received
  - Update Training Record – following an eLearning or the 3-year update
  - Training Evidence (uploads) – upload new training certificate
1. Use the 'Find a sample taker' search engine located under the 'Sample Taker Management' of the CSTD to search for the Sample Taker record:



2. Click on the record to edit it.
3. Scroll down to the subsection of your interest (as above) – see section 4.4.
4. Update or add details where required. See section 5.3 for detailed instructions.

**Note:** Fields with a blue background are only editable by the Labs IT Support team.

5. Contact the Laboratory IT Helpdesk should you experience any difficulties or if you would like them to update any of the remaining details (clearly specify these in your email) – see section 6.

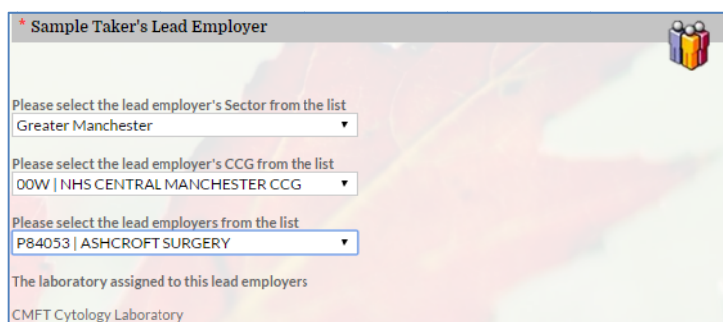
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### 5.4. Register a qualified Sample Taker

**Note:** Before submitting request for new registration always ensure that smear taker isn't already registered within the CTSD. To do so follow the instructions from section [5.2](#)

To register a new qualified Sample Taker on the Manchester CSTD, you have to complete the 'Request to add new sample taker' form located under the 'Sample Taker Management' section – see section [4.4](#):

1. Complete the 'Sample Taker details' subsection by providing the following data:
  - Username (NMC - 8 alphanumerical characters / GMC – 7 numerical digits only)
  - Title
  - First name
  - Surname
  - Contact Number
  - Doctor/Nurse
  - GMC/NMC Number
  - Email (used to notify the Sample Taker of CSTD account creation)
  - Date of Birth (if known)
  - Sample taker status (Qualified / Not-Qualified)
2. Specify the 'Sample Taker's Lead Employer' by selecting from the list:
  - Select the sector of employment:
    - Cumbria
    - East Lancashire
    - Greater Manchester
    - Lancashire
    - Merseyside
  - Based on the sector selection, select the CCG of employment.
  - Based on the CCG selection, select the practice of employment.



\* Sample Taker's Lead Employer

Please select the lead employer's Sector from the list  
Greater Manchester

Please select the lead employer's CCG from the list  
00W | NHS CENTRAL MANCHESTER CCG

Please select the lead employers from the list  
P84053 | ASHCROFT SURGERY

The laboratory assigned to this lead employers  
CMFT Cytology Laboratory



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3. Provide as much information as possible about the Sample taker's 'Training History'
  - Previous training history comments
  - Initial training provider
  - Date completed theoretical modules
  - Extension given?
  - Date due to complete training
  - Date of final sign off

**N.B. You will need to enter a 'Last Training Date' into the Sample Taker record - this can only be done once the user has been added into the CSTD and the sample taker status has been set to "qualified".**
4. Click on 'Add sample taker' button located on the bottom of the page.
5. If Sample Taker is employed at more than one location, click on 'Add a Practice/Department' button to add the secondary location assignments.
6. Under the 'Training evidence (uploads)' subsection upload any available training certificates. To do so, click on the 'Browse' button to upload a certificate.
7. Click on 'Save changes' button at any point to save changes you've performed.

**Note:** All new registration requests are sent for approval to the Laboratory IT Helpdesk, we will send a confirmation email to the Sample Taker once your request has been accepted.

### 5.5. Reassign Sample Taker to your practice

1. Access the 'Sample Takers management' section of the CSTD – see section [4.4](#)
2. Scroll down the page to section titled 'Reassign a Sample Taker to your practice'
3. In the text box enter the GMC/NMC number of the Sample Taker you wish to assign to your practice
4. If this fails to return any results, register a new Sample Taker – see section [5.4](#)
5. If correct record is returned (verify the full name as well as the GMC/NMC number) click on that record to assign it to your practice (your own practice assignment):

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### Reassign a Sample Taker to your practice



If a sample taker has joined your practice from another practice in the region and already has a regional sample taker code, you may assign them to your practice using this function. If you cannot find the sample taker on the system, then you will need to request a code for them..

[Find](#)[TEST ST](#) | - click to assign

JL0HM | Status: Active | GMC Number: G112233

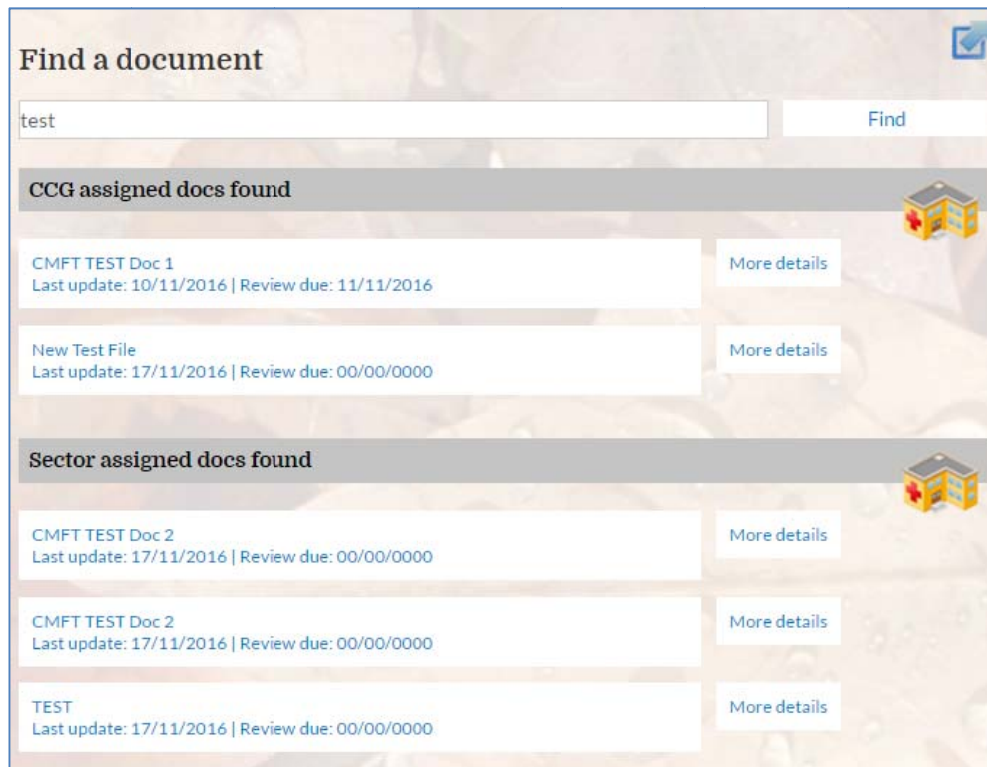
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### 5.6. Finding a document, manual or newsletter

Various documents will be published and made available to you either on the 'Dashboard' under 'Latest documents' subsection (see section 4.2) or in the 'Documents' designated section of the Cervical Sample Taker Database. The 'Documents & Updates' section (see section 4.3) allows you to search for document or guideline no longer displayed on the 'Dashboard' but still active within the Manchester CSTD.

To find a document assigned to your Sector or CCG:

1. Find a document or update of interest to you by either looking at 'Latest documents' list on the 'Dashboard' or 'View documents & updates' list on the 'Documents & Updates' sections.
2. If the document or update is not found as explained in step 1 above, use the 'Search documents & updates' facility as shown below:



**Find a document**

test Find

**CCG assigned docs found**

CMFT TEST Doc 1 Last update: 10/11/2016   Review due: 11/11/2016	More details
New Test File Last update: 17/11/2016   Review due: 00/00/0000	More details

**Sector assigned docs found**

CMFT TEST Doc 2 Last update: 17/11/2016   Review due: 00/00/0000	More details
CMFT TEST Doc 2 Last update: 17/11/2016   Review due: 00/00/0000	More details
TEST Last update: 17/11/2016   Review due: 00/00/0000	More details

3. Click on the document or update to open it.

N.B. To view all documents available to you, leave the search field empty and click 'Find'

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## 5.7. Report generation

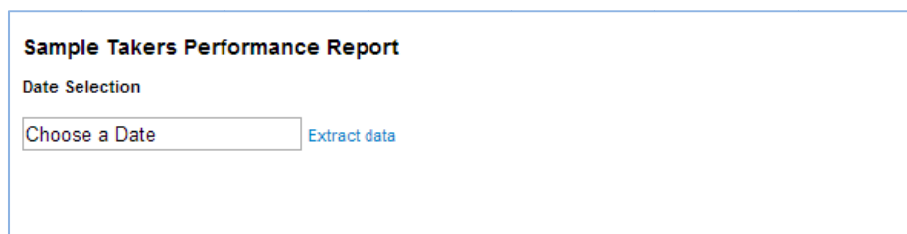
A total of ten custom reports are available to each Practice Manager to be generated when required. These are available from the 'Data Uploading/Reports' section (see section 4.6) of the Cervical Sample Taker database:

- RAG Ratings | Inadequate
- RAG Ratings | ZT
- Practice Coverage Data
- Number of months in basic training
- Sample takers requiring update training in the next year
- Sample takers performance (Org)
- Sample takers performance (CCG)
- Organisation Performance
- Other Practice Performance Data

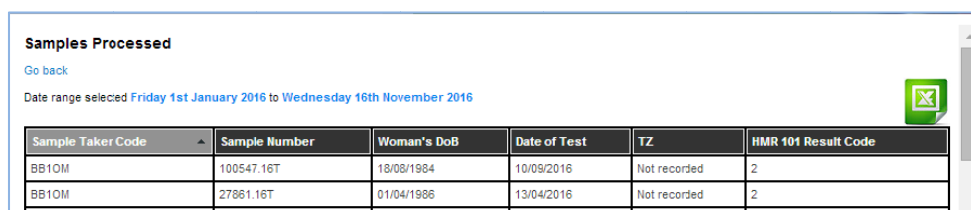
**Note:** When each batch of data is ready for review a system global message will appear for all sample takers to make them aware. Please note that there is an approximate gap of 6 weeks k;

### To run a report:

1. Click on the description of the report to select it.
2. Depending on your selection an additional pop-up window might appear asking you to select a date filter to be applied to the report:



3. Select the date and click on 'Extract data'.
4. Table matching selected criteria will be displayed:



Sample Taker Code	Sample Number	Woman's DoB	Date of Test	TZ	IIMR 101 Result Code
BB10M	100547.16T	18/08/1984	10/09/2016	Not recorded	2
BB10M	27861.16T	01/04/1986	13/04/2016	Not recorded	2

5. If required, click on the green icon to save the report as Excel document.

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### 6. Contact details

#### Cytology Laboratory

Operational issues around sample taking and Cervical screening results:

Email: [cyto.pathology@mft.nhs.uk](mailto:cyto.pathology@mft.nhs.uk)

Telephone: 0161 276 5111

Fax: 0161 276 3285

#### Laboratory IT Helpdesk

Technical issues around access and functionality to the Manchester CSTD:

Email: [labs.sd@mft.nhs.uk](mailto:labs.sd@mft.nhs.uk)

Telephone: 0161 276 4079