**DPHN**

**Instructions/FAQ’s for setting up**

**Public Health Nursing**

**Primary Care Metrics Software system**

**15th Sept 2021 v2**

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 **DPHN Instructions for setting up and viewing the primary care metric system**

**Setting Up**

You have received a link to the system and a username and password.

**Initial Set up**

Click on the link and the system will open (**for subsequent access to the system please use google Chrome to enter www.phnmetrics.ie)**

Enter the username and password that you have received

This will bring you to the DPHN portal.

**Tutorials/Training video clips are embedded into the DPHN portal home page and will be available every time the DPHN portal is opened.**

**The following instructions are in addition to the tutorials and will assist you in setting up the nurses within your network on the system and dealing with different scenarios.**

**Set up your ADPHN’s user name and password**

Action: Go to Nurses Tab

Register New – register each ADPHN as’ Network admin ‘ in the drop down box

Create a user name for the ADPHN

Create a Password – the system will generate a password for you or you can choose your own password.

If you choose to create your own password please use following rules

At least 6 characters

One capital

One number

One symbol

Once you have set up each ADPHN in your area please send on username and password to each ADPHN

***Only the DPHN can view all networks in his/her area. Each ADPHN can only access data for his/her own network***

*Instructions/training clip for the use of this DPHN portal is embedded into this Home page.*

**What do I do next?**

Instruct the ADPHNs in your area to proceed to set up all the PHNs and RGNs in each network/sector onto the system (prioritise PHNs initially then move to set up RGNs).

On average it should take an ADPHN 2 -3 days to set up all staff on the system. This amount of time allows the ADPHN time to familiarise themselves with the system and complete the training tutorials This is a very rough estimate as it will depend on the number of staff, number of job sharers, numbers of RGNs working across caseloads.)

It takes less than a minute to set up each nurse on the system.

 Each ADPHN is allocated a Network Number ( 1 2,3, etc). You as DPHN need to confirm with each ADPHN re numbering of networks/unless it is already agreed

Once an ADPHN is allocated his/her/Network number this should not change.

Aim to have all staff up on the system and ready to commence data entry at the beginning of a month. If data entry commences mid-month retrospective data will have to entered If all staff commence use of the system within a given month there is no overlap with the excel spreadsheets

**Before transferring data to the CIF sheet at month end**

1. Check in the tab ‘Network’ and then ‘submissions’ that all the green boxes are ticked. (Each PHN ticks the box at the end of the month to confirm that entries are complete for that month).
2. Continue as with Excel sheets and enter ‘monthly in arrears’ data onto CIF sheet
3. The DPHN can allow DPHN admin access into the system. This person can then be delegated the task of transferring the data onto the CIF sheet /once agreed with DPHN

**How do I set up the PHN or RGN Caseload Holders?**

**(ADPHNs as administrators of the system will complete this however you have the facility to this also)**

*The ADPHN can commence setting up the caseloads as soon as he/she receives the link However It is recommended that ADPHNs plan for implementation of the system to start (i.e PHNs and RGNs to commence data entry) on the first of the month or as early in the month as possible..*

*It is advisable also for the DPHN to be familiar with the ADPHN and PHN portal. It is important to note that the PHN must tick a box at the end of each month’s data entry to indicate that all entries for the month are complete. The nurse receives a prompt from the system to do this. Unless this box is ticked the ADPHN has no way of knowing whether data entry is complete for that month. This ‘tick’ is recorded as green in the ‘****Nurse Submissions Tab’.*** *There is also a prompt at the end of the month to remind the nurse to enter data into line 91, 92 and 93*

*If a nurse makes a mistake on her data entry and wishes to correct the error, the only change that the nurse can make is an increase. The system does not allow for decreasing activity numbers. The ADPHN as administrator of the system can decrease activity number in consultation with the nurse. This is a design feature.*

*Do not attempt to fill out the initial set up form as this form is only to be filled out by the PHN. It will only appear on one occasion: the first time the PHN opens the system. It will never need to be completed again*

**Network/Sector Numbers**

Each ADPHN is allocated a Network Number (1, 2, 3, etc). Please check with DPHN re numbering of network, if it has not already been agreed.

Once the ADPHN is allocated a network number this should not change.

**Caseloads**

Each network is allocated 30 caseloads on the system eg. Network 1 (1-30), Network 2 (31-60), Network 3 (61-90) etc.

Before you start setting up the PHNs into caseloads ensure that you have allocated a caseload code to each existing caseload. The PCM caseloads codes will likely differ from the existing system that is used for naming or numbering caseloads in your area. E.g. in South Tipperary the caseload codes are ST 01 to ST30. The first two letters signify the LHO and the numbers indicate the caseload number/code

**Set up PHNs and RGNs from your network onto the system**

Go to the tab named Nurses and select ‘Register New’.

Set up each PHN caseload in your network, a different caseload code is generated by the system

Each PHN caseload is allocated Number e.g. KK01.

If an RGN is a caseload holder, link the RGN to the allocated caseload code.

The system will automatically generate a password for each PHN or you can select to enter your own password.

N.B. If you have more than one nurse linked to a caseload, the last nurse that you assign to a caseload is the name that will appear in the ADPHN portal/caseloads/monthly summaries

**Set up PHN job sharers**

If there are two PHNs job sharing a caseload, the two PHNs use the same caseload code.

Both PHNs can then enter activity into this caseload e.g. Mary Byrne KK12 and Kate Murphy KK12.

Mary and Kate will have different user names but can both access the same caseload.

**Set up an RGN (non caseload holders)/HCA**

If an RGN or HCA just works with only one PHN: set up the RGN or HCA and link him/her to the PHN caseload code.

If an RGN or HCA works with several PHN caseloads: set up the RGN or HCA and link him/her to each of the caseloads. This allows data activity entry in all of the caseloads.

The system will only allow you to use a username once. You can only set her up as e.g. joan.bloggs@hse.ie on one occasion. In order to link a RGN or HCA to more than one caseload use a different identifier for the RGN or HCA for each caseload e.g. number, letter or symbol. In the example below the RGN is working across four caseloads and the unique identifier is the caseload code.

joan.bloggs13@hse.ie is linked to PHN caseload KK13

joan.bloggs16@hse.ie is linked to PHN caseload KK16

joan.bloggs20@hse.ie is linked to PHN caseload KK20

joan.bloggs34@hse.ie is linked to PHN caseload KK34

To make it easier for the RGN or HCA be sure and use the same password for each different user name.

In this example Joan Bloggs RGN can go into the system and correctly get access to the relevant PHN caseload. The RGN has to be careful to use the correct user name for each PHN caseload. When the RGN or HCA enters the system she should double check the number/code of the caseload on the data entry page before starting data entry.

**Set up Cross Cover Staff**

In the event of maternity, sick or other leave any cross cover staff can be set up and linked to the respective caseload. You will have to create a different username similar to setting up an RGN that works across several caseloads.

**Set up agency staff**

Agency staff working within the PHN service can be set up on the system as long as they have a HSE email and access to a desktop. HSE mobile phone is required for data entry on a mobile phone.

 **Removing a PHN/RGN/HCA from a caseload.**

If a PHN/RGN/HCA retires or moves out of a caseload e.g. KK12, delete this user and set up the new PHN/RGN/HCA and allocate the new PHN/RGN/HCA to the KK12 caseload. The caseload data is never deleted. Any other nurse (e.g. job sharer or RGN) linked to KK12 will remain unchanged.

 **Combined Caseloads/Integrated Teams**

If several caseloads have been combined for operational reasons (e.g. during Covid – 19 or Longford/Westmeath model: just allocate a caseload code to the ‘combined caseloads’ and then attach all the staff that work in that combined caseload to the caseload code.

**DPHN view of current monthly activity**

In the DPHN portal, the DPHN can view the total monthly activity to date for any caseload (cumulative).

In the event the DPHN wants to view entries for the any period go to network tab and click ‘Edit Recent Submissions’. You can search by Email address/ caseload/year/month/day

**Technical Issues**

’When accessing [www.phnmetrics.ie](https://scanner.topsec.com/?t=0e3862b6e1b71a5c06b476d93963197bdc805945&u=http%3A%2F%2Fwww.phnmetrics.ie&d=1762&r=show), please ensure you are using HSE equipment e.g. HSE laptop, phone or PC on the NHN network (HSE Network)

Majority HSE phones are on HSE network.

If inputting on a HSE phone ensure you are using data and not attached to non HSE WI-FI

Personal equipment will prevent access.

Please do not use personal Wi-Fi (HSE Checkpoint VPN is okay)’’

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| **PHN/RGN caseload holders instructions to commence data entry** |

The ADPHN sends each PHN or RGN Caseload holder (by email)

1. User name
2. Password
3. Link to system
4. Zipped file - this contains templates to assist the nurse in collecting waiting list and caseload data. *(Waiting list and Caseload template are only completed once and only required for initial set up as the system will carry over into each new year).* The zipped file also contains instructions on how to create a desktop icon and set up a link on mobile phone. **Be sure and include the link to the system into the instructions.**

**Tutorials/Training video clips are embedded into the PHN portal home page and will be available every time the PHN portal is opened.**

The page to enter the waiting lists and caseload data will automatically pop up for the PHN/RGN when the PHN portal is opened for the first time.

The PHN/RGN can commence data entry at any time in the month. It is recommended that data entry starts on the first of the month. However if the nurse commences mid-month, retrospective activity data has to be entered for that month.

**PHN/RGN instructions:**

**Step one:** enter your username and password

This will bring you to the PHN portal page

**Step Two:** click on tab named Forms at the top of the page. Select **Daily Input**. The initial set up form will appear.

**Step Three:** enter your waiting list and caseload data and press the green **Submit** button at the bottom left of the page in order to save the data. When the submit button is clicked the Daily Input page will automatically open.

**Sample email to be sent to PHN/ RGN caseload holder with above attachments**

*Dear PHN/RGN Caseload holder*

*Primary Care metrics are moving from excel to a software system that will be available on your HSE mobile phone., laptop or desktop. The system is now ready for you to set up your Primary Care Metrics on the new software system. I am enclosing your user name, password and link to enter the system.*

***You will need to use Google Chrome to enter www.phnmetrics.ie***

*I would be grateful if you could look at your current metrics and record your caseload totals in each care group as of the end of (state month). Also record the number of new patients seen for each care group for the months of (state months), this information is required for new system. See attachments for further instructions if required. This information is only required once to set up the system.*

***Tutorials/Training video clips are embedded into the PHN portal home page and will be available every time the PHN portal is opened.***

***Link:***

***Username:***

***Password:***

***Attachments:***

1. *Template to enter waiting list data (Care group activity)*
2. *Template for caseload Data (Care group patient totals)*
3. *Instructions on how to create icon on desktop and shortcut on mobile phone*. **Be sure and include the link to the system into the instructions.**

*It is recommended to start using the system for the first time on the first day of a month. (be sure you have completed all data entry in the excel sheets for the previous month before you move to new system) You can commence data entry at any time in the month, however if you do start mid-month then all retrospective data has to be entered for that month.*

***How to get started?***

**Step one:** enter your username and password

This will bring you to the PHN portal page.

**Step Two:** click on tab named **Forms** at the top of the page. Select **Daily Input**. The initial set up form will appear.

**Step Three:** enter your waiting list and caseload data and press the green **Submit** button at the bottom left of the page in order to save the data. When the submit button is clicked the Daily Input page will automatically open.

You can now commence entry of activity data.

*Best of luck*

………………ADPHN

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| **RGNs instructions to commence data entry** |

The ADPHN sends each RGN

1. User name or user names if the RGN is working across several caseloads
2. Password
3. Link to system
4. *Instructions on how to create icon on desktop and shortcut on mobile phone*. **Be sure and include the link to the system into the instructions.**

Tutorials/Training video clips are embedded into the PHN portal home page and will be available every time the PHN portal is opened.

The RGN cannot commence data entry until the PHN has entered the waiting list and caseload data. This has to be inputted first to activate the system. It is advisable to set up the PHNs/RGN caseload holders first and ensure the PHNs have commenced data entry prior to sending on the usernames and links etc. to the RGNs.

*Dear RGN*

*Primary Care metrics are moving from excel to a software system available on your HSE mobile phone, laptop or desktop. The system is now ready for you to commence entry of Primary Care Metrics onto the new software system. I am enclosing your user name, password and link to enter the system.*

***You will need to use Google Chrome to enter www.phnmetrics.ie***

*Tutorials/Training video clips are embedded into the PHN portal home page and will be available every time the PHN portal is opened.*

***Link:***

***Username:***

***Password:***

***Attachments:***

***Instructions on how to create icon on desktop and shortcut on mobile phone***

*It is recommended to start using the system for the first time on the first day of a month. You can commence data entry at any time in the month, however if you do start mid-month then all retrospective data has to be entered for that month.*

***How to get started?***

**Step one:** enter your username and password

This will bring you to the PHN portal page.

**Step Two:** click on tab named **Forms** at the top of the page. Select **Daily Input**.

**Step Three :** enter your activity data and be sure to press the green **Submit** button. The daily input page will automatically open on today’s date. You can change the date retrospectively using the calendar.

*You can now commence entry of activity data*. *It is recommended to start using the system for the first time on the first day of a month. (be sure you have completed all data entry in the excel sheets for the previous month before you move to new system) You can commence data entry at any time in the month, however if you do start mid-month then all retrospective data has to be entered for that month. Before you make your first entry please check with the PHN caseload holder that he/she has activated the system*

*Best of luck*

……………………ADPHN

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| **HCA’s instructions to commence data entry** |

The ADPHN sends each HCA

1. User name or user names if HCA is working across several caseloads
2. Password
3. Link to system
4. *Instructions on how to create icon on desktop and shortcut on mobile phone*. **Be sure and include the link to the system into the instructions.**

Tutorials/Training video clips are embedded into the PHN portal home page and will be available every time the PHN portal is opened.

The HCA cannot commence data entry until the PHN has entered the waiting list and caseload data. This has to be inputted first to activate the system. It is advisable to set up the PHNs/RGN caseload holders first and ensure the PHNs have commenced data entry prior to sending on the usernames and links etc to the HCAs.

*Dear HCA*

*Primary Care metrics are moving from excel to a software system available on your HSE mobile phone, laptop or desktop. The system is now ready for you to commence entry of Primary Care Metrics into the new software system. I am enclosing your user name, password and link to enter the system.*

***You will need to use Google Chrome to enter www.phnmetrics.ie***

*Tutorials/Training video clips are embedded into the PHN portal home page and will be available every time the PHN portal is opened.*

***Link:***

***Username:***

***Password:***

***Attachments: Instructions on how to create icon on desktop and shortcut on mobile phone***

 *You can commence data entry at any time in the month, however if you do start mid-month then all retrospective data has to be entered for that month.*

***How to get started?***

**Step one:** enter your username and password

This will bring you to the PHN portal page.

**Step Two:** click on tab named **Forms** at the top of the page. Select **Daily Input**.

**Step Three :** enter your activity data and be sure to press the green **Submit** button. The daily input page will automatically open on today’s date. You can change the date retrospectively using the calendar.

 *You can commence data entry at any time in the month, however if you do start mid-month then all retrospective data has to be entered for that month. Before you make your first entry please check with the PHN caseload holder that he/she has activated the system. (be sure you have completed all data entry in the excel sheets for the previous month before you move to new system)*

*Best of luck*

……………………ADPHN

 **Plan for national roll out and national reports**

It is envisaged that all DPHN areas will have migrated to the new PCM software system by the end of Dec 2021. One CHO area at a time will be supported to implement. Regular webex will be held to **support ADPHNs** with implementation. The PHN/RGN introductory letter and PHN tutorials are sufficient to allow front line staff to commence data entry. (Based on feedback from pilot site).

Monthly/ annual reports per DPHN/CHO will be generated from the system for Primary Care

No excel sheets will be prepared for 2022.

 **Further help/queries**

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