



Public Health  
England

Protecting and improving the nation's health

# HCAI Data Capture System User Manual

Summary Dashboard

# About Public Health England

Public Health England exists to protect and improve the nation's health and wellbeing, and reduce health inequalities. It does this through world-class science, knowledge and intelligence, advocacy, partnerships and the delivery of specialist public health services. PHE is an operationally autonomous executive agency of the Department of Health.

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## Document History

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# Contents

About Public Health England	2	
Document History	3	
Dashboards	5	
Introduction		5
Summary Dashboard	6	
Using the Summary Dashboard		6
Summary Dashboard Parameters		7
Summary Dashboard Report Navigation		7
Summary Dashboard Parameters		7
Summary and Trends Elements		10
Data Collection Completeness Element		10
Data Collection Completeness (Shared Cases) Element		13
Sign-off History Element		15
PIR Actions Element		16

# Dashboards

## Introduction

There are up to three report dashboards available to users depending on their permissions and access to the system. The dashboards provide an overview of data on the system to direct user's workflow and highlight outstanding actions. The available dashboards are:

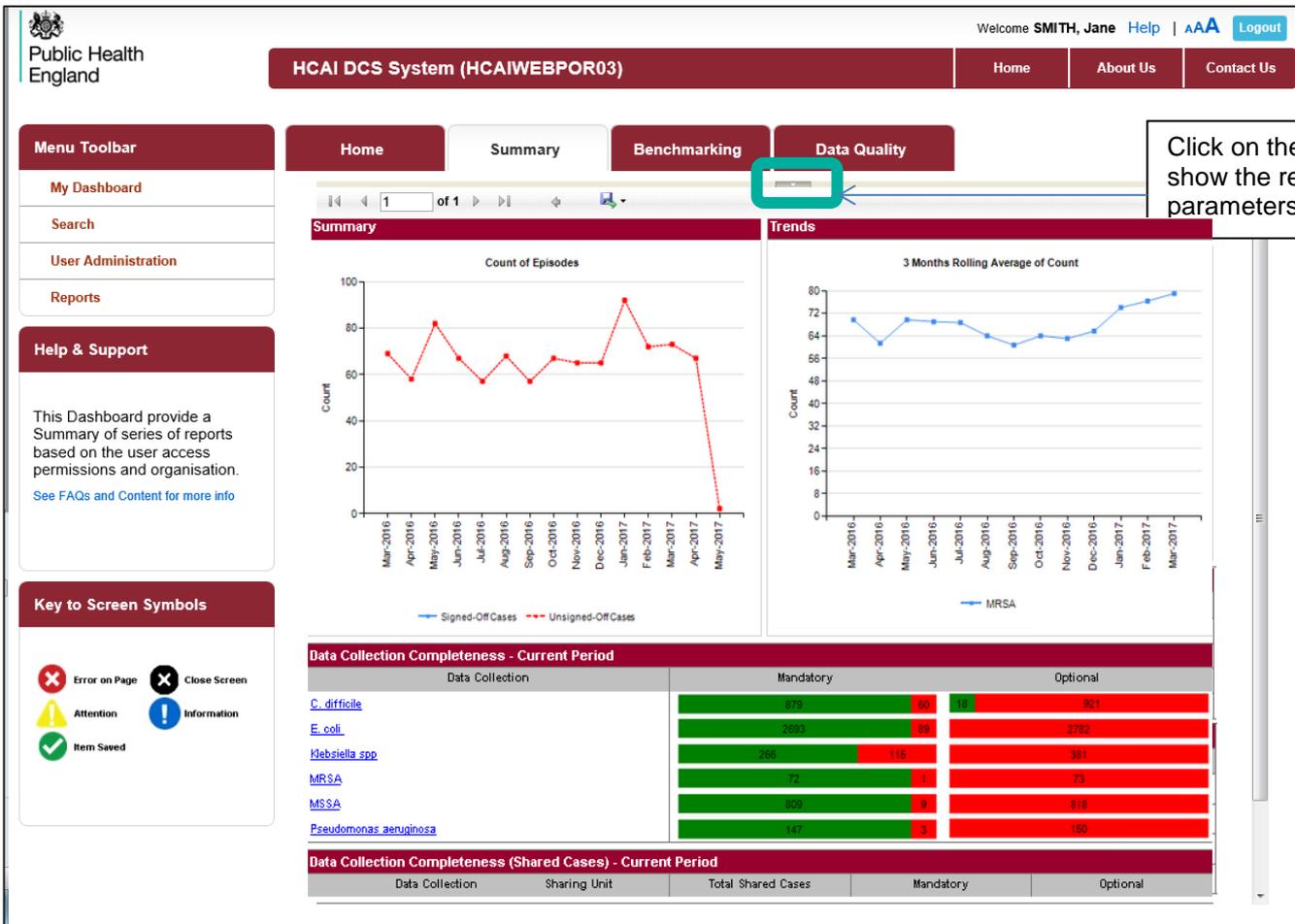
- Summary (summary of cases entered onto the system, data completeness, sign off and Post Infection Review (PIR));
- Benchmarking (allows users to compare their organisation against other organisations in terms of rates and counts of reported cases);
- Data Quality (completeness of data entry of cases on the system).

# Summary Dashboard

## Using the Summary Dashboard

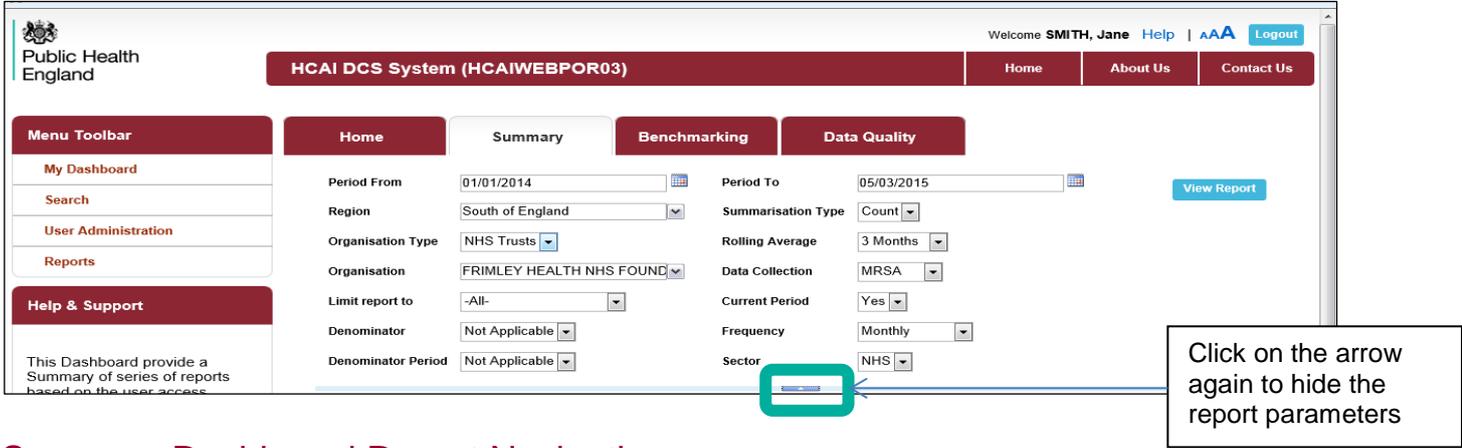
The Summary Dashboard has up to five elements, access to which is determined by user permissions. When first landing on the Summary Dashboard a report, based on pre-set default parameters, similar to Figure 1 will appear. To view and modify the parameters (see Figure 2) click on the small down arrow towards the top of the screen. The parameters can be hidden by clicking this arrow again (Figure 2). Each of the Summary Dashboard elements will now be described in turn. An overview of the different report parameters on the Summary Dashboard can be found in Table 1.

Figure 1: The Summary Dashboard



## Summary Dashboard Parameters

Figure 2: Summary Dashboard Report Parameters



## Summary Dashboard Report Navigation

Several of the Summary Dashboard Elements have hyperlinks allowing users to navigate to other sub-reports. In order to return to the previous report, click on the small blue back arrow located at the top of sub-reports (Figure 3) and not your browser’s “Back” button.

Figure 3: Report Navigation



## Summary Dashboard Parameters

Table 1: Overview of the report parameters on the Summary Dashboard

Parameter	Reports affected	Comment
Period From and Period To	By default: <ul style="list-style-type: none"> <li>Summary graph</li> <li>Trends graph</li> <li>PIR actions</li> </ul> Only if Current Period is set to No: <ul style="list-style-type: none"> <li>Data Completeness</li> <li>Data Completeness (Shared Cases)</li> </ul>	Changes the time period the data is shown for. The time periods selected will always modify the data returned in the ‘Summary’ and ‘Trends’ elements of the Summary dashboard. These dates will only modify other elements of the Summary dashboard if Current Period is set to ‘No’. See below.

Parameter	Reports affected	Comment
Summarisation Type	<ul style="list-style-type: none"> <li>• Summary graph</li> <li>• Trends graph</li> </ul>	Changes the chart output to Count or Rate. This parameter only affects Summary dashboard elements where a rate can be returned.
Rolling Average	<ul style="list-style-type: none"> <li>• Trends graph</li> </ul>	<p>Changes the duration of the rolling average calculation. For example, a 3 month rolling average is calculated as the average of the count or rate of the current month and the previous two months. For a 6 month period the calculation would use the current month and the previous 5 months of data, etc.</p> <p>Note the rolling average calculation in the 'Trends' chart will use data prior to the selected 'Period From' in order to calculate the rolling average for the initial data points. The amount of data used prior to the Period From is determined by the Rolling Average selected</p>
Data Collection	<ul style="list-style-type: none"> <li>• Summary graph</li> <li>• Trends graph</li> </ul>	Changes which 'Data Collection' the charts present data for
Limit Report To	<ul style="list-style-type: none"> <li>• Summary graph</li> <li>• Trends graph</li> </ul>	<p>Allows the chart data to present: 'All cases', or cases by apportioning ('Trust apportioned' or 'Non-Trust apportioned') or, for MRSA only, by PIR assignment ('Trust assigned', 'CCG assigned', 'Third Party Assigned').</p> <p>NB <i>E. coli</i> bacteraemia and all Independent Sector data should only be viewed as 'All cases' as they are not subject to apportioning or the PIR process.</p>
Current Period	<ul style="list-style-type: none"> <li>• Data Collection Completeness</li> <li>• Data Collection Completeness (Shared cases)</li> <li>• Sign-off History</li> </ul>	The 'Current Period' works differently for the 'Data Completeness' and 'Sign off History' elements. Please refer to the specific sections below for more detail.
Denominator	<ul style="list-style-type: none"> <li>• Summary graph</li> <li>• Trends graph</li> </ul>	<p>Please refer to the Denominator User Guide for more information on the appropriate denominator to choose.</p> <p>Note this option is only available if 'Summarisation Type' is set to 'Rate'.</p>
Denominator Period	<ul style="list-style-type: none"> <li>• Summary graph</li> <li>• Trends graph</li> </ul>	This will default to 'Most applicable' which means the system will automatically select the time period of the denominator to cover the 'Period From' and 'Period To' dates entered. A specific denominator period can be selected if required.

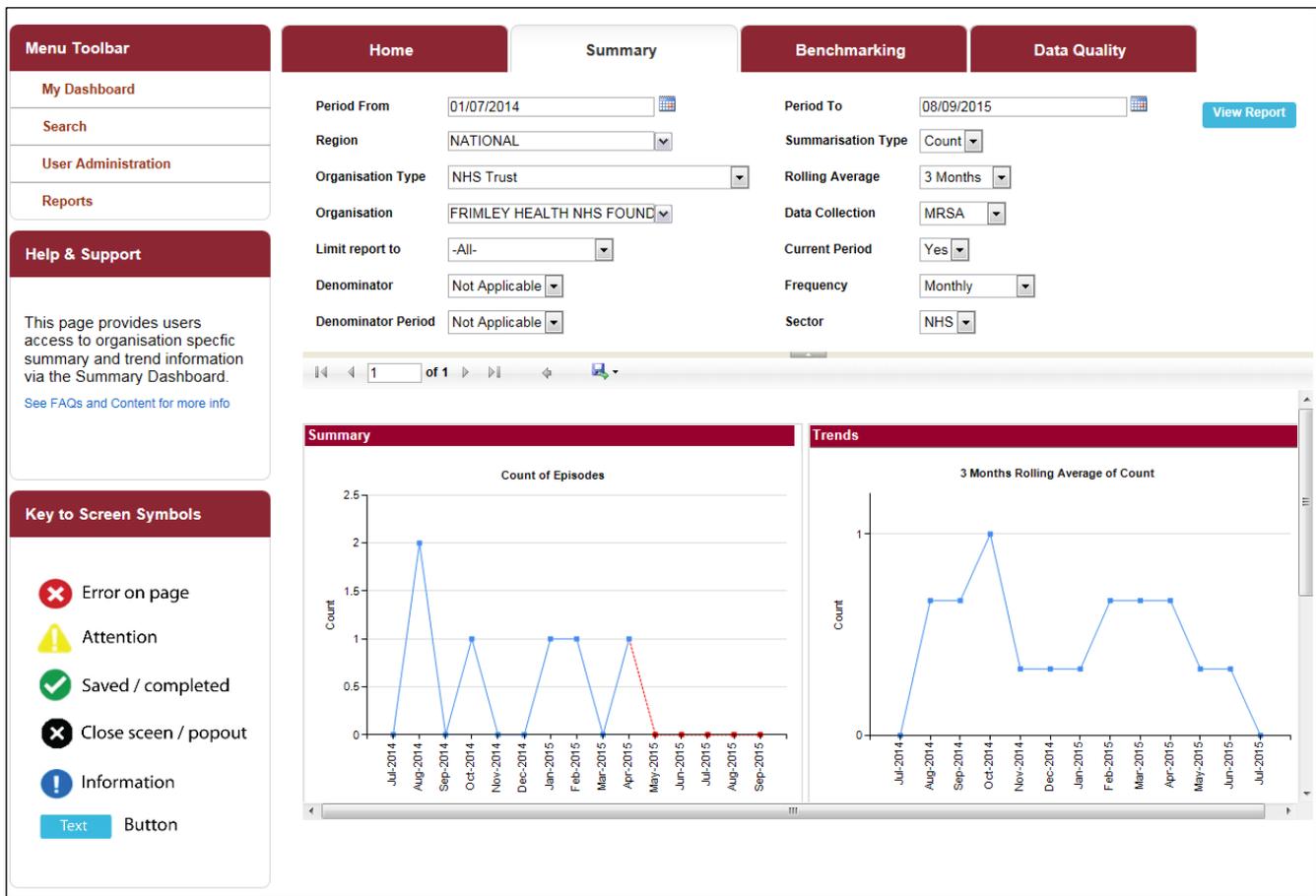
Parameter	Reports affected	Comment
		<p>Note this option is only available if 'Summarisation Type' is set to 'Rate'.</p> <p>Please see the Denominator User Guide for more information.</p>
Frequency	<ul style="list-style-type: none"> <li>• Summary graph</li> </ul>	<p>The 'Frequency' filter changes whether the Summary chart is presented weekly, monthly etc.</p> <p>Note this filter only modifies the output of the Summary element.</p>
Sector	<ul style="list-style-type: none"> <li>• Summary graph</li> <li>• Trends graph</li> <li>• Data Collection Completeness</li> <li>• Data Collection Completeness (Shared cases)</li> <li>• Sign-off History</li> </ul>	<p>This determines whether data reported by the NHS or Independent Sector is shown.</p> <p>Note if viewing data by 'Independent Sector Healthcare Provider' or 'Independent Sector Healthcare Provider Site', then the 'Sector' filter must be set to 'Independent'.</p>
Region	<ul style="list-style-type: none"> <li>• Summary graph</li> <li>• Trends graph</li> <li>• Data Collection Completeness</li> <li>• Data Collection Completeness (Shared cases)</li> <li>• Sign-off History</li> <li>• PIR actions</li> </ul>	<p>This will filter the list of organisations to those within the selected region. This will be limited to the regions the user has permissions to view data for.</p>
Organisation Type	<ul style="list-style-type: none"> <li>• Summary graph</li> <li>• Trends graph</li> <li>• Data Collection Completeness</li> <li>• Data Collection Completeness (Shared cases)</li> <li>• Sign-off History</li> <li>• PIR actions</li> </ul>	<p>Allows the report to be presented based on the selected 'Organisation Type'. This will be limited to the organisation types the user has permissions to view data for.</p>
Organisation	<ul style="list-style-type: none"> <li>• Summary graph</li> <li>• Trends graph</li> <li>• Data Collection Completeness</li> <li>• Data Collection Completeness (Shared cases)</li> <li>• Sign-off History</li> <li>• PIR actions</li> </ul>	<p>Allows the report to be presented based on the selected 'Organisation/s'. This will be limited to the 'Organisation Type' the user has permissions to view data for. Selecting a non-reporting organisation type will map cases to the selected type, based on the organisational hierarchy.</p>

## Summary and Trends Elements

This element shows two graphs at the top of the report screen. The Summary graph, on the left (Figure 4), shows the number or rate of cases entered as per report parameters. Signed off data appears as a blue line and unsigned off data as a red dashed line. If any reporting organisation within the selected report parameters has unsigned off data this will be reflected as a red line.

The Trends graph, on the right (Figure 4), shows a monthly rolling average of the number or rate of cases over time.

Figure 4: Summary and Trends elements of the Summary Dashboard



## Data Collection Completeness Element

This element (Figure 5) shows the completeness of mandatory and optional questions for each of the 'Data Collections' and allows users to drill down to view the record/s which require further data entry. Users who do not have permission to view personal identifiable information (PII) will be able to drill down to these records; however, the PII will be anonymised.

Setting the 'Current Period' control to 'Yes' will return data from the earliest unsigned off period onwards. If there are no unsigned-off data, data from the start of the previous second month onwards will be returned.

An overview of the report output can be found in Table 2.

Figure 5: Data Collection Completeness

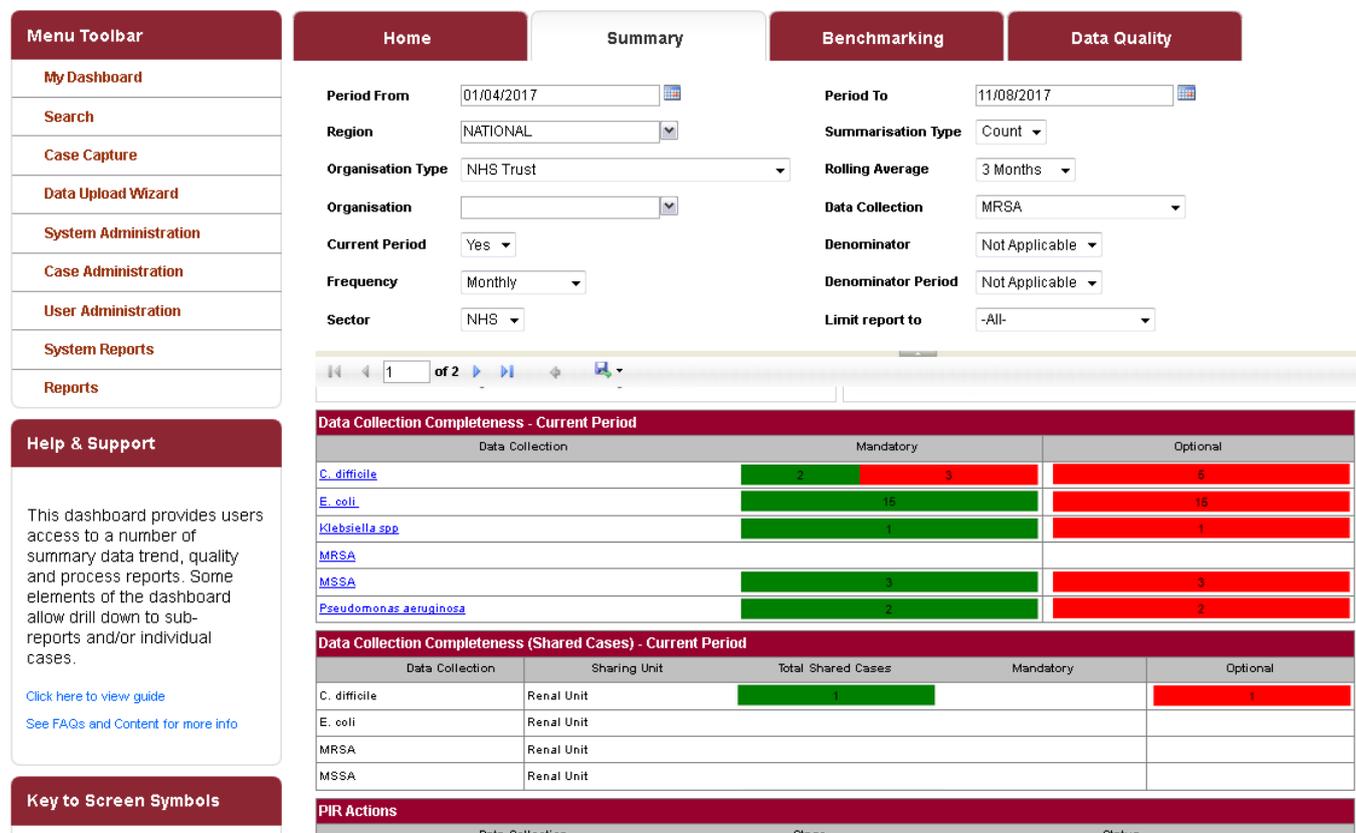


Table 2: Data Collection Completeness: Interpreting the Report Output

Parameter	Comment
Data Collection	<p>List of the relevant 'Data Collections'.</p> <p>Clicking on the 'Data Collection' hyperlink navigates to the drill down report shown in Figure 6. This report shows the number of cases with 'Completed', 'Unknown', or 'Missing' responses for each 'Data Collection Field'.</p> <p>Clicking on the number in each of the 'Completed', 'Unknown' or 'Missing' cells further drills down to a list of the case/s (Figure 7). The ID is a hyperlink which will navigate to the case capture screen allowing any missing data to be completed. If the data are within a signed-off period then an unlock request will need to be made to modify the data (see Unlock User Guide for more information).</p>
Mandatory	<p>Summary of completeness of 'Mandatory' questions for each 'Data Collection'. The green portion of the bar indicates the number of cases with complete mandatory questions and the red portion the number of cases with incomplete mandatory questions (Figure 5).</p>

Parameter	Comment
	<p>Clicking on the red or green bar drills down to a list of the case/s (Figure 7). The ID is a hyperlink which will navigate to the case capture screen allowing any missing data to be completed. If the data are within a signed-off period then an unlock request will need to be made to modify the data (see Unlock User Guide for more information).</p>
Optional	<p>Summary of completeness of 'Optional' questions for each 'Data Collection'. The green portion of the bar indicates the number of cases with complete optional questions and the red portion the number of cases with incomplete mandatory questions (Figure 5).</p> <p>Clicking on the red or green bar drills down to a list of the case/s (as shown in Figure 7). The ID is a hyperlink which will navigate to the case capture screen allowing any missing data to be completed. If the data are within a signed-off period then an unlock request will need to be made to modify the data (see Unlock User Guide for more information).</p>

Figure 6: Drill down from the 'Data Collection' hyperlink

The screenshot shows the 'Data Quality' section of the HCAI Data Capture System. It features a navigation menu on the left and a main content area with a table of data collection fields. A callout box highlights the number '5' in the 'Missing' column for the 'Laboratory where specimen processed' row.

Data Collection Field	Category	Completed	Unknown	Missing
Reporting Organisation	Episode Details	5	0	0
Data Collection Date	Episode Details	5	0	0
Time Period	Episode Details	5	0	0
Attributed Organisation	Episode Details	5	0	0
Specimen Date	Episode Details	5	0	0
Type of Specimen Date	Episode Details	5	0	0
Specimen No	Episode Details	0	0	0
Laboratory where specimen processed	Episode Details	0	0	5
Other Laboratory	Episode Details	5	0	0
NHS Number	Episode Details	5	0	0
Forename	Episode Details	5	0	0
Surname	Episode Details	5	0	0
Date of Birth	Episode Details	5	0	0
Age	Episode Details	5	0	0
Sex	Episode Details	5	0	0
Hospital Number	Episode Details	0	0	5
Episode Category	Episode Details	0	0	5
NHS Commissioned Patient	Episode Details	5	0	0
Patient Location	Episode Details	5	0	0
Other Patient Location	Episode Details	5	0	0
Trust / Provider	Episode Details	5	0	0
Other Provider & Site To	Episode Details	5	0	0
Hospital Site	Episode Details	5	0	0
Other Hospital Site To	Episode Details	5	0	0
Patient Category	Episode Details	5	0	0
Other Patient Category	Episode Details	5	0	0
Do you know the admission date?	Episode Details	5	0	0

Click on the hyperlink to view the relevant cases (see Figure 7)

Figure 7: Drill down showing list of case/s

**Menu Toolbar**

- My Dashboard
- Search
- User Administration
- Reports

**Help & Support**

This page provides users access to organisation specific summary and trend information via the Summary Dashboard.

**Home Summary Benchmarking Data Quality**

Public Health England

**Data Collection Field Completeness**

Period From: 01/05/2015 | Period To: 31/10/2015 | Data Collection: E. coli

Current Period: Yes | Organisation Type: NHS Trust | Region: NATIONAL

Sector: NHS | Organisation: FRIMLEY HEALTH NHS FOUNDATION TRUST

ID	Data Collection	Reporting Organisation	Specimen Date	NHS Number	Patient Name	Sex	Attributed Organisation	Last Update Date
<a href="#">415442</a>	E. coli	FRIMLEY HEALTH NHS FOUNDATION TRUST	11/05/2015	6744252590	C M000	F		29/05/2015

### Data Collection Completeness (Shared Cases) Element

This element summarises the status of cases that should have been shared with renal units (Figure 8).

Setting the 'Current Period' to 'Yes' will return data from the earliest unsigned off period onwards. If there is no unsigned off data, data from the start of the previous second month onwards will be returned.

Figure 8: Data Collection Completeness (Shared Cases)

**Menu Toolbar**

- My Dashboard
- Search
- Case Capture
- Data Upload Wizard
- User Administration
- Reports

**Help & Support**

This Dashboard provide a Summary of series of reports based on the user access permissions and organisation. See FAQs and Content for more info

**Key to Screen Symbols**

- Error on Page
- Close Screen
- Attention
- Information
- Item Saved

**Home Summary Benchmarking Data Quality**

Period From: 01/01/2014 | Period To: 04/03/2015 | View Report

Region: South of England | Summarisation Type: Count

Organisation Type: NHS Trusts | Rolling Average: 3 Months

Organisation: FRIMLEY HEALTH NHS FOUND | Data Collection: MRSA

Limit report to: -All- | Current Period: Yes

Denominator: Not Applicable | Frequency: Quarterly

Denominator Period: Not Applicable | Sector: NHS

← Signed-Off Cases    → Unsigned-Off Cases    → MRSA

**Data Collection Completeness - Current Period**

Data Collection	Mandatory	Optional
<a href="#">C. difficile</a>	13	13
<a href="#">E. coli</a>	54	54
<a href="#">Klebsiella spp</a>	6	11
<a href="#">MRSA</a>	1	1
<a href="#">MSSA</a>	12	12
<a href="#">Pseudomonas aeruginosa</a>	7	7

**Data Collection Completeness (Shared Cases) - Current Period**

Data Collection	Sharing Unit	Total Shared Cases	Mandatory	Optional
<a href="#">C. difficile</a>	Renal Unit	1	0	1
<a href="#">E. coli</a>	Renal Unit	5	0	5
<a href="#">MRSA</a>	Renal Unit	23	0	24
<a href="#">MSSA</a>	Renal Unit	45	0	45

An overview of the report output can be found in Table 3.

Table 3: Data Collection Completeness (Shared Cases): Interpreting the Report Output

Parameter	Comment
Data Collection	List of the relevant 'Data Collections'.
Sharing Unit	Populated with 'Renal Unit'.
Total Shared Cases	<p>Indicates how many of the cases that should have been shared (where the patient was in established renal failure; a question on the 'Episode Details' tab) have been shared.</p> <p>The green portion of the bar indicates how many of the cases that should have been shared have been shared. The red portion shows the number of cases that should have been shared but have not been shared (Figure 8).</p> <p>Clicking on the green or red portion of the bar navigates to a list of the case/s (similar to that shown in Figure 7). The ID is a hyperlink which will navigate to the case capture screen allowing any missing data to be completed. If the data are within a signed-off period then an unlock request will need to be made to modify the data (see Unlock User Guide for more information).</p>
Mandatory	<p>Summary of completeness of 'Mandatory' questions on the 'Renal Tab' for each 'Data Collection'. The green portion of the bar indicates the number of cases with complete mandatory questions and the red portion the number of cases with incomplete mandatory questions (Figure 8).</p> <p>Clicking on the red or green bar will navigate to a list of the case/s (similar to Figure 7). The ID is a hyperlink which will navigate to the case capture screen allowing any missing data to be completed. If the data are within a signed-off period then an unlock request will need to be made to modify the data (see Unlock User Guide for more information).</p>
Optional	<p>Summary of completeness of 'Optional' questions on the 'Renal Tab' for each 'Data Collection'. The green portion of the bar indicates the number of cases with complete optional questions and the red portion the number of cases with incomplete mandatory questions (Figure 8).</p> <p>Clicking on the red or green bar will navigate to a list of the case/s (similar to Figure 7). The ID is a hyperlink which will navigate to the case capture screen allowing any missing data to be completed. If the data are within a signed-off period then an unlock request will need to be made to modify the data (see Unlock User Guide for more information).</p>

## Sign-off History Element

Only 'Sign-off Authority' users are able to view this element of the dashboard (Figure 9). This dashboard report allows users to view the sign-off status of the time periods and 'Data Collections' for 'Organisations' that they are responsible for. This dashboard element also allows 'Data Collections' to be signed off (please see the Sign-off User Guide).

Figure 9: Sign-off History

The screenshot shows the 'Sign-off History' dashboard. At the top, there are navigation tabs: Home, Summary, Benchmarking, and Data Quality. The 'Summary' tab is active. Below the tabs are filter fields for 'Period From' (01/01/2014), 'Period To' (04/03/2015), 'Region' (South of England), 'Organisation Type' (NHS Trusts), 'Organisation' (FRIMLEY HEALTH NHS FOUND), 'Limit report to' (-All-), 'Denominator' (Not Applicable), 'Denominator Period' (Not Applicable), 'Summarisation Type' (Count), 'Rolling Average' (3 Months), 'Data Collection' (MRSA), 'Current Period' (Yes), 'Frequency' (Monthly), and 'Sector' (NHS). A 'View Report' button is on the right. Below the filters is a table titled 'Sign-off History - 3 Months' with the following data:

Date	Sign Off	Data Collection	Org Code	Organisation Name	Total Reported Cases	Earliest Sign off Date	Sign-off Deadline	Date Signed-off	Sign_off Status
01/01/2015 31/01/2015	<a href="#">Sign Off</a>	C. difficile	RDU	FRIMLEY HEALTH NHS FOUNDATION TRUST	0	01/02/2015	15/02/2015		▲
01/12/2014 31/12/2014		C. difficile	RDU	FRIMLEY HEALTH NHS FOUNDATION TRUST	1	01/01/2015	15/01/2015		▲
01/01/2015 31/01/2015	<a href="#">Sign Off</a>	E. coli	RDU	FRIMLEY HEALTH NHS FOUNDATION TRUST	2	01/02/2015	15/02/2015		▲
01/12/2014 31/12/2014		E. coli	RDU	FRIMLEY HEALTH NHS FOUNDATION TRUST	6	01/01/2015	15/01/2015		▲
01/12/2014 31/12/2014		MRSA	RDU	FRIMLEY HEALTH NHS FOUNDATION TRUST	0	01/01/2015	15/01/2015		▲
01/01/2015 31/01/2015	<a href="#">Sign Off</a>	MSSA	RDU	FRIMLEY HEALTH NHS FOUNDATION TRUST	0	01/02/2015	15/02/2015		▲
01/12/2014 31/12/2014		MSSA	RDU	FRIMLEY HEALTH NHS FOUNDATION TRUST	2	01/01/2015	15/01/2015		▲
01/02/2015 28/02/2015	<a href="#">Sign Off</a>	C. difficile	RDU	FRIMLEY HEALTH NHS FOUNDATION TRUST	1	01/03/2015	15/03/2015		▲

An overview of the report output are in Table 4.

Table 4: Sign-off History Element: Interpreting the Report Output

Parameter	Comment
Date	Shows the sign-off period(s) within the time period selected based on either the 'Current Period' or the 'Period From' and 'Period To' parameters.
Sign-Off	Contains 'Sign-Off' hyperlink if the sign-off period is eligible for sign-off.  Clicking on the 'Sign-Off' hyperlink navigates to the 'Sign-Off Episodes' screen (see Sign-off User Guide).
Data Collection	The 'Data Collection' relating to the sign-off period.  Clicking on the 'Data Collection' hyperlink navigates to a list of

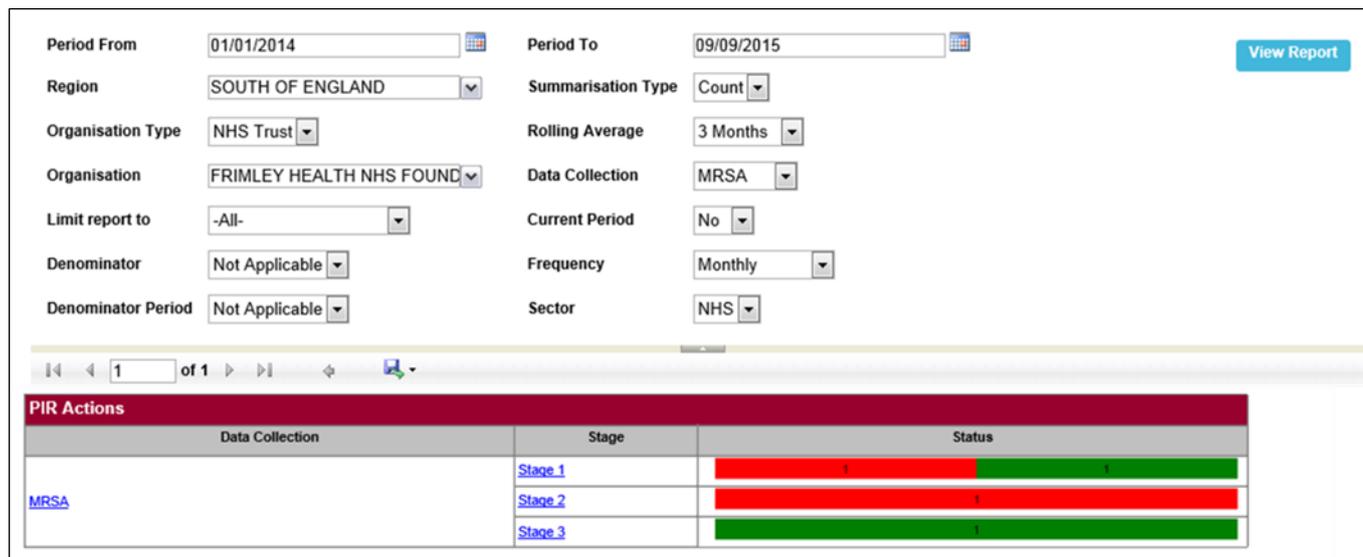
Parameter	Comment
	the case/s (similar to Figure 7). The ID is a hyperlink which will navigate to the case capture screen.
Org Code	The code relating to the organisation in the 'Organisation Name' field.
Organisation Name	The name of the organisation/s that the logged in user has permissions to sign-off data for
Total Reported Cases	The total number of cases reported for the 'Data Collection' and time period. The number is a hyperlink.  Clicking on the hyperlink navigates to a list of the case/s (similar to Figure 7). The ID is a hyperlink which will navigate to the case capture screen.
Earliest Sign-Off Date	The earliest date at which the period and 'Data Collection' can be signed-off.
Sign-off deadline	The latest date at which the 'Data Collection' and time period can be signed-off without being flagged as a late sign-off. Any data signed-off after this date will be flagged as a late sign-off.
Date signed-off	The actual date the 'Data Collection' was signed-off
Sign-off Status	A visual indication providing the status of sign-off for the data period. There are five different statuses:  <ul style="list-style-type: none"> <li>(  ) - indicates that the sign-off for the data period has been completed and has been signed-off by the sign-off deadline.</li> <li>(  ) - indicates that the sign-off for the data period has been completed but that sign-off occurred after the sign-off deadline.</li> <li>(  ) - indicates that the data period is eligible for sign-off and that the sign-off deadline has not yet been passed.</li> <li>(  ) - indicates that the data period is eligible for sign-off but that the sign-off deadline has been passed and so sign-off will be considered late.</li> <li>(    ) - a missing symbol/blank indicates that the data period is not yet eligible for sign-off.</li> </ul>

## PIR Actions Element

This element allows you, if you have PIR permissions (i.e. Local Administrator, PIR Data Entry User, PIR Assignment, PIR Arbitrator, PIR View Only), to see how many PIRs are associated with your organisation and how many have PIR actions that are required (Figure 10).

Setting the 'Current Period' to 'Yes' will return data from the earliest unsigned off period onwards. If there is no unsigned off data, data from the start of the previous second month onwards will be returned.

Figure 10: PIR Actions



An overview of the report output can be found in Table 5.

Table 5: PIR Actions: Interpreting the Report Output

Parameter	Comment
Data Collection	<p>List of the relevant ‘Data Collections’.</p> <p>The name of the data collection is a hyperlink. Clicking on the hyperlink navigates to a list of all case/s undergoing a PIR associated with your organisation for the time period indicated (Figures 11a and 11b). The ID is also a hyperlink, which will navigate to the case capture screens (PIR Assignment tab) allowing any data entry or assignment decisions to be made (see Figure 12).</p>
Stage	<p>Populated with the different PIR stages.</p> <p>The name of the stage is a hyperlink. Clicking on the hyperlink navigates to a list of case/s associated with your organisation that are undergoing a PIR for the time period indicated and that are at that specific PIR stage.</p>
Status	<p>Indicates the number of the case/s undergoing a PIR that are associated with your organisation for the time period indicated and for the stage listed in ‘Stage’ column.</p> <p>The red portion of the bar shows the number of case/s undergoing a PIR associated with your organisation that require action by your organisation. The green portion of the bar shows the number of case/s undergoing a PIR associated with your organisation that require no action by your organisation.</p>

Parameter	Comment
	<p>Clicking on the green or red portion of the bar navigates to a list of the case/s, similar to Figures 11a and 11b but that are specific to the stage the bar represents. The ID is a hyperlink which will navigate to the case capture PIR Assignment screen allowing any actions to be completed.</p> <p>The total number of case/s undergoing a PIR at a specific stage, can be calculated by summing the number of case/s in the green and red portions of the bar.</p> <p>Of note, if your organisation has only case/s for a particular stage that require action by your organisation, then the whole bar will show was red. Conversely, if for a particular stage your organisation has only case/s that require no action by your organisation, then the whole bar will appear green. Finally, if you have no case/s undergoing a PIR for the time period indicated for any/all PIR stages, then the 'Status' box will show as an empty box (i.e. neither red or green bars).</p>

Figure 11a: Drill down showing list of case/s undergoing a PIR

The screenshot shows the 'Summary' dashboard with the following filters:

- Period From: 01/07/2014
- Period To: 09/09/2015
- Data Collection: MRSA
- Current Period: Yes
- Organisation Type: NHS Trust
- Region: SOUTH OF ENGLAND
- Sector: NHS
- Organisation: -All-

ID	Data Collection	Specimen Date	NHS Number	Patient Name	Sex	DOB	Age	Age Description	Apportioned Organisation
<a href="#">421547</a>	MRSA	01/09/2015	9999999999	Example Case	Male	25/06/1978	37	37 years	FRIMLEY HEALTH NHS FOUNDATION TRUST
<a href="#">421548</a>	MRSA	02/09/2015	9999999999	Another Example_Case	Female	14/02/1983	32	32 years	
<a href="#">421549</a>	MRSA	07/09/2015	9999999999	Final Example_Case	Female	15/07/1956	59	59 years	

If you scroll to the right, you will see the rest of the drill down line listing (see Figure 11b).

Of note, if you would like to navigate back to the Summary Dashboard from this sub-report, please use the small arrow highlighted in Figure 11a and not your browsers 'Back' button.

Figure 11b: Drill down showing list of case/s undergoing a PIR

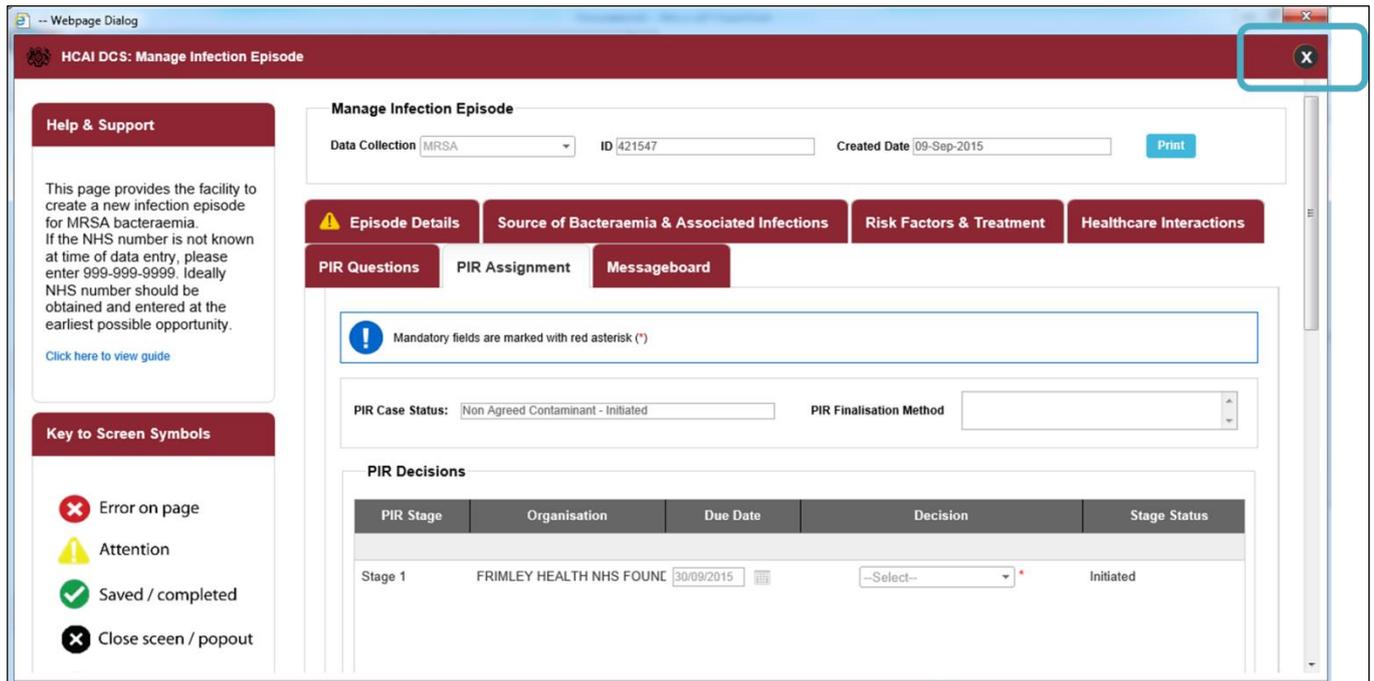
PIR Lead Organisation	PIR Assisting Organisation	PIR Arbitrator	PIR User Role	PIR Stage	PIR Stage Initiated Date	PIR Stage Due Date	PIR Stage Status	Remaining Number of Days	PIR Action Status	Last Updated Date
FRIMLEY HEALTH NHS FOUNDATION TRUST	NHS SURREY HEATH CCG	SOUTH OF ENGLAND COMMISSIONING REGION	Provisionally Assigned	Stage 1	09/09/2015	30/09/2015	Initiated	21		09/09/2015
NHS SURREY HEATH CCG	FRIMLEY HEALTH NHS FOUNDATION TRUST	SOUTH OF ENGLAND COMMISSIONING REGION	Assisting	Stage 2	09/09/2015	14/09/2015	Initiated	5		09/09/2015
NHS SURREY HEATH CCG	FRIMLEY HEALTH NHS FOUNDATION TRUST	SOUTH OF ENGLAND COMMISSIONING REGION	Assisting	Stage 1	09/09/2015	30/09/2015	Initiated	21		09/09/2015

An overview of the ‘PIR Action Status’ symbols can be found in Table 6.

Table 6: The traffic light symbols under ‘PIR Action Status’ represent:

Symbol	Stage	Action required
	1	No action required at this stage by your organisation.
	2	No action required at this stage by your organisation.
	3	No action required at this stage by your organisation.
	1	Action required by your organisation, due date for the action is >5 days away.
	2	Action required by your organisation, due date for the action is >5 days away.
	3	Action required by your organisation, due date for the action is >5 days away.
	1	Immediate action required by your organisation, due date for the action is ≤5 days away.
	2	Immediate action required by your organisation, due date for the action is ≤5 days away.
	3	Immediate action required by your organisation, due date for the action is ≤X days away.

Figure 12: PIR Assignment Case Capture Screen



Please note, that to exist this pop-out window and to return to the drill-down sub-report (and then to access Summary Dashboard with parameters as previously set), please close this window using the large cross in the top right hand-corner, highlighted in Figure 12.