



PAM User Guide

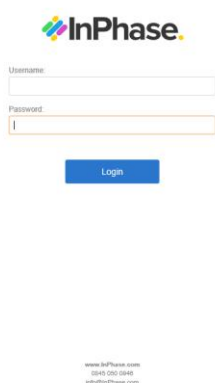
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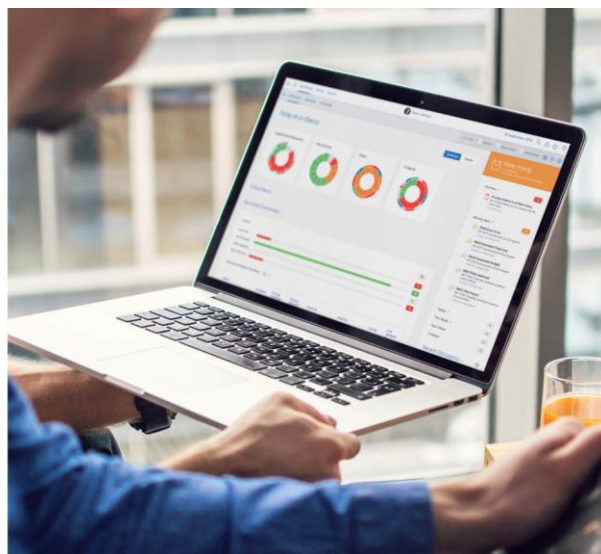
General Navigation and User Preferences

Accessing the Site

To access InPhase please enter your unique InPhase URL into any modern web browser.



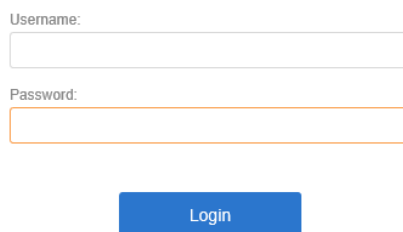
The screenshot shows the InPhase login page. At the top is the InPhase logo. Below it are two input fields: 'Username' and 'Password'. The 'Password' field has a small eye icon to toggle visibility. A blue 'Login' button is positioned below the fields. At the bottom, there is a small footer with the website URL and contact information.



Username and Password

Usernames and passwords can be granted by an administrator.

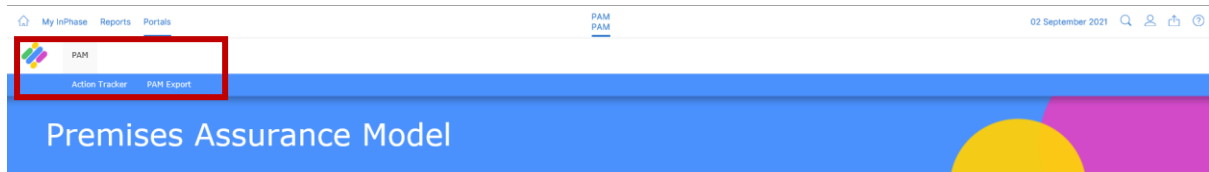
The username format is; ***FirstName Surname***



The screenshot shows a close-up of the login form. It includes the InPhase logo at the top. Below the logo are two input fields: 'Username:' and 'Password:'. A blue 'Login' button is located at the bottom of the form.

Navigation

To navigate to a page, click on the relevant option on the menu at the top of the page.

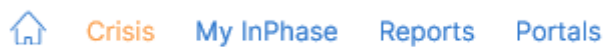


Premises Assurance Model Prompts

Please note that all previous comments and items of evidence can be seen by clicking details. Only new evidence or changes to previous items of evidence should be made below. It is expected that all evidence is reviewed annually as part of your self assessment process.

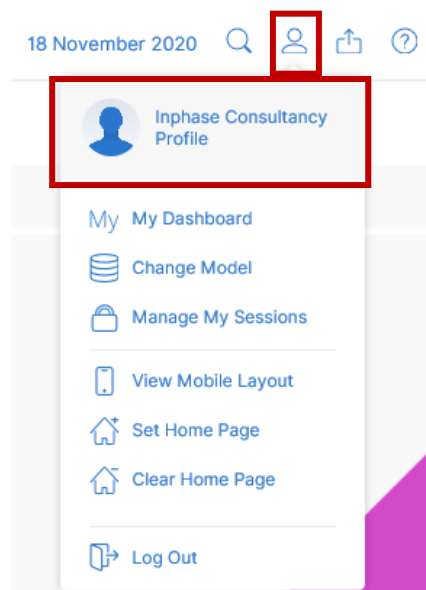
Select Data Entry mode to begin completing your self assessment.

To return to the HOME page, to access your personal dashboard or to refresh the page you are on use the icons in the top left-hand corner of the screen

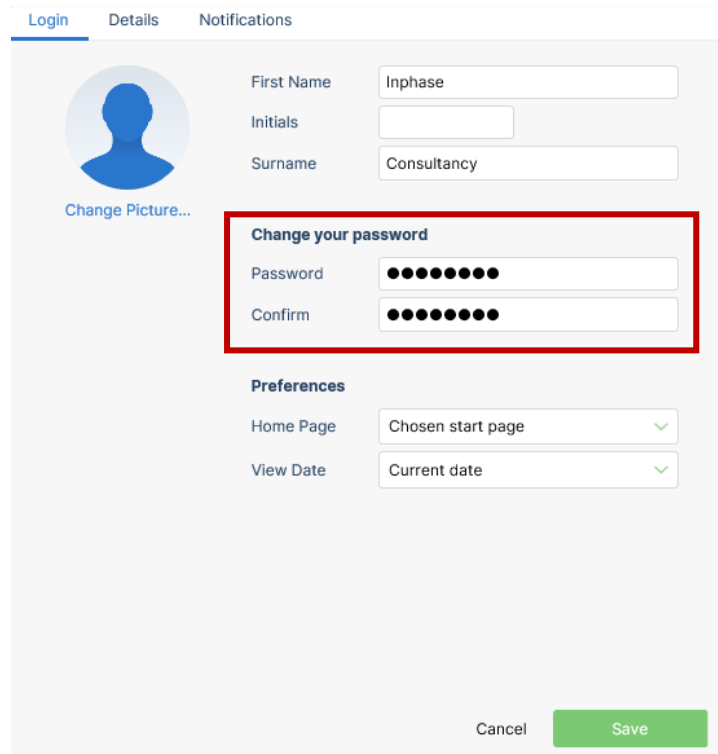


Changing Password

Click on the person icon at the top right-hand corner of the screen. Select **Profile** from the drop-down menu



Enter your new password in the fields provided and click save.

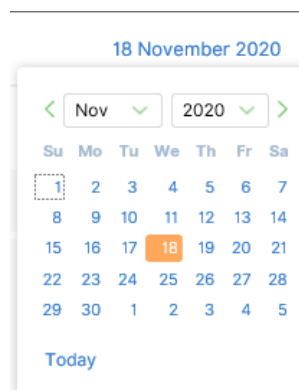


You will notice that you have other preferences that you can change on the profile pop up also.

View Date

Data entered and displayed in InPhase is tracked by date. This means that if you wish to see past date or future time periods you can by simply changing the view date.

The view date is located in the top right-hand corner of the screen. Click the date to produce the calendar.



General Functionality

This section documents functions that are used throughout InPhase.

Data Entry Mode

InPhase has a number of tables where data can be entered or changed. The ability to add or change data is dictated by the Data Entry Mode icon. This icon will be positioned to the right-hand side of the table.

Clicking the icon will refresh the table and allow data to be entered or changed.

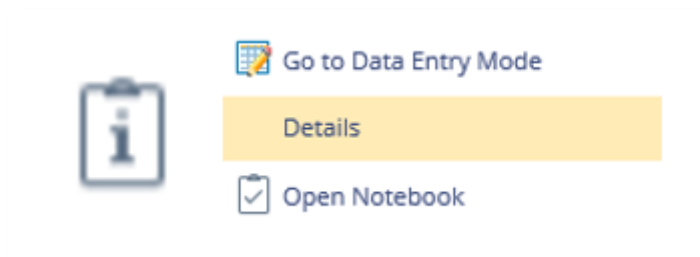


To exit data entry mode the select the following icon.



Performance Pop Up

If the option to see DETAILS is available either via an icon or by right clicking on an item then a performance pop up is available



Performance pop ups allow you to either view and edit data (if an action) or view trend information.

Adding an Action

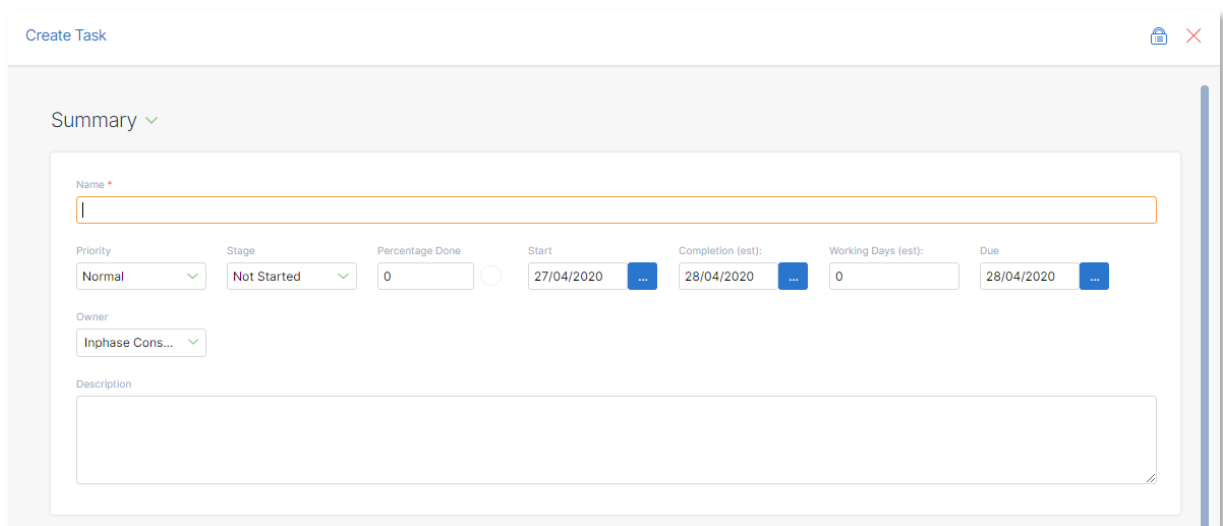
In each module there are areas to add actions. These will be displayed as either page buttons or table icons. Adding an action regardless of the module or page you are on requires the same process.



Clicking on either an Add Action button or Icon will produce the Action pop.

The following fields need to be completed:

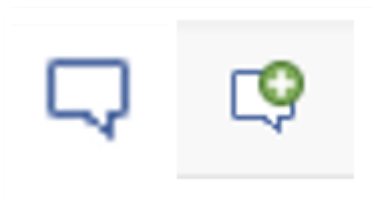
- Name
 - Limited to 100 Characters. Should be clear and concise to what the action is.
- Start
 - Calendar Selector. Date of when action will start
- Completion (est)
 - Calendar Selector. Data of when action is estimated (or actually) completed. When first adding a task this should be set as the same as the Due Date
- Due
 - Calendar Selector. Date of when action is due to be completed by
- Owner
 - Defaults to the user adding the action. Can be changed if someone else will be responsible for completing the action



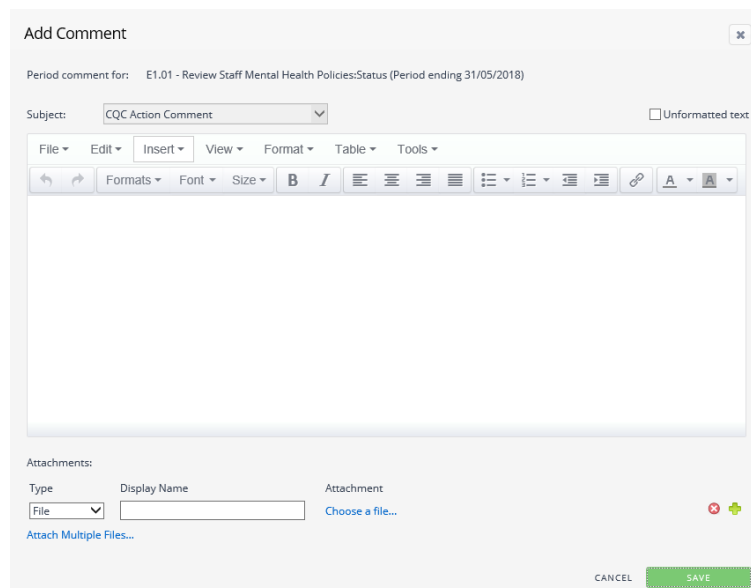
Once you have completed the required fields click Create.

Adding a Comment

Anywhere within InPhase the following icons are seen mean a comment or document can be added.



Clicking on either of the above icons will produce a comments pop up box. Type comment in the space provided and click save.



The screenshot shows a 'Add Comment' dialog box. At the top, it says 'Add Comment' with a close button. Below that, it indicates the 'Period comment for: E1.01 - Review Staff Mental Health Policies:Status (Period ending 31/05/2018)'. The 'Subject' is set to 'CQC Action Comment' with a dropdown arrow, and there is an unchecked checkbox for 'Unformatted text'. A rich text editor toolbar is visible, including menus for File, Edit, Insert, View, Format, Table, and Tools, along with icons for undo, redo, bold, italic, text color, background color, bulleted list, numbered list, link, and unlink. A large text area is provided for entering the comment. At the bottom, there is an 'Attachments' section with a table-like structure:

Type	Display Name	Attachment
File	<input type="text"/>	Choose a file...

Below the table, there is a link for 'Attach Multiple Files...'. At the bottom right of the dialog, there are 'CANCEL' and 'SAVE' buttons.

**TIP – You can attached documents or links to a comment using the attachments part at the bottom of the pop up*

Premises Assurance Model

The Premises Assurance Model (PAM) module allows the user to conduct a self-assessment using the NHS Premises Assurance Model.

Sunburst

This visualisation displays the score for the PAM domains. The score is calculated as an average of the scores for the self-assessment questions (SAQs) that sit beneath the Domain.



The user must select a segment of the Sunburst in order to generate the SAQ table to the right of the page.

SAQ Table

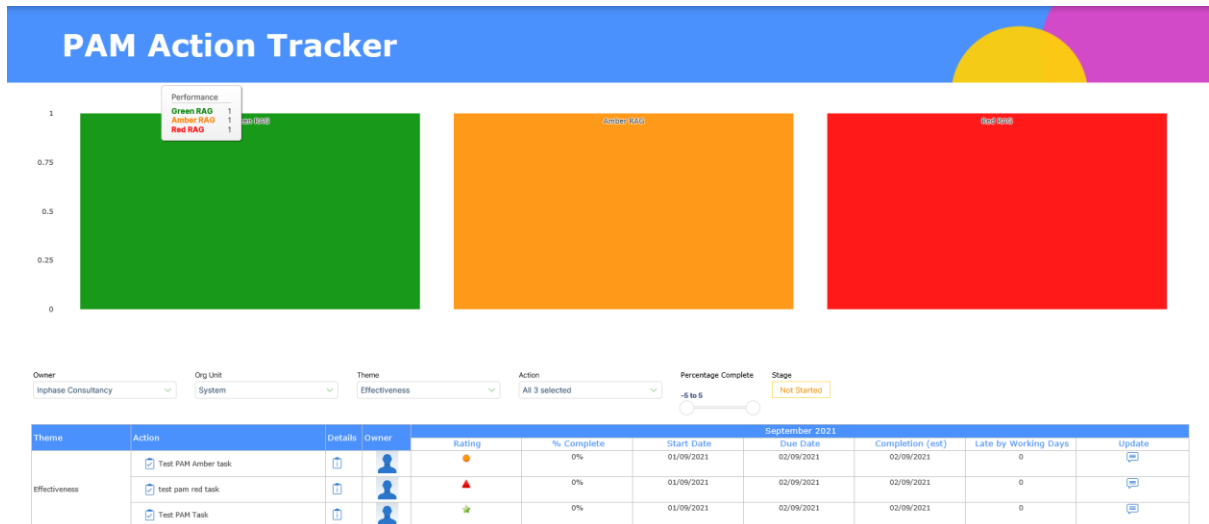
When a segment on the Sunburst is selected, the SAQ table will populate with the relevant SAQs for the PAM Domain.

		Organisation Governance	
		2022	2023
		Rating	Rating
G1	With regard to ensuring the Estates and Facilities governance framework has clear responsibilities and that quality, performance and risks are understood and managed, can	Good	
G2	With regard to ensuring the Estates and Facilities leadership and culture reflects the vision and values, encourages openness and transparency and promoting good quality		
G3	With regard to ensuring that the Organisations Board has access to professional advice on all matters relating to Estates and Facilities services can the organisation evidence the		

The user is not required to enter any data into this table, as the score for the SAQ is calculated as an average of the scores from the Prompts that sit beneath each SAQ. As with the Sunburst, the user should click on a SAQ in the table to generate the relevant prompts in the table below.

Action Tracker

This page allows the user to view all Actions added against the PAM Domains.



Bar Chart

The Bar Chart displays the number of Actions with a Green/Amber/Red performance rating.

Action Table

The Action Table contains details for all of the Actions. The information can be filtered using the slicers at the top of the page.

Owner: Inphase Consultancy | Org Unit: System | Theme: Effectiveness | Action: All 3 selected | Percentage Complete: -5 to 5 | Stage: Not Started

Theme	Action	Details	Owner	Rating	% Complete	Start Date	Due Date	Completion (est)	Late by Working Days	Update
Effectiveness	Test PAM Amber task			●	0%	01/09/2021	02/09/2021	02/09/2021	0	
	test pam red task			▲	0%	01/09/2021	02/09/2021	02/09/2021	0	
	Test PAM Task			★	0%	01/09/2021	02/09/2021	02/09/2021	0	

PAM Export

This page compiles all of the information across the PAM Domains, SAQs and Prompts. The ratings and commentary are also displayed within the table. The user can filter the information on the table using the slicers at the top. By selecting the Excel icon in the top right of the table, the user can export the current table view (with any filters applied) to a csv file to open in Excel.





Theme		Rating	2022		
All 7 selected		All 4 selected	Actual	Comments	Evidence
Effectiveness	> Effectiveness		Requires Minimal Improvement		
Efficiency	> Efficiency		Requires Minimal Improvement		
Safety	> Safety	This measure comprises of two sub themes	Inadequate		
Soft FM	> Safety	This measure comprises of two sub themes	Inadequate		
Combined and Hard FM	> Safety	This measure comprises of two sub themes	Inadequate		
	> Patient Experience		Outstanding		
	> P1	With regards to ensuring engagement and involvement on estates on facilities services from people who use the services, public and staff can your organisation evidence the following?	Outstanding		
	> F1.01: Views and Experiences	Are people's views and experiences gathered and acted on to shape and improve the services and culture?	Outstanding		
	> F1.02: Engagement	Are people who use services, those close to them and their representatives actively engaged and involved in decision making?			
	> F1.03: Staff Engagement	Do staff feel actively engaged so that their views are reflected in the planning and delivery of services and in shaping the culture?			
	> F1.04: Prioritisation	Do leaders prioritise the participation and involvement of people who use services and staff?			
	> F1.05: Value	Do both leaders and staff understand the value of staff raising concerns? Is appropriate action taken as a result of concerns raised?			
	> F1.06: Costed Action Plans	If any ratings in this SAQ are 'inadequate' or 'requires moderate or minor improvement' are there risk assessed costed action plans in place to achieve compliance? Costs can be entered below.			
	> P2	With regard to ensuring patients, staff and visitors perceive the condition, appearance, maintenance and privacy and dignity of the estate is satisfactory can your organisation evidence the following?			
	> P3	With regard to ensuring ensure that patients, staff and visitors perceive cleanliness of the estate and facilities to be satisfactory can your organisation evidence the following?			
	> P4	How does your organisation/ate ensure that NHS Catering Services provide adequate nutrition and hydration through the choice of food and drink for people to meet their diverse needs?			
	> P5	With regard to ensuring that access and car parking arrangements meet the reasonable needs of patients, staff and visitors can your organisation evidence the following?			
Organisation Governance	> Organisation Governance		Good		

Once exported, this information can then be input into the NHSi PAM Portal.