General Practice Data Collection Tool User Guide
For queries relating to access and workforce data contact nss gp data collection tool@nhs.net
For queries relating to income and expenses data contact nss gp contract data collection@nhs.net

Further information on our Website://www.isdscotland.org/Health-Topics/General-Practice
General Practice Data Collection
Updated User Guide for the completion of Workforce and Finance data

The following guide has been written to provide assistance to Practice Managers when completing the GP data collection tool. When completing the tool if you have any queries about what an individual field means, hovering the mouse over the question mark will provide helpful information. Further details can be found in the reference documentation which you will have received along with your login details.

Our Website://www.isdscotland.org/Health-Topics/General-Practice has a section on the GP Data Collection Tool, where you will find copies of all the supportive documentation as well as Frequently Asked Questions. If there are any changes to the tool during the period of data collection, there will be an alert on the landing page along with further information about the update on the news section of GP Data Collection Tool webpages.

You were previously e-mailed a Staff Template to aid the manual collection of Workforce data within the practice, should the information requested not be readily available electronically.

Along with notification of the release of the Finance section of the tool, you will have received a Finance Template for forwarding on to your practice accountant. Please ask your accountants to complete the ‘Finance’ tab on the template. Once completed, the accountant should return to you, the Practice Manager, for inputting the data to the tool. You should use the ‘Practice’ tab on the template, it has been designed to help with data entry into the tool.

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The tool has now been refreshed to make visible the income and expenditure data that needs to be completed. As well as adding the functionality to submit your data to NSS.

To help differentiate between the data you need to complete as a practice (workforce) and that provided by your practice accountants (income and expenses)

- Workforce data items are in grey
- Finance data items are in blue

If you are experiencing problems using the tool, contact nss_gp_data_collection_tool@nhs.net. The mailbox is monitored twice a day and we aim to respond to all enquiries within 24hrs Mon-Fri. There is a separate mailbox set up to deal with any questions over the finance data nss_gpcontractdatacollection@nhs.net
Starting the submission

- Your username and password can be found in the e-mail you receive. On first login you will be asked to change your password.
- If you forget your password, please click on the ‘Password Reset’ button on login page (see below). After submitting your e-mail address, you will be sent a new password which will then require to be changed.

- Please use the **SAVE as DRAFT** button on the data entry screens as you go along.
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After entering your username and password this screen will appear.

Please click on the green tick box to **begin your submission**.

**Only tick this box on your first visit to the tool.**

On subsequent visits you will be taken to ‘**My Current Submission**’. Please click on the green tick box to continue your submission.
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• Selecting the practice code [#1] will auto-populate a number of fields with information about your GP practice.
• We want to know how many GP sessions your week is divided into. For example, if you have 2 sessions per day, 5 days per week, then you should enter 10. **We do not want you to total this across all GPs**
• From the information returned by your accountant, please complete the field ‘Was your Practice Accounting Year 1 April 2018 to 31 March 2019, if answer is NO, you will be asked to specify the end date of you Accounting Year [#2],
• If you have NO additional branch surgeries, please ensure you select ‘No additional branch surgeries’ from the drop down list.
• Once the questions asking about leavers/vacancies/locum GPs have been completed [#3], select ‘save as draft’ in the top right corner of the screen. [#4]. Additional data entry areas will then appear at the bottom of the screen [#5].

**Staff Members as at 31 March 2019**

• For each member of staff within the practice who has a substantive post as at 31 March 2019, a new entry will need to be completed under the ‘Individual Staff Members’ tab [#5].
• Please **exclude** all Locums GPs from this section (long and short term).
• Please **exclude** all student placements from this section.
• When you select the staff group a ‘Job Role’ field will pop-up. Selecting the magnifying glass will allow you to choose the role from the dropdown [#6 screenshot below]. If your Job Title does not appear in the drop down list, please select the best fit to your role.
• If a member of staff has multiple job roles the form will display additional fields for completion. A staff member will have multiple job roles if he/she works to more than one job description. If a staff member covers several different roles e.g. Medical Secretary / Receptionist / Telephonist but only has one job description, then you must only enter the job role that the person was employed to fill.
• We want to know whether you train FY1s or FY2s so please enter names and select FY1/FY2 as job role.
• For part-time staff whose holiday entitlement is calculated in hours, please calculate how many hours would constitute an ‘average’ day and base holiday entitlement on this. For example, working 20 hours across 4 days would give a 5 hour average day.
• For staff on a zero hour contract, holiday entitlement would be 0 as this would be factored in to gross annual salary.
• For all GPs, holiday entitlement should be recorded in days and not in sessions. If holidays are in the contract as sessions then these should be converted to days. For example, 2 sessions could equate to one day..
• The Income, Reimbursement and Expenses data items will appear for Partners only. All the data within this section will be provided by the practice accountant.
• The practice accountant will supply all the necessary information to complete any blue boxes
• If a Partner does not receive a share of the profits e.g. on a fixed salary, please complete the Gross Annual Salary field
• For staff joining the practice during the year, the salary entered should be their gross annual salary as per contract i.e. what they would have earned had they been working for the practice for the full year.
• Any overtime should not be included with gross annual salary.
• If you have non-GP staff who are not employed by the practice but are employed by your NHS Board, then you must divide the amount paid by the practice to the Board to fund these staff members by the number of people in that staff group and enter this as their gross annual salary. This only applies to the small number of practices who pay money to their NHS Board for staff that work in the practice. You may have to wait until you receive information from your accountants before completing this section.
• If you do not pay money to the Board for staff employed by the Board, then do not include these staff in the return.
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Vacancies/Leavers during period 1 April 2018 to 31 March 2019

- Complete the ‘vacancies’ tab for each role that was left vacant during the above period. If a member of staff had multiple roles entered under the Individual Members Tab, then complete a separate entry for each role vacated.
- Complete the 'leavers' tab for each member of staff that left the practice during the above period. If the staff member had multiple roles entered under the Individual Members Tab, then complete a separate entry for each role left.
- Start date of vacancy relates to the date when the practice decides to replace a leaver or create a new/additional post. A decision may be taken not to fill a vacancy right away. If vacancy began before 1 April 2018 then enter the actual date the role became vacant and not 1 April 2018.
- A vacancy would be considered 'filled' when the successful candidate has been chosen and has accepted the post with a date to start work.

Please save as a draft before leaving the page

Absences/Temporary Cover during period 1 April 2018 to 31 March 2019

- Complete the ‘absences’ tab for the above period for both GPs (in sessions) and non-GP practice members (in days) and Save as Draft.
- Complete the ‘temporary cover’ tab for the above period and Save as Draft.

Please save as a draft before leaving the page

You may find that a popup box appears when trying to enter information on this page. This relates to the version of browser you are using.
- If a pop-up asks you to disable your popup blocker. Click ‘ok’.
- If a pop-up asks you to confirm if you want to leave the page [screenshot below]. Select ‘stay on page’.
Finance Data

When you received the notification of the release of the Finance section of the tool, you will have received a Finance Template for forwarding on to your practice accountant. **You do not need to enter data into any of the income and expenditure tabs until you receive the completed template back from your accountants.**

Once the Finance template has been returned to you, you can begin to enter the data.

- Once you have opened the template, you will see 3 tabs at the bottom (see below) select the PRACTICE tab, as it holds all the data you need and has been set up to make the data entry to the tool as easy as possible. You may wish to print off this template to help with data entry.
• The first field you need to complete is for the Accounting Period, this is on the first screen (Practice Information) and the question is ‘Was your Practice Accounting Year 1 April 2018 to 31 March 2019, if answer is NO, you will be asked to specify the end date of your Accounting Year

• The majority of data entry is for the practice, however there are a small number of data items which have to be completed on the individual staff members screen, these are for Partners only.

• Data needs to be entered into the following tabs in the data collection tool, and we suggest you enter the data in the following order.
  
  o Practice Level Income DES
  o Practice Level Income NES
  o Practice Level Income LES
  o Practice Level Income SESP
  o Individual Staff Members tab for Partners only
  o Practice Level Income
  o Reimbursements
  o Premises Expenditure
  o Staff Expenditure
  o Other Expenditure

**Printing the Form**

• If at any stage during completion of the tool you wish to print a copy of a page(s) for your own records, then click on the cog at the top right hand corner of the screen and select ‘printer friendly version’. When choosing to print a page ensure Landscape is selected. This will need to be done separately for individual staff members/vacancies/leavers.
Submitting the Form

- On completing each section, please ‘Save as Draft’.
- Once all the data has been entered for both the Workforce and Finance fields you can select the ‘Submit Final’ button at the top right of the screen (this button was made available with the release of the finance section).
- Please make your final submission after all Workforce and Finance fields have been completed. If you have missed a section or not filled out specific fields you will receive a pop-up alerting you. Final submission will only be allowed once these have all been completed.
- Once it has been submitted as final, you will not be able to edit the submission.

Deadline for Submission

All practices are requested to submit their data by end January 2020

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