

## 6 - How do I upload evidence for my practice's self assessment?

1. To open an indicator and access the assessment information, click on the arrow next to the relevant indicator

Expand all ▾				
	Number	Indicator	Year	Completion (%)
▶	INDICATOR 1	The practice meets the requirements of the Code of Health and Disability Services Consumers' Rights 1996	Year 1 ▾	0%

2. An alternative is to click the 'Expand all' button which will open up all of the indicators in that section.

Patient experience and equity					Practice environment and safety					Clinical effectiveness					Professional development				
Expand all ▾																			
	Number	Indicator																	
▶	INDICATOR 1	The practice team complies with the Code of Health and Disability Services Consumers' Rights 1996																	

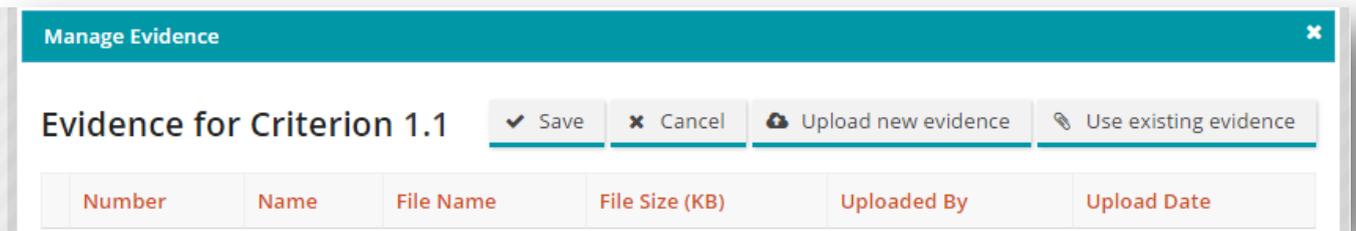
To collapse all Indicators, click the arrow next to expand all and then click 'Collapse All' which will close all of the indicators in that section.

Patient experience and equity					Practice environment and safety					Clinical effectiveness					Professional development					Adv				
Expand all ▾																								
Collapse all ▾																								
	Number	Indicator																						
▶	INDICATOR 1	The practice meets the requirements of the Code of Health and Disability Services Consumers' Rights 1996																						

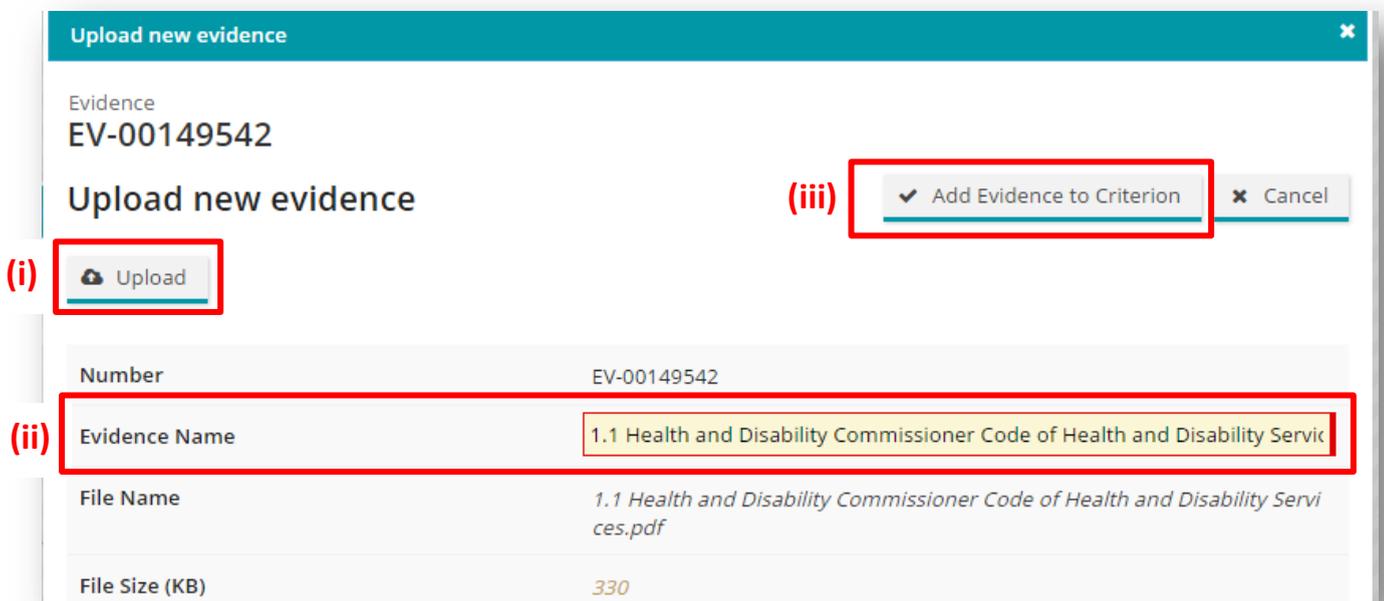
3. To upload evidence for the criterion in the Indicator, click the paper clip symbol to the left of the criterion

INDICATOR 1					The practice meets the requirements of the Code of Health and Disability Services Consumers' Rights 1996					Year 1 ▾					0%				
	Number	Criterion	Evidence May Include	Self Assessment	Evidence	Assessor Assessment	Moderator/Audit Assessm												
📎	1.1	The practice displays a copy of The Code of Health and Disability Services Consumers'	<ul style="list-style-type: none"> <li>Posters on prominent display in the reception area identifying The Code, and brochures are available.</li> </ul>	--None-- ▾															

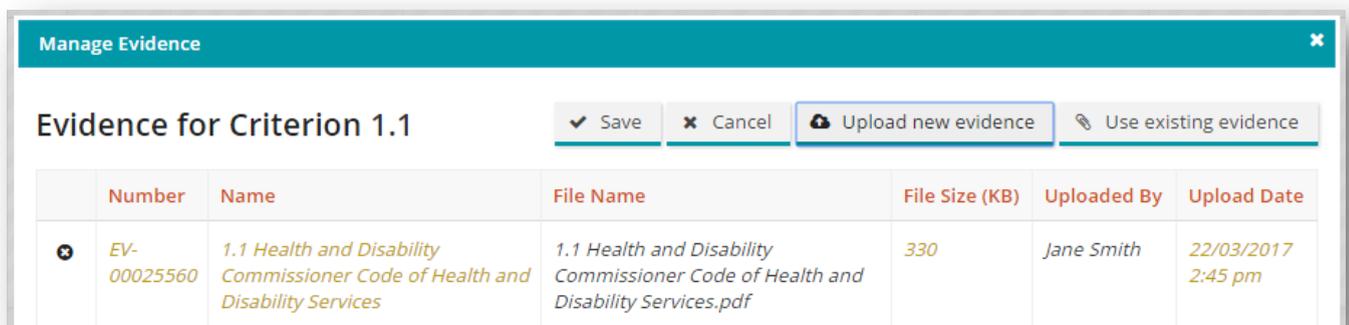
4. A window will open where you can choose to 'Upload new evidence' or 'Use existing evidence'. Initially it is likely you will need to upload new evidence until your library of evidence starts to build up.



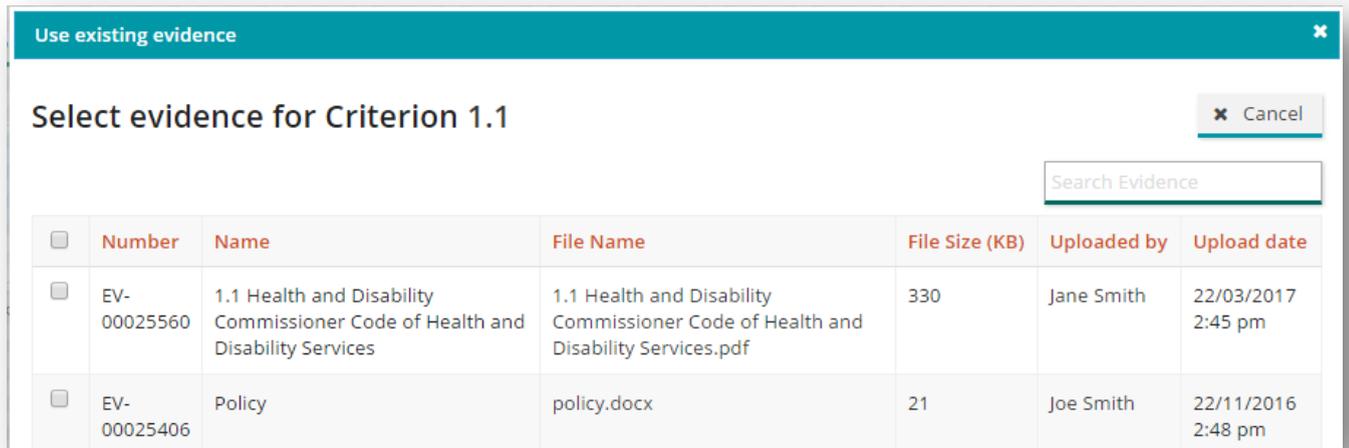
5. To upload new evidence, click the button and another window will open where you can upload the evidence.
  - i. Click the 'Upload' button to find your proposed attachment from your local drive.
  - ii. Give the file a name, and wait until the upload button indicates the upload was successful.
  - iii. After it has uploaded, click the 'Add Evidence to Criterion' button.



6. Repeat this step as necessary to load your evidence. After new evidence has been uploaded, the evidence will be listed, see example below.



7. To use existing evidence that has previously been uploaded in QA2QI, click the 'Use existing evidence' button. A window will open listing evidence loaded previously.



The screenshot shows a dialog box titled "Use existing evidence" with a close button (X) in the top right corner. Below the title bar, the text "Select evidence for Criterion 1.1" is displayed. To the right of this text is a "Cancel" button with an X icon. Below the text is a search box labeled "Search Evidence". Underneath the search box is a table with the following columns: "Number", "Name", "File Name", "File Size (KB)", "Uploaded by", and "Upload date". The table contains two rows of evidence items.

<input type="checkbox"/>	Number	Name	File Name	File Size (KB)	Uploaded by	Upload date
<input type="checkbox"/>	EV-00025560	1.1 Health and Disability Commissioner Code of Health and Disability Services	1.1 Health and Disability Commissioner Code of Health and Disability Services.pdf	330	Jane Smith	22/03/2017 2:45 pm
<input type="checkbox"/>	EV-00025406	Policy	policy.docx	21	Joe Smith	22/11/2016 2:48 pm

8. To find relevant evidence, there is a search box to search. Enter the name of the evidence.



The screenshot shows the same "Use existing evidence" dialog box as in the previous image. The search box, which now contains the text "polic", is highlighted with a red rectangular box. The table below the search box now only displays the single evidence item that matches the search criteria.

<input type="checkbox"/>	Number	Name	File Name	File Size (KB)	Uploaded by	Upload date
<input type="checkbox"/>	EV-00025406	Policy	policy.docx	21	Joe Smith	22/11/2016 2:48 pm

9. Click the check box next to the relevant evidence and then click 'Use Selected Evidence'



The screenshot shows the "Use existing evidence" dialog box with the search box containing "polic". The "Use Selected Evidence" button, located at the top left of the table area, is highlighted with a red rectangular box. The first row of the table, which corresponds to the evidence item "EV-00025406", has its checkbox selected (checked) and is also highlighted with a red rectangular box.

<input type="checkbox"/>	Number	Name	File Name	File Size (KB)	Uploaded by	Upload date
<input checked="" type="checkbox"/>	EV-00025406	Policy	policy.docx	21	Joe Smith	22/11/2016 2:48 pm

10. To complete the upload of evidence for the relevant criterion, **it must be saved.**

**Manage Evidence**

**Evidence for Criterion 1.1**

	Number	Name	File Name	File Size (KB)	Uploaded By	Upload Date
✕	EV-00025406	Policy	policy.docx	21	Joe Smith	22/11/2016 2:48 pm
✕	EV-00025560	1.1 Health and Disability Commissioner Code of Health and Disability Services	1.1 Health and Disability Commissioner Code of Health and Disability Services.pdf	330	Jane Smith	22/03/2017 2:45 pm

11. The evidence will then be listed in the 'Evidence' column

Number	Indicator	Completion (%)			
▼	INDICATOR 1 The practice meets the requirements of the Code of Health and Disability Services Consumers' Rights 1996	0%			
Number	Criterion	Evidence May Include	Self Assessment	Evidence	Assessor Assessment
🔗 1.1	The practice displays a copy of The Code of Health and Disability Services Consumers' Rights 1996 (The Code) poster prominently in the practice and brochures about The Code are available for patients to access.	<ul style="list-style-type: none"> <li>Posters on prominent display in the reception area identifying The Code, and brochures are available.</li> </ul>	--None-- Example	<ul style="list-style-type: none"> <li>Policy</li> <li>1.1 Health and Disability Commissioner Code of Health and Disability Services</li> </ul>	

12. Once a comment and/or any evidence has been uploaded, the self assessment needs to be set to 'Met', or 'Partially Met' from the drop down list in the 'Self Assessment' column in order for evidence to be submitted. Setting it to 'Not Met' will not allow the indicator to reach 100%.

Number	Indicator	Completion (%)			
▼	INDICATOR 1 The practice meets the requirements of the Code of Health and Disability Services Consumers' Rights 1996	0%			
Number	Criterion	Evidence May Include	Self Assessment	Evidence	Assessor Assessment
🔗 1.1	The practice displays a copy of The Code of Health and Disability Services Consumers' Rights 1996 (The Code) poster prominently in the practice and brochures about The Code are available for patients to access.	<ul style="list-style-type: none"> <li>Posters on prominent display in the reception area identifying The Code, and brochures are available.</li> </ul>	--None-- Example	<ul style="list-style-type: none"> <li>Policy</li> <li>1.1 Health and Disability Commissioner Code of Health and Disability Services</li> </ul>	

13. The completion bar should fill upon completion of self assessment for the criterion. **Note, for the criterion to be completed and the completion bar to fill, there must be something entered into the Comments box and/or some evidence uploaded.**

Number	Indicator	Completion (%)
INDICATOR 1	The practice meets the requirements of the Code of Health and Disability Services Consumers' Rights 1996	25%

Number	Criterion	Evidence May Include	Self Assessment	Evidence	Assessor Assessment
1.1	The practice displays a copy of The Code of Health and Disability Services Consumers' Rights 1996 (The Code) poster prominently in the practice and brochures about The Code are available for patients to access.	<ul style="list-style-type: none"> <li>Posters on prominent display in the reception area identifying The Code, and brochures are available.</li> </ul>	Met <input type="button" value="v"/> Example	<ul style="list-style-type: none"> <li>Policy</li> <li>1.1 Health and Disability Commissioner Code of Health and Disability Services</li> </ul>	

**Don't forget to regularly save your assessment activity!**