



Assessor Application - Assessor's Guide

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1. Introduction

Intended Audience

This guide is for Assessors using the Provider Assessment & Market Management Solution in their role as Assessor of the quality of care delivered by Providers of adult social services.

About This Guide

This guide describes the functionality which is available to ADASS Assessors within the Assessor Application component.

What is PAMMS?

The Provider Assessment & Market Management Solution (PAMMS) is designed to support the data gathering, workflow management and analytic needs of the ADASS organisation in its role as Assessor of the quality of care delivered by Providers of adult social services.

The solution includes web-based tools that allow users to manage the Provider assessment process, to publish completed assessment reports to the internet, and to support the post-assessment action planning process with the Provider. It also includes a sophisticated analytics capability that provides management insights into the assessment process.

Solution functionality is delivered via three distinct, yet closely related, component parts.





1. **Assessor Application** – An online application used by Assessors that allows for the creation, delivery, and management of Provider assessments. On completion, assessments are automatically rated according to the rating algorithm configured within the application and published to the Assessment Portal.
2. **Assessment Portal** – A web-based platform via which completed assessment reports are made available to members of the public (in summary form). Following authentication, Provider organisations can view full details of their assessment reports via the Portal. They can then work with their Assessor to create, agree, and deliver action plans to address issues identified during the assessment process.
3. **Reporting and Analytics** – A set of predefined reports and dashboards that provide managers with the ability to view comparative Provider-focused analyses across participating local authorities with the ability to drill-down from an aggregated view into the underlying detail. An ad-hoc querying capability is also provided that allows the solution data to be interrogated to provide answers to tactical questions as they arise.

Glossary of Abbreviations

Abbreviation	Term
PAMMS	Provider Assessment & Market Management Solution
CQC	Care Quality Commission
Provider	Agency, Care Provider, Service Provider
Locality Administrator	PAMMS Administrator for the Location an Assessment is taking place in

ADASS	Association of Directors of Adult Social Services
ADASS Admin	Regional PAMMS Administrator (for entire ADASS Region)

Conventions

Convention	Explanation
	Highlight activity on the screen
	Highlight linked functionality on the screen
1. First do Command 2. Then do Option if	Numerically Ordered procedures or descriptions which include screen Commands or Options
	Procedural Steps highlighted on screen
Commands or Options	Commands, Labels or Options
	Important Information
link activated link	Link to another part of this document, a web page or an email address

New to this Release

Software Version 2019.2.0.023 allows the optional inclusion of additional Visibility options for submitted and published Assessments

Related Documentation

PAMMS Provider Guide.

PAMMS Administrator Guide.

2. Accessing the Assessor Application

The PAMMS Assessor Application is hosted in the cloud and delivered over a secure web connection via a browser on your device.

Supported Browsers

We recommend using the latest (but not beta or test version) releases of Chrome or Firefox. The following browsers are currently supported:

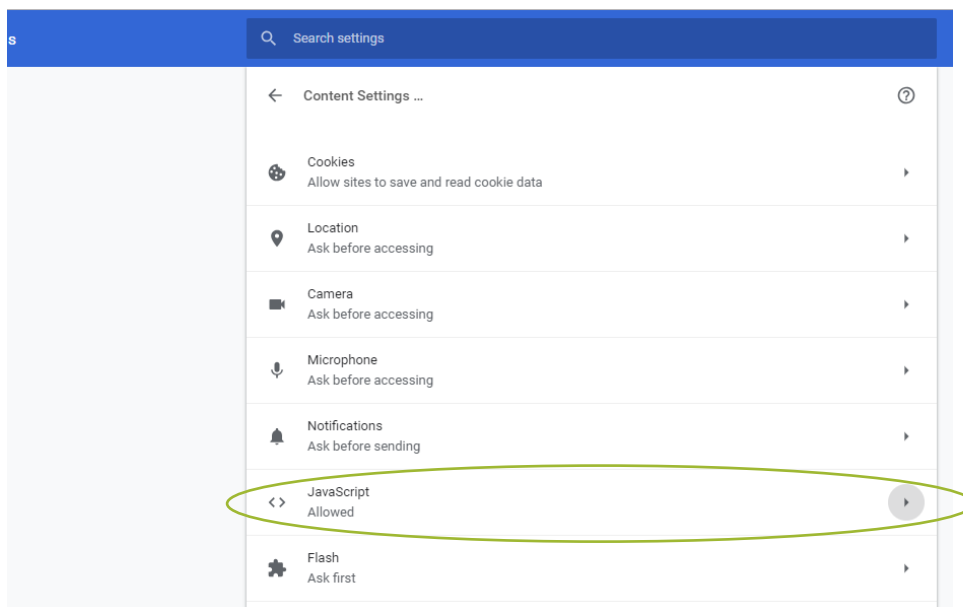
- Internet Explorer v10 and above
- Google Chrome v49 and above
- Mozilla Firefox v44 and above
- Safari running on iOS device version 12.0 and above

PAMMS may work on older versions of these browsers or other browsers but we can't verify or support those installations. HAS Technology always recommends using newer browsers as they are more secure. The currently deployed version of PAMMS is not supported on the Microsoft Edge browser.

You should ensure that browser properties are set to allow JavaScript to be run by sites that you visit. This setting is accessed in a different way for each browser type.

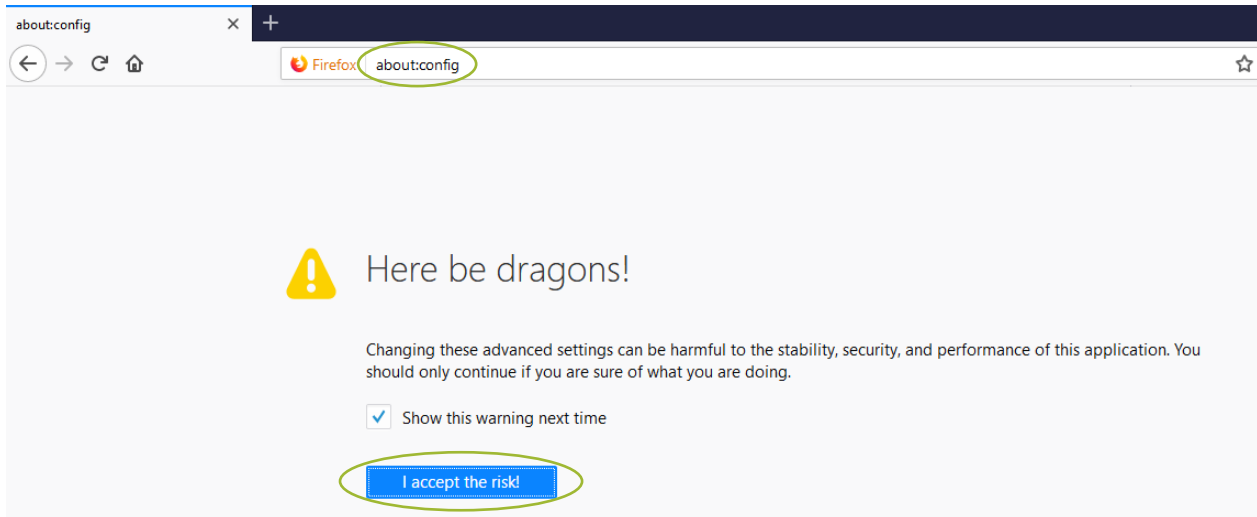
Google Chrome

Select **Settings**⇒**Advanced**⇒**Privacy & Security**⇒**Content Settings**⇒**JavaScript Allowed**.



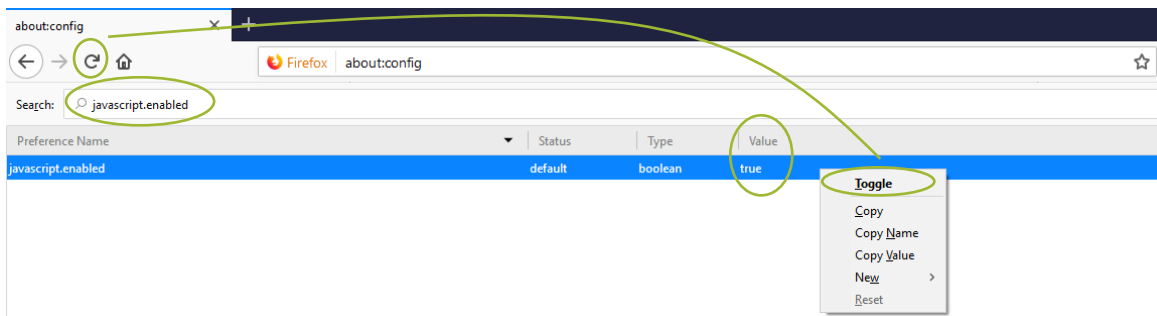
Mozilla Firefox

In the address bar, type **about:config** and press **Enter**. Click the **I accept the risk button**.



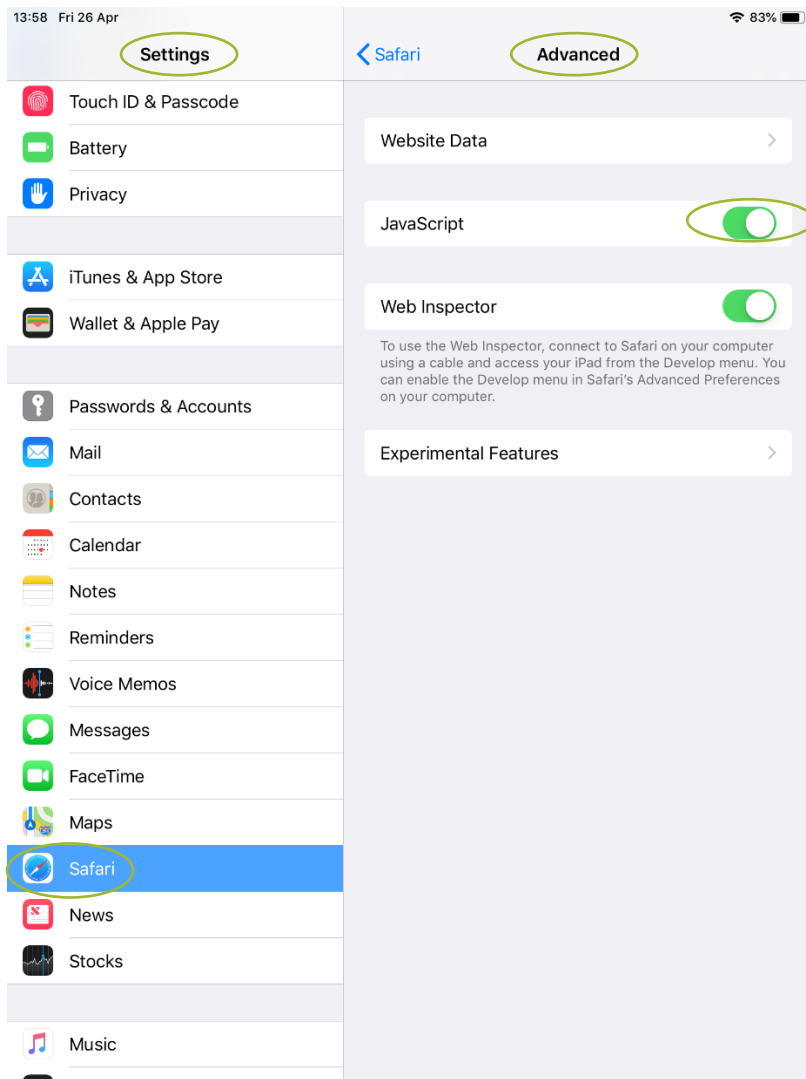
In the search box, type **javaScript.enabled**.

Check that the **Value** is showing as **true**, otherwise **right click** and select **Toggle** to change it (**Reload** the page if you Toggle the setting).



Safari

Go to **Settings**⇒**Safari**⇒**Advanced** and set **Javascript** to **On**.



Supported Devices

Devices running the following Operating Systems are supported:

- Windows v7 and above
- Linux
- Android v4 and above
- Apple iOS 12.0 and above (assessment must be completed online)

All devices should have a minimum screen size of 4 inches, though we would recommend the screen used is at least tablet sized for ease of visibility.

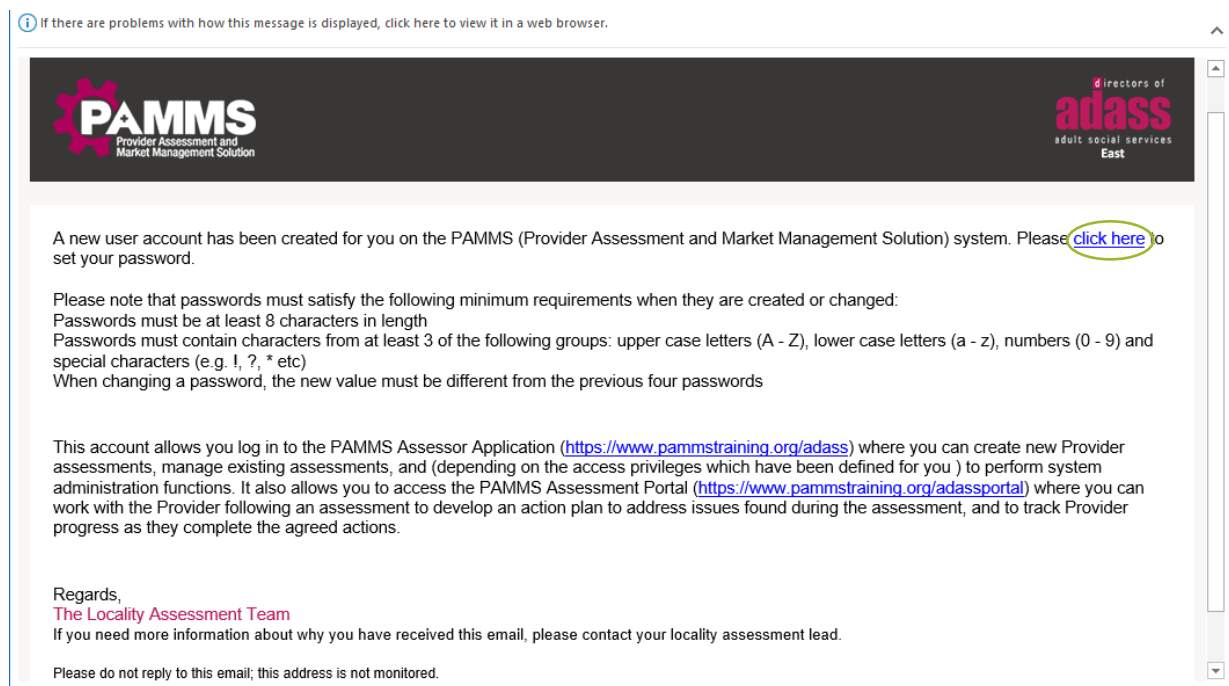
3. Logging in to the Assessor Application

Accessing the Assessor Application for the First Time

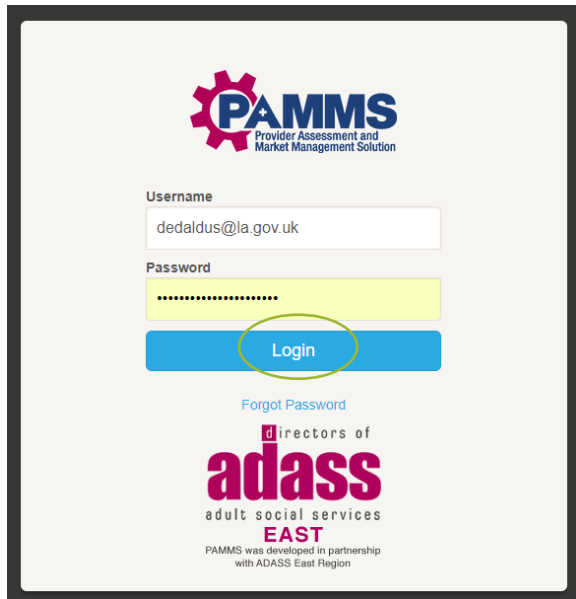
A user account for the Assessor Application will be set up for you by a Locality Administrator. They will supply you with your user name.

On creation of your user account, the system will automatically send you an email containing a [click here](#) hyperlink to a page where you can create a password for your account. The rules for creating a password are contained within the email. Your password must contain at least eight characters and three of the following:

- an upper case letter
- a lower case letter
- a number
- a special character such as & % ^ ~ {



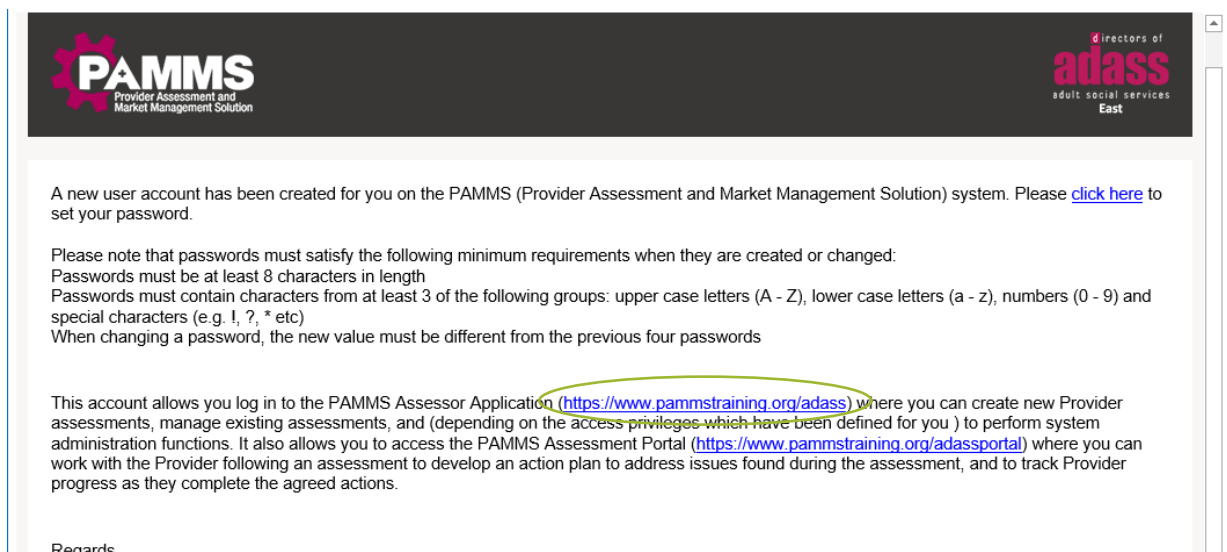
Once you have created a password, the login page will be displayed. Enter your user name and password and click the **Login** button.



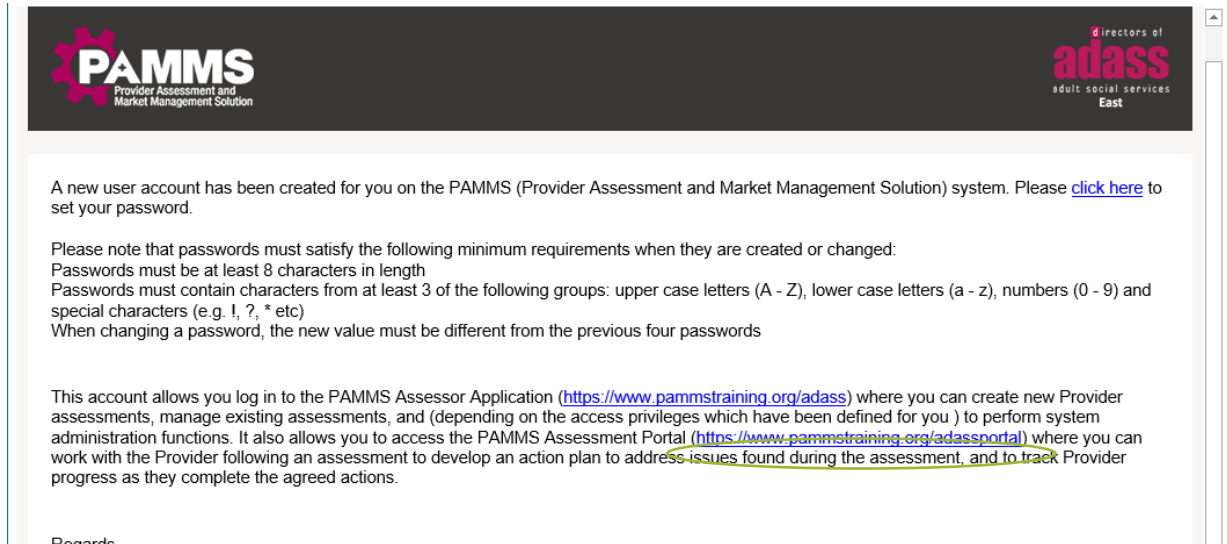
Subsequent Access to the Assessor Application

After your user account set-up has been completed, subsequent access to the system will be via the **URL** supplied in the email from you ADASS Admin system administrator.

Clicking on the [link](#) will show the login page (you can save this to your Browser for subsequent access).



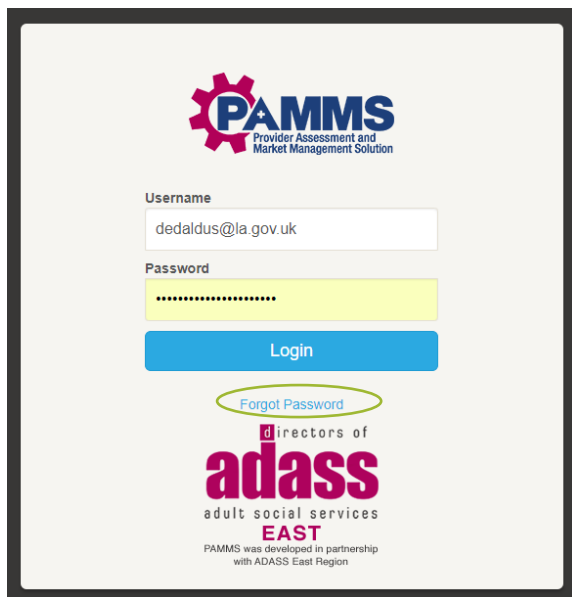
The user account and password that you use to access the Assessor Application is the same user account which provides access to the **PAMMS Assessment Portal** component (the second link provided in the email).



The screenshot shows an email notification from PAMMS. The header includes the PAMMS logo (Provider Assessment and Market Management Solution) and the logo for Directors of ADASS (adult social services East). The main text of the email reads: "A new user account has been created for you on the PAMMS (Provider Assessment and Market Management Solution) system. Please [click here](#) to set your password." It then lists password requirements: "Please note that passwords must satisfy the following minimum requirements when they are created or changed: Passwords must be at least 8 characters in length. Passwords must contain characters from at least 3 of the following groups: upper case letters (A - Z), lower case letters (a - z), numbers (0 - 9) and special characters (e.g. !, ?, * etc). When changing a password, the new value must be different from the previous four passwords." Below this, it states: "This account allows you log in to the PAMMS Assessor Application (<https://www.pammstraining.org/adass>) where you can create new Provider assessments, manage existing assessments, and (depending on the access privileges which have been defined for you) to perform system administration functions. It also allows you to access the PAMMS Assessment Portal (<https://www.pammstraining.org/adassportal>) where you can work with the Provider following an assessment to develop an action plan to address issues found during the assessment, and to track Provider progress as they complete the agreed actions." The email ends with "Regards".

Password Reset

If you forget your password, click the **Forgot Password** hyperlink on the Login page. An email will be sent providing instructions for gaining access to your account.

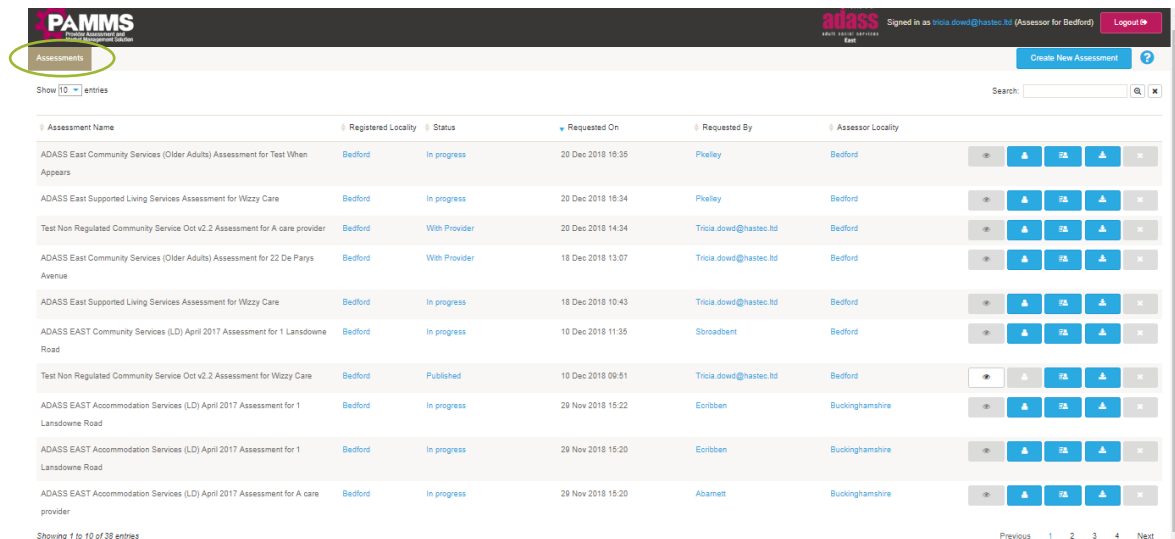


The screenshot shows the PAMMS login page. At the top is the PAMMS logo. Below it are two input fields: "Username" with the value "dedaldus@la.gov.uk" and "Password" with masked characters. A blue "Login" button is positioned below the password field. A "Forgot Password" link is located below the login button and is circled in green. At the bottom of the page is the logo for Directors of ADASS (adult social services EAST) with the text "PAMMS was developed in partnership with ADASS East Region".

4. The Assessments Dashboard

About the Assessments Dashboard

After logging in to the Assessor Application the **Assessment Dashboard** is displayed.



The Assessment Dashboard displays a list of the assessments that are in progress or have previously been completed.

Column Heading	Description
Assessment Name	The Care Provider Location where the assessment will be/was carried out.
Registered Locality	The Local Authority with which the Assessment Location is registered.
Status	The current Status of the assessment. As the assessment progresses through the assessment process, this will be automatically updated. Statuses can be In Progress , Awaiting Approval , Review Required , With Provider , Complete – hidden and Published .
Requested On	The Date on which the assessment was created by the Assessor (this may be different from the date on which the assessment was completed).
Requested By	The User Name of the Assessor who created the assessment.

Assessor Locality	The Local Authority for which the Assessor who created the assessment works.
Action Buttons	Options to perform actions on an assessment.

The Assessment Dashboard is paginated - it displays the full list of assessments across multiple pages. You may select the number of assessments to **Show** on each page:

The screenshot shows the PAMMS interface. At the top left is the PAMMS logo (Provider Assessment and Market Management Solution) and 'Training Server' on the right. Below the logo is a 'Show 10 entries' dropdown menu with options 10, 25, 50, and 100. The main table has columns for Assessment Name, Registered Locality, Status, and Requested On. The first row shows 'ADASS EAST Community Services (LD) April 2017 Assessment for 1 Lansdowne Road' with locality 'Bedford' and status 'In progress'.

Use the **Previous** or **Next** hyperlinks in the bottom right-hand corner of the page to scroll through the assessments:

This screenshot shows a list of assessments with columns for Assessment Name, Registered Locality, Status, Requested On, Requested By, and Assessor Locality. At the bottom right, there are pagination controls: 'Previous', '1', '2', '3', '4', and 'Next'. The 'Previous' and 'Next' buttons are circled in the image.

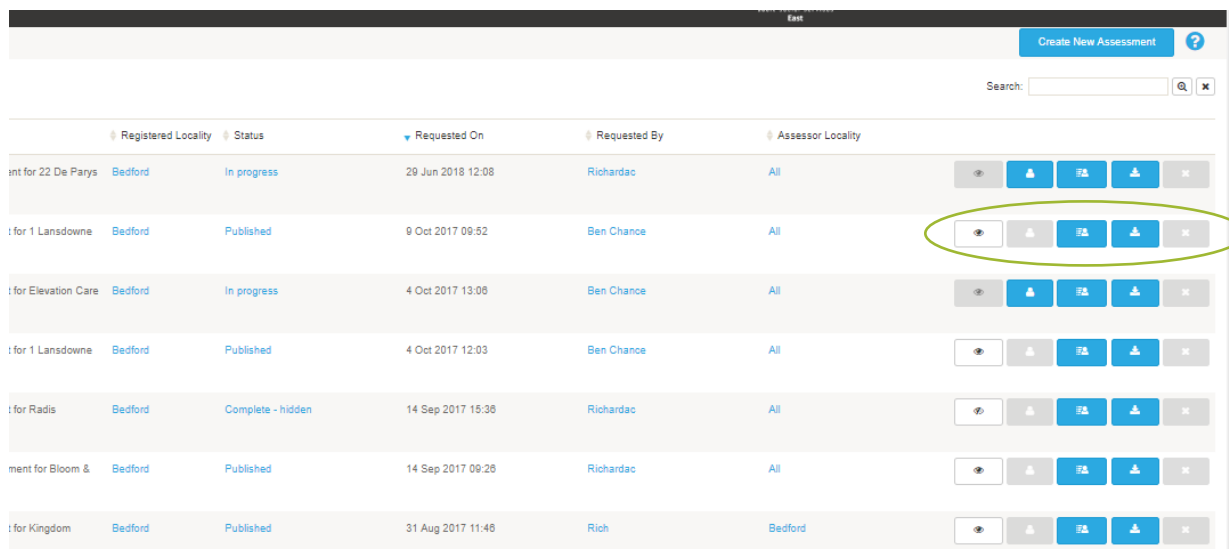
Sorting Columns on the Dashboard







Click on the up or down arrow next to a column heading to sort the assessments in ascending or descending order. The sort order will be displayed with a **blue arrow**.

The screenshot shows the 'Assessments' table with columns: Assessment Name, Registered Locality, Status, Requested On, Requested By, and Assessor Locality. A blue arrow is visible next to the 'Requested On' column heading, indicating it is sorted. The table contains several rows of assessment data.




Assessment Dashboard Action Buttons

Each assessment displayed on the Assessment Dashboard is associated with a group of **Action Buttons** which enable you to perform certain actions against that assessment. If a button is greyed out, you do not have permission to perform that action.



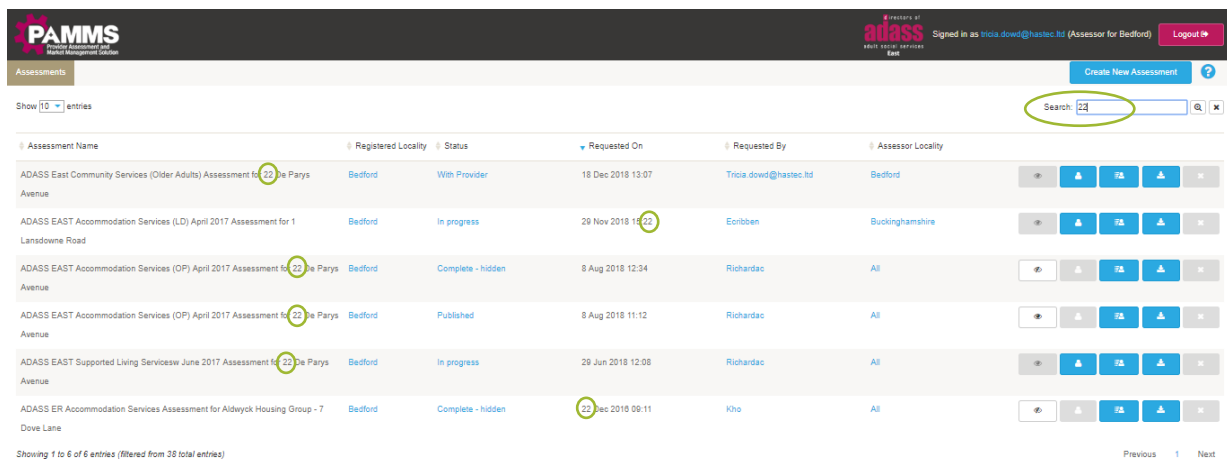
Action Button	Description
	Published to the Assessment Portal. An assessment can only be published after it has been completed. Select this button if you no longer want the Assessment to be visible on the portal.
	Hidden – completed. The assessment is complete but is not visible on the Assessment Portal.
	The Published option will remain greyed out until the Assessment has been completed (e.g. if it is In Progress or With Provider).
	Update Provider Manager details (Name, Email Address and Telephone Number). If the Status of the assessment is With Provider, this can also be used to Reset the time that the Provider must return Comments by (the assessment email is re-sent, and the response time reset – usually to 14 days ¹).
	The Update option will remain greyed out once the assessment has been Completed or Published.
	Manage Provider Access to your published assessments. Allows you to manage the list of Provider users who can view the assessment.

¹ Only an ADASS Administrator for your region can change the default return time from being 14 days.

	<p>Downloads a copy of the assessment to your device.</p>
	<p>Deletes the assessment from the system. This option will only be available if your account has Delete Assessment privileges.</p>
	<p>This will usually be greyed out for Assessors.</p>

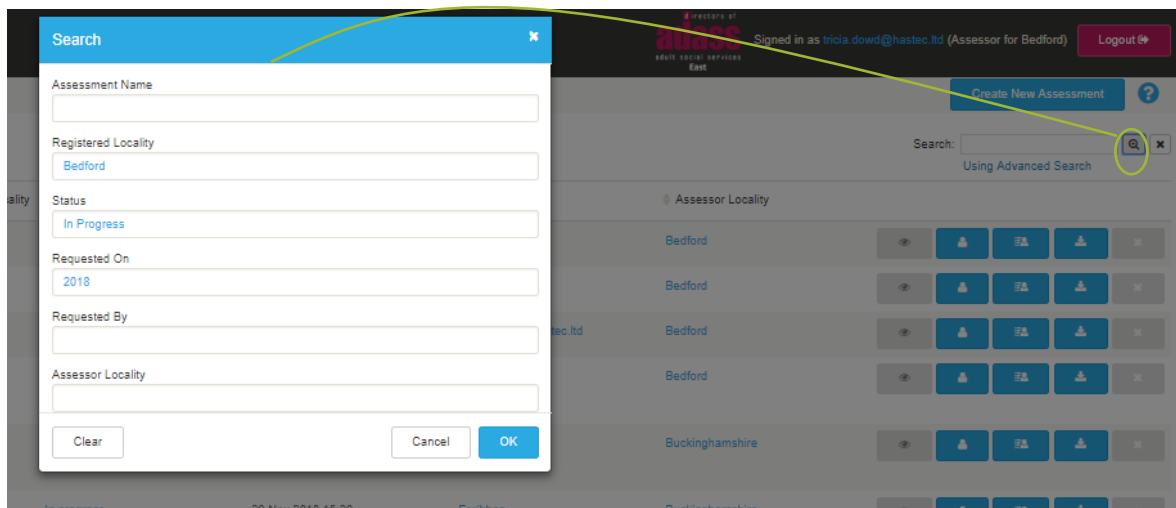
Using the Search Facility

The Search facility enables you to filter and locate assessments on the system. To perform a quick filter, enter a term or a partial search term in the **Search** box. The data in **all columns** will be searched and matching contents displayed.



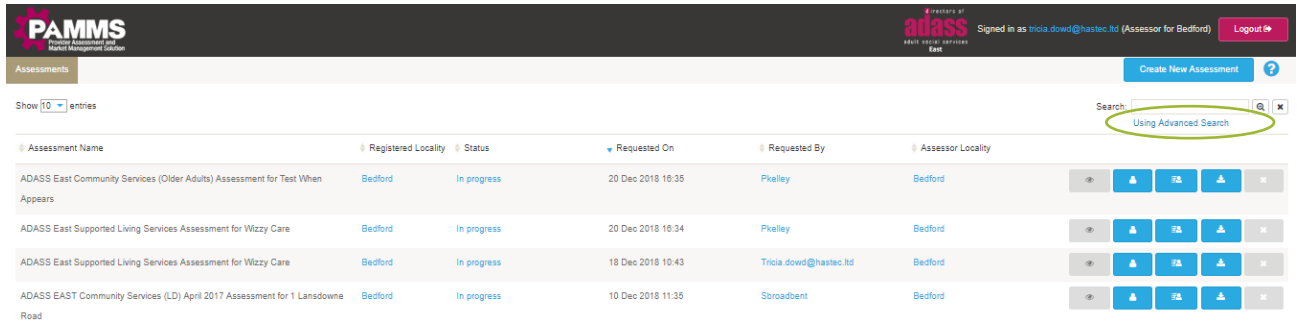
The screenshot shows the PAMMS Assessments dashboard. At the top right, there is a search bar with the text "Search: []" and a magnifying glass icon. Below the search bar is a table with the following columns: Assessment Name, Registered Locality, Status, Requested On, Requested By, and Assessor Locality. The table contains several rows of assessment data, including "ADASS East Community Services (Older Adults) Assessment for 22 De Parys Avenue" and "ADASS EAST Accommodation Services (LD) April 2017 Assessment for 1 Lansdowne Road".

To search on more than one term or partial term (Advanced Search), select the **Magnifying Glass** icon. Enter the terms next to the column heading:

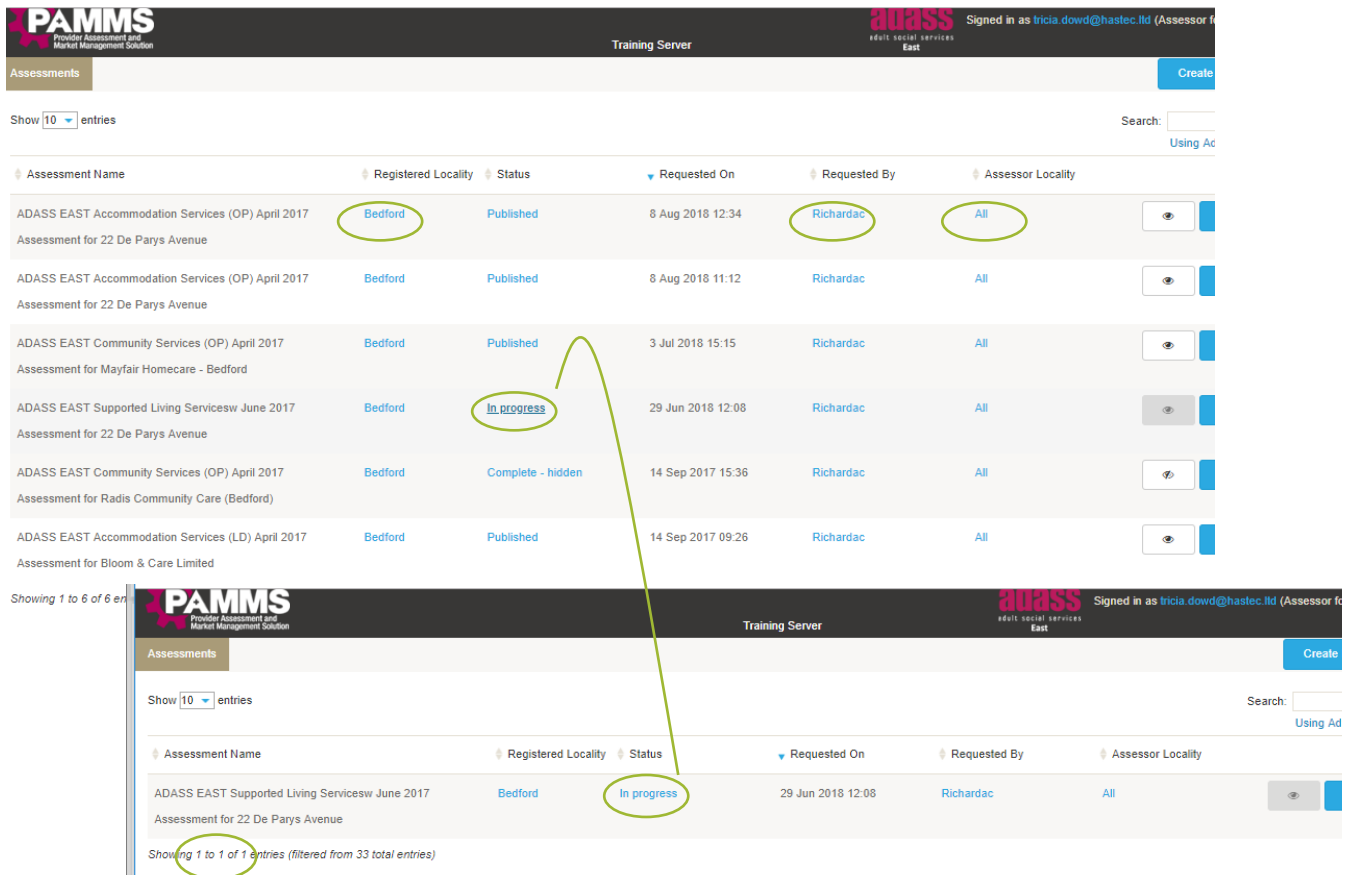


The screenshot shows the PAMMS dashboard with the Advanced Search modal window open. The modal window has a title "Search" and a close button. It contains several input fields for filtering: Assessment Name, Registered Locality (with "Bedford" entered), Status (with "In Progress" selected), Requested On (with "2018" entered), Requested By, and Assessor Locality. There are "Clear", "Cancel", and "OK" buttons at the bottom of the modal. In the background, the search bar from the previous screenshot is visible, with the magnifying glass icon circled in red and a red arrow pointing to the "Using Advanced Search" text below it.

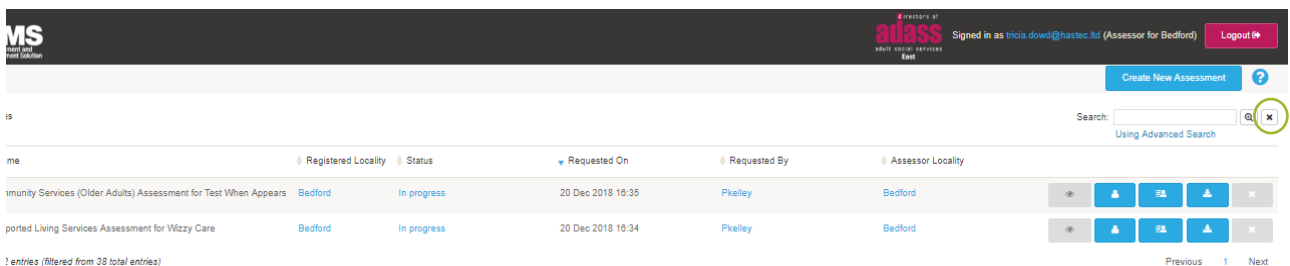
When an Advanced Search has been applied, a **Using Advanced Search** warning is displayed:



You can also perform an Advanced Search by clicking on values (displayed as **blue hyperlinks**) on the dashboard. Only those records with the selected values will be displayed.



To remove the search filter, click the **X** icon.



5. Preparing to Deliver an Assessment

Creating a New Assessment

To create a new assessment form, click the **Create New Assessment** button at the top of the Assessment Dashboard. The New Assessment page is displayed.

Complete the details of the Provider organisation that is going to be assessed:

1. **Registered Locality** - Select the name of the Local Authority that the Location is registered with
2. **Location** - Select the Location of the facility you are going to assess. Only Locations within the selected Registered Locality will be listed. Locations are updated daily from the CQC. When you select a location, the **Provider Details** and **Contact Details** will automatically populate. These cannot be modified. The Provider ID is the unique CQC Identifier.
3. **Assessment Template** - Choose a Template based on the type of assessment that you want to deliver. Templates can only be updated by an ADASS Administrator
4. **Managers Name** – The Manager of the Location. This will be your primary contact in terms of delivering the assessment. This should be entered if known but can be added as part of the assessment process
5. **Manager's Email Address** – This must be entered
6. **Repeat Manager's Email Address** – You will need to retype the address for data verification purposes as this address will be used as the registration email for the Provider to access the assessment
7. **Telephone Number** – This should be entered if known but can be added as part of the assessment process

Select **OK**.

Create New Assessment

Registered Locality **1**
Bedford

Location **2**
Bens Care

Assessment Template **3**
ADASS East Community Services (Older Adults)

Provider Details

Provider: Bens Care
Parent Company: Bens Care Group
ID: adass-1536746774

Contact Details

Address: Bens Care, Four Oaks House, 160 Lichfield Road
Post Code: B74 2TZ

Manager's Name **4**: Harry Potts
Manager's Email Address **5**: HarryP@bencare.org.uk
Repeat Manager's Email Address **6**: HarryP@bencare.org.uk
Telephone Number **7**: [Empty]

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Cancel OK

The new assessment will be available on the Assessment Dashboard.

In rare circumstances, you may need to create an assessment on a non-regulated Provider. In these instances, when you set up your assessment, you must select **Location** ⇒ **Non-Regulated Provider**. Only then will you be able to enter text into the **Provider Details** and **Contact Details** fields.

Create New Assessment

Registered Locality: Bedford

Location: **Non-Regulated Provider**

Assessment Template: Test Non Regulated Community Service Oct v2.2

Provider Details

Provider: [Empty]
Parent Company: [Empty]
ID: [Empty]

Contact Details

Address: [Empty]
Post Code: [Empty]

Manager's Name: [Empty]
Manager's Email Address: [Empty]
Repeat Manager's Email Address: [Empty]
Telephone Number: [Empty]

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Cancel OK

Downloading an Assessment

Please Note – this does not apply if using an iOS Device. If using an iOS Device you must complete the assessment on-line, see [Completing an Assessment on an iOS Device](#).

In order to complete the assessment, you must first **download** a copy of it to your local device.

You should ensure that you have downloaded the assessment prior to travelling to the Location to be assessed. You should download it from a place where you can be assured of Internet or Wi-Fi connectivity to the Assessor Application. We would recommend downloading the assessment at least one day before attending the assessment.

Click on the **Download Assessment** button from the Assessment Dashboard. Note that the file download options that are presented will differ depending on the browser you are using. The file may be saved automatically to the Download folder on your device or you may be prompted to open the assessment or save it to a location on your device. Choose to **Save** the template to somewhere that you will be able to access it on the day of the assessment. The naming convention for the downloaded file is:

TemplateName_for_Location_DownloadDate. The file is downloaded in HTML format.

The screenshot shows the PAMMS Assessment Dashboard. At the top right, it says 'Signed in as Inicia.dowd@hastec.hk (Assessor for Bedford)'. Below the header is a table of assessments. The table has columns for Assessment Name, Registered Locality, Status, Requested On, Requested By, and Assessor Locality. Two rows are visible, both with a status of 'In progress'. The first row is for 'ADASS East Community Services (Older Adults) Assessment for Test When Appears' and the second is for 'ADASS East Supported Living Services Assessment for Wizzy Care'. To the right of each row are several action buttons, including a blue button with a download icon. A green arrow points from this button to the browser's address bar at the bottom, which shows the file path 'ADASS_East_Com...html'.

You must not rename or change the file extension type.

Completing an Assessment on an iOS Device

If you are using an iOS Device, you must complete the assessment online via an appropriate internet browser such as Chrome or Safari. You will not be able to progress the assessment if you lose internet connectivity.

Click on the **Download Assessment** button from the Assessment Dashboard, the file will open in your browser.

The screenshot shows the PAMMS (Provider Assessment and Market Management Solution) interface. At the top, there's a navigation bar with 'Assessments', 'Users', and 'Providers' tabs. A search bar and a 'Create New Assessment' button are also present. Below the navigation, a table lists assessment entries. One entry is highlighted, showing details for 'ADASS EAST' in 'Bedford', with a status of 'In progress', requested on '24 Apr 2019 09:07', and requested by 'Skhan'. The 'Assessor Locality' is also 'Bedford'. A green circle highlights the 'Download' icon in the action menu for this entry. Below the table, a detailed view of the selected assessment is shown, titled 'ADASS EAST Accommodation Services (L... for A care provider)'. The left sidebar contains navigation options: 'Provider Details', 'Assessment', 'Progress Summary', and 'Notes'. The main content area displays the 'Provider Details' form, which includes fields for ID (adass-1494942147), Registered Locality (Bedford), Provider (A care provider), Parent Company, and Address (A care provider).

Any information you complete in the assessment will be saved automatically when you close the browser or log out. The forms synchronise and upload new data to the web every 10 seconds. If you lose internet or Wi-Fi connectivity, any data entered since your device went off-line/last synchronised will be lost.

6. Delivering an Assessment

Opening an Assessment

Double click on the assessment file you saved from the Assessor Application (open it from the Assessment Dashboard if using an iOS Device). The file will open in your web browser.

Unless you are using an iOS device, you do not need to have internet or Wi-Fi access to work with an assessment once it has been saved. If you do not have connectivity at the Location that you are assessing, you can complete the assessment and upload it to the site when you do have internet access.

When you first open the assessment, menu options are displayed on the left of the screen. Click the **blue chevrons** to alternate between menu and full screen view.

The image displays two screenshots of the ADASS assessment interface. The top screenshot shows the 'Provider Details' form in a compact view with a left-hand menu. A blue chevron icon is circled in green. The bottom screenshot shows the same form in a full-screen view, with the left-hand menu hidden. A blue chevron icon is also circled in green.

ADASS East Community Services (Older Adults) for 22 De Parys Avenue

Provider Details

ID: 1-313657728

Provider Details

Registered Locality: Bedford

Provider: Consensus Support Services Limited

Parent Company: Unspecified

Contact Details

Address: 22 De Parys Avenue

Post Code: MK40 2TW

Manager's Name: Fred Wheezley

Manager's Email Address: fred.wheezley@bencare.co.uk

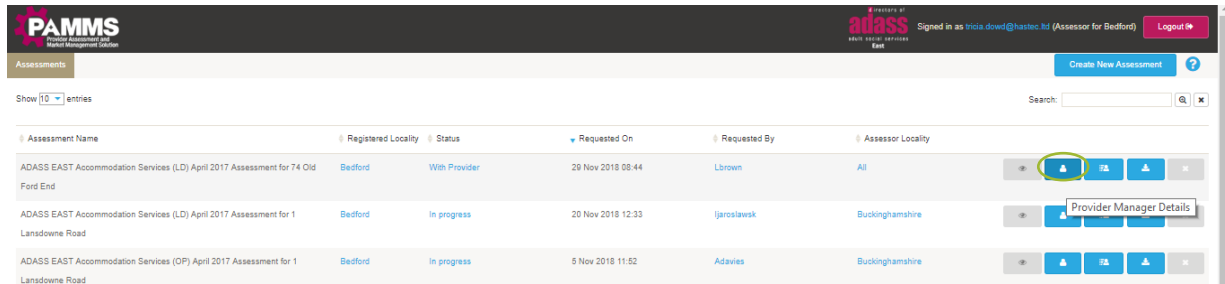
Repeat Manager's Email Address: fred.wheezley@bencare.co.uk

Telephone Number

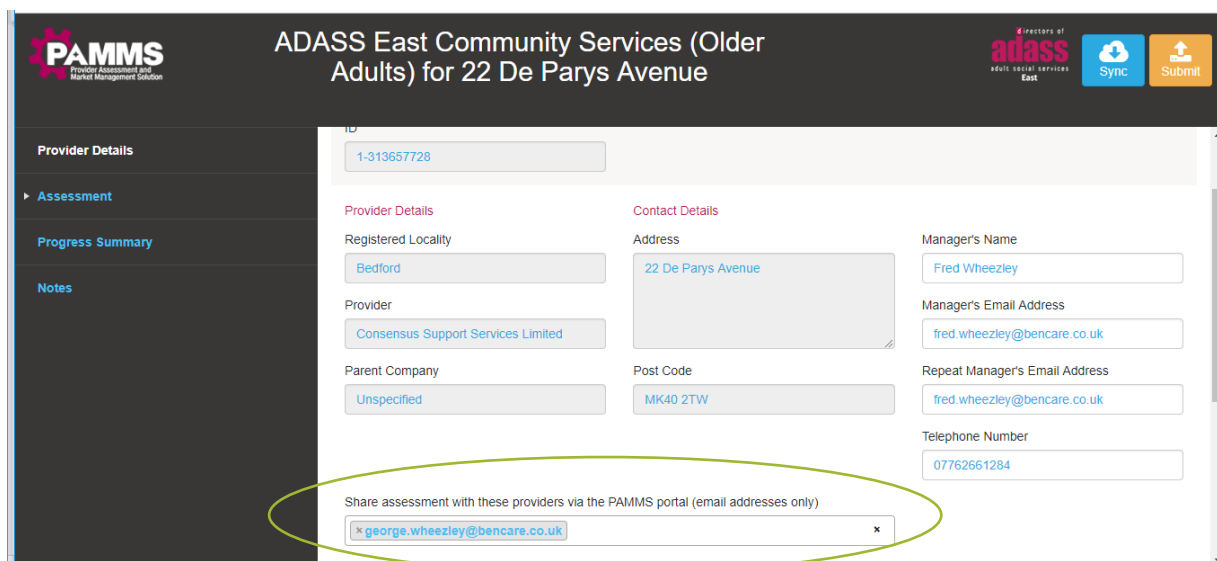
Completing an Assessment

Provider Details

The Provider Details you selected (these are updated daily from the CQC data registry) are shown. If you did not enter a **Manager's Name** or **Telephone Number** when you created the assessment, these should be added through the **Provider Manager Details** option on the Assessment Dashboard.

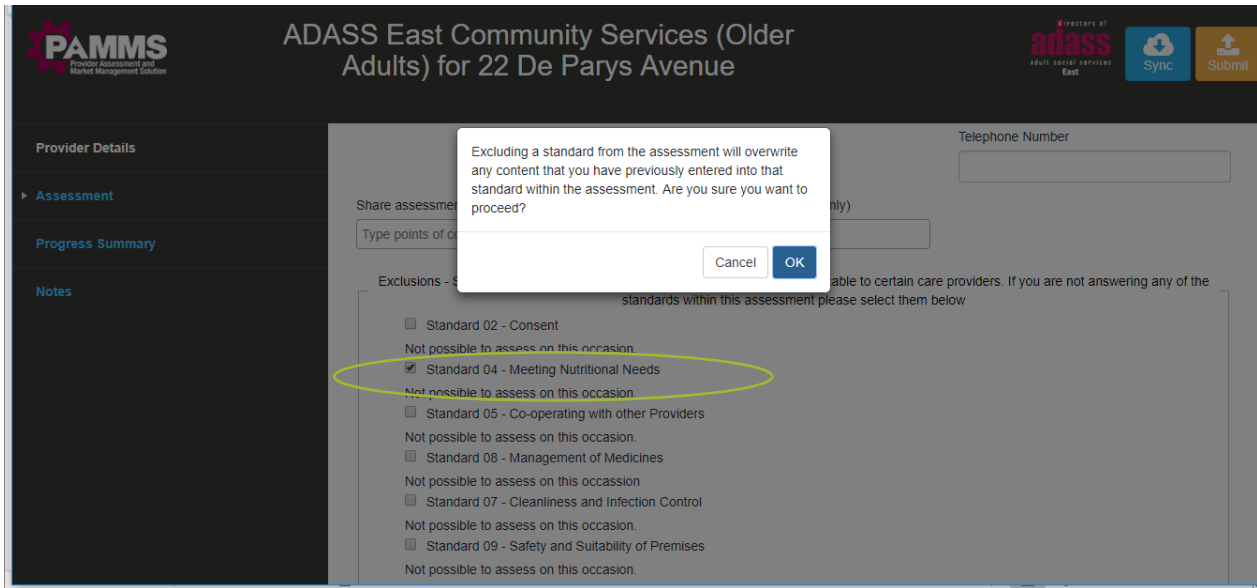


You can also share the assessment with additional members of staff. Enter their email addresses in the **Share assessment with these providers via the PAMMS portal** box. When the assessment is complete, they will be registered on the site and can log in and view the final assessment.



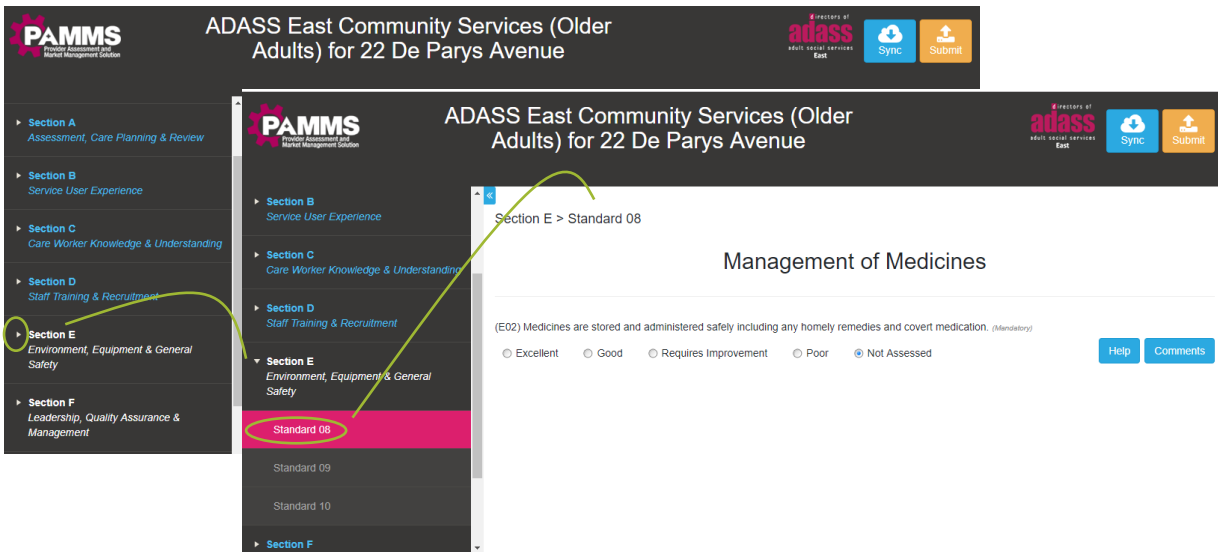
Exclusions

You have the option to remove any areas from the assessment because they are not performed by the Provider. For example, if staff at the Location do not provide food or nutritional checks, you can select to **exclude Standard 4**. You will be prompted to provide confirmation before it is removed from the assessment.

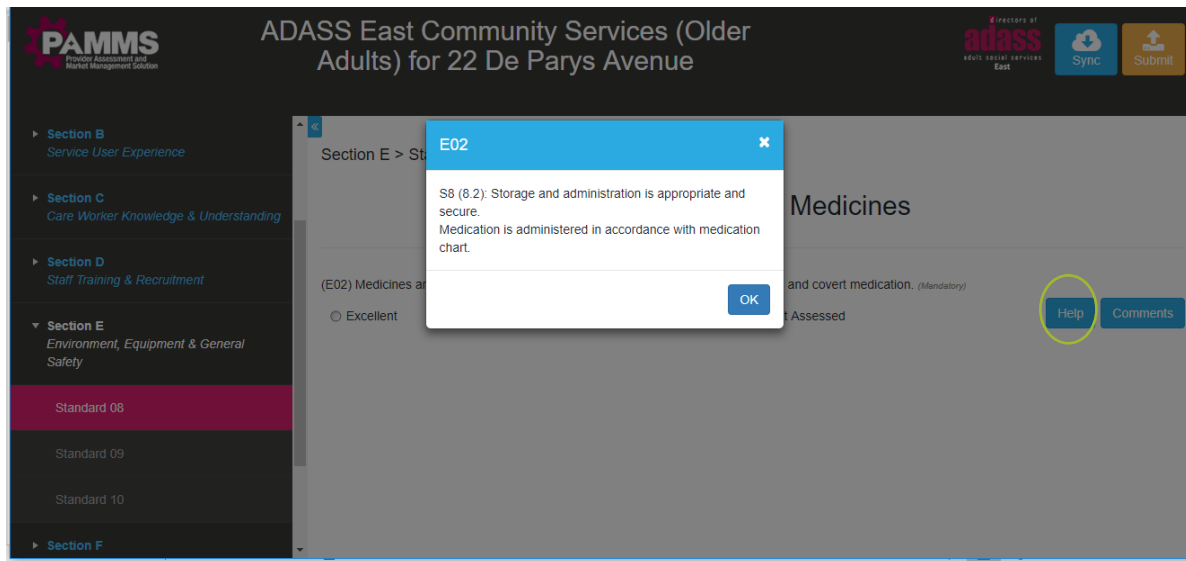


Assessment

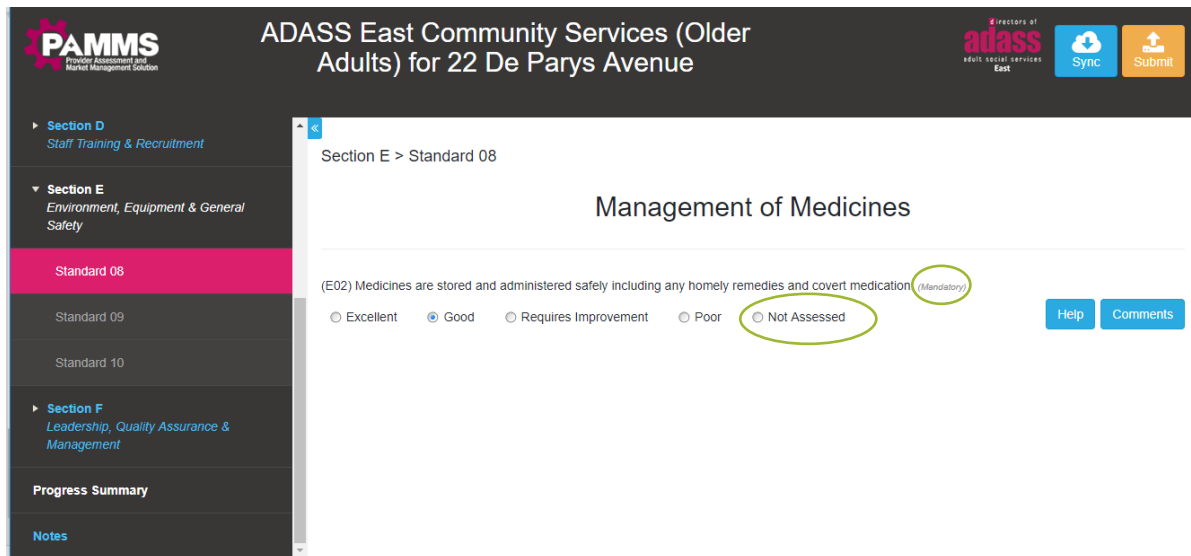
Click the **arrow** to open the Assessment elements. The Assessment is made up of up to seven Sections – A to G, and each Section contains questions covering up to 17 Standards. Click on the **Standard** to view the questions, see [Appendix A](#). The number of sections will depend on the template being used (which will depend on the type of care being assessed).



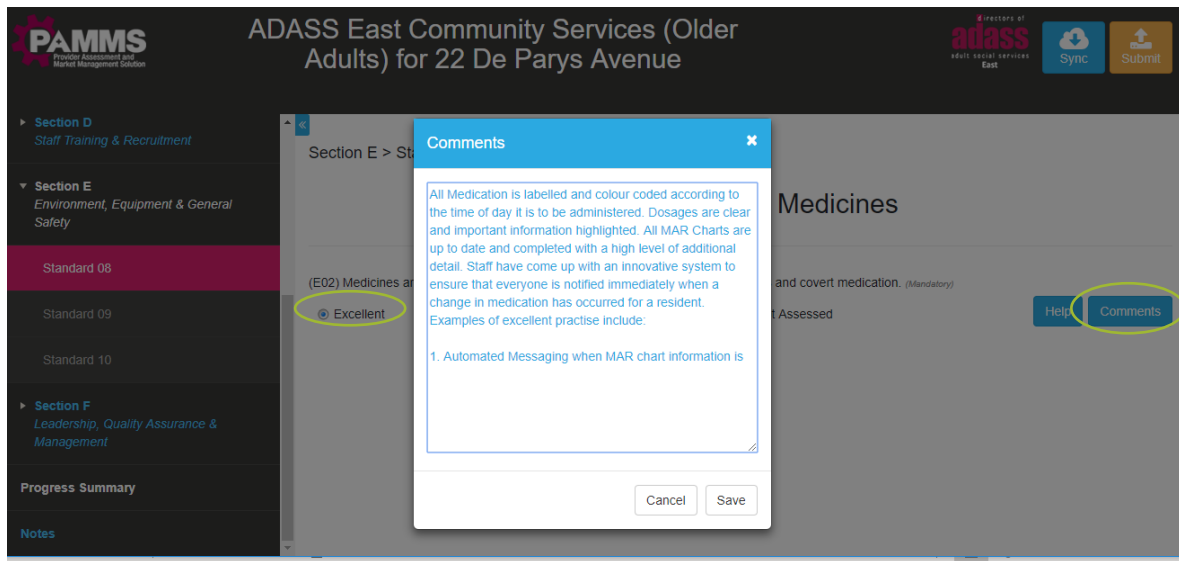
You can select **Help** to gain further information about a question.



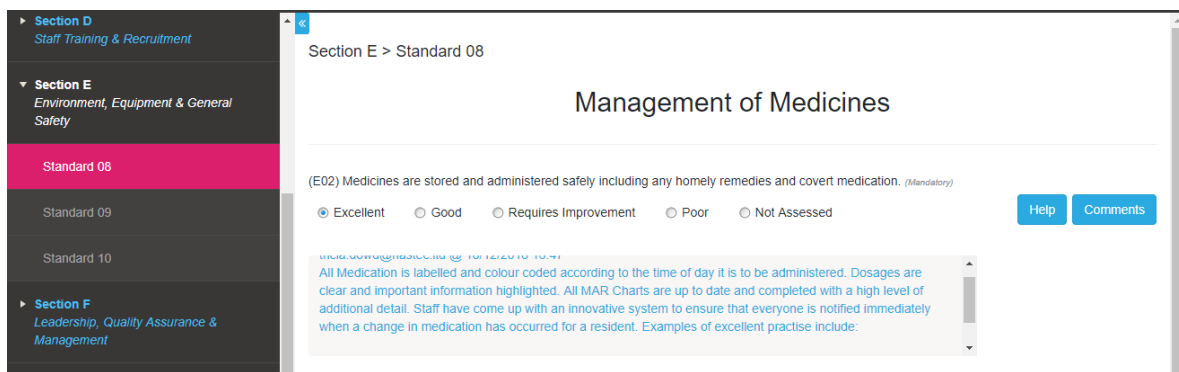
Some questions are marked as **Mandatory**. An assessment can't be submitted if any Mandatory questions have not been completed. Some Non-Mandatory questions may not be applicable to the Provider being assessed. These can be left as **Not Assessed**. The number of questions which can be left as Not Assessed is subject to meeting a Completion Criteria threshold.



As you perform the assessment, select the appropriate **Rating** to award for each question. Select **Comments** to add evidence as to why they received that rating.



Saved comments can be viewed next to their associated question and will form part of the Assessment Report the Provider views.



Progress Summary

The assessment **Progress Summary** provides an overview of the assessment.

1. All Sections of a Standard are coloured **Red** if any Mandatory Questions have not been answered or if the Completion Threshold has not been met in any of the Sections. Individual Sections will indicate the number of **Incomplete Questions** and the number of **Incomplete Mandatory Questions**.
2. All Sections of a Standard are coloured **Green** if all Mandatory Questions have been answered and the Completion Threshold has been met across all sections. Individual Sections will indicate the number of **Incomplete Questions**. If answers are left Incomplete, these values will not be included in the rating.

The screenshot shows the ADASS assessment interface for 'ADASS East Community Services (Older Adults) for 22 De Parys Avenue'. The interface includes a sidebar with navigation options: Standard 10, Section F (Leadership, Quality Assurance & Management), Standard 08, Standard 12, Standard 14, Standard 15, Standard 16, Progress Summary (circled in green), and Notes. The main area displays a table of progress for Standards 01 through 05 across Sections A, B, C, D, and E. The table uses color coding: red for incomplete standards with mandatory questions remaining, green for complete standards, and grey for standards not yet reached. Numbers in green circles indicate the count of mandatory questions remaining.

	Section A	Section B	Section C	Section D	Section E
Standard 01	Standard 01 Complete	Standard 01 1/1 mandatory questions remaining 5/5 questions remaining	Standard 01 Complete	1	
Standard 02	Standard 02 Complete	Standard 02 Complete	Standard 02 Complete	2	
Standard 03	Standard 03 1/12 questions remaining	Standard 03 1/3 mandatory questions remaining 1/3 questions remaining	Standard 03 Complete	1	
Standard 04	Standard 04 Complete	Standard 04 Complete	Standard 04 1/2 questions remaining	2	
Standard 05	Standard 05 Complete	Standard 05 Complete		2	

Meeting the Threshold for Completeness

When an assessment template is created, the template author (the ADASS Administrator) sets a Completeness Threshold for each of the Standards by specifying the maximum number of Incomplete Questions permissible for the Standard to meet the Completion Threshold (and turn green).

For example, if a Standard has eight questions and the Completion Threshold is set to six, the Standard will turn Green once six or more Questions have been answered (if none of the Incomplete Questions are Mandatory).

Notes

The **Notes** area allows you to add general notes which are not related to a specific question. The Notes entered here will not be included in the Assessment which is sent to the Provider.

The screenshot shows the 'Notes' section of the ADASS assessment interface. The sidebar on the left has 'Notes' circled in green. The main area is titled 'Notes' and contains a text input field with the following text: 'At the time of the assessment, Building Work was being completed to provide an additional area for residents to relax in. Although their was considerable noise associated with the machinery being used, excellent systems were put into place to ensure that residents safety took paramount priority, this included: Fitting locks in the |'. There is a 'Sync' button and a 'Submit' button in the top right corner.

Working with Another Assessor

Unless you are using an iOS device, if you are delivering an assessment in partnership with another Assessor, you can each work independently on the same assessment at the same time. You can then synchronise your work to create a unified assessment before it is submitted.

If you are using an iOS device and delivering an assessment in partnership with another Assessor, you must take care not to access the assessment at the same time in case you “overwrite” each other’s entries. You should agree a schedule in which you complete your component parts.

Prior to the Assessment

One of the Assessors must create the assessment in the standard way (see [Creating a New Assessment](#)) using the Assessment Dashboard.

Each Assessor will need to download a local copy of the assessment to their device (see [Downloading an Assessment](#)).

Before starting the assessment, agree which sections each Assessor will complete. Each Assessor **must complete different parts** of the assessment. If a part of the assessment is completed by both Assessors, they are at risk of overwriting each other’s answers.

When the Assessor Portal is accessed while connected to the internet, the assessment answers are automatically saved. If the Assessment is completed without internet connectivity, the answers will be stored on the local computer and can be uploaded to replace the live copy when the computer is connected to the internet.

When each Assessor clicks the **Sync** button when connected to the Internet, their local copy of the assessment will update the completed sections on the live copy held in the website.

The screenshot shows the ADASS East Community Services (Older Adults) for 22 De Parys Avenue assessment dashboard. The interface includes a sidebar with navigation options: Provider Details, Assessment, Progress Summary, and Notes. The main content area displays 'Provider Details' with the following information:

- ID: 1-313657728
- Registered Locality: Bedford
- Address: 22 De Parys Avenue
- Manager's Name: Fred Wheezlev

A 'Sync' button is highlighted in the top right corner of the dashboard.

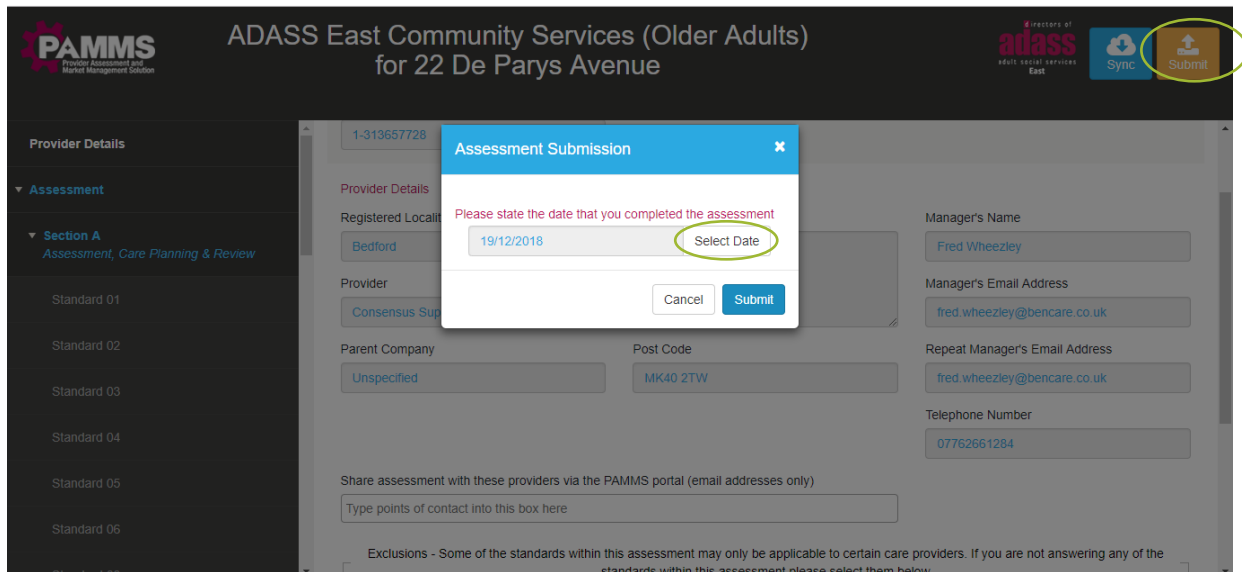
Once the assessment is complete, the Assessor who originally created the assessment must make sure that they have synchronised with the live copy of the assessment after the other Assessors involved have copied their responses into the master copy. They can then submit the assessment in the normal way (see [Submitting the Assessment](#)).

7. Creating the Assessment Report

Submitting the Assessment

Once you are satisfied that the assessment is complete you can submit it for the Provider to review and comment.

Click the **Submit** button. You will be prompted to **Select Date**, select the date on which the assessment was completed. The Assessment (other than the generic Notes page) will be emailed to the Provider Manager.



If you do not have the Submit Assessment permission associated with your user account, when you click **Submit**, the status of the assessment on the Assessment Dashboard will be updated to **Awaiting approval**. You should contact a supervisor with Submit Assessment permission to request that they review the assessment. If the reviewing user is satisfied, they will complete the submission process and the draft assessment report will be emailed to the Provider Manager.

Assessment Name	Registered Locality	Status	Requested On	Requested By	Assessor Locality
ADASS East Community Services (Older Adults) Assessment for 22 De Parys Avenue	Bedford	Awaiting approval	18 Dec 2018 13:07	Tricia.dowd@hastec.ltd	Bedford
ADASS East Supported Living Services Assessment for Wizzy Care	Bedford	In progress	18 Dec 2018 10:43	Tricia.dowd@hastec.ltd	Bedford
ADASS EAST Community Services (LD) April 2017 Assessment for 1 Lansdowne Road	Bedford	In progress	10 Dec 2018 11:35	Sbroadbent	Bedford

If the Assessment remains with an **Awaiting approval** status for seven days, an email will be sent to all Local Authority Assessors and Administrators who have Submit Assessment permission to alert them that an assessment needs to be reviewed. They will continue to receive an email each day until the assessment has been submitted.

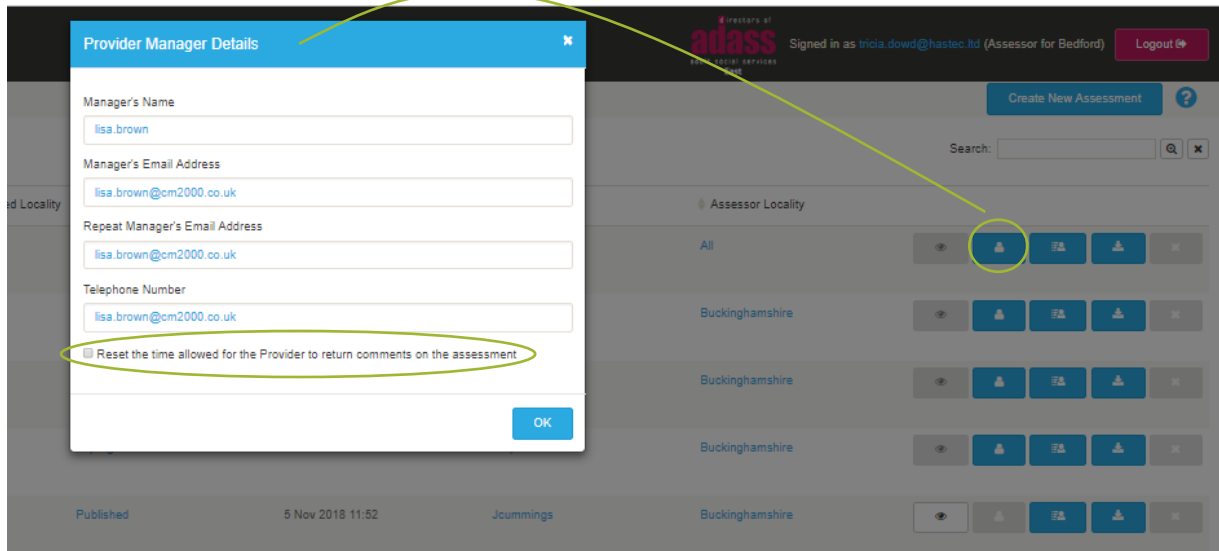
When the submission is complete, the Submit button turns green.

Modifying a Provider Manager

If the **Provider Manager** or their details change, these can be modified.

If the Provider has an acceptable reason not to be able to respond in the default time (such as due to staff change or sickness), this option can also be used to resend the assessment.

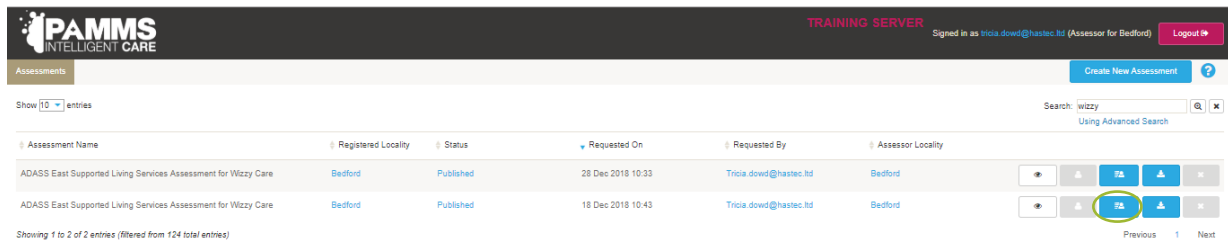
Select **Reset the time allowed for the Provider to return comments on the assessment** and the time to comment on the assessment will be reset (usually to 14 days).



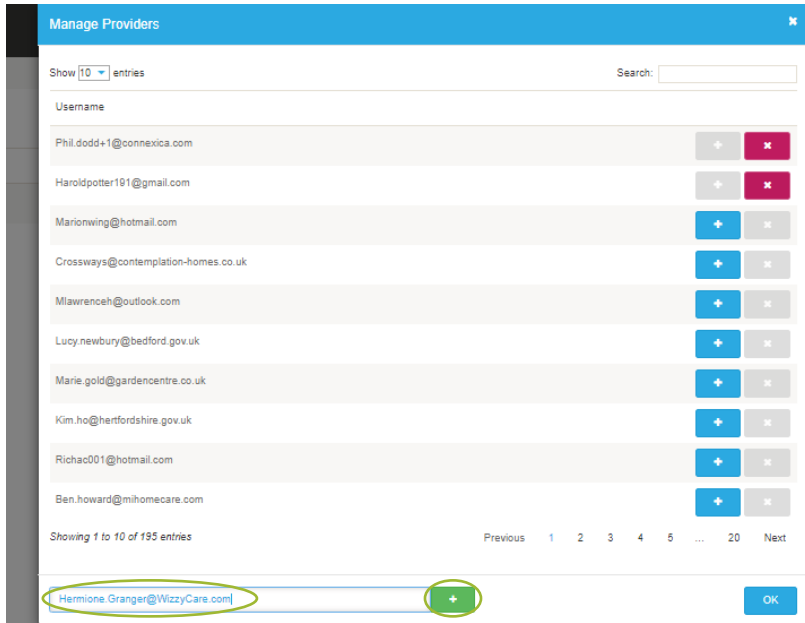
*Please note that **a new email is not sent out** to the Provider when the response deadline is Reset.*

If an organisation **changes** their Provider Manager, the new manager will not be able to view previous assessment reports when they log into the provider portal as the previous registered manager's email address will be associated with the assessments.

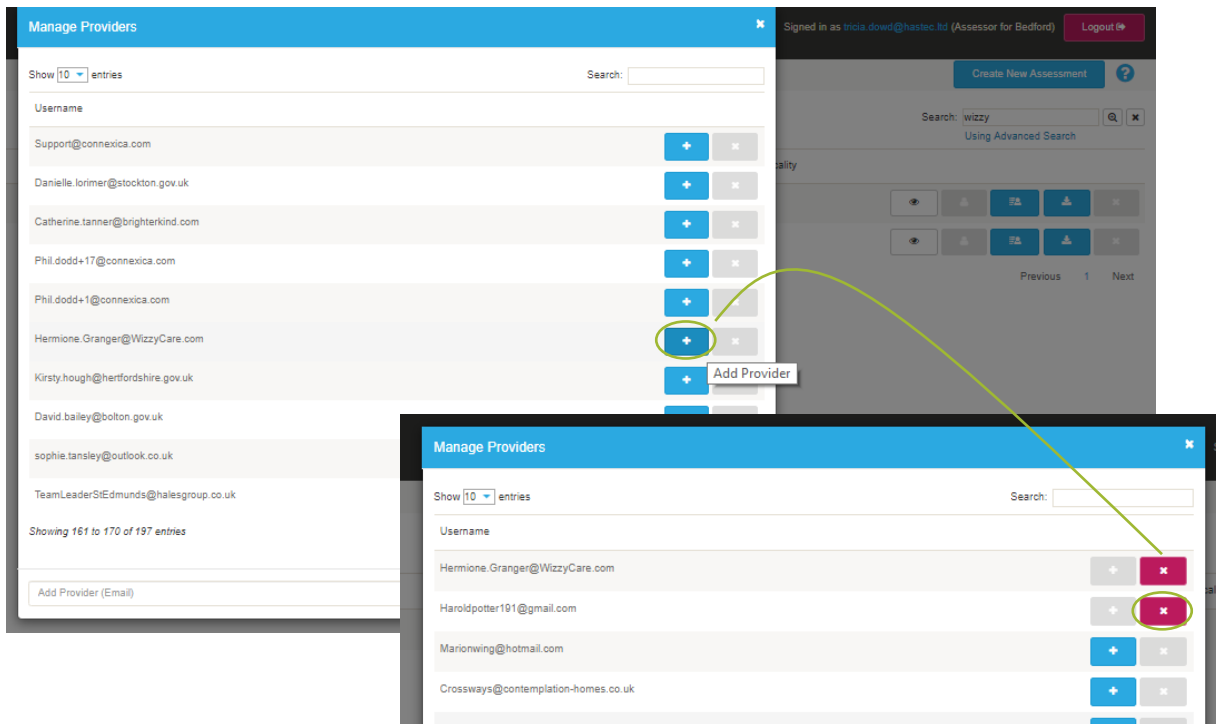
Select **Manage Providers** next to the Assessment they need to view.



If the Provider Manager's details have not been added yet, enter their **Email Address** and the Add + icon.

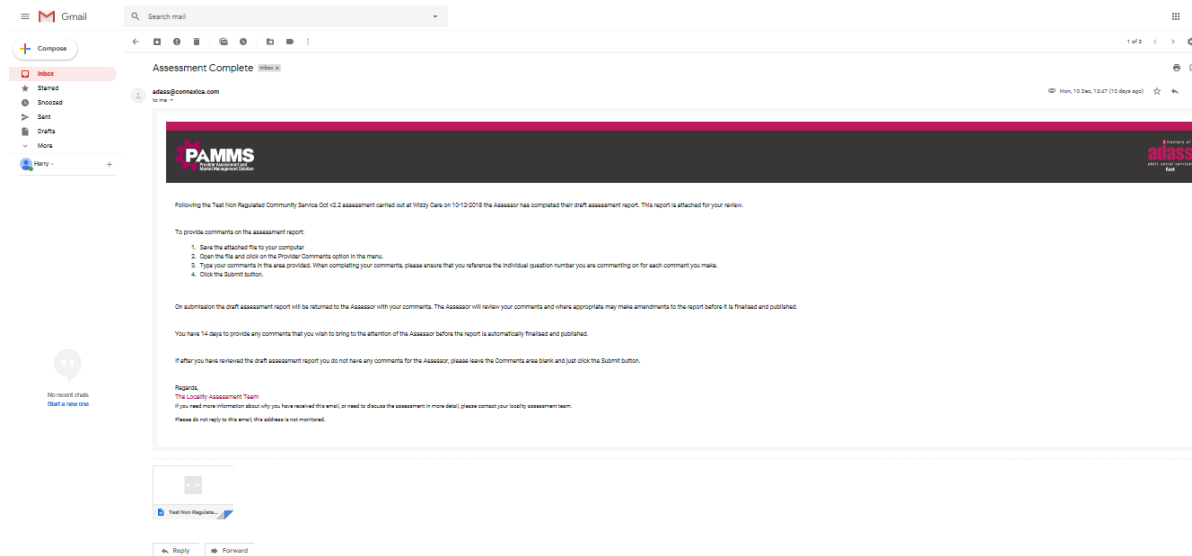


After you have added the details (or if the Provider Manager details have already been entered) select the Plus + icon next to their record to give them visibility of the assessment. Select the x icon to prohibit a member of staff from viewing an assessment.



8. Provider Comments

After the assessment has been submitted it will be emailed to the Provider Manager for review. They can add their own comments to the assessment.

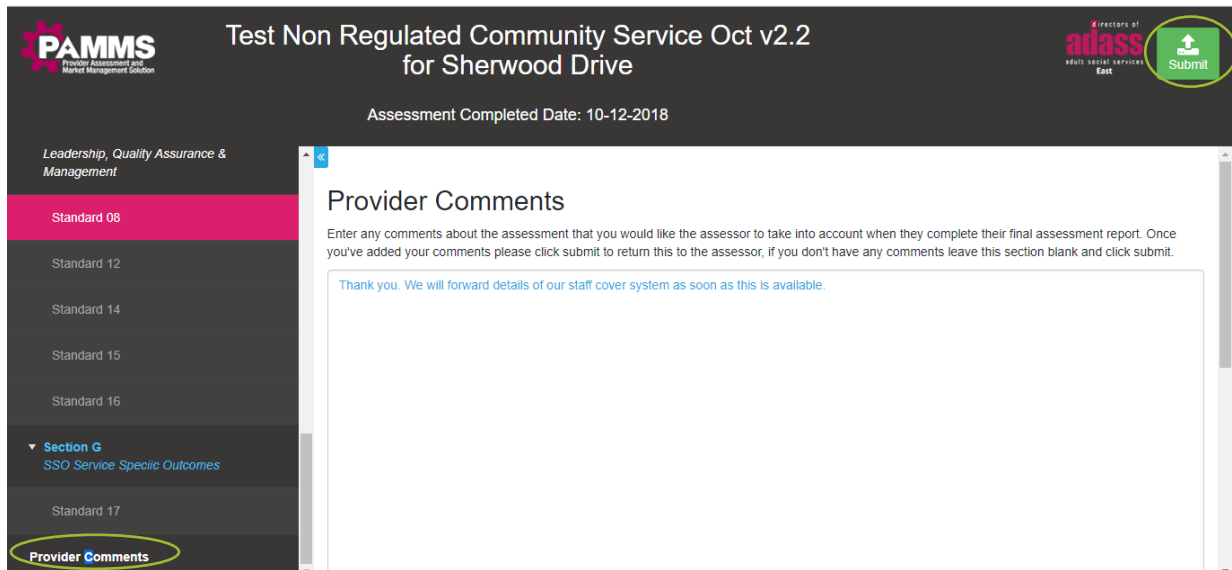


The Provider can save and open the assessment in a web browser. They can only see the Questions, Scores and Comments. They do not see the Ratings calculated from the assessment at this point. They also have the option to add their own comments by selecting the **Provider Comments** option.

The Provider has a fixed set of time (usually 14 days from receiving the assessment - this can be modified by the Locality Administrator) to respond². When they have added their Comments, they can select the **Submit** button (when connected to the internet).

If a Provider does not Submit an Assessment within the 14 day deadline, the Assessment will be published automatically as **Hidden**. The status will change to **Completed**.

² Only the ADASS Administrator can change the default time from 14 days and this would be applied over the entire region.





Reviewing Comments

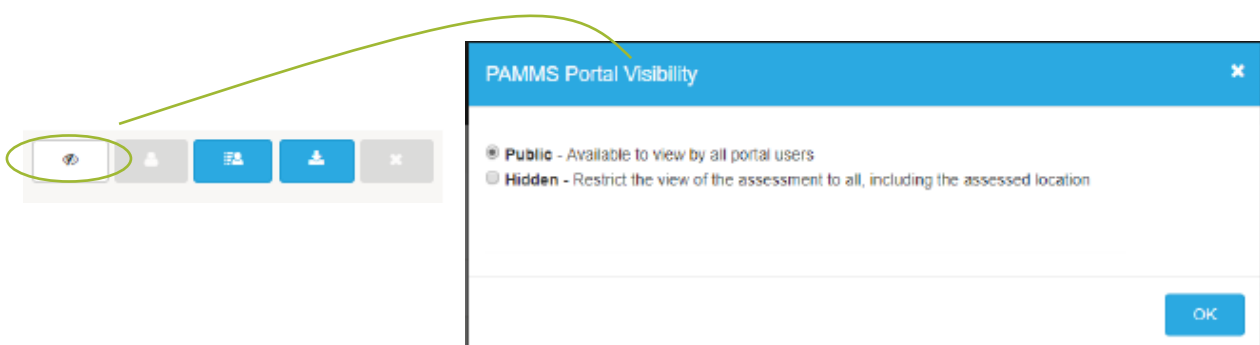
When the Provider clicks the Submit button an email alert is sent to you (or the lead Assessor) informing that the assessment has been returned for review. You can view these comments by downloading a copy of the assessment from the Assessment Dashboard and selecting the **Provider Comments** option.

Depending on the comments received, you may want to amend the scoring or add to the comments associated with specific questions to take account of the feedback.

Finalising the Assessment

When you are satisfied that the assessment returned by the Provider is ready to be published, click the **Finalise** button in the top right-hand corner of the assessment. This will complete the assessment process and publish the resultant assessment report to the Assessment Portal. You have two options to select the visibility of an Assessment:

-  **Public** – Available to view by all portal users
-  **Hidden** – Restrict the view of the assessment to all, including the assessed location



You can change who can view the assessment by selecting the **Visibility Button** and selecting from the options.

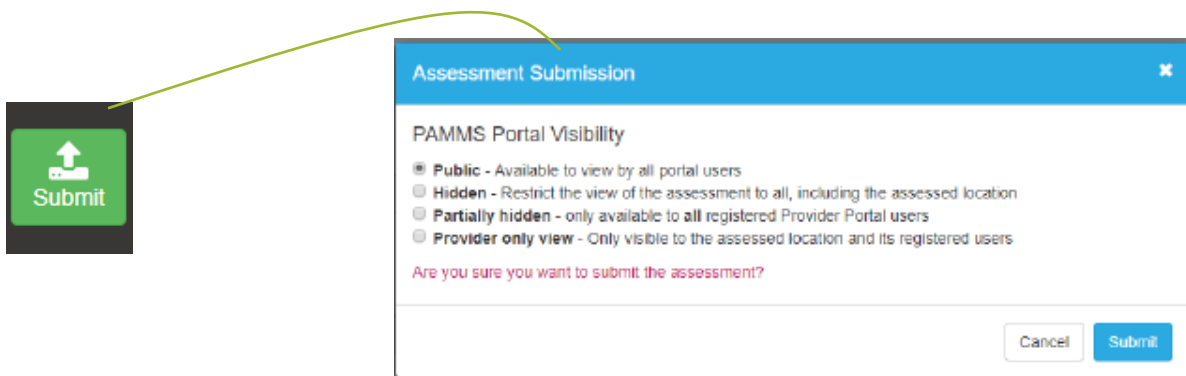
If you do not have Submit Assessment privileges on your user account, the assessment will not be published to the Assessment Portal. Instead, the status of the assessment will be changed to **Awaiting Approval** and the Locality Administrators within your Local Authority will be alerted that they need to review and approve the assessment before it is published to the Assessment Portal.

Assessment Name	Registered Locality	Status	Requested On	Requested By	Assessor Locality	
ADASS EAST Accommodation Services (LD) April 2017 Assessment for 74 Old Ford End	Bedford	With Provider	29 Nov 2018 08:44	Lbrown	All	[Icons]
ADASS EAST Accommodation Services (LD) April 2017 Assessment for 1 Lansdowne Road	Bedford	In progress	20 Nov 2018 12:33	Ijaroslavsk	Buckinghamshire	[Icons]
ADASS EAST Accommodation Services (OP) April 2017 Assessment for 1 Lansdowne Road	Bedford	In progress	5 Nov 2018 11:52	Adavies	Buckinghamshire	[Icons]
ADASS EAST Accommodation Services (LD) April 2017 Assessment for 182 Bromham Road	Bedford	In progress	5 Nov 2018 11:52	Alupinska	Buckinghamshire	[Icons]
ADASS EAST Accommodation Services (OP) April 2017 Assessment for A care provider	Bedford	Published	5 Nov 2018 11:52	Jcumings	Buckinghamshire	[Icons]
ADASS EAST Community Services (OP) April 2017 Assessment for A care provider	Bedford	Awaiting approval	5 Nov 2018 11:51	Fyngalen	Bedford	[Icons]

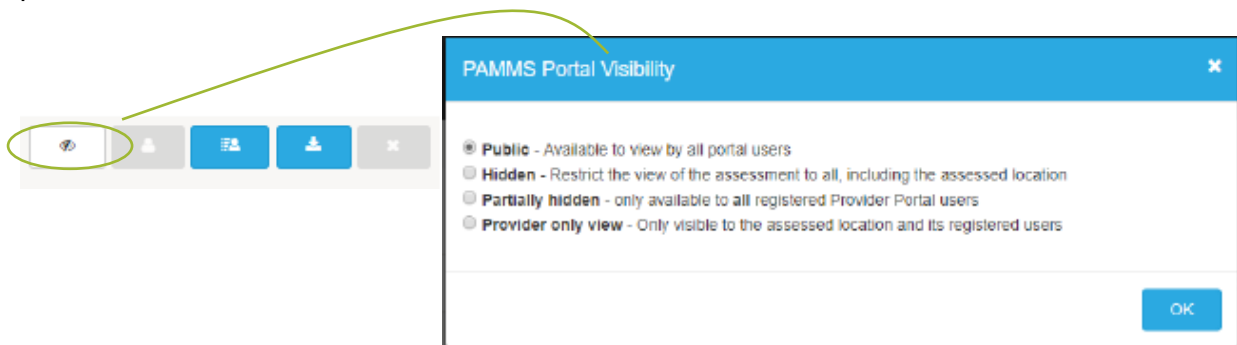
Optional Additional Publishing Options

Your organisation may select additional options for publishing assessments. This is an **optional feature that HAS Technology can switch on for your Locality**. When this is switched on, the options available when you select to **Submit** an Assessment will change to:

- Public** – Available to view by all portal users
- Hidden** – Restrict the view of the assessment to all, including the assessed location
- Partially hidden** – Only available to **all** registered users who log into the Provider Portal
- Provider only view** – Only visible to the assessed location and its registered users



These options are also available when you select the **Portal Visibility** button on a published assessment.



By default, if you select **OK** without modifying the options, the Assessment will be made **Public** and can be viewed by everyone (including members of the public who are not registered to log in).

If a Provider does not Submit an Assessment within the 14 day deadline, the Assessment will be published automatically as **Hidden**.

Viewing Assessment Ratings

Once the assessment has been submitted from the Assessor (or Locality Administrator), the rating algorithm runs automatically, and the resulting ratings are applied to the assessment. These can be viewed against the Standards and Domain Groupings that have met the completion criteria (see [Progress Summary](#)).

To view the Ratings, download a copy of the assessment, open it and select the new **Ratings** option. Three types of Ratings are included.

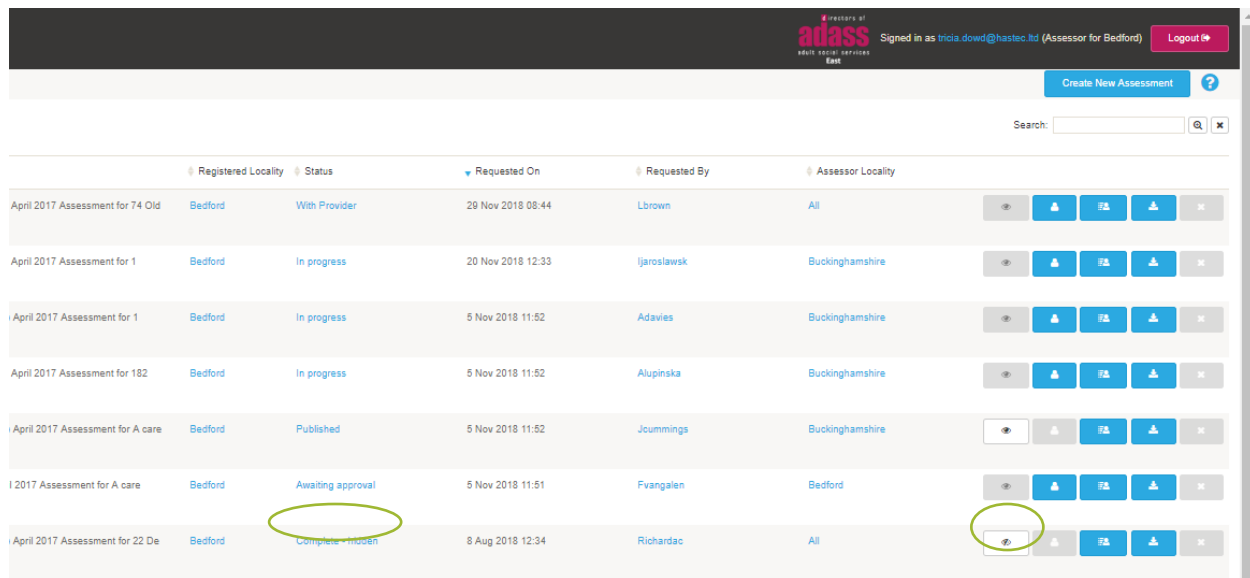
1. An **Overall** rating for the assessment. This will only be included if all the domain areas have received a rating.
2. A rating for each of the completed **Domains**. This will only be included if all the included standards in the domain received a rating.
3. A rating for each of the completed **Standards** and the percentage score achieved.

Title	Rating	Score
Involvement and Information	2	
(Standard 01) Respecting and Involving Service Users	3	91.43
(Standard 02) Consent	3	90.00
Personalised Care and Support	2	
(Standard 03) Care and Welfare of Service Users	3	87.50
(Standard 04) Meeting Nutritional Needs	3	90.00
(Standard 05) Co-operating with other Providers		100.00

If you update the draft assessment scores after you receive comments from the Provider, the rating algorithm will run again and recalculate the ratings.

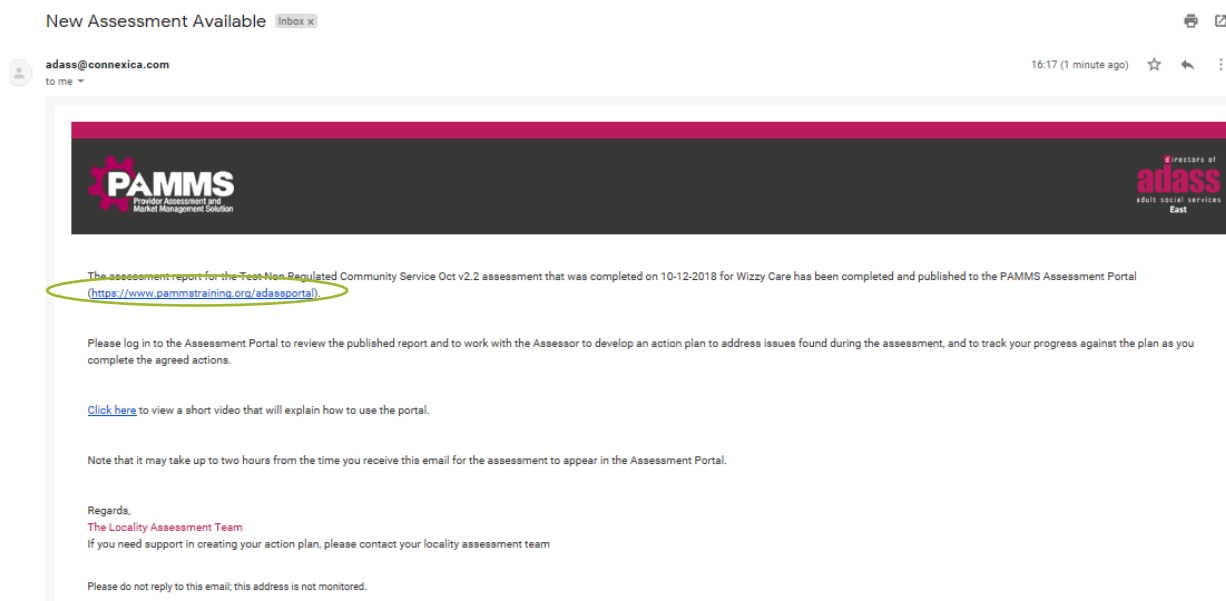
Provider Access to an Assessment

Once an Assessment is Complete you can select to keep it hidden or publish it on the Assessment Portal by toggling the **Eye** icon.



When it is published to the Assessment Portal, a summary of the assessment is made available to all users). The full assessment report and access to the follow-on action planning functions are made available to the Manager and the additional nominated users in Provider organisation (see [Provider Details](#)).

The Manager and nominated users will receive an email with a **link** they can click to access the Provider Portal.



Assessor Application - Assessor's Guide - Provider Comments

Once the assessment has been published, the list of Providers who can access the report on the Assessment Portal can be maintained by clicking the **Manage Providers** icon on the Assessment Dashboard.

The screenshot shows the PAMMS Assessment Dashboard. At the top, there is a header with the PAMMS logo and user information. Below the header, there is a table of assessments. The table has columns for Assessment Name, Registered Locality, Status, Requested On, Requested By, and Assessor Locality. The first row is highlighted, and a green circle highlights the 'Manage Providers' icon (a blue square with a white plus sign) in the right-hand column of that row.

Assessment Name	Registered Locality	Status	Requested On	Requested By	Assessor Locality	Manage Providers
ADASS EAST Accommodation Services (LD) April 2017 Assessment for 74 Old Ford End	Bedford	With Provider	29 Nov 2018 09:44	Lbrown	All	
ADASS EAST Accommodation Services (LD) April 2017 Assessment for 1 Lansdowne Road	Bedford	In progress	20 Nov 2018 12:33	Ijaroslaws	Buckinghamshire	
ADASS EAST Accommodation Services (OP) April 2017 Assessment for 1 Lansdowne Road	Bedford	In progress	5 Nov 2018 11:52	Adawies	Buckinghamshire	
ADASS EAST Accommodation Services (LD) April 2017 Assessment for 182 Bromham Road	Bedford	In progress	5 Nov 2018 11:52	Alupinska	Buckinghamshire	
ADASS EAST Accommodation Services (OP) April 2017 Assessment for A care provider	Bedford	Published	5 Nov 2018 11:52	Jummings	Buckinghamshire	

Select the blue **+** or pink **x** icons to enable or disable other Providers from viewing the full assessment.

The screenshot shows a modal window titled 'Providers'. It has a search bar and a dropdown menu for the number of entries (set to 10). Below the search bar, there is a list of providers with their email addresses. Each provider has a blue '+' icon and a pink 'x' icon. The pink 'x' icon for the first provider is circled in green. At the bottom of the modal, there is a text input field for 'Add Provider (Email)' with a green '+' icon and an 'OK' button.

Username	Enable	Disable
Alexhurley@lbview.com		
Connexicatet4@hotmail.com		
Davesmith@lbview.com		

You may also register a Provider who does not already have a user account on the Portal and give them access to the assessment. Enter their email address in the box at the foot of the page and click the green **+** icon.

The screenshot shows the 'Providers' modal window with a new provider being added. The email address 'george.wheezley@bencare.co.uk' is entered in the 'Add Provider (Email)' field, and the green '+' icon is circled in green. The 'OK' button is also visible.

Username	Enable	Disable
Fred.wheezley@bencare.co.uk		

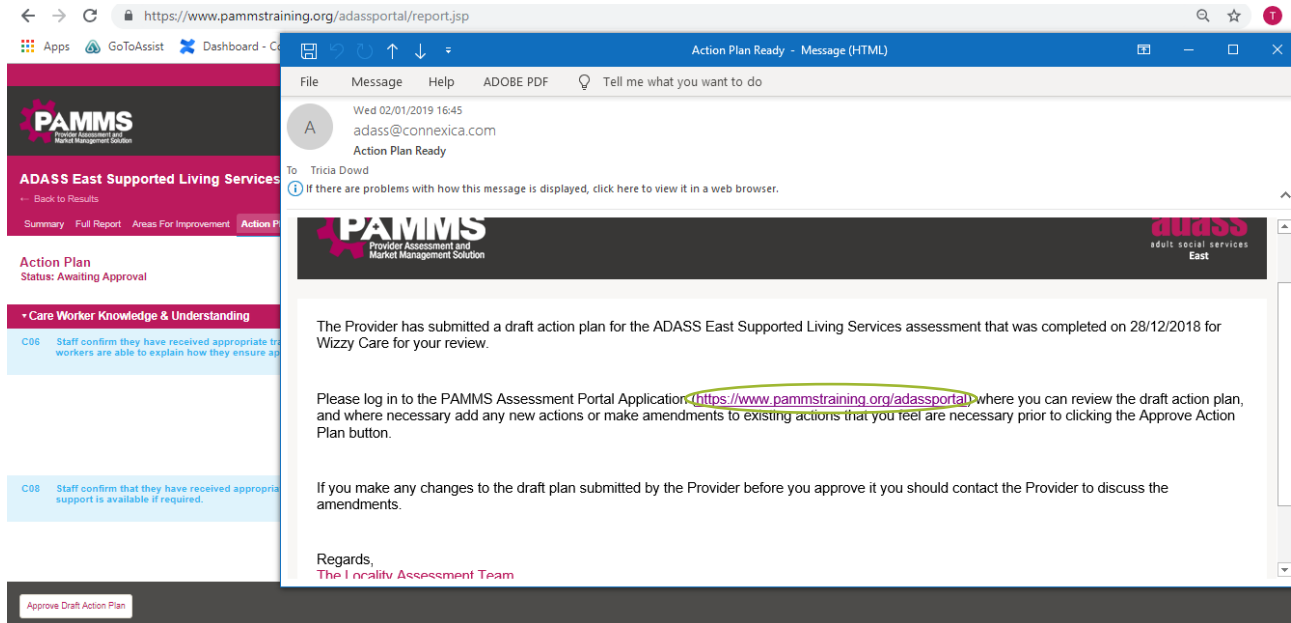
Showing 61 to 70 of 154 entries

Previous 1 ... 6 7 8 ... 16 Next

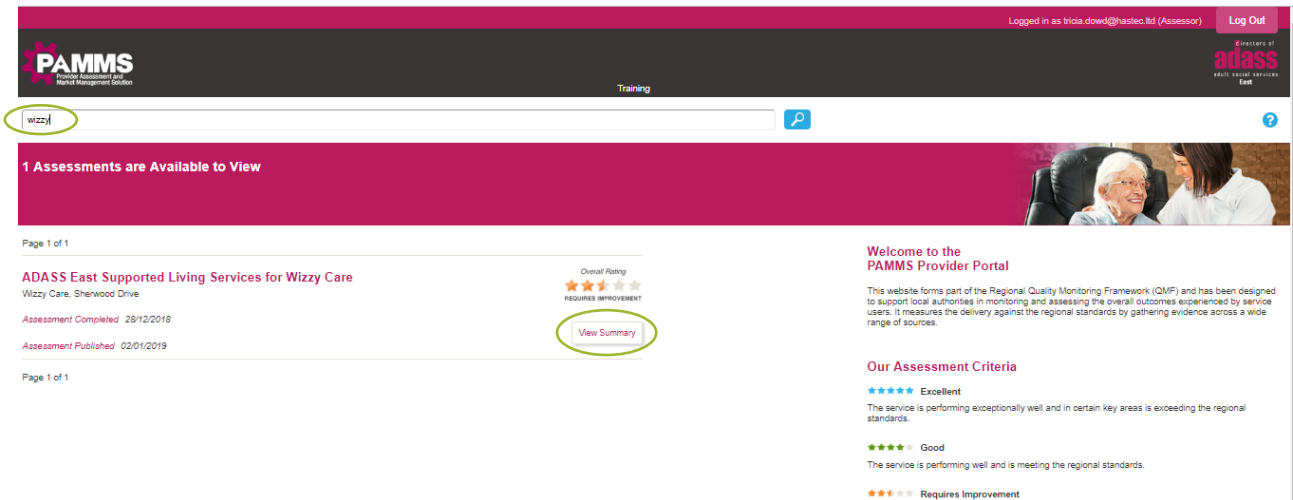
george.wheezley@bencare.co.uk OK

9. Supporting the Action Plan

You will receive an email notification when a Provider submits a Draft Action Plan. Click the **link** to access the site:



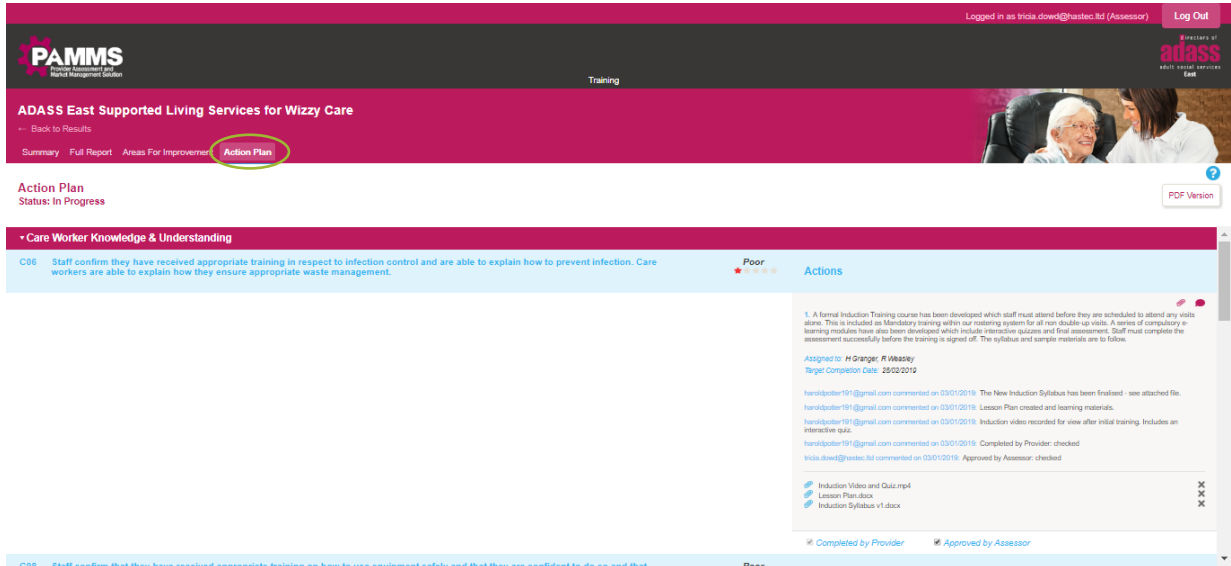
Search for the Assessment and select to **View Summary**:



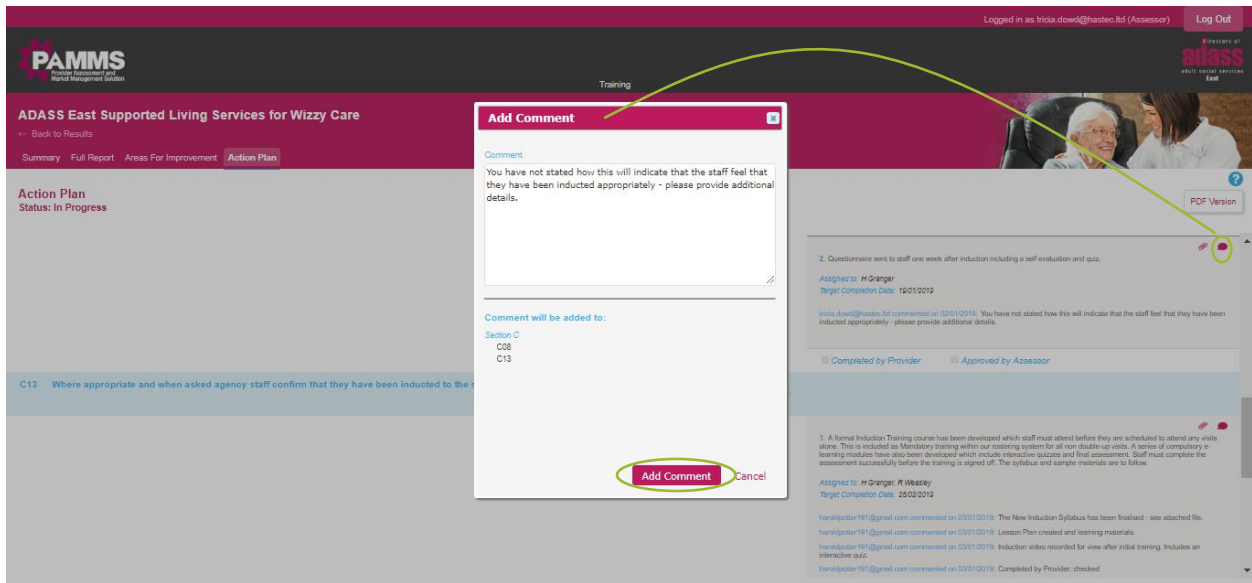
Review the Action Plan

Select the **Action Plan** tab:

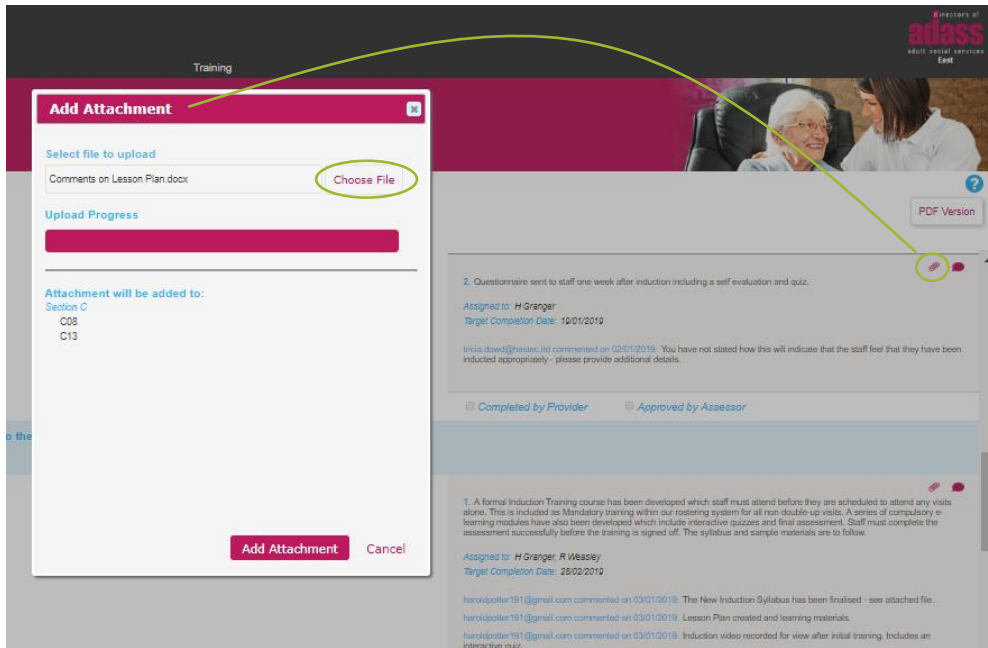
Assessor Application - Assessor's Guide - Supporting the Action Plan



Go through each element of the Action Plan to verify that it will meet the improvement requirements. Select the **Comments** icon to add comments or request additional information or clarification. Select **Add Comments** to save the changes.



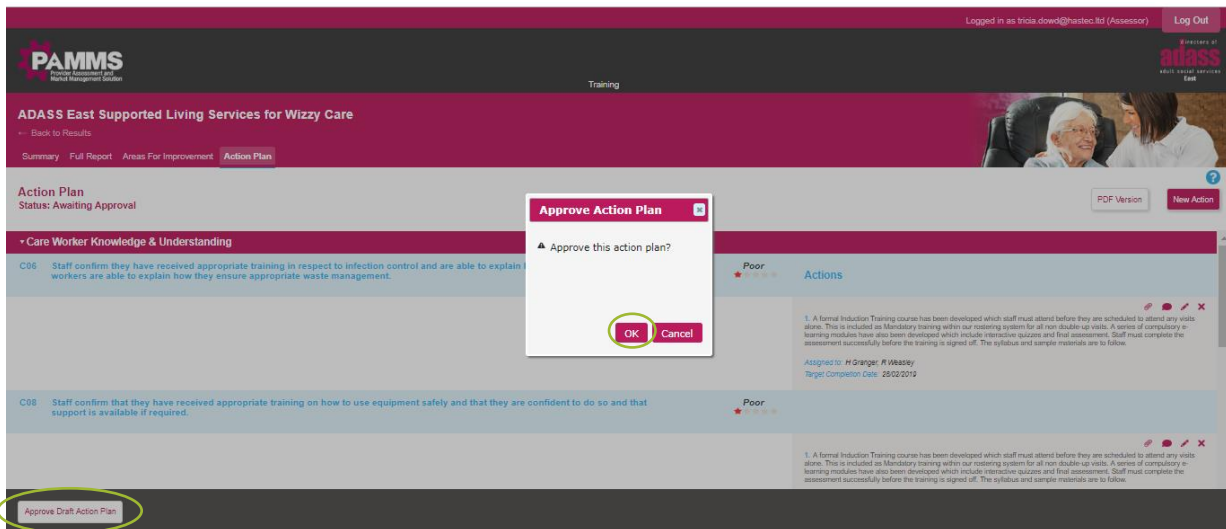
You can also upload documents by selecting the **attachment** icon and **Choose File**.



You should inform the Provider Manager when you add any comments as they will not receive automated notification that a comment or attachment has been added.

Approve Draft Action Plan

When you are happy that the Proposed Action Plan covers all the required improvements, select **Approve Draft Action Plan** and select **OK** to confirm.



Completing the Action Plan

The Provider will continue to work on their Action Plan. When they complete an area, they can select **Completed by Provider**.

Assessor Application - Assessor's Guide - Supporting the Action Plan

Logged in as tricia.dowd@hastec.td (Assessor) Log Out

PAMMS
Person Assessment and
Market Management Solution

Training

ADASS East Supported Living Services for Wizzy Care

Summary Full Report Areas For Improvement **Action Plan**

Action Plan
Status: In Progress PDF Version

Care Worker Knowledge & Understanding

C06 Staff confirm they have received appropriate training in respect to infection control and are able to explain how to prevent infection. Care workers are able to explain how they ensure appropriate waste management. Poor

1. A formal Induction Training course has been developed which staff must attend before they are scheduled to attend any visits alone. This is included as Mandatory training within our rostering system for all non double up visits. A series of compulsory e-learning modules have also been developed which include interactive quizzes and final assessment. Staff must complete the assessment successfully before the training is signed off. The syllabus and sample materials are to follow.

Assigned to: H Granger, R Weasley
Target Completion Date: 28/02/2019

Completed by Provider Approved by Assessor

C08 Staff confirm that they have received appropriate training on how to use equipment safely and that they are confident to do so and that support is available if required. Poor

1. A formal Induction Training course has been developed which staff must attend before they are scheduled to attend any visits alone. This is included as Mandatory training within our rostering system for all non double up visits. A series of compulsory e-learning modules have also been developed which include interactive quizzes and final assessment. Staff must complete the assessment successfully before the training is signed off. The syllabus and sample materials are to follow.

Assigned to: H Granger, R Weasley

You will receive an email notification when an Action has been Completed by Provider. You can then select to **Approve by Assessor** and sign off that action as complete or to add further comments.

Logged in as tricia.dowd@hastec.td (Assessor) Log Out

PAMMS
Person Assessment and
Market Management Solution

Training

ADASS East Supported Living Services for Wizzy Care

Summary Full Report Areas For Improvement **Action Plan**

Action Plan
Status: Submitted Awaiting Assessor Approval PDF Version

1. A formal Induction Training course has been developed which staff must attend before they are scheduled to attend any visits alone. This is included as Mandatory training within our rostering system for all non double up visits. A series of compulsory e-learning modules have also been developed which include interactive quizzes and final assessment. Staff must complete the assessment successfully before the training is signed off. The syllabus and sample materials are to follow.

Assigned to: H Granger, R Weasley
Target Completion Date: 28/02/2019

hans@polder191@gmail.com commented on 03/01/2019: The New Induction Syllabus has been finalised - see attached file.

hans@polder191@gmail.com commented on 03/01/2019: Lesson Plan created and learning materials.

hans@polder191@gmail.com commented on 03/01/2019: Induction video recorded for view after initial training. Includes an interactive quiz.

hans@polder191@gmail.com commented on 03/01/2019: Completed by Provider: checked

tricia.dowd@hastec.td commented on 03/01/2019: Approved by Assessor: checked

Induction Video and Quiz.mp4 X
Lesson Plan.docx X
Induction Syllabus v1.docx X

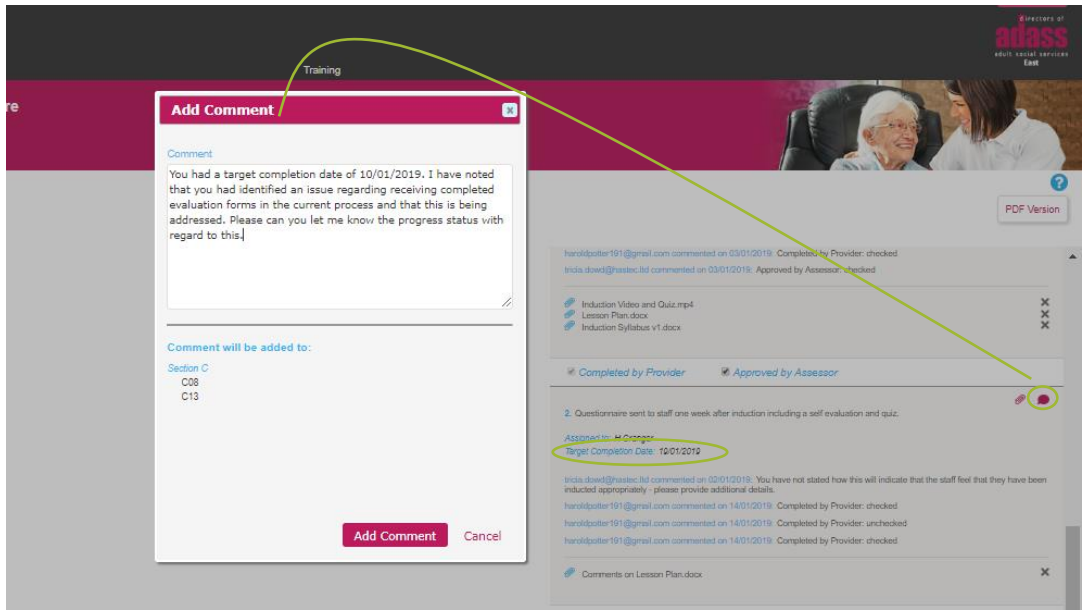
Completed by Provider Approved by Assessor

2. Questionnaire sent to staff one week after induction including a self evaluation and quiz.

Assigned to: H Granger
Target Completion Date: 10/01/2019

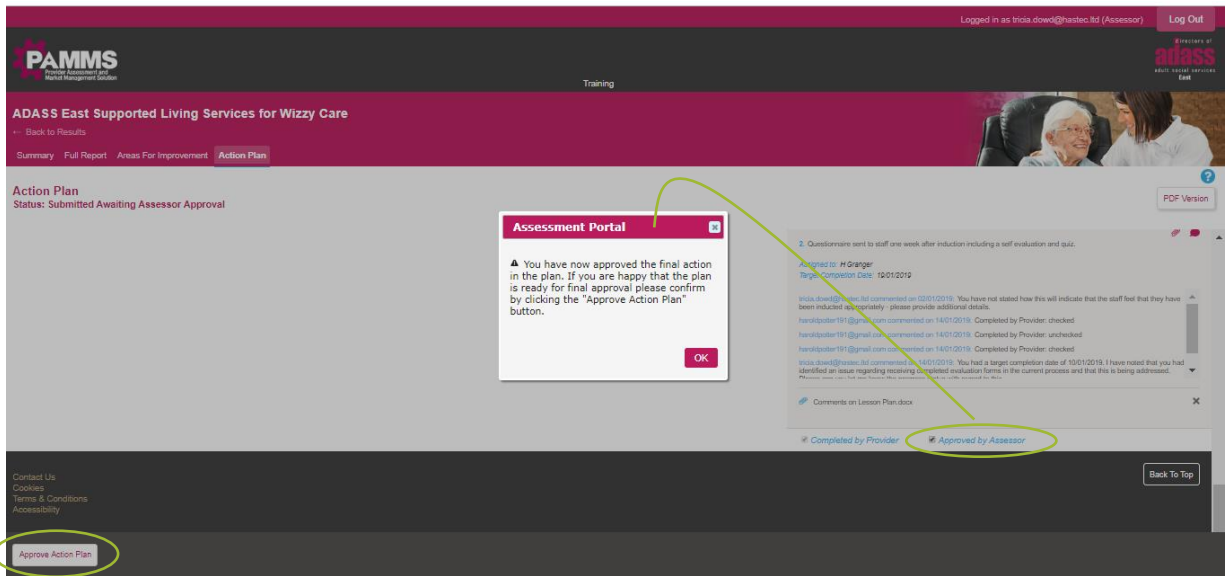
Approve Action Plan

You will also receive an email notification if a Provider fails to complete an Action by the **Target Completion Date**. You can continue to view progress on these items and add **comments** to follow up progress as necessary.



Approve Action Plan

When the Provider has completed all items of their Action Plan and you select **Approved by Assessor** on the final item, you will be reminded that the Action Plan is ready for final approval. Select **Approve Action Plan**.



Although the original rating will not change, the published report will be updated to show that an Action Plan has been completed which addressed all non-compliant ratings to the satisfaction of the Assessor.

Assessor Application - Assessor's Guide - Supporting the Action Plan

Assessment Published 28/11/2018

ADASS East Community Services (Older Adults) for Four Oaks House

Four Oaks House, 160 Lichfield Road

Overall Rating
★★★★☆
GOOD

Assessment Completed 26/11/2018

[View Summary](#)

Assessment Published 26/11/2018



Since the assessment was carried out, the Provider has agreed an action plan with the Assessor to put in place remedial actions to address non-compliances identified during the assessment. These actions have all been carried out to the satisfaction of the Assessor.

ADASS EAST Accommodation Services (LD) April 2017 for Care Direct

Overall Rating

Appendix A

Domains and Standards

The domains and standards included depend on the particular template being used for an assessment.

Domains

Outcome Domain Number	Domain Title
1	Involvement & Information
2	Personalised Care & Support
3	Safeguarding & Safety
4	Suitability of Staffing
5	Quality of Management

Standards

Standard Number	Standard Title
1	Respecting & Involving Service Users
2	Consent
3	Care & Welfare of Service Users
4	Meeting Nutritional Needs
5	Co-operating with other Service Providers
6	Safeguarding People who use the Service from abuse
7	Cleanliness & Infection Control
8	Management of Medicines
9	Safety & Suitability of Premises
10	Safety, Availability & Suitability of Equipment
11	Requirements relating to staff recruitment
12	Staffing and Staff Deployment
13	Supporting Staff
14	Assessing & Monitoring the Quality of Services Provision
15	Complaints
16	Records

Appendix B

Emails and Notifications

Subject	Main Flow	Single or Repeated	Sent To	Description
A new account has been created for you on the ADASS (ER) PAMMS system	N	Single	Main Assessor and Assessor	New Assessor created. Contains a link for the Assessor to create a password
Assessments Requiring Review	Y	Repeated	Assessor with submit privilege	An Assessor with the appropriate privileges is required to review the assessment before it goes to the Provider
Provider has reviewed and submitted their assessment	Y	Single	Main Assessor	Notification that the Provider has submitted the assessment sent to them for review
No Provider Comments Entered For Assessment	Y	Single	Main Assessor	Time limit for Provider comments has expired with no comments received
Action Plan Ready	Y	Single	Main Assessor	The Provider has submitted a draft action plan for review
Draft Action Plans Not Submitted		Single	Main Assessor	Time limit for Provider to submit a draft action plan has expired and the plan has not been submitted
Action Plans In Progress	Y	Repeated	Main Assessor	Reminder of overdue actions and completed actions ready for review
Action Plan Ready	Y	Single	Main Assessor	Action plan has been completed by the Provider and is ready for final review
Password Reset	N	Single	Main Assessor and Assessor	Contains link enabling password reset



HASTECH Limited

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