Addysg a Gwella Iechyd Cymru (AaGIC)
Health Education and Improvement Wales (HEIW)

Belong, Thrive, Stay

Retention Self-Assessment Tool User Guide

September 2024

Retention Self-Assessment Tool - User Guidance

The **Retention Self-Assessment Tool** has been created by Health Education and Improvement Wales (HEIW) to support organisations in assessing their retention position. Findings of the self-assessment can then be used at a local level to both inform the development of local retention plans, and measure the effectiveness of retention improvement interventions undertaken. This user guidance has been developed to support users in creating assessments and actions, reviewing and editing answers, and accessing the reporting dashboard. To further support users, a training video has been developed and can be accessed via the **Belong, Thrive, Stay Retention Hub** within Gwella.

Before You Start

The tool has been created via the Power Platform; in an application we called ‘PowerApps’. PowerApps are a licensed product, so users require the correct licensing to utilise. All Health Boards in Wales have ‘E5’ licenses as part of a national licensing agreement managed by **Digital Health and Care Wales (DHCW)**, however, there may be some local restrictions applicable in some Health Boards. If you’re unable to access the app due to ‘not having a plan’, please liaise with your local IT Team in the first instance.

To ensure you can utilise the full functionalities and features on this app, please ensure you are using Microsoft Edge. Although the app will work in other browsers, such as Google Chrome, we cannot guarantee that functionality will perform as expected.

If a yellow bar appears at the top of the page when opening the app, please follow the on-screen instructions. This will ensure you are using the latest app version. As this is a licensed product, you must be logged into your NHS account to access this resource. You can also download the ‘PowerApps’ app, if you prefer to access this from an alternative device such as a phone or tablet.

If you need any further help or support please contact your local retention lead in the first instance.

Starting an Assessment

Retention Self-Assessment Tool - User Guidance

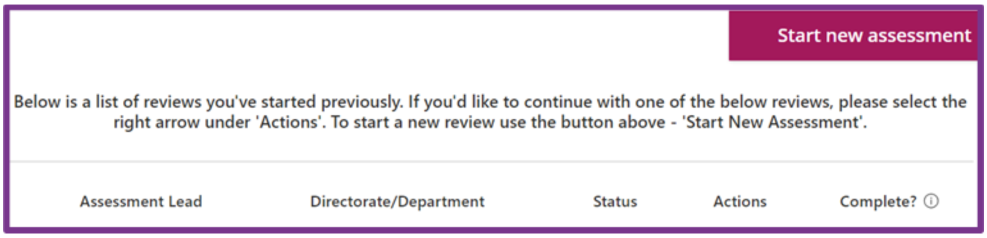
When you navigate to the tool using the link at the top of this document you will see the home screen. You can use the button towards the top left of the page to switch the app between Welsh and English.

You'll then see 3 buttons on the right-hand side. '**App feedback**' is a way for you to provide instance feedback about the app, for example, you feel something needs more clarity and you'd like to retain certain features for future iterations. If you select this button, you'll see the below form.

The wording in the text box will provide some prompts for you. This is dynamic and will change depending on the 'star rating' you select. Once you've given a rating and provided your feedback, the submit button will activate and be directed to the Digital Transformation Team in HEIW.

If you select '**Assessments**', you'll be directed to a secondary menu scree[illegible] want to start a new assessment, or return to a partially completed assessment, select the top button. If you want to view or edit a submitted answer, or you've been added as a Delegated User, select the 'view or edit submitted answers or actions buttons.

When you navigate to the '**Assessment Dashboard'** you'll have the option to start a new assessment or continue a previous assessment.



Retention Self-Assessment Tool - User Guidance

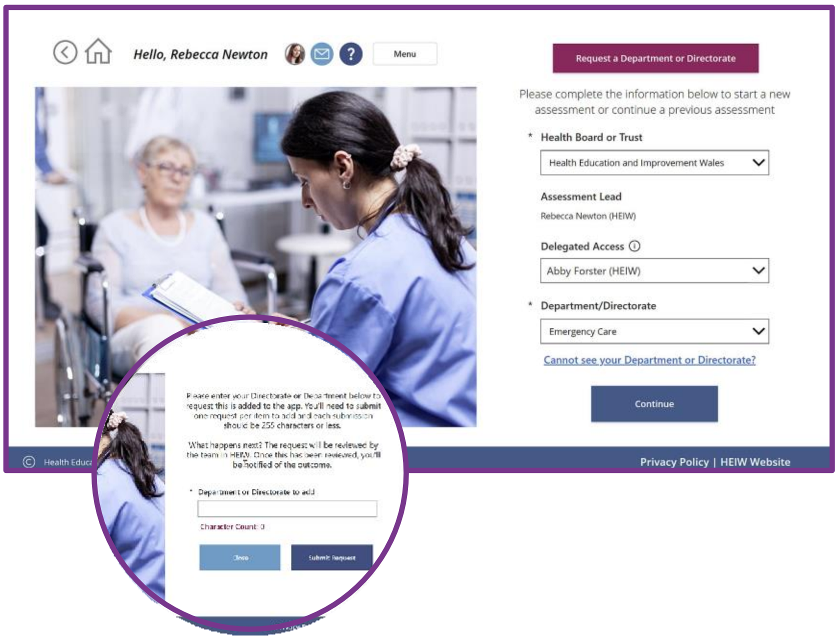
IMPORTANT: Each submission can only have 1 assessment lead. The Assessment Lead will need to start and manage the assessment but can provide colleagues with access to the whole assessment or certain questions and actions. You can only assign one Delegated User per question.

We recommend that each assessment is completed prior to initiating a new assessment, we however recognise that some of you will undertake the assessment lead role for more than one directorate

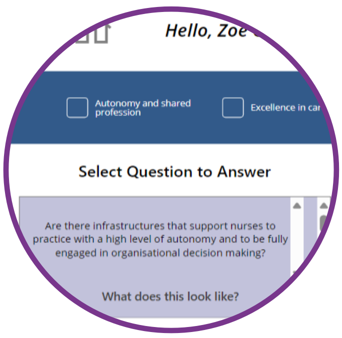
If you initiate a new assessment prior to completing a previous submission, one of the following must be different from the existing assessment: Health Board, Directorate/Department or Service Area (BCUHB only).

When you initiate a new assessment, you'll need to complete the relevant information such as your Health Board and Department. You'll be able to delegate questions in the next section. If you do not see your Directorate or Department in the dropdown list, you can use the 'Request a department or Directorate' button. This will give you a pop up to complete.

This will send the request to the team in HEIW, and they'll review the request. You'll be notified of the outcome, and once approved you'll be able to access the app and continue initiating your assessment.



You'll then be directed to this page, where you'll complete your assessment. Towards the top left-hand corner, you'll see some navigation buttons such as the **back arrow**, **home icon** and **menu** button. You can also navigate to the '**Contact Us**' page and the '**FAQs**' page using the corresponding icons.



The top blue bar shows the categories for the questions you need to complete. The question gallery on the left-hand side will show all questions as default unless you select a category. There is a **scroll bar** to the right of the questions. Select a question from the left gallery, this should turn purple and the '**QID**' should appear on the right-hand side.

Nurse Retention Self-Assessment Tool - User Guidance

Each question contains a '**What does this look like?**' button which provides additional guidance to support you with completing the self-assessment. If there is additional information contained on Gwella or elsewhere, you'll also be able to select the '**Further Information**' button, and this will open in a new window.

To complete a question, add the current strengths, areas for improvement and RAG status. The 'Delegated Access' field will pre-populate with the user you enter previously, but you can change this here if another colleague is more suited to that question. Once you've completed this, you can either select **'Submit'** or **'Submit and add an action'.**

As questions are completed, they will turn 'green'. So, if you need to return to a partially complete assessment, you can easily identify which questions are remaining.

You can add/edit the Delegated Access by selecting the '**+**' or '**Edit**' icon. This is also how you'll add the '**Action Owner**' in the next section.

Adding an Action

If you would like to add an action when submitting an answer to a question, select **'Submit and add an action'**. This will create a new form to complete. You'll need to indicate if it's a key action, a review date, the action owner and some further detail. Once all required information is added click **'Submit and Close'**. If you select to add an action in error, you can simply use the **'Close'** button.

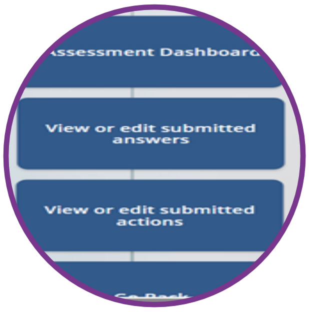
The **'Action Owner'** functionality works in the same way as **'Delegated Access'**, and the selected person will be able to both see their allocated actions and be able to edit the information provided.

There is more information later in the guidance relating to how these questions can be accessed and edited by either the 'Assessment Lead' or via the 'Delegated Access' or 'Action Owner' roles.

View & Edit Submitted Answers, or Delegated Access/Action Owners Function

Nurse Retention Self-Assessment Tool - User Guidance

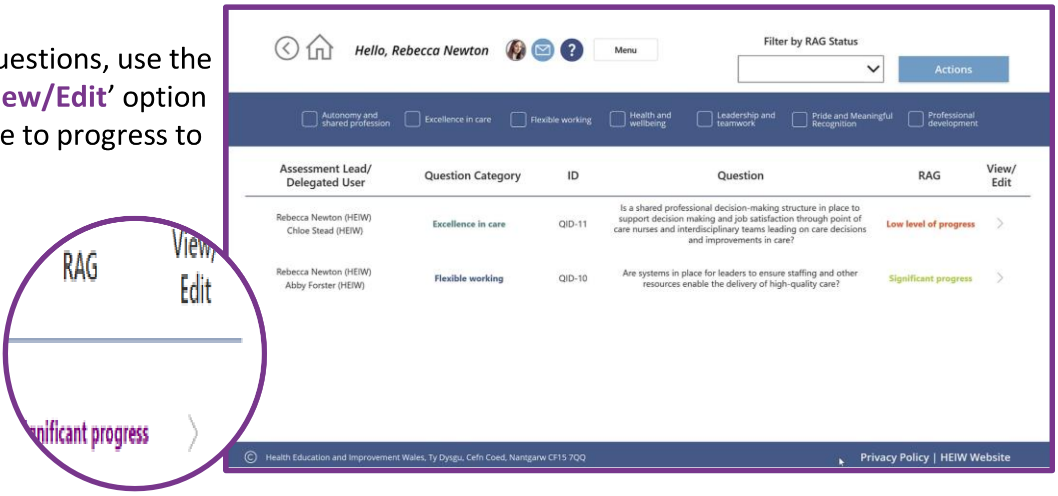
IMPORTANT: The Assessment Lead will need to provide Delegated Access or Assign an action owner before those colleagues can see those questions. For the main questions, you can provide Delegated Access to a colleague and 'Submit' without completing the question. This allows them to follow the steps in the process below.

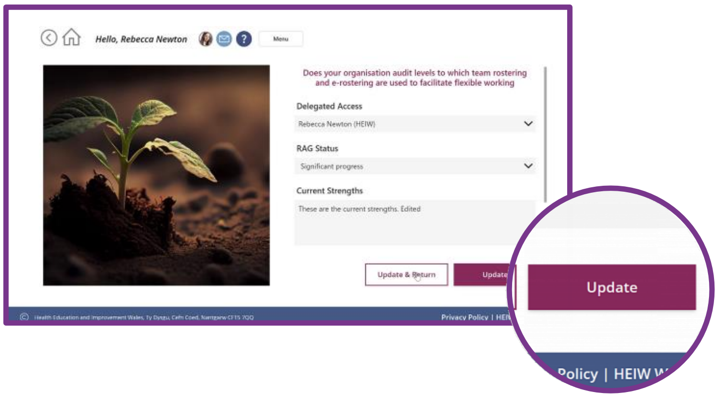


After clicking '**Assessments**' from the home screen, you can then select **'View or edit submitted answers.** You would complete this as an Assessment Lead, Delegated Access or an Action Owner to access the relevant pages.

You'll then see the gallery, with a list of questions that have been completed to date. As default you'll see all questions for which you are either the Assessment Lead or have been given delegated access to. You can filter these more using the 'category' checkboxes on the blue bar, or by 'RAG' status using the dropdown menu at the top. These filters work together or separately.

To view or edit the questions, use the '**arrow**' under the '**View/Edit**' option on the right-hand side to progress to the next screen.

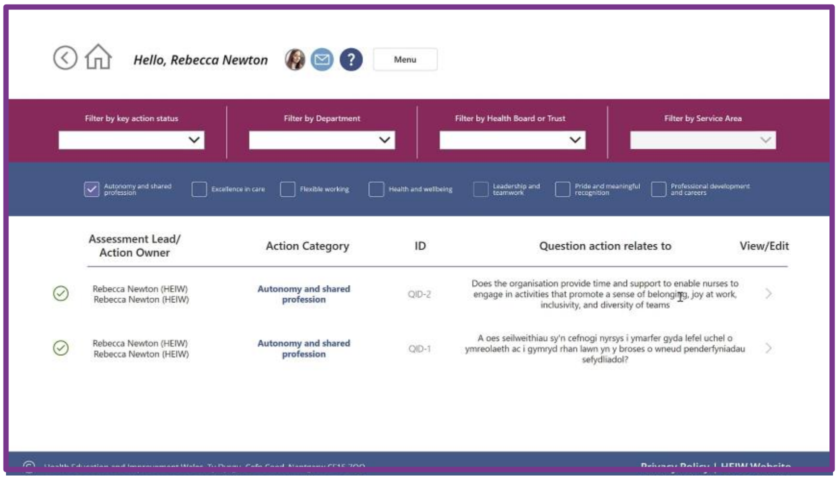




You'll then navigate to this screen where you can edit the 'Delegated Access', 'RAG Status' or question answers. Once this has been done, use the **'Submit & Return'** button to return to the question gallery

Nurse Retention Self-Assessment Tool - User Guidance

The '**Actions**' work in the same way, select the '**Actions**' button from the menu and you'll see any actions where you are the assessment lead or action owner.



When you select an action, you'll be able to add to or edit the action. Once the action has been completed, this can be marked as '**complete**' which allows you to monitor and track the actions you've added.

In the same way, you'll also be able to mark an action as **cancelled**, **on hold**, or **back in progress**.

At the top of each page, you can use the '**Contact Us**' or '**FAQs**' icon to navigate to the selected screen. The Contact Us will provide details for the National Retention Programme Contact and the FAQs will provide some technical support for the app.

The National Retention Programme Lead will be providing front line support for the app and the retention assessment process, please get in touch if you require any additional support.

GIG CYMRU NHS WALES | Addysg a Gwella Iechyd Cymru (AaGIC) Health Education and Improvement Wales (HEIW)

Nurse Retention Self-Assessment Tool - User Guidance

Once you and your Delegated Users have completed the assessment, you should then navigate to the ‘**Assessment Dashboard**’ and select ‘**Mark Complete**’. This will signal the completion of the assessment, and you’ll be able to initiate a new assessment for the next assessment period.

Essential Information

Delegated Users

As assessment lead, you are responsible for assigning Delegated Users or Action owners. Your Delegated Users will **not** be able to interact with the app in the same way you can, as assessment lead. Delegated Users should not use the ‘Assessment Dashboard’ as this will only be visible to the Assessment Lead. The Assessment Lead should initiate the assessment and navigate to the questions, if the Assessment Lead wants to allocate a question to a colleague, select the question from the left-hand gallery, use the search function to assign the Delegated User and then select ‘Submit’. The Delegated User will then navigate to the ‘View or edit submitted answers’ to complete their submission(s).

Assessment Status

Once you complete your submission, it’s important to mark this as completed using the final step in this guidance. If you do not mark this as complete and initiate a new submission next cycle, the questions will be shown as already completed.

Notifications

When you nominate a colleague as a Delegated User, they’ll receive a notification informing them so they can complete their submission. They’ll also receive a notification if they are assigned as an Action Owner.

Support

If you require any support with the process, you should contact either your local retention lead or zoe.gibson@wales.nhs.uk National Retention Programme Lead.