

Foundation assessment preparation: From start to finish

Part 1: Set-up

Familiarise yourself with the structure of the RNZCGP quality website.

- How to find the Foundation Standard section
- Where to find the standards for each quality assurance indicator
- Where to find the guidance for each indicator

How to access the Practice Administration Portal (dashboard button at top right):

1. Use your practice HPI (facility code) to log in. If you do not know what your HPI is, contact Quality.Team@pinnacle.health.nz or quality@rnzcgp.org.nz
2. From within the Practice Administration Portal, you can access:
 - Any invoices that are due (note: access to your Smartsheet may be restricted, if your membership is outstanding)
 - Your Smartsheet

Part 2: How to use Smartsheet

The Smartsheet is a cloud-based work management tool, allowing users to share information and work collaboratively within a central hub.

You can access Smartsheet:

1. By visiting www.smartsheet.com (your username is your practice email address)
2. Via your Practice Administration Portal (see Part 1: Set-up)
3. By link, if someone has sent you an invitation

If you have not logged in to Smartsheet before, you will need to create an account.

The [Smartsheet 'how to' guide for general practice](#) helps practices use Smartsheet and contains information about:

- Logging in to your Smartsheet
- Sheets and dashboards
- Text formatting tips
- Sheet sharing
- Attaching evidence
- Leaving comments
- Tracking

Part 3: Get your head around what needs to be done, set milestones, and keep chipping away

1. Work out a timeline (milestones) to make sure your evidence is completed by the submission date, in preparation for your in-person assessment
2. Establish a “core” Foundation Standard team. For larger practices this may consist of:
 - Nurse – infection control lead
 - GP/Clinical Governance – audits; policies and procedures
 - Practice Manager/Lead Admin – documentation and non-clinical policies
 - Health and Safety Lead
 - Equity Champion
3. Set up regular meetings to track progress and update team members
4. Share the load and map tasks to individual roles and indicators.
5. Determine the “low-hanging fruit” from the challenging / time- consuming components (e.g. highlight in different colours).
6. Use the Smartsheet to track your progress.
7. Evidence can be made up of photos, policies, survey results and other documentation. As you upload evidence and notes into your Smartsheet, be sure to update the status of each indicator as you go to “Met”
8. Ask for support from your Foundation Standard facilitator if needed
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Part 4: Assessment

1. Take note of the dates in your Pinnacle Foundation Standard letter of engagement for:
 - Smartsheet submission date – this is when 100% of your evidence needs to be uploaded to your Smartsheet
 - In-practice assessment date
2. Approximately 80 per cent of the assessment is done by the assessor remotely assessing your attachments and descriptions
3. Prepare for the in-practice assessment (the assessor will provide a schedule closer to the date)
4. The in-person visit takes approximately 3 hours and enables the assessor to validate the evidence provided on the Smartsheet and make observations of the physical site

Part 5: Post-assessment dialogue

1. Following your assessment, an action plan will be provided for any indicators that are not met.
2. Your action plan must be completed within four weeks from the day your assessor provides it.

Part 6: Certification

Once the assessor has completed the assessment and can confirm the practice has met all indicators, they will recommend that the College award Foundation Standard certification.