Local Portfolio Management System (LPMS) Primary Care Proforma
User Guide

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1. Introduction

This guidance explains how primary care locations (i.e. general practices, dental practices, community pharmacy, and community optometry) should complete and return the proforma (excel spreadsheet) documenting monthly research recruitment activity. Returned data will be uploaded onto the Local Portfolio Management System (LPMS) by the primary care research team.
2. Tabs for your attention

Introduction tab

When you open the ‘MDS Primary Care Specific Proforma Vx.x’ excel spreadsheet, you will see the following page:

The Introduction tab provides a summary of:

- the rationale for this request to practices,
- what practices will need to do
- the timelines practices are currently being asked to work to (this is subject to change)
‘Participant recruitment’ tab

The ‘Participant Recruitment’ tab will be the most frequently used part of this proforma by locations. On this tab, you can add any patients who have been recruited into a study running at your location. You should include the following information:

- **Name of the study.** This information helps to ensure recruitment activity is attributed to the correct study running at the practice. Please note this can be selected from the drop down box when clicking on a cell in column A. Drop down information provides a list based on the feedback from practices on their current studies.

- **Unique Patient Identification number (PID) allocated to each patient.** This helps ensure patients are correctly uploaded into LPMS and avoids a patient being included twice or missed completely.

- **Date the patient was recruited.** This helps to ensure recruitment activity is attributed to the correct month. Please note that dates have to be entered in the specific format using ‘/’ rather than ‘.’ (e.g. DD/MM/YYYY rather than DD.MM.YYYY)
‘Study Name MDS Proforma’ tab

You will find a ‘Study Name MDS Proforma’ tab for each study we have documented as recruiting at the practice.

These tabs are used by practices to document initial study information as well as some study information available at the end of your involvement. It is therefore recommended that you will only need to use these tabs on limited occasions at the beginning and end of running a study at your location.

Please note:

- We are also hoping that some of the study information can be prepopulated before the proforma is circulated to locations as part of the proposed study set up process.
- Some studies will not require you to report recruitment data as they continue to be uploaded by central study teams. This is referred to as ‘manual RA upload’
3. Tabs for your information

‘Wales Minimum Data Set_PC’ tab

This tab provides detailed information on the specific primary care Minimum Data Set (MDS) for Wales. This has been included for reference only.

‘Study Upload Route’ tab

This tab provides a list of studies at the practice and indicates the upload route.

- Manual RA Upload Route: continues to be uploaded by the central study team (e.g. CI or study manager) as previously.
- LPMS Route: recruitment information will be uploaded by the primary care research team on behalf of practices.

Pre-included formula

The proforma has been created to include a number of formula which can prepopulate certain cells reducing the need for you to answer some questions. Examples of these are as follows:

- Once a patient has been added to the ‘Participant Recruitment’ tab, this will automatically update figures in the ‘Study Name MDS Proforma’ tab (Columns C-N on row 25).
- ‘First Participant Recruited Date at Location’ will be prepopulated with the earliest date documented on the ‘Participant Recruitment Tab’

Adding new studies

Practices can add additional studies onto the proforma using the following routes:

- ‘Study upload route’ tab: Adding a new study into a cell on row 4 of this tab will automatically add the new study as a drop down option on the participant recruitment tab.
- ‘Study Name MDS Proforma’ tab: Utilise one of these blank tabs to add the specific information for any new studies.
  - Initial information may be available to practices to be able to complete rows 7-21. Note practices may not know all this information, therefore
please complete as much as possible and additional information can be added as and when available.

4. Returning your proforma

Completed proformas can be returned to the primary care team via research-primarycare@wales.nhs.uk who will then upload monthly activity on behalf of primary care locations by the fifth working day of each month.