

Monitoring NHS R&D Activity

1. Purpose and Scope of this Guidance Document

The aim of this document is to advise NHS organisations on how their NHS R&D Activity will be monitored, in order to assess progress against R&D Division, Welsh Government's national NHS R&D objectives, key indicators and targets as outlined in the R&D Division Welsh Government's ***Delivery Framework - Performance Management of Local Support and Delivery Services 2020/21***.

This document is reviewed annually and is intended to be as helpful as possible. Any feedback on future editions of the guidance should be submitted to the Health and Care Research Wales Support & Delivery Centre.

This guidance document should be read in conjunction with other guidance documents relating to the Delivery Framework.

2. Background: Roles and Responsibilities

2.1. Health and Care Research Wales Support & Delivery Centre : Roles and Responsibilities

The R&D Division, Welsh Government's ***Delivery Framework - Performance Management of Local Support and Delivery Services 2020/21*** advises that under the direction of the R&D Division, Welsh Government, the Health and Care Research Wales Support & Delivery Centre will:

- Monitor NHS organisations' progress against the national objectives, key indicators and targets by monitoring R&D activity;

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- Review whether NHS organisations are spending their Local Support and Delivery Funding in line with Welsh Government's guidance, by monitoring R&D expenditure;
- Manage the Health and Care Research Wales Directory¹ and provide research activity data in support of performance monitoring.

This guidance document outlines how the Health and Care Research Wales Support & Delivery Centre **provides research activity data in support of performance monitoring and monitors NHS organisations' progress against the national objectives, key indicators and targets by monitoring R&D activity.**

The guidance on how the Health and Care Research Wales Support & Delivery Centre will review whether NHS organisations are spending their Local Support and Delivery Funding in line with the R&D Division, Welsh Government's guidance and **AcoRD for Wales** is described in guidance document ***Monitoring the Use of Local Support and Delivery Funding.***

As also outlined in the R&D Division, Welsh Government's ***Delivery Framework - Performance Management of Local Support and Delivery Services 2020/21***, the data provided by the Health and Care Research Wales Support & Delivery Centre will be used to performance manage the Local Support and Delivery Funding.

The Health and Care Research Wales Support & Delivery Centre also has a role in supporting NHS organisations to meet their NHS R&D objectives, key indicators and targets. The Health and Care Research Wales Support & Delivery Centre is able to provide advice on how to achieve the key indicators and targets outlined in the ***Delivery Framework - Performance Management of Local Support and Delivery Services 2020/21.***

2.2. NHS Organisations': Roles and Responsibilities

As outlined in the R&D Division, Welsh Government's ***Delivery Framework - Performance Management of Local Support and Delivery Services 2020/21***, R&D Directors are expected to decide strategically how to meet the national NHS R&D objectives and how to subsequently spend their Local Support and Delivery Funding within their Health Board or NHS Trust.

¹ https://www.healthandcareresearch.gov.wales/uploads/About/Research_Directory_Policy_Paper.pdf

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In line with these requirements, R&D Directors in NHS organisations are expected to review their R&D activity in the NHS Research Performance Dashboard relating to their organisation on a regular basis to assess their accuracy and inform their R&D strategy. Any additional analysis or business intelligence (BI) can also be requested from the Health and Care Research Wales Support & Delivery Centre in order to aid these decisions.

3. Key Principles

3.1. The use of centrally collated data: NHS organisations' progress against national NHS R&D objectives; key indicators and targets will be assessed through the monitoring of NHS research related data. With the implementation of the Local Portfolio Management System in Wales (ReDA3) and the requirement to collect the Wales minimum data set, the data entered locally will be used to produce reports, which enables consistency and removes the need for data verification, as this comes from local data entry.

3.2. Ensuring data quality: it is the responsibility of the NHS organisations across Wales to ensure the accuracy of the research related data being entered into LPMS. The Minimum Data Set for Wales details the fields that are expected to be recorded for all studies and is designed to promote a consistent way of recording data that is aligned with UK wide standards.

The Health and Care Research Wales Support & Delivery Centre will support all NHS organisations in Wales in working to ensure data completeness and accuracy in LPMS.

3.3. Sharing of NHS research data: as outlined in the R&D Division, Welsh Government's *Delivery Framework - Performance Management of Local Support and Delivery Services 2020/21*, the R&D Division, Welsh Government is committed to sharing data and to the transparency of data. Therefore, NHS research data will be made available on the Health and Care Research Wales website.

4. Purpose of Collecting NHS research data

NHS research data is being collected in order to assess NHS organisations' progress against the R&D Division, Welsh Government's national NHS R&D objectives, key indicators and targets as outlined in the R&D Division, Welsh Government's *Delivery*

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Framework - Performance Management of Local Support and Delivery Services 2020/21.

NHS research data is collated by the Health and Care Research Wales Support & Delivery Centre and fed back to the R&D Division, Welsh Government through the NHS Research Performance Dashboard (see below). Additional analyses will be undertaken in order to generate helpful business intelligence to aid strategic decision making.

5. Mechanisms for Collecting NHS research data

The majority of the NHS research data is collected through the Local Portfolio Management System (LPMS) for Wales (ReDA) and the Health and Care Research Wales Portfolio or Central Portfolio Management System (CPMS).

The primary route for upload of research activity data is now from LPMS to CPMS. Monthly recruitment figures for the majority of Portfolio studies will be captured in the LPMS (ReDA) and flow into the Central Portfolio Management System (CPMS). Central study teams will review and confirm or query monthly recruitment received from ReDA, and this information will be sent back to ReDA for local study teams to review and correct monthly recruitment figures where necessary.

6. NHS Research Performance Dashboard

6.1. Purpose and Use

The NHS Research Performance Dashboard is used to assess progress against the national NHS R&D objectives, key indicators and targets. It provides the R&D activity data which is collected centrally to assess NHS organisations' progress and to present the all Wales picture in terms of national research activity.

The data is no longer provided in spreadsheets on a quarterly basis and is instead, reported through a dashboard created using BI software. The dashboard is routinely updated on a weekly basis and is available to view online via the following weblink:

<https://app.powerbi.com/view?r=eyJrIjoiaMTAzM2Q5OTQtOGE4NS00ZDg1LTlmNDUtNzMwNTljNTNmOGQ5IiwidCI6ImMwMwQ5ZWUxLTBIYjAtNDc1NC05OWFILTAzYWU4YTczMmI1MCIslmMiOjh9>

The NHS Research Performance Dashboard is reliant on the data accuracy and completeness in LPMS and the UK wide LPMS:CPMS link up. The NHS Research Performance Dashboard has been designed to be populated by data drawn from the

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relevant sources as described in **Detail on National NHS R&D objectives, key indicators and targets**.

The Health and Care Research Wales Support & Delivery Centre provides the all Wales data through the dashboard, where each NHS organisation can filter their individual data. The NHS Research Performance Dashboard will also be shared with the R&D Division, Welsh Government.

R&D Division, Welsh Government will use the data within the NHS Research Performance Dashboard to assess progress against the national NHS R&D objectives, key indicators and targets.

6.2. Content

The NHS Research Performance Dashboard will contain R&D activity data relating to the following national NHS R&D objectives, key indicators and targets:

- **C.** To increase the quantity of high quality research being undertaken in NHS Wales
 - **C1.** Number of non-commercial studies on the Health and Care Research Wales Portfolio
 - **C2.** Number of commercially sponsored studies on the Health and Care Research Wales Portfolio
- **D.** To increase the opportunity for NHS participants to participate in, and benefit from clinical trials and other well designed studies
 - **D1.** Number of participants recruited into Health and Care Research Wales non-commercial Portfolio studies
 - **D2.** Number of participants recruited into Health and Care Research Wales Portfolio commercially sponsored studies
- **E.** To improve the efficiency of processes for research permissions, study set-up and delivery of research in NHS Wales
 - **E1.** Time taken from receipt of Local Information Pack (LIP) to recruitment of first participant into Health and Care Research Wales non-commercial Portfolio studies
 - **E2.** Time taken from receipt of Local Information Pack (LIP) to recruitment of first participant into Health and Care Research Wales Portfolio commercially sponsored studies
 - **E3.** Data no longer collected
 - **E4.** Data no longer collected

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- **E5.** Percentage of Health and Care Research Wales non-commercial Portfolio studies recruiting to time and target
- **E6.** Percentage of Health and Care Research Wales Portfolio commercially sponsored studies recruiting to time and target
- **E7.** Percentage of non-recruiting Health and Care Research Wales non-commercial Portfolio studies within NHS organisations
- **E8.** Percentage of non-recruiting Health and Care Research Wales Portfolio commercially sponsored studies within NHS organisations

Please see the table at **Appendix 1** for further information on the content of the NHS Research Performance Dashboard.

In addition to providing data for the Key Indicators listed, the Health and Care Research Wales Support & Delivery Centre uses the data entered into LPMS as required by the Wales minimum data set to facilitate the creation of other additional reports for different purposes.

6.3. Data Verification

In previous years, the NHS Research Performance Reports were circulated in draft form to NHS organisations for them to verify the data. In 2019/20 this process was removed as the primary source of data for the reports is the Local Portfolio Management System (LPMS) which is updated directly by the NHS organisations themselves.

6.4. Frequency

The NHS Research Performance Dashboard for all NHS organisations will be updated on a weekly basis.

6.5. Data Cuts & Schedule

With regards to the data from the Health and Care Research Wales Portfolio, LPMS, and Central Portfolio Management System (CPMS), the national data cuts will be taken 4 weeks after the quarter has ended. This means that NHS organisations should ensure that the data on the centralised systems are up to date at the point of the data cuts, for example, all recruitment data from the previous quarter must be uploaded within four weeks of that quarter's end.

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Research activity data must be entered into LPMS within 5 days of the end of the month in which the activity has taken place.

Please see the below table, which outlines the data cut dates and planned quarterly reporting timelines (these are approximate and subject to change):

Date of Data Cut	Date of Report (Approx.)	Data Covering Period of Time
24 th July 2020	24 th July 2020	01 April to 30 June (Q1)
23 rd October 2020	23 rd October 2020	01 April to 30 September (Q1-2)
29 th January 2021	29 th January 2021	01 April to 31 December (Q1-3)
23 rd April 2021	23 rd April 2021	01 April to 31 March (Q1-4)

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Appendix 1: Content of NHS Research Performance Dashboard

Key Indicator	Data Source	Data Included	Data Excluded
C1. Number of non-commercial studies on the Health and Care Research Wales Portfolio	<p>Local Portfolio Management System (LPMS)</p> <p>Central Portfolio Management System (CPMS)</p> <p>Open Data Platform (ODP)</p>	<p>Health and Care Research Wales non-commercial Portfolio studies which are open within the relevant time period.</p> <p>This includes information related to Health and Care Research Wales non-commercial Portfolio studies stored on the Central Portfolio Management System (CPMS) that have recruited at least one participant at the relevant site during the time period.</p> <p>The data is extracted from the Local Portfolio Management System (LPMS) and Open Data Platform (ODP) on a weekly basis. It is possible that additional recruitment data could have been submitted from Welsh sites after the data has been extracted.</p>	<p>Non-commercial Studies not registered onto the Health and Care Research Wales Portfolio at the agreed data cut time point will be excluded.</p> <p>Performance data will only record Welsh sites open which have been uploaded onto the CPMS (viewed in the NIHR Open Data Platform (ODP)) at the agreed data cut time point. Sites not listed on CPMS at this time point will be excluded from measure against this key indicator.</p>

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<p>C2. Number of commercially sponsored studies on the Health and Care Research Wales Portfolio</p>	<p>Local Portfolio Management System (LPMS)</p> <p>Central Portfolio Management System (CPMS)</p> <p>Open Data Platform (ODP)</p>	<p>Health and Care Research Wales Portfolio commercially sponsored studies which are open within the relevant time period.</p> <p>This includes information related to Health and Care Research Wales Portfolio commercially sponsored studies registered on the Central Portfolio Management System (CPMS) that have recruited at least one participant at the relevant site during the time period.</p> <p>Where Health and Care Research Wales Portfolio commercially sponsored studies are not registered on CPMS, recruitment data should be added to LPMS so that the Health and Care Research Wales Support & Delivery Centre can identify those studies which are open and recruiting.</p> <p>The data is extracted from the Local Portfolio Management System (LPMS) and Open Data Platform (ODP) on a weekly basis. It is possible that additional recruitment data could have been submitted from Welsh sites after the data has been extracted.</p>	<p>Performance data will only record Welsh sites open which have been uploaded onto the CPMS (viewed in the NIHR Open Data Platform (ODP)) at the agreed data cut time point, unless the studies are not registered on CPMS (in which case the data will be taken from LPMS where applicable).</p> <p>For studies registered on CPMS, if sites are not listed on CPMS at this time point, they will be excluded from measure against this key indicator.</p>
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<p>D1. Number of participants recruited into non-commercial Health and Care Research Wales Portfolio studies</p>	<p>Local Portfolio Management System (LPMS)</p> <p>Central Portfolio Management System (CPMS)</p> <p>Open Data Platform (ODP)</p>	<p>Participants recruited into Health and Care Research Wales non-commercial Portfolio studies within the relevant time period.</p> <p>This includes information related to Health and Care Research Wales non-commercial Portfolio studies stored on Central Portfolio Management System (CPMS) that have recruited at least one participant at the relevant site during the time period.</p> <p>The data is extracted from the Open Data Platform (ODP) on a weekly basis. It is possible that additional recruitment data could have been submitted from Welsh sites after the data has been extracted.</p>	<p>Recruitment data for non-commercial studies not registered on the Health and Care Research Wales Portfolio are excluded.</p> <p>Recruitment data uploaded to CPMS after the agreed data cut time point are excluded.</p>
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<p>D2. Number of participants recruited into Health and Care Research Wales Portfolio commercially sponsored studies</p>	<p>Local Portfolio Management System (LPMS)</p> <p>Central Portfolio Management System (CPMS)</p> <p>Open Data Platform (ODP)</p>	<p>Participants recruited into Health and Care Research Wales Portfolio commercially sponsored studies within the relevant time period.</p> <p>This includes information related to Health and Care Research Wales Portfolio commercially sponsored studies stored on Central Portfolio Management System (CPMS) that have recruited at least one participant at the relevant site during the time period.</p> <p>Where Health and Care Research Wales Portfolio commercially sponsored studies are not registered on CPMS, recruitment data should be added to LPMS so that the Health and Care Research Wales Support & Delivery Centre can identify those studies which are open and recruiting.</p> <p>The data is extracted from the Local Portfolio Management System (LPMS) and Open Data Platform (ODP), on a weekly basis. It is possible that additional recruitment data has been submitted from Welsh sites since the data was extracted.</p>	<p>Recruitment data provided to NIHR for upload onto the Open Data Platform (ODP) after the agreed data cut time point are excluded.</p> <p>Performance data will exclude Health and Care Research Wales Portfolio commercially sponsored studies not registered CPMS if recruitment data has not been entered onto LPMS.</p>
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<p>E1. Time taken from receipt of Local Information Pack (LIP) to recruitment of first participant into Health and Care Research Wales non-commercial Portfolio studies *</p>	<p>Local Portfolio Management System (LPMS)</p> <p>Central Portfolio Management System (CPMS)</p> <p>Open Data Platform (ODP)</p>	<p>All Health and Care Research Wales non-commercial Portfolio studies which have recruited their first participant during the relevant time period.</p> <p>The date the Local Information Pack (LIP) was shared with the NHS organisation by the Sponsor should be uploaded to the study record on LPMS in the 'Date Site Selected' field, on the Events tab under the Governance section.</p> <p>The First Participant Recruited Date at Site, should be entered onto LPMS accordingly.</p>	<p>Health and Care Research Wales non-commercial Portfolio studies where the site has not uploaded the date the Local Information Pack (LIP) was shared with the NHS organisation by the Sponsor to LPMS, will be excluded until the information has been provided.</p> <p>Health and Care Research Wales non-commercial Portfolio studies where the Site has not entered the First Participant Recruited date onto LPMS.</p> <p>Health and Care Research Wales non-commercial Portfolio studies which are planning to recruit less than 1 participant per month are not included within this measure, unless they do so within</p>
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			<p>70 days of receipt of the Local Information Pack (LIP).</p> <p>Non-commercial studies not registered on the Health and Care Research Wales Portfolio by the agreed data cut time point are excluded.</p> <p>Health and Care Research Wales non-commercial Portfolio studies where the recruitment data has not been uploaded to CPMS before the data cut for the relevant time period will be excluded.</p>
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<p>E2. Time taken from receipt of Local Information Pack (LIP) to recruitment of first participant into Health and Care Research Wales portfolio commercially sponsored studies *</p>	<p>Local Portfolio Management System (LPMS)</p> <p>Central Portfolio Management System (CPMS)</p> <p>Open Data Platform (ODP)</p>	<p>All Health and Care Research Wales Portfolio commercially sponsored studies which have recruited their first participant during the relevant time period.</p> <p>The date the Local Information Pack (LIP) was shared with the NHS organisation by the Sponsor should be uploaded to the study record on ReDA 3 in the 'Date Site Selected' field, on the Events tab under the Governance section.</p> <p>The First Participant Recruited Date at Site, should be entered onto LPMS accordingly.</p>	<p>Health and Care Research Wales Portfolio commercially sponsored studies where the site has not uploaded the date the Local Information Pack (LIP) was shared with the NHS organisation by the Sponsor to LPMS will be excluded, until the information has been provided.</p> <p>Health and Care Research Wales Portfolio commercially sponsored studies which are planning to recruit less than 1 participant per month are not counted within this measure, unless they do so within 70 days of receipt of the Local Information Pack (LIP).</p> <p>Health and Care Research Wales Portfolio commercially sponsored studies registered on</p>
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			<p>CPMS, where the recruitment data has not been uploaded before the data cut for the relevant time period will be excluded.</p> <p>Health and Care Research Wales Portfolio commercially sponsored studies not registered on CPMS, where the date of the first participant recruited has not been entered on LPMS.</p>
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E3. Data no longer collected			
E4. Data no longer collected			
<p>E5. Open Studies: Percentage of Health and Care Research Wales non-commercial Portfolio studies recruiting to time and target</p>	<p>Local Portfolio Management System (LPMS)</p> <p>Central Portfolio Management System (CPMS)</p> <p>Open Data Platform (ODP)</p>	<p>All Health and Care Research Wales non-commercial Portfolio Studies that are open to recruitment within the relevant time period.</p> <p>Sites should ensure that the Study Site Status field in LPMS has been completed, along with the following data items:</p> <ul style="list-style-type: none"> - Date Site Confirmed - Date Site Ready to Start - Site Actual Open to Recruitment Date - Site Planned Recruitment Close Date - Site Recruitment Target 	<p>Non-commercial studies not registered on Health and Care Research Wales Portfolio and any recruitment attributable to these studies are excluded.</p> <p>Recruitment data uploaded to CPMS after the agreed data cut time point is excluded.</p> <p>Health and Care Research Wales non-commercial Portfolio Studies that have any missing data sets which are required to calculate and evaluate performance against this key indicator, are</p>

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			<p>excluded from measure against this key indicator. Missing data sets this includes are: recruitment targets & planned recruitment start/end dates.</p> <p>Health and Care Research Wales non-commercial Portfolio Studies which are not recruiting participants at NHS organisations.</p> <p>Health and Care Research Wales non-commercial Portfolio Studies not open to recruitment within the relevant time period.</p> <p>Health and Care Research Wales non-commercial Portfolio Primary Care studies.</p>
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<p>E5. Closed Studies: Percentage of Health and Care Research Wales non-commercial Portfolio studies recruiting to time and target</p>	<p>Local Portfolio Management System (LPMS)</p> <p>Central Portfolio Management System (CPMS)</p> <p>Open Data Platform (ODP)</p>	<p>All Health and Care Research Wales non-commercial Portfolio studies that have been open to recruitment and have closed during the relevant time period</p> <p>Sites should ensure that the Study Site Status field in LPMS has been completed and that the Site Recruitment Target & Site Actual Recruitment Close Date has been entered.</p>	<p>Non-commercial studies not registered on Health and Care Research Wales Portfolio and any recruitment attributable to these studies are excluded.</p> <p>Recruitment data uploaded to CPMS after the agreed data cut time point is excluded.</p> <p>Health and Care Research Wales non-commercial Portfolio studies that have any missing data sets which are required to calculate and evaluate performance against this key indicator are excluded from measure against this key indicator. Missing data sets this includes are, recruitment targets &, planned recruitment start/end dates.</p>
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			<p>Health and Care Research Wales non-commercial Portfolio studies which are not recruiting participants at NHS organisations.</p> <p>Health and Care Research Wales non-commercial Portfolio studies that have not been open to recruitment within the relevant time period.</p> <p>Health and Care Research Wales non-commercial Portfolio Primary Care studies.</p>
<p>E6. Open Studies. Percentage of Health and Care Research Wales Portfolio commercially sponsored studies recruiting to time and target</p>	<p>Local Portfolio Management System (LPMS)</p> <p>Central Portfolio Management System</p>	<p>All Health and Care Research Wales Portfolio commercially sponsored studies that are open to recruitment within the relevant time period.</p> <p>Sites should ensure that the Study Site Status field in LPMS has been completed, along with the following data items:</p> <ul style="list-style-type: none"> - Date Site Confirmed - Date Site Ready to Start 	<p>Recruitment data for Health and Care Research Wales Portfolio commercially sponsored studies registered on CPMS, which has been uploaded to CPMS after the agreed data cut time point are excluded.</p>

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	<p>(CPMS)</p> <p>Open Data Platform (ODP)</p>	<ul style="list-style-type: none"> - Site Actual Open to Recruitment Date - Site Planned Recruitment Close Date - Site Recruitment Target 	<p>Health and Care Research Wales Portfolio commercially sponsored studies that have any missing data required to calculate and evaluate performance against the key indicator are excluded from measure against this key indicator. Missing data sets include, recruitment targets & planned recruitment start/end dates.</p> <p>Health and Care Research Wales Portfolio commercially sponsored studies which are not recruiting participants at NHS organisations.</p> <p>Health and Care Research Wales Portfolio commercially sponsored studies that have not been open to recruitment within the relevant time period.</p>
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			Health and Care Research Wales Portfolio commercially sponsored Primary Care studies.
<p>E6. Closed Studies. Percentage of Health and Care Research Wales Portfolio commercially sponsored studies recruiting to time and target</p>	<p>Local Portfolio Management System (LPMS)</p> <p>Central Portfolio Management System (CPMS)</p> <p>Open Data Platform (ODP)</p>	<p>All Health and Care Research Wales Portfolio commercially sponsored studies that have been open to recruitment and have closed during the relevant time period.</p> <p>Sites should ensure that the Study Site Status field in LPMS has been completed and that the Site Recruitment Target & Site Actual Recruitment Close Date has been entered.</p>	<p>Recruitment data for Health and Care Research Wales Portfolio commercially sponsored studies registered on CPMS, which has been uploaded to CPMS after the agreed data cut time point are excluded.</p> <p>Health and Care Research Wales Portfolio commercially sponsored studies that have any missing data required to calculate and evaluate performance against the key indicator are excluded from measure against this key indicator. Missing data sets include, recruitment targets &, planned recruitment start/end dates.</p>

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			<p>Health and Care Research Wales Portfolio commercially sponsored studies which are not recruiting participants at NHS organisations.</p> <p>Health and Care Research Wales Portfolio commercially sponsored studies that have not been open to recruitment within the relevant time period.</p> <p>Health and Care Research Wales Portfolio commercially sponsored Primary Care studies.</p>
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<p>E7. Percentage of non-recruiting Health and Care Research Wales non-commercial Portfolio studies within NHS organisations</p>	<p>Local Portfolio Management System (LPMS)</p> <p>Central Portfolio Management System (CPMS)</p> <p>Open Data Platform (ODP)</p>	<p>Health and Care Research Wales non-commercial Portfolio studies that have been open to recruitment, but have closed to recruitment within the relevant time period and have not recruited a participant throughout the duration of the study recruitment period.</p> <p>Sites should ensure that the Study Site Status field in LPMS has been completed and that the Site Actual Recruitment Close Date has been entered.</p>	<p>Non-commercial studies not registered on Health and Care Research Wales Portfolio are excluded.</p> <p>Recruitment data uploaded to CPMS after the agreed data cut time point are excluded.</p> <p>Health and Care Research Wales non-commercial Portfolio studies that have any missing data required to calculate and evaluate performance against the key indicator are excluded from measure against this key indicator. Missing data sets include, recruitment targets & planned recruitment start/end dates.</p> <p>Health and Care Research Wales non-commercial Portfolio studies which are not</p>
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			<p>recruiting participants at NHS organisations.</p> <p>Health and Care Research Wales non-commercial Portfolio studies not open to recruitment within the relevant time period.</p> <p>Health and Care Research Wales non-commercial Portfolio Primary Care studies.</p>
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<p>E8. Percentage of non-recruiting Health and Care Research Wales Portfolio commercially sponsored studies within NHS organisations</p>	<p>Local Portfolio Management System (LPMS)</p> <p>Commercial companies</p> <p>Central Portfolio Management System (CPMS)</p> <p>Open Data Platform (ODP)</p>	<p>All Health and Care Research Wales Portfolio commercially sponsored studies that have been open to recruitment but have closed to recruitment within the relevant time period and have not recruited a participant throughout the duration of the study recruitment period.</p> <p>Sites should ensure that the Study Site Status field in LPMS has been completed and that the Site Actual Recruitment Close Date has been entered.</p>	<p>Recruitment data for Health and Care Research Wales Portfolio commercially sponsored studies registered on CPMS, which has been uploaded to CPMS after the agreed data cut time point are excluded.</p> <p>Health and Care Research Wales Portfolio commercially sponsored studies that have any missing data required to calculate and evaluate performance against the key indicator are excluded from measure against this key indicator. Missing data sets include, recruitment targets &, planned recruitment start/end dates.</p> <p>Health and Care Research Wales Portfolio commercially sponsored studies which are not</p>
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			<p>recruiting participants at NHS organisations.</p> <p>Health and Care Research Wales Portfolio commercially sponsored studies that have not been open to recruitment within the relevant time period.</p> <p>Health and Care Research Wales Portfolio commercially sponsored Primary Care studies.</p>
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Please note that NIHR publish CPMS recruitment data on their Open Data Platform (web based platform). This is the most up-to-date information source and NHS organisations are encouraged to register to use this application to investigate any discrepancies between NHS Research Performance Reports and locally held information. Additional training or advice regarding the Open Data Platform can be requested from the Health and Care Research Wales Support & Delivery Centre.

It is also critical that NHS organisations maintain accurate local records of their R&D performance data using the Local Portfolio Management System (LPMS), as this is now a primary source of data for performance monitoring.