

Ali's fabulous



Helping practices navigate Foundation Standards with confidence

Date: 28 May 2026

Topic: How to get the best from your SmartSheet

Introduction:

RNZCGP uses Smartsheet to manage and assess practices for Foundation. Smartsheet is a cloud-based work management tool, allowing users to share information and work collaboratively within a central hub. Using the Smartsheet effectively will help your team manage the process better and enable your assessor to access the required evidence quicker.

Key Information

- 1. Practice Profile:** There is a template for your practice profile sitting in Line 1 of your Smartsheet. This contains valuable information for your assessor and the College on your practice. Please remember to complete this.
- 2. Self-assessment:** (The pale-yellow cells) Filled in the free text column for each indicator. This is a brief summary of how your practice meets the indicator. This helps your assessor know how you apply your policies and procedures. You can also add information about the extra things you do at your place that show how your team provides quality care to your patients in a safe environment. It is also a useful way for your team to track their progress towards accreditation. Click on the drop-down list in the column beside it, to mark if you think you have met that indicator. These need to be completed before your assessment visit.
- 3. Assessor column:** (The Pink Cells) Leave this one for the Assessor. They may make comments on what they want to check or ask about. Don't be too concerned if they add comments that you think you have already answered. They are just noting it to clarify with you. By the time your assessment is ready to submit to RNZCGP, the pink columns will be all met, with a concise explanation of the evidence provided, either as attached, or shown at the practice visit.
- 4. Attachments:** The attachment icon is in the first column of each indicator. This is where you attach evidence to show how you meet the indicator. Consider how you name your files before attaching them – this makes it easier for your team, and the assessor to quickly find what they are looking for. Consider grouping similar evidence together in one file to make this quicker e.g. training certificates.
- 5. Sharing your Smartsheet:** As part of your agreement with an assessor, whether WellSouth or other, they will ask you to share your Smartsheet with them by a certain date. For WellSouth assessors, we ask for this to be shared at least two months prior to your assessment visit. This is so we can ensure your team is well on the way to completing the Self-assessment and evidence attachment. You can also share with other team members, a facilitator or your practice partner as required. To share your Smartsheet, click on the Share button on the top right corner of your Smartsheet and follow the links. Ensure you are selecting editing permissions for your assessor. Once your practice has been accredited by RNZCGP, you can remove share permission from your assessor.
- 6. For more information on using the Smartsheet click here** [How to use Smartsheet | RNZCGP](#)

Top Tip

Ensure you have access to your Smartsheet early:

- Understand what you need to add
- Share Smartsheet early with your assessor.
- Contact quality@rnzcgp.org.nz if you have any issues accessing or using your Smartsheet.

Need help? Want to give Feedback/Suggestions for future top tips?

Please email alison.wilden@wellsouth.org.nz or contact your practice partner.

NEXT ISSUE: Privacy update – What do you need to consider with the amendment to the Privacy Act 1 May 2026