# Document Control

## Document History

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## Document Review

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## Document Distribution

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<tr>
<td>NSS-ISD (David Baird)</td>
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<td>The manual will be placed on the SSTS platform for all relevant users to access</td>
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1. Introduction

1.1 Purpose and background

This document will outline how the Clinical Nurse Specialist (CNS) workload tool should be used.

The work of the Nursing and Midwifery Workload and Workforce Planning Programme is to ensure Boards have the right number of staff, in the right place at the right time. The workload tool provides Clinical Nurse Specialists with information for negotiation when drawing up work plans.

It will be the responsibility of NHS Boards to use the information captured in the workload tool to identify the potential risks for the organisation and allocate the resources in line with that particular Board’s health priorities. A key factor, therefore, is knowing how to use the information appropriately set along side local context.

The tool measures all aspects of a Clinical Nurse Specialist’s work and includes; “face to face contact”, “non-face to face contact”, and associated work. The tool measures workload, based on intensity of work and time taken.

A ‘Frequently Asked Questions’ document is also available within the CNS workload tool.
2. Logging In

Once you have been issued with your username and password, via your local SSTS manager, you should use the link provided to go to the login page.

The login page should appear as below.

Enter your username and password as they were provided to you. Please note your password is case-sensitive.

Click “Login” to log in to the system and the below screen will appear.

Click “Confirm” to proceed, where the below screen will appear.
Select “Workload Tools” where the above drop down menu will appear. This will list ALL the workload tools you have been given permissions to. Select “CNS” from the drop down menu – now proceed to section three; “Creating/Editing Workload Tool”.

The manual for this tool can be found here.
A questions and answer sheet can be found here.
3. Creating/Editing Workload Tool

Once logged in, the below screen will appear. This screen will show recently completed forms with associated dates within the “Workload Date” section. The user can use this section to “Edit” or “Delete” previously entered dates. It is also possible within this section for the user to change the date without re-keying previously entered data.

The calendar within this screen should be used to “Create” a new daily workload. Click on the relevant date within the calendar, and the below screen will appear.

This screen will have all the details as contained within the SSTS system (your SSTS manager will have helped to set this up).
The user can update **certain** details within this section at anytime. Once details have been changed the user should click on the “Save” button. When the user visits this screen in the future, the updated details will be shown.

The **Daily Working Start Time / End Time** can be completed by entering in the relevant times for the given shift, and cleared using the “clear” button.

**Additional Hours option**

Work Day Start Time and End Time captures the actual hours worked (contracted hours are already recorded). The Additional Hours fields should **only** be used when hours are worked over and above the working day e.g. returned to work for an evening support group / called out / telephone calls. In these circumstances the user can then enter the “Additional Start Time” and “Additional End Time”.

Once the user has selected the “Save” button, a message will appear highlighting the save has been successful. Click “OK” to move on.

Selecting “Exit” on the above screen will take the user back to the initial screen where they can access dates previously entered OR select a new workload date.
4. Adding a Direct Intervention

To add a “Direct Intervention” the user should select “Direct Intervention” from the tab at the top of the screen. Once selected the below screen will appear.

![Direct Intervention Screen](image)

Click on "Direct Interventions" tab where this screen will appear.

Click "Add Direct Intervention" to add an intervention.

The Direct Intervention screen (as shown above) will initially contain no details when the user accesses this screen (and date) for the first time. Therefore to add a direct intervention, the user should select “Add Direct干预” where the below screen will appear.

![Direct Intervention Details](image)

The screen is set up ready to record both ‘Face to Face’ and ‘Non Face to Face’ contacts. If the user clicks the “No Face to Face Contact” option then all details in this section will be ‘greyed’ out. Selecting this means that no Face to Face contact for the relevant patient took place.

Similarly, if the user selects the “No Non Face to Face Contact” option then all details will be ‘greyed’ out. Selecting this means that no Non Face to Face contact for the relevant patient took place.
The “Duration” default will be shown as “Not Set”. **Note:** If ‘90 + mins’ is selected from the duration drop down, the exact number of mins should be entered in the ‘Exact minutes if 90 or over’ text box.

By clicking on the blue “info” links you will get a popup window showing the guidance from that section. This is particularly helpful if the user wants to access examples associated with the levels of intervention.

Location refers to the location of where the direct intervention took place. Within “Location” the following options are available:

- Ward
- Clinic
- Community
- Other

NB: All routine CNS clinics should be recorded on the Direct Intervention screen. Initial set up and clear up time at the end of the clinic should be entered under “Non Face to Face”, Level 1, with ‘SET UP / CLEAR UP’ recorded in the unique identifier box.

If “Other” within “Location” is selected, then the user should enter relevant details into the “Other” free text box to better define what the location was.

With regards to the “Location” when associated with a “Non Face to Face contact”; this refers to the location of the CNS at the time of the intervention, and NOT the patient.

There are three options once the user has entered information for the direct intervention:

- Click ‘Save’ to save the information and return to the Direct Interventions Summary screen (see screen below).
- Click ‘Save and add another’ to save the information and be presented with a blank Direct Intervention screen to enter the next direct intervention.
- Clicking ‘Cancel’ will **NOT** save any information that is on the ‘Direct Intervention’ screen and will return the user to the summary screen.

Once Direct Interventions have been added, the screen will look like that shown below.
Within the above screen, the user can access those patients that have already been entered for the given date. Select “Edit” to edit previously entered patients for the related “Face to Face” OR “Non Face to Face” contact.

The “Delete” button will delete the relevant record and the following message will appear; “Are you sure you want to delete this Direct Intervention?”. The user should select “Yes” if they want to delete the record, and “No” to abandon the action.

As more interventions are added, they will be shown on the above screen.

Selecting “Exit” on the above screen will take the user back to the initial screen where they can access dates previously entered OR select a new workload date.
5. Clinics

N.B. This section should only be used to record patient groups or Health Promotion / Education sessions

To add a clinic, the user should select “Clinics” from the tab at the top of the screen. Once selected the below screen will appear:

The Clinics screen (as shown above) will initially contain no details when the user accesses this screen (and date) for the first time. Therefore to add a clinic, the user should select “Add Clinic” where the below screen will appear.

Within the “Type” menu the following options are available:
- Group
- Health Promotion/Education Sessions

Further information can be added:
- **Clinic Description** – the user can enter details of the clinic that took place.
- **Start and End Time** – this refers to the start and end time of the clinic. This should include clinic set-up/clear-up time.
Nursing and Midwifery Workload and Workforce Planning Programme

- **Number of Patients** – this refers to the number of patients who attended the clinic.

When selecting a clinic, each member of staff involved in the clinic will record his/her own individual workload activity in their own record.

By clicking on the blue “info” links you will get a popup window showing the guidance from that section.

There are three options once the user has entered information for the clinic:

- Click ‘Save’ to save the information and return to the Clinic Summary screen (see screen below).
- Click ‘Save and add another’ to save the information and be presented with a blank Clinics screen to enter the next clinic.
- Clicking ‘Cancel’ will **NOT** save any information that is on the ‘Clinics’ screen and will return the user to the summary screen.

Once Clinics have been added, the screen will look like that shown below.

Within the above screen the user can access those patients that have already been entered for the given date. Select “Edit” to edit previously entered patients for the related “Clinic”.

The “Delete” button will delete the relevant record and the following message will appear; “Are you sure you want to delete this Clinic?”. The user should select “Yes” if they want to delete the record, and “No” to abandon the action.

As more clinics are added, they will be shown on the above screen.

Selecting “Exit” on the above screen will take the user back to the initial screen where they can access dates previously entered OR select a new workload date.
6. Associated Workload and Travel

To add “Associated Workload”, the user should select “Associated Workload” from the tab at the top of the screen. Once selected the below screen will appear.

Associated Workload should be entered for the **WHOLE** shift and not per patient.

These sections appear as below, and are made up drop-down boxes and text boxes.

**Note:** If the user selects 90+ minutes from the drop-down, they should fill in the exact number of minutes in the text box next to the drop down.

![Associated Workload Screen](image)

Clicking on the blue “info” link provides guidance on that section.

There are two options once the user has entered information for the clinic:

- Click ‘Save’ to save the information on this screen, where the following message will appear: “Successfully saved Associated Workload Details”.
- Selecting “Exit” on the above screen will take the user back to the initial screen where they can access dates previously entered OR select a new workload date.
To add “Travel”, the user should select “Travel” from the tab at the top of the screen. Once selected the below screen will appear.

Travel should be entered for the **WHOLE** shift and not per patient.

Travel Time should be entered in minutes.

Travel Miles should be rounded to the nearest decimal place. *A future version of this tool will allow the user to enter Miles to one decimal place, e.g. 10.5 miles.*

All relevant “Modes” of travel should be selected. Note it is possible to select multiple options.

There are two options once the user has entered information for travel:

- Click ‘Save’ to save the information on this screen, where the following message will appear: “Successfully saved Travel Details”.

- Selecting “Exit” on the above screen will take the user back to the initial screen where they can access dates previously entered OR select a new workload date.
7. Exceptions

To add exceptions, the user should select “Exceptions” from the tab at the top of the screen. Once selected the below screen will appear.

Exception reporting is only for rare, extraordinary events that cannot reasonably be anticipated on a day to day basis. This may not always be related to a patient. The Unique identifier box is a mandatory field and requires completion. When entering non patient related exceptions, N/A should be entered into the Unique Identifier box.

NB Leave (e.g. annual leave, sick leave, special leave) are management issues and are not recorded as Exceptions.

A list of pre-defined “Reasons” relating to exceptions is already available within the “Reasons” drop down menu. The user can select “Other” from this list should none apply. When “Other” is selected, the user should add details of this exception to the “Other Reason” text box.
The number of staff relates to the **TOTAL** number of staff associated with the detailed exception. *The request to capture this information will be reviewed in future versions of the tool.*

There are three options once the user has entered information for the clinic:

- Click ‘Save’ to save the information and return to the Exceptions Summary screen (see screen below).
- Click ‘Save and add another’ to save the information and be presented with a blank Exceptions screen to enter the next exception.
- Clicking ‘Cancel’ will **NOT** save any information that is on the ‘Exceptions’ screen and will return the user to the summary screen.

Once Exceptions have been added, the screen will look like that shown below:

By clicking on the blue “info” links you will get a popup window showing the guidance for Exception reporting.

Within the above screen the user can access those exceptions that have already been entered for the given date. Select “Edit” to edit a previously entered “Exception”.

The “Delete” button will delete the relevant exception and the following message will appear; “Are you sure you want to delete this Exception?”. The user should select “Yes” if they want to delete the record, and “No” to abandon the action.

As more exceptions are added, they will be shown on the above screen.

Selecting “Exit” on the above screen will take the user back to the initial screen where they can access dates previously entered OR select a new workload date.
8. **Professional Judgement Tool**

This section should not be completed.

The Professional Judgment tool is available within SSTs and can be accessed, and completed, by team leaders / designated individuals.