Nursing and Midwifery Workload and Workforce Planning Programme

Mental Health & Learning Disabilities Workload Tool

User Manual
# Document Control

## Document History

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## Document Approvals

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## Document Distribution

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<tr>
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<td>NSS-ISD</td>
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1. Introduction

1.1 Purpose and background

This document will outline how the Mental Health & Learning Disabilities (MH&LD) 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 tool is intended to be used to quantify workload and to assist in developing and agreeing appropriate staffing levels for MHLDS wards. This process is based around assessing the typical workload of an average ward on an average week and should not act as a barrier to the application of clinical judgement on a daily basis.

The workload tool captures clinical workload, the variability and complexity of patient/tasks. The tool has, built into the calculator, a proportion of time for Direct Care, Indirect Care, Associated Workload and the inclusion of 22.5% to cover sickness leave, maternity leave, special leave etc.

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 alongside local context and professional judgement.

The tool comprises of elements which should all be completed by the Senior Charge Nurses. Collation of activity data in advance of completing the tool is essential. These are admission and discharge, patient specific, task specific and groupwork information. This involves selecting a typical week and noting activity etc throughout that week.

Please take time to read the accompanying Guidance and Frequently Asked Questions documents situated within the editing and creating a workload tool section above the calendar screen.
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 “mental health” from the drop down menu – now proceed to section three; “Creating/Editing Workload Tool”.
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” previously entered dates. The user can also “Delete” previously entered dates, as well as 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.

Click on relevant date to enter a new daily workload. The current date will be highlighted as the “Default”.

Click “Edit” to access previously entered data.

Click “Delete” to permanently remove data entered against wrong date.

Click “Proceed to history summary” to view further entries and saved 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.
4. Adding data to the Admission/Discharge Tab

This screen will have all the details as contained within the SSTS system (your SSTS manager will have helped to set this up).
Admission/Discharge tab:
The user should click on Speciality and select from the drop down menu the type of speciality which best describes the ward.

The User should continue to select as directed within the Speciality boxes.
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The User should then complete the Ward Identifier with the name of the ward as it appears on the SSTS roster location.

Average Occupied beds (this should be less than or equal to the number of beds held in roster configuration) - the user must enter the average number of occupied beds based on the previous financial year.

Admission process - the user must enter the average number of admissions per week over last financial year.

Discharge process - the user must enter the average number of discharges per week over last financial year.

The system will allow figures to be entered to one decimal point.

By clicking on the blue “info” links you will get a popup window showing the guidance for the Admission and Discharge tab

Once details have been added the user should click on the “Proceed” button move to the Patient Specific tab
5. Adding data to the Patient Specific Tab

**Patient specific tab:**

Enter data against each task which applies to the number of patients in your ward. The total entered cannot be greater than the number of ward beds.

However please note that when completing the following groupings, (\(\leq\) less than or equal to)

- One to one sessions – additional
- One to one sessions – daily
- One to one sessions - 3 times per week
- Continence care - level 1
- Continence care - level 2
- Continence care - level 3

The sum of these entries must be \(\leq\) bed number
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- Nutrition & Hydration - requires assistance
- Nutrition & Hydration – continuous assistance required

- Personal hygiene - Level 1
- Personal hygiene - Level 2
- Personal hygiene - Level 3
- Personal hygiene - Level 4

- Pressure area care - Level 1

The sum of these entries must be <= bed number

By clicking on the blue “info” links you will get a popup window showing the guidance for the Patient Specific tab.

Once details have been added the user should click on the “Proceed” button and move to the Task Specific tab.
6. Adding data to the Task Specific Tab

Task specific tab:

Enter data against each task which applies to patients in your ward. The total entered is the number of times this task occurs in a typical week. The tool routinely refers to a typical week – tasks which occur infrequently should be excluded from the tool as these are not typical.

By clicking on the blue “info” links you will get a popup window showing the guidance for the Task Specific tab.

Once details have been added the user should click on the “Proceed” button and move to the Groupwork tab.
7. Adding data to the Groupwork Tab

**Groupwork tab:**

Enter data against each type of groupwork session which occurs in your ward. The totals entered are the number of sessions in each category which occur in a typical week with differing staff numbers in attendance.

Only enter data against categories which are relevant to your patient or client group.

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

Once details have been added the user should click on the “Save and Proceed to completion” button and move to the Summary tab.
Within the summary tab, you will be presented with the Whole Time Equivalent (WTE) figure that the tool has calculated the ward requires for the workload entered.
8. Professional Judgement Tool

The Professional Judgment tool (24 hr) is available within SSTS and can be accessed, and completed, by Senior Charge Nurses / designated individuals.