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1. Introduction

1.1 Purpose of Guidance

The purpose of this section is to provide guidance about completing the Update to Quality Tool and to provide examples.

The Quality Tool has been designed by the Healthcare Staffing Programme (HSP) with key stakeholders including clinical managers, clinicians from service and partnership.

The Quality Tool should be applied with either the Community Tool (CN) or the Community Children’s and Children’s Specialist Nurse (CCSN) Tool.

The capacity to deliver safe and effective care to the patient\(^1\) in the daily working environment is important to those involved in that care. The tool comprises a questionnaire that is designed to reflect the level of quality of care being achieved taking account of staffing, workload and the environment during the designated period.

The questionnaire should be completed concurrently with the workload tool for the designated period by each Team Leader.

This information is collated with results and can be used by the practitioner and managers to plan the allocation of resources to effectively meet the service or health board’s priorities and to identify any risks that may exist in the service. It is important to remember the report is only one part of the triangulation approach to workload planning and should be considered in conjunction with:

- Funded establishment
- The findings from specific workload tool for service area
- Quality indicators and
- Local context

This guidance will provide all of the information required to complete the Quality Tool.

This document will provide detailed information from how to log in to how to finalise and submit data. It will not provide information about the methodologies used to develop the tool or how best to use the reports obtained from the tool. That information can be accessed via the learning resources available on the HSP (previously known as NMWWPP) webpages:

http://www.isdscotland.org/Health-Topics/Workforce/Nursing-and-Midwifery/NMWWP/

\(^1\) The term patient denotes client/ child/ young person/service user/ family/ carer.
1.2 Background

Nursing & Midwifery workload tools are an essential part of the Health and Care (Staffing) (Scotland) Act 2019 aimed at ensuring health & social care staffing is at the level required to deliver safe, quality focused care to people using the services. The tools are designed to give staff the platform on which to record information about the actual work they do. This is to collate the activities in a manner that supports decisions about staffing, resource allocation and service design as part of a triangulated process of planning.

To find out more about this, please refer to the HSP website and learning resources:
http://www.isdscotland.org/Health-Topics/Workforce/Nursing-and-Midwifery/NMWWP/

The political commitment in Scotland is that, through application of a common staffing method (Figure 1) health services will be staffed to the level required to provide safe, high quality care. To ensure this, each NHS Scotland Board and the services therein, are responsible for having effective planning processes, informed by the activities captured through the mandated use of workload tools. The Quality Tool is one of national workload tools available for this purpose.

Figure 1 – The common staffing method
2. Logging In

2.1 Accessing the tools

To gain access to the quality tool you will require access to the local SSTS platform. Please speak to your line manager about local processes to obtain this.

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 tools should be accessed via Internet Explorer 11 or Internet Explorer 8. Firefox, Google Chrome or any other browsers are not supported and should not be used.

Enter your username and password as they were provided to you and select ‘Login’:

Passwords are case-sensitive and you will be prompted to change your password the first time you log in.

Click ‘Confirm’ to proceed:
And then select ‘SSTS’: 

2.2 Screen display issues

Some boards have reported issues with the workload tool screens not displaying correctly, for example save buttons being hidden or data entry boxes being misaligned. This is due to compatibility issues following an SSTS update.

If you experience display problems, you should first check that you are using either Internet Explorer 8 or Internet Explorer 11.

If you are still having problems, please contact your local SSTS Manager, who can advise on local settings and solutions.

Firefox, Google Chrome or any browsers apart from Internet Explorer 8 or 11 are not supported and should not be used
2.3 Changing Working Location

Once you have logged in to the tool you will be presented with the following screen:

Check the Current Location at the top of the screen.
If this is incorrect, select ‘My Account’ and then ‘Change Working Location’:

A screen will then appear containing the ward and clinical areas you have access to:

The ward/area can be searched for by roster location, staff bank, local area or employer.
To choose a ward/area of interest, select it from the available list and then click ‘Select’:
The below screen will then appear, select ‘OK’ to proceed:

The location will then update on the toolbar:
3. Creating/Editing Entries in Tool

3.1 Opening the tool

Data entry into this tool is open for 30 calendar days only as such the tool cannot be used out with this time period. For example if an audit period starts on the 1st of April 2019 the data can only be recorded in the window 1st of April to the 30th of April. Data input on the 3rd of May cannot be entered for the 1st of April as this is greater than 30 days. The timescale covers the preceding 30 days only.

To open the Quality Tool select ‘Workload Tools’ and then ‘Quality Tool’:

A screen similar to the below will then appear:
3.2 Entering Data

To add data simply select the Start and End Dates and then ‘New Submission’:

![New Submission Screen]

And the below screen will appear:

![Detailed Submission Screen]

This screen will have all the details as contained within the SSTS system.

⚠️ Your SSTS manager will have helped to set this up

If you are completing the tool on behalf of your team, you should select the below box:

![Checkbox: Completing on behalf of a team]

The Workload Tool drop down box gives two options: Community Nursing and CCSN select and click on the appropriate option:
If you wish to record a **comment**, insert this in the comments box:

```
Please comment below on particular circumstances that may have affected care during this period:
```

The comments box can be used to provide explanation if required on particular circumstances that may have affected care during this period.

Once the page is complete select **Continue**

⚠️ The questionnaire must be completed fully within a 15 minute timeframe or the system will time out and the data will be lost meaning that you must start again. The details page is also unable to be altered after selecting ‘Continue’, so make sure all details are correct before proceeding.

There are 3 sections within the tool:

- Management
- Care Delivery
- Safe and Effective Care

⚠️ You cannot move between sections until all questions have been answered within that section. All other sections will remain greyed out until the relevant data is entered.

There are 3 possible answers to each question:

- Yes
- No
- Not Applicable (N/A)

⚠️ There are a series of linked questions and if the first of these questions is answered as ‘No’ then the corresponding questions will be greyed out.

Definitions are provided for text highlighted in red. To view the definition hover over the text:

```
Team Communication/Support
1. Was there sufficient time to share and/or communicate essential information with members of the team within working hours?  
   □ Yes  □ No  □ N/A
```

Once a section has been completed, select **Continue** to proceed.
Once you have completed the final section the following message will appear, select OK to proceed:

The questionnaire has been completed successfully.

3.3 Editing Data

The history screen enables users to see previous entries and amend the date of these entries or delete if necessary:

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
<th>Workhead Tool</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>15/04/2019</td>
<td>16/04/2019</td>
<td>CN</td>
<td>Delete</td>
</tr>
<tr>
<td>08/04/2019</td>
<td>12/04/2019</td>
<td>CN</td>
<td>Delete</td>
</tr>
<tr>
<td>01/05/2018</td>
<td>02/05/2018</td>
<td>CN</td>
<td>Delete</td>
</tr>
<tr>
<td>09/04/2018</td>
<td>10/04/2018</td>
<td>CC&amp;SN</td>
<td>Delete</td>
</tr>
</tbody>
</table>

User’s are unable to amend any answers once the questionnaire has been completed.
4. Business Objects

After Quality tool data entry into SSTS is complete, please use one of the Quality Tool standard reports developed in Business Objects (BOXI) to view and extract information for a selected period of time.

These reports were created by the national team and have a series of built-in prompts to generate customised outputs locally, for example:

<table>
<thead>
<tr>
<th>Prompts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reply to prompts before running the query.</td>
</tr>
<tr>
<td>Select START DATE:</td>
</tr>
<tr>
<td>Select END DATE:</td>
</tr>
<tr>
<td>Select EMPLOYER:</td>
</tr>
<tr>
<td>Select SPECIALTY:</td>
</tr>
</tbody>
</table>

Access to BOXI reports requires a login and password, which can be granted by your local SSTS Manager.

⚠️ You will require your Line Manager’s permission and authorisation before contacting your local SSTS Manager.
5. Frequently asked questions

Q1 How often should the tool be completed?

The tool should be completed alongside the CN and CCSN tools. There is a national recommendation for the running of the CCSN tool i.e. July, November and March for the period of one calendar month. The recommendation for the Community Tool is that it is applied daily for 2-week periods the frequency of which is determined locally. The national team would recommend checking with your local workforce team for detail about when the tool has been scheduled for the local area.

Q2 How many days/weeks should the tool run for?

The Quality tool should be run at the end of each week the CN/CCSN tools are completed. If the tools are run for two weeks or more then there should be a quality tool entry for each week. The Quality tool is run concurrently with the CN and CCSN tools, in other words the team leader is looking back over that week and is basing the answers on that period.

Q3 How is the tool accessed?

The Quality tool is accessed via the SSTS platform. Local processes about gaining access to the platform will be in place in every board. A common process adopted is that access permission is given by the local SSTS team on receipt of a line manager authorisation form. After they receive this you will be issued with a username and password. Follow the directions in Section 2.1 to access the tool once your username and password is in place. Occasionally screen display issues arise with the tool on local board systems. If this happens, please refer to Section 2.2 or contact your local IT team for assistance.

Q4 How can I edit a tool entry?

Users are able to amend the dates on a previous entry or delete. The tool has no facility for users to go back to edit answers to the questionnaire.

Q5 Should other tools be completed at the same time as the Quality tool?

Yes. The tool has been designed for use in conjunction with the CN/CCSN tools and the Professional Judgement Tool as detailed below. Like the Quality tool, both of these tools can be accessed via the SSTS platform. User guides on how to input data is available for each tool. Please refer to this during the run. The Professional Judgement tool is completed for two full weeks during the calendar run of the CN/CCSN tools. The tool is set up to record data for two weeks. It is recommended that the two weeks begin on a Monday. One tool is normally completed by a team leader or designated person on behalf of the team. Local arrangements should be established so information from the whole team is collated to inform completion of the Professional Judgement tool.
Q6  How does the tool work?

The tool aims to highlight problems that affect staffing and workload during the data collection period, and to indicate problems in systems and the environment that may inadvertently impact on the standard of care delivered.

It is split into 3 main sections:

- Management - asking questions around efficient and effective use of staff, organisation of the working environment, and supervision/teaching.
- Care Delivery - questions about assessment of patients, care planning, documentation, and communication with the team and patients.
- Safe & Effective Care - questions about team working, staffing levels, organisational culture, and patient satisfaction.

The tool gives a maximum score of 100, based upon staff responses (Y/N/NA), with the scoring method devised by Keith Hurst.

⚠️ It is important that No and NA are used correctly in the context of the question otherwise the overall score will be affected.

Q7  Where can I see the tool score?

The score can be viewed via a number of reports available through BOXI.

Q8  How is the score calculated?

The quality tool uses a Donabedian scoring approach, in which each question is categorised as either:

- Structural: questions relating to staffing and equipment
- Process: questions relating to how teams work
- Outcome: questions relating to staff and patient satisfaction

Q9  How are the scores used?

Scores can be used by teams locally to inform the “quality” section of the “triangulation” process.

Scores are also used by ISD in the development of the Community Nursing and CCSN staffing calculators. Only those teams deemed to be exhibiting “best practice” (i.e. scoring 70+ in the QT) are used in the databases underlying the calculators.

Q10 Where can I get support when completing this tool?

Information about tool completion can be obtained on the SSTS platform and by clicking on the information icons positioned throughout the tool. Further details on how to complete the tool can be found within our video demonstration, accessed by clicking here.

If additional support is required, please contact your local workforce lead.