

Professional Judgement Staffing Level Tool

User Guide

March 2024



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1. Introduction

The Professional Judgement (PJ) tool is part of the national triangulation process for nursing and midwifery workload planning. Although the PJ tool can be used on its own, it is not designed to be a standalone tool, and should be used in conjunction with other tools, i.e. if the ward/community team (roster) is doing a run of the relevant specialty specific staffing level tool, the PJ tool should be completed together with it.

The PJ Tool is based on users' professional opinion on how many staff, registered and unregistered, are needed to carry out the workload required in a defined time, normally over a period of two consecutive weeks. The PJ tool always starts on a Monday.

The PJ Tool is set up to allow nurses and midwives to record information about the number of staff required in order to undertake the workload activities at a particular point in time. These time periods are broken down into 4 hourly blocks. It is important that where a block incorporates a handover period that requires an increased staffing presence these are accounted for. Further consideration should be given to staffing requirements associated with other aspects of workload e.g. training, breaks and meetings. To assist with the recording of partial hours within a 4-hour block e.g. handover periods, please refer to the table below.

Number of staff required	Portior	n of 4-hour time	e block and hea	ad count
	30 min (1/8)	1 hour (1/4)	2 hours (1/2)	3 hours (3/4)
1	0.12	0.25	0.50	0.75
2	0.25	0.50	1.00	1.50
3	0.37	0.75	1.50	2.25
4	0.50	1.00	2.00	3.00
5	0.62	1.25	2.50	3.75
6	0.75	1.50	3.00	4.50
7	0.87	1.75	3.50	5.25
8	1.00	2.00	4.00	6.00
9	1.12	2.25	4.50	6.75
10	1.25	2.50	5.00	7.50

Each relevant block should be completed to reflect the number of registered and non-registered staff required to undertake the workload in the specific operational area.

The PJ tool allows the user to record a brief explanation or justification for recorded staff requirements, for example if the number recorded differs from the usual staffing level. There is a data capture template available to aid data collection before upload to SSTS (<u>Appendix B</u>)

This information is collated, with a standard predicted absence allowance (PAA) of 22.5% for nursing and midwifery staff and 25% for medical staff where applicable.

This information is then available in a report that 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 element of the **Common Staffing Method** mandated by the Health and Care (Staffing) (Scotland) Act 2019 (<u>Appendix A</u>).

The report should be considered in conjunction with:

- Funded establishment
- The findings from the Specialty Specific Tool
- Quality indicators and local context

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 Healthcare Staffing Programme webpages: <u>Healthcare Staffing Programme (healthcareimprovementscotland.org)</u> Background information on Staffing Level Tools can be found in <u>Appendix A</u>

2. Logging in

2.1 Accessing the tools

To gain access to the PJ tool you will require access to the local SSTS platform. Please speak to your Workforce Lead and/or line manager about local processes to obtain this. Some staff may already have a SSTS access but will require additional permissions to access the staffing level tools.

Once the local SSTS manager has confirmed that your additional permissions are in place, you should use the link they provide to go to the login page.

SSTS and the staffing level tools can only be accessed on a board approved computer network or portable network

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

ePayroll, SSTS and Workforce.
Please enter a valid Username and Password
Username:
Password:
Login Evit
Lugar Luc
NOTICE TO USERS
This computer system is the preparty of NUCC cetland. This for
This computer system is the property of NHSScotland. It is for
authorised use only. Unauthorised or improper use of this system
authorised use only. Unauthorised or improper use of this system may result in disciplinary action.
authorised use only. Unauthorised or improper use of this system may result in disciplinary action.

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":

Shared Authentication for eExpenses, ePayroll, SSTS and Workforce.	NHS
	SCOTLAND
Select an application:	
ePayroll	
<u>SSTS</u>	

2.2 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. It is unlikely that you will need to change Working Location. However, if Working Location is incorrect, and you have the necessary permissions, select '**My Account**' and then '**Change Working Location**': See below:

If you do not have the appropriate permissions, please reach out to your local workforce lead or SSTS team.

IHS S	STS	Welcome : A	umanda Current L	ocation: Work	load Tools Te	ating Site - Workle	ad Tools Test Post Mata	Ward Build 33.99 39.21
R	tostering	Employees	SSPS Transfers	Staff Bank	Absences	Configuration	Staffing Level Turks	My Account Application
3110								C
							(Change Username
								Change Working Editation

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'**:

NHS SSTS Welcome :Amanda Coment Location: Workload Tools Teol Rostering Employees SSPS Transfers Staff Benk Absences (Change Working Location	ing Sile - Workloud Tools Test Post Natel Ward Build 33.09.2338.21 💿 Configuration Staffing Level Tools Ny Account Application
Your Gurrent Location is: Workload Tools Test Post Natal Ward Setect a Location Type O All I Roster Locations O Staff Banks O Local Areas O Employers	
Please enter all or part of a Roster Location:	Search Locations Show Inactive:
Workload Tools Testing Site - MSP Input Test Workload Tools Testing Site - Workload Tools Test Ante Natal Ward Workload Tools Testing Site - Workload Tools Test Area 1 Workload Tools Testing Site - Workload Tools Test Area 2 Workload Tools Tools Tools Test Out 8 - Workload Tools Test Out 8 - Rhone Workload Tools Testing Site - Workload Tools Test Out 8 - Rhone Workload Tools Testing Site - Workload Tools Test Maternity Climic Workload Tools Testing Site - Workload Tools Test Maternity Community Workload Tools Testing Site - Workload Tools Test Maternity Community Workload Tools Testing Site - Workload Tools Test Maternity Community Workload Tools Testing Site - Workload Tools Test Maternity Community Workload Tools Testing Site - Workload Tools Test Maternity & Workload Tools Testing Site - Workload Tools Test Maternity & Workload Tools Testing Site - Workload Tools Test Maternity & Workload Tools Testing Site - Workload Tools Test Maternity & Workload Tools Testing Site - Workload Tools Test Maternity & Workload Workload Tools Testing Site - Workload Tools Test Maternity & Workload Tools Testing Site - Workload Tools Test Maternity & Workload Tools Testing Site - Workload Tools Test Maternity & Workload Workload Tools Testing Site - Workload Tools Test Thage/Ass Ward	
Servect	

The location will then update on the toolbar:



3. Creating/Editing Entries in Tool

3.1 Opening the tool

To open the Professional Judgement Tool select '**Workload Tools**' and then '**Professional Judgement**':

Rostering Employees SSPS Transfers Staff Bank Absences Configuration	Staffing Level Tools: My Account. Application Adult Inpatient Tool Version 3 Children's Specialist Nurse Tool Version 2 Clinical Nurse Specialist Tool Version 2 (for adults) Community Printal Health Community Nurse Tool Version 2 Emergency Care Provision Tool Version 3 Matemity Tool Version 2 Nental Health and Learning Disability Tool Version 2 Nental Tool Version 2 Nental State Content Tool Version 2 Nental NetWork Tool Version 2 Nental State Content Tool Version 2 Nental NetWork Tool Version 2 Dimensional Judgement Tool Version 2 Dimensional State Content Co
--	---

A screen like the one below will then appear:

VESSTS Weicome: Miss Amanda Awastar Current Location: Workload Tools Test Area 1 Build 33.1 2333.17 Protessional Judgement Staffing Level Tool Version 2										
fessional judgement. I ool user guide a										
Select Record Add Record We										
Filter										
From 26/01/2023	To 26/01/2024 Apply Filter									
Period Start	Staffing Level Tool	Status								
23/01/2024	CCSN	Awaiting Sign-Off 1	Edit	Delete						
01/01/2024	CNS	In Progress	Edit	Delete						
01/01/2024	Mental Health	In Progress	Edit	Delete						
02/10/2023	Adult Inpatient	In Progress	Edit	Delete						
04/09/2023	Professional Judgement Tool Only	Awaiting Sign-Off 1	Edit	Delete						
04/09/2023	Adult Inpatient	Awaiting Sign-Off 1	Edit	Delete						
26/06/2023	CCSN	Awaiting Sign-Off 1	Edit	Delete						
05/06/2023	Community Nursing	In Progress	Edit	Delete						
05/06/2023	Neonatal	Awaiting Sign-Off 1	Edit	Delete						
30/05/2023	Maternity	In Progress	Edit	Delete						
15/05/2023	Adult Inpatient	In Progress	Edit	Delete						
15/05/2023	Community Nursing	In Progress	Edit	Delete						
01/05/2023	CCSN	Awaiting Sign-Off 1	Edit	Delete						
03/04/2023	CCSN	Awaiting Sign-Off 1	Edit	Delete						
Showing 1 to 14 of 14 entries				Previous 1 Next						

3.2 User Roles

There are two types of user role for the Professional Judgement tool:

• Editor permissions allow users to create, enter, edit/delete records, including skill mix and to view tool results

•Data Entry permissions allow users to create records and enter data on the Week 1 and Week 2 tabs, but not to enter Skill Mix, view results or delete records.

3.3 Entering Data

After opening the Professional Judgement tool, a screen similar to the below will appear:

Professional Judgemen	nt Staffing Level Tool Version 2											
onal Judgement Tool user guide and FAC	Professional Judgement Stalling Level Tool Version 2											
	Qs											
t Record Add Record Week 1	Skill Mix 1 Week 2 Skill Mix 2 Results Sign Off											
liter												
rom 26/01/2023 To 26	5/01/2024 Apply Filter											
Period Start	Staffing Level Tool	Status										
3/01/2024	CCSN	Awaiting Sign-Off 1	Edit	Delete								
/01/2024	CNS	In Progress	Edit	Delete								
/01/2024	Mental Health	In Progress	Edit	Delete								
2/10/2023	Adult Inpatient	In Progress	Edit	Delete								
4/09/2023	Professional Judgement Tool Only	Awaiting Sign-Off 1	Edit	Delete								
4/09/2023	Adult Inpatient	Awaiting Sign-Off 1	Edit	Delete								
5/06/2023	CCSN	Awaiting Sign-Off 1	Edit	Delete								
5/06/2023	Community Nursing	in Progress	Edit	Delete								
5/06/2023	Neonatal	Awaiting Sign-Off 1	Edit	Delete								
0/05/2023	Maternity	In Progress	Edit	Delete								
5/05/2023	Adult Inpatient	In Progress	Edit	Delete								
5/05/2023	Community Nursing	In Progress	Edit	Delete								
/05/2023	CCSN	Awaiting Sign-Off 1	Edit	Delete								
3/04/2023	CCSN	Awaiting Sign-Off 1	Edit	Delete								
wing 1 to 14 of 14 entries				Previous 1 Nex								
vit												

Any data entered into the tool before the evening of the January 2023 will not be visible on this screen. Instead, it can be viewed in BOXI reports (see section 4)

To navigate through the tool, please use the buttons at the bottom of the page (e.g. Save & Proceed, Previous). Clicking directly between tabs may result in entered data being lost.

The Status column shows records which have been completed or are still In Progress.

Editor users will have the option to Edit or Delete records.

Data entry users will only be able to delete records.

More information on editing and deleting records can be found in the next 2 sections (3.4 and 3.5)

If you wish to create a new record, click on the 'Add Record' tab. You will see the following screen:

NHS SSTS Welcome : Miss Amanda Newstart Current Location : Workload Tools Test Area 1 Build 33.1.2353.17 Professional Judgement Staffing Level Tool Version 2															
Professional Judgement Tool user guide and FAQs															
Select Record Add Record Wes 1 Skill	Mix 1	1	Wee	k 2	Sk	cill M	lix 2	Results	Sign Off						
Start Date	0		Janu	ary 2	2024										
	Мо	Tu	We	Th	Fr	Sa	Su								
	1	2	3	4	5	6	7								
	8	9	10	11	12	13	14								
	15	16	17	18	19	20	21								
	22	23	24	25	26	27	28								
	29		31												
Staffing Level Tool	Ple	ease	Selec	t						~	1				
Comments															1
Save & Proceed Previous														11	

Select the **date** you wish your two-week data collection to begin. This cannot be a date in the future:

0	J	Janua	ary 2	2024		
Мо	Ти	We	Th	Fr	Sa	Su
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Then, select the Staffing Level Tool which you are running in conjunction with the Professional Judgement Tool:

elect Record Add Record Inc	4.4 Mail Min t Week 2 MAR Min 2 Results, Suge OR	
Start Date	0 January 2024	
	No. Tu: We Th Fr Sa Su 1 2 3 4 5 6 7 0 9 10 11 12 15 14 15 16 17 18 19 20 21 22 23 24 25 26 17 18	
Staffing Level Tool	Please Select	•
Comments	Please Select Adult Inputient CCSN CNS Community Nursing EDEM Matematy Mercal Health	•

If you choose Professional Judgement Tool Only, a text box appears asking you to specify the service area. This should only be used where no specialty specific staffing level tool is available:

	Staffing Level Tool	Professional Judgement Tool Only	0
	Please specify Service Area		
			1.
<	Comments		0
			le
\langle	Save & Proceed Previous		

This must be completed before clicking 'Save & Proceed'.

For specific guidance on completing the Professional Judgement Tool for the Emergency care provision Staffing Level Tool go to section 3.6

If you wish to record a **comment**, insert this in the Comments box (as seen above).

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The comments box should be used to provide explanation and justification of staff requirements. Please see the FAQ section for more details on how the comments box should be used.

The Professional Judgement Tool and workload information should be used together to explain staffing needs for the actual workload carried out during the designated period.

Once the comments have been updated, click on '**Save & Proceed**' and you will see the following screen:

NHS SSTS	elcome : Miss Amanda M fessional Judgement St	Newstart Current Location : We Caffing Level Tool Version 2	orkload Tools Test Area 1 Buil	d 33.1.2353.17						
Professional Judgement Tool u	iser guide and FAQs									
Select Record Add Re	cord Week 1	Skill Mix 1 Week 2	Skill Mix 2 Results	Sign Off						
Staffing Level Tool: Start Date: Date Created: Date Completed: Comment:		Adult Inpatient 01/01/2024 26/01/2024		End Date: Created By: Completed By:		14/01/2024 Amanda Newstart				
										<i>h</i>
Activate All	Time Block	Nursing Categories 🍘	Mon	Tue	Wed	Thu	Fri	Sat	Sun	
Activate	08:00 to 12:00	Registered Unregistered								Clear Data Clear Data
Activate	12:00 to 16:00	Registered Unregistered								Clear Data Clear Data
Activate	16:00 to 20:00	Registered Unregistered								Clear Data Clear Data
Activate	20:00 to 00:00	Registered Unregistered								Clear Data Clear Data

At the top of the screen, there is information about the record, Start Date & End Date.
 Start and end date refer to the start and end of the period of the Professional Judgement Tool run.
 Date created and created by, refer to when the record was started.
 Date completed and completed by, refer to when the tool was completed and saved (after input of the second weeks skill mix).

The Professional Judgement tool is developed in 4 hourly time blocks. To enter data for a time block, click the checkbox below Activate. This will allow data to be entered into the Registered and Unregistered rows for that time block:

Activate	08:00 to 12:00	Registered					Clear Data
		Unregistered					Clear Data

To activate all 6-time blocks, click the Activate All checkbox at the top of the page:

NHS S	STS Welcome Profession	: Miss Amanda al Judgement :	Newstart Curren Staffing Level Too	It Location : W	orkload To	
Professional Judg	<u>ement Tool user gu</u>	ide and FAQs				
Select Record	Add Record	Week 1	Skill Mix 1	Week 2	Skill M	
Staffing Start Da Date Cre Date Con Commer	Level Tool: te: eated: mpleted: nt:		Adult I 01/01, 26/01,	Inpatient /2024 /2024		
Activat		Fime Block	Nursing Categor	ies 🥧	Mon	
•	Unchecking an Unchecking the boxes, renderin When you dese message, this is	Activate bo Activate Al g them de- lect the Act s not the ca	x will deactiv Il box will rem active. tivate All optio se when you	ate this blo nove data f on you will untick a s	ock. from all the receive a ingle time	e completed warning block.
	Confirm Are you sure you want to dese will be deleted.	elect all boxes? All enter	red data			
•	If you select Cle that row	ear Data at	the end of the	e row this	will clear a	ll the data ir
Pressi	ng the Return ke	ey at any po	pint will save	the data a	nd move y	ou onto the

Ţ

next screen.

Activate the blocks required and add the number of staff required (Registered & Unregistered) against each block.

Staff numbers must be lower than 100 and have no more than two decimal places.

If not, there will be a red asterix next to the relevant box: and you will not be able to save the record.

You cannot leave any boxes, within an activated time block, blank. If staff were not needed in this time block, please enter 0.



Any updates will be saved when you click "Save & Proceed".

1

Once data entry is complete, click 'Save & Proceed'. If you have **Editor** Permissions, you will then be taken to the Skill Mix tab:

The **Night WTE Req'd** column will be displayed even if only daytime blocks have been activated. If no night activity this can be left as 0.

NHS SS	TS Welcome : Professiona	Miss Amanda Il Judgement	a Newstart Curren Staffing Level Too	t Location : V I Version 2	Vorkload Tools Tes	st Area 1 Build	33.1.2353.17					
Professional Judgen	<u>ient Tool user guid</u>	de and FAQs										
Select Record	Add Record	Week 1	Skill Mix 1	Week 2	Skill Mix 2	Results	Sign Off					
Staffing Le Start Date: Date Creat Date Comp	evel Tool: ed: pleted:		Adult 04/09 13/09 13/09	End Date: 17/09/2023 O4/09/2023 Created By: J3/09/2023 Created By: Myley Walker 12/09/2023								
Comment:			No	catering sta	ff. 2:1 student to	o registered s	staff					
	Category		Sta	aff Band		Day WTE R	eq'd 🥡		Night WTE Req'o	d 🕧	Totals	
				Band 7		1.00			0.00		1.00	
	Registered		Band 6			3.31			0.00		3.31	
				Band 5			6.00		0.00	6.00		
	Total						10.31			0.00		10.31
					and 4		4.00			0.00		4.00
	Unregistered				Sand 3		1.00	1		0.00		1.00
				E	and 2		1.59	1		0.00		1.59
	Total						6.59			0.00		6.59
Save & Proce	eed Previous											

If you have not completed **Week 1** data input at this point, you should select '**Previous**' (bottom left of the page – see above).

Once you have completed **Week 1** data, you are then required to allocate staff to the relevant Agenda for Change Bands, ensuring that these add up to the total WTE calculated by the tool. The allocation of staff should be undertaken using your professional judgement and not directly aligned to current funding or skill mix.

If you amend the data on the week 1 screen, any data entered into the Skill mix 1 tab will be cleared.

Click on 'Save & Proceed' to save the data.

If you have Data Entry permission only, you will be taken straight from the Week 1 to Week 2 screen. You cannot view or enter Skill Mix.

You will then be taken to the Week 2 screen:

	rme : Miss Arnanda New sional Judgement Staffi	vstart Current Location : Wor ng Level Tool Version 2	kload Tools Test Area 1 Build	33.1.2353.17						
Professional Judgement Tool use	r guide and FAQs									
Select Record Add Record	rd Week 1 Sk	ill Mix 1 Week 2	Ski Mix 2 Results	Sign Off						
Staffing Level Tool: Start Date: Date Created: Date Completed: Comment:		Adult Inpact 01/01/2024 26/01/2024		End Date: Created By: Completed By:		14/01/2024 Amanda Newstart				
	Time Black	Musing	Max	Tur	Wed	Thu	r.i	(m)		
	тіте віоск	Categories 🅧	мон	Tue	weu	Thu	rii	541	Sun	
Activate	08:00 to 12:00	Registered Unregistered								Clear Data Clear Data

Follow the same process as for Week 1 and Skill Mix 1.

A 'Clone Week 1' option is available **if the** staffing requirements for Week 2 **exactly match** those of Week 1.

To use this option, click on the 'Clone Week 1' button:



Once completed, click 'Save & Proceed'.

If you have **Data Entry** permissions, you will receive a message confirming that the data has been saved.

If you have Editor Permissions, you will then be required to complete Skill Mix 2.

A **Clone Skill Mix 1** option is also available on the Skill Mix 2 tab (again only **if** the staffing requirements **exactly match** those of week 1)

NHS SS	TS Welcome Profession	Miss Amanda Ne al Judgement Sta	ewstart Current I ffing Level Tool ^v	Location : Workloa Version 2	d Tools Test Area 1 Build	33.1.2353.17				
Professional Judgem	ent Tool user gu	ide and FAQs								
Select Record	Add Record	Week 1	Skill Mix 1	Week 2 Ski	I Mix 2 Results	Sign Off				
Staffing Le Start Date: Date Create Date Comp Comment:		Adult In 04/09/3 13/09/3 13/09/3	10000000000000000000000000000000000000	student to registered	End Date: 17/09/2023 Created By: Myley Walker Completed By: Myley Walker					
	Category		10 68	Staff Pag	d			light WTE Boold	0	Totals
	Category				u	Day WIE Keq u				1.00
	Registered			Band 6		5.03	}	0.00		5.03
				Band 5		5.00		0.00		5.00
	Total					11.03	0).00		11.03
				Band 4		4 19		0.00		4.19
	Unregistered			Band 3		3.00		0.00		3.00
				Band 2		0.00		0.00		0.00
	Total					7.19	C).00		7.19
Save & Proce	ed Previou	s Clone Sl	kill Mix 1							

Active blocks in weeks 1 and 2 must match before skill mix can be cloned.

The cloning function should only be used where there is minimal, or no, variation on workload between the two weeks.

Once complete click on 'Save & Proceed':



The Results tab will then appear:

	Professio	onal Judgement :	Staffing Level Tool	Version 2		
ional Judger	<u>nent Tool user g</u>	uide and FAQs				
ect Record	Add Record	Week 1	Skill Mix 1	Week 2 Skil	Il Mix 2 Resul	s Sign Off
Staffing Le Start Date Date Crea Date Com Comment:	evel Tool: : : ted: pleted:		Adult In 04/09/ 13/09/ 13/09/ No ca	npatient (2023 (2023 (2023 atering staff. 2:1	student to register	End Date: Created By: Completed By: ed staff
Staff E	and	Week 1 WTE	Week 2 WTE	Average WTE		
Band	17	1.00	1.00	1.00		
Band	6	3.31	5.03	4.17		
Band	5	6.00	5.00	5.50		
Band	14	4.00	4.19	4.10		
Band	13	1.00	3.00	2.00		
Band	2	1.59	0.00	0.80		
Tota	lls	16.90	18.22	17.56		
Nursing C	ategory	Week 1 WTE	Week 2 WTE	Average WTE	Skill Mix Ratio	
Regist	ered	10.31	11.03	10.67	60.76%	
Unregis	tered	6.59	7.19	6.89	39.24%	
Tota	ls	16.90	18.22	17.56	100.00%	

You can amend the Comments box in this screen if required - click '**Update**' to cascade any change to the previous screens.

If you wish to print a copy, click on the **'Print'** button. Click **'Exit'** to return to the Select Record screen.



3.4 Editing Data

If you wish to select an existing record, the record can be searched for using the filter option on the Select Record screen:

Professional Judgement Staffing Level Tool - User Guide

J	NHS SSTS Welcome : Miss Amanda Newst Professional Judgement Staffing	arf Current Location : Workload Tools Test Area 1 Build 33.1.2353.17 : Level Tool Version 2			
Prof	fessional Judgement Tool user guide and FAQs				
	Select Record Add Record Week 1 Skill	Mix 1 Week 2 Skill Mix 2 Results Sign Off			
	Filter				
\subseteq	From 26/01/2023 To 26/01/202	24 Apply Filter			
	Period Start	Staffing Level Tool	Status 🔶		
	01/01/2024	Adult Inpatient	In Progress	Edit	Delete
	01/01/2024	CNS	In Progress	Edit	Delete
	01/01/2024	Mental Health	In Progress	Edit	Delete
	02/10/2023	Adult Inpatient	In Progress	Edit	Delete
	04/09/2023	Professional Judgement Tool Only	Awaiting Sign-Off 1	Edit	Delete
	04/09/2023	Adult Inpatient	Awaiting Sign-Off 1	Edit	Delete
	26/06/2023	CCSN	Awaiting Sign-Off 1	Edit	Delete
	05/06/2023	Community Nursing	In Progress	Edit	Delete

The filter can be applied for up to a one-year period.

You can also click on the table headings to sort the data.

Once the record has been found, click 'Edit':

!

Period Start	Staffing Level Tool \$	Status	\$	
01/01/2024	Adult Inpatient	In Progress	Edit	Delete
01/01/2024	CNS	In Progress	Edit	Delete
	and the second			

This can either be a completed record or the record you are currently working on.

If you click "Edit" on a complete record, this will change to "In Progress". You will need to click "Save & Proceed" on the skill mix 2 tab to mark this record as "Complete".

You will need to select the start date every time you wish to add data to the current data set. You can review the data by clicking on the tabs at the top of the screen:

NHS SS	TS Welcome : Professiona	Mrs Trinny Tr al Judgement	rimble Current Lo	cation : Workd	oad Tools Test Ar	ea 1 Build 23.0.1842.26
Click for manual/qu	idance					
Select Record	Add Recor	Week 1	Skill Mix 1	Week 2	Skill Mix 2	Results

3.5 Deleting Data

1 ONLY users with Editor Permissions can delete records.

To delete an entry select the entry of interest on the Summary screen and then 'Delete':

Period Start	Workload Tool	1 Status		
30/09/2019	Adult Inpatient	Completed	Edit	Delete
30/09/2019	CCSN	In Progress	Edit	Delete

You will be asked to confirm that you wish to delete the record.



3.6 Professional Judgement for the Emergency Care Provision Staffing Level Tool

If Emergency Care Provision tool (EDEM in drop down box) is selected as the staffing level tool on the Add Record screen, additional tabs to enter medical staff data appear:

NHS SSTS Welcome : Miss Amanda News	art Current Location : Work	kload Tools Test Area 1 Build 33.1.2353	17			
Professional Judgement Staffing	Level Tool Version 2					
Professional Judgement Tool user guide and FAQs						
Select Record Add Record Nursin Week I	Medical Week 1	Skill Mix 1 Nurse g Week 2	Medical Week 2	Skill Mix 2 Res	sults Sign Off	
Staffing Level Tool: Start Date:	EDEM 01/01/2024	End D	ate.		14/01/2024	
Date Created: Date Completed:	26/01/2024	Create	d By: eted By:		Amanda Newstart	
Comment:			-			

Data can also be entered for ENPs in the nursing tabs:

NHS S	SSTS Welcon Profession	ne : Miss Amanda Newsta Ional Judgement Staffing	rt Current Location : Wo Level Tool Version 2	rkload Tools Test /	Area 1 Build 33.1.2353.1	17							
Professional Jun	dgement Tool user	guide and FAQs											
Select Reco	Add Record	Nursing Week 1	Medical Week 1	Skill Mix 1	Nursing Week 2	Medical Week 2	Skill Mix 2	Results	Sign Off				
Staffin Start E Date C Date C	ng Level Tool: Date: Created: Completed:		EDEM 01/01/2024 26/01/2024		End Da Creater Comple	te: I By: eted By:		14/01/ Amand	2024 a Newstart				
Comm	ient:												
Activ	/ate All	Time Block	Nursing Categories 🥧	Mon	Tue	We	4	Thu		Fri	Sat	Sun	
Activa	te	08:04:0 12:00	Registered ENP Unregistered)									Clear Data Clear Data Clear Data

Data should be entered as described for other tools above.

In the Skill Mix 1 and Skill Mix 2 tabs, skill mix for doctors is automatically calculated based on information entered in the Medical Week 1 and Medical Week 2 tabs:

Workload Tool: Start Date: Date Created: Date Completed: Comment:	EDEM 30/09/2019 30/09/2019	End Date: Created By: Completed By:	13/10/2019 Crystal Clear	
Category	Staff Band / Medical Grades	Day WTE Req'd 🍘	Night WTE Req'd 🍈	Totals
1	Senior Doctor	15.25	15.25	30.50
Medical Staffing	Middle Doctor	18.46	14.45	32.91
	Junior Doctor	15.25	8.83	24.08
Total		48.96	38.53	87.49
	Band 7	0.00	0.00	0.00
	ENP	0.00	0.00	0.00
Registered / ENP	Band 6	0.00	0.00	0.00
	Band 5	0.00	0.00	0.00
Total		47.12	40.28	87.40
	Band 4	0.00	0.00	0.00
Unregistered	Band 3	0.00	0.00	0.00
	Band 2	0.00	0.00	0.00
Total		23.50	20.14	43.64

4. Business Objects

After Professional Judgement data entry into SSTS is complete, please use one of the Professional Judgement 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.

Repl	y to prompts before running the query.	
+	Select START DATE:	
+	Select END DATE:	
+	Select EMPLOYER:	
	Select SPECIALTY:	

Access to BOXI reports requires a login and password. Local processes for BOXI access can vary. Typically, BOXI access can be granted by your local SSTS Manager, line manager or Workforce Lead. Access is requested using the same access permission request form as the one for SSTS access.

UPlease seek your line managers permission and authorisation before contacting your local SSTS manager.

Appendix A

Background

Nursing & midwifery staffing level 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:

Healthcare Staffing Programme

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 staffing level tools. The Professional Judgement tool is run alongside one of national staffing level tools, or independently.

Figure 1 – The common staffing method





Ward / area / I	location				Day:	Date:
Time period		Nurse or Midwife	Insert what number of staff was needed for activity	Comments – in situations/ com	this column: General & plexity social and or phy	Variation -e.g. Transfers/ escorts/ emergency rsical / specific demands/ theatre lists /one-one care
Morning 0800-1200	Staffing	Registered				
	meet workload	Non- registered				
Afternoon 1200-1600	Staffing requirement to	Registered				
	meet workload	Non- registered				
Evening 1600-2000-	Staffing	Registered				
	meet workload	Non- registered				
Late Evening Nicht	Staffing requirement to	Registered				
2000-0002	meet workload	Non- registered				
Night 0000-0400	Staffing	Registered				
	meet workload	Non- registered				
Night	Staffing	Registered				
0400-0800	requirement to meet workload	Non- registered				

20230907 HSP Data Capture Template V3.0

Appendix B Data Capture Sheets



Professional Judgement Tool Guidance

- This tool runs for 2 concurrent weeks, commencing on a Monday and completed daily.
- To be completed by Senior Charge Nurse / Midwife or recognised leader of each time period / shift.
- The sheet to be completed as 'live' as possible retrospectively at the end of each 4 hourly segment.
- Discuss how the time went with staff and record in the comment section; record any additional workload pressures such as complex social cases, non-English speaking patients, physical issues/ transfers, complex 1-2-1 patients that may not be in labour, bereavement etc. These are the times when in your professional judgement more staff were required
- Document the actual amount of staff that you required to meet the workload, registered and non-registered in each of the sections, and this can vary over the day due to peaks and troughs in workload i.e. emergencies etc.
- If the available rostered staff in your team exceeds the workload activity please record to indicate this accordingly
- Ь Queries about what information should be recorded in the tool or the proforma please contact your line manager workforce planning co-ordinator.
- Data should be input into SSTS timeously once the data is discussed and quality assured in partnership with senior clinical staff and colleagues. .
- Ensure the SSTS configuration reflects either 8, 12 or 24 hour services

Data Capture Sheet – Professional Judgement: Nursing Emergency Care Provision Staffing Level Tool



Date:	this column: General & Variation -e.g. Transfers/ escorts/ tions/ complexity social and or physical / specific demands theatre lists /one-one care																	
Day:	Comments – in emergency situa																	
	Insert what number of staff was needed for activity																	
	Nurse or Midwife	Registered Non Registered	ENP	Registered	Non Registered	ENP	Registered	Non Registered	ENP	Registered	Non Registered	ENP	Registered	Non Registered	ENP	Registered	Non Registered	ENP
/ location		Staffing requirement to meet workload		Staffing requirement	to meet workload		Staffing requirement	to meet workload		Staffing requirement	to meet workload		Staffing requirement	to meet workload		Staffing requirement	to meet workload	
Ward / area /	Time period	Morning 0800-1200		Afternoon	1200-1600		Evening	1600-2000		Late	Evening	2000-0000	Night	0000-0400		Night	0400-0800	

20240124 HSP Data Capture Template NURSING Emergency Care Provision Staffing Level Tool V4.0

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Professional Judgement Data Capture Template: NURSING Emergency Care Provision Staffing Level Tool

Professional Judgement Tool Guidance

- This tool runs for 2 concurrent weeks, commencing on a Monday and completed daily.
- To be completed by Senior Charge Nurse / Midwife or recognised leader of each time period / shift.
- The sheet to be completed as 'live' as possible retrospectively at the end of each 4 hourly segment. .
- Discuss how the time went with staff and record in the comment section; record any additional workload pressures such as .= may not be complex social cases, non-English speaking patients, physical issues/ transfers, complex 1-2-1 patients that These are the times when in your professional judgement more staff were required labour, bereavement etc. .
 - of the Document the actual amount of staff that you required to meet the workload, registered and non-registered in each sections, and this can vary over the day due to peaks and troughs in workload i.e. emergencies etc. •
- If the available rostered staff in your team exceeds the workload activity please record to indicate this accordingly .
- 5 Queries about what information should be recorded in the tool or the proforma please contact your line manager workforce planning co-ordinator. .
- Data should be input into SSTS timeously once the data is discussed and quality assured in partnership with senior clinical staff and colleagues. •
- Ensure the SSTS configuration reflects either 8, 12 or 24 hour services

Data Capture Sheet – Professional Judgement: Medical Staffing Emergency Care Provision Staffing Level Tool

Date:	eral & Variation -e.g. Emergency situations/ cal / specific demands /care of the dying.												
Day:	Comments – in this column.Gen complexity social and or physic												
	Head count												
	Medical Category	Senior Doctor	Middle Doctor	Junior Doctor	Senior Doctor	Middle Doctor	Junior Doctor	Senior Doctor	Middle Doctor	Junior Doctor	Senior Doctor	Middle Doctor	Junior Doctor
ion		Staffing	requirement to meet	workload									
Area / locat	Time period		8am -	12md		12md -	4pm		4pm -	8pm		8pm -	12am

20240124 HSP Data Capture Template MEDICAL STAFFING: Emergency Care Provision Staffing Level Tool v4.0

Continues overleaf....

Professional Judgement Data Capture Template: MEDICAL STAFFING: Emergency Care Provision Staffing Level Tool

Healthcare Improvement Scotland

Professional Judgement Data Capture Template: MEDICAL STAFFING: Emergency Care Provision Staffing Level Tool

Senior Doctor	Middle Doctor	Junior Doctor	Senior Doctor	Middle Doctor	Junior Doctor
Staffing	requirement to meet	workload	Staffing	requirement to meet	workload
	12am -	4am		4am -	8am

- To be completed by Medical Staff, Team leader/ Manager or designated individual for a 2 week period.
- Professional judgement sheet to be completed as 'live' as possible retrospectively for each time block i.e. morning / afternoon etc
- Discuss the workload in the time period with staff.
- State how many Senior/Middle/Junior grade staff in the section of the table that you would require on duty to cover the workload Staff should make a note of their shift on the Professional judgement sheet on each day of the 2 week data collection to facilitate team using your own professional judgement. This is not what you had rostered but what staff were needed to undertake the workload. •
 - discussion and judgement with Medical Staff, Team Leader / Manager completing the Professional Judgement tool on SSTS
 - Comments should record any additional workload pressures such as complex social cases, non English speaking patients, physical This is times when in your professional judgement more staff were required in the clinical area. issues/ transfers/ care of the dying.
 - If the number of staff required is different from your actual staffing write reasons in the comments box.
- Queries about what information should be recorded in the tool or the proforma please contact your line manager or workforce planning co-ordinator

Appendix C

Frequently Asked questions

Below are the most frequently asked questions and answers raised during the use and application of the Professional Judgement Tool. This quick guide has adopted a question/ answer format and should be used in conjunction with earlier parts of the user guide.

Q1	What do I need to do before I start using the tool?
	You need to make sure you are familiar with the PJ tool.
	Training and support will be provided via your local Workforce Lead. Please make sure you understand
	all the information provided, the responsibilities and expectations for you and your team.
	Please also refer to the Quality Assurance Checklist
00	
Q2	How do I access the tool?
	Please see Section 2.1 Accessing the tools for details.
03	How often should the Professional Judgement tool be completed?
40	The often should the Professional Judgement tool be completed :
	The Professional Judgement tool is run concurrently with the staffing level tool for the particular
	specialty. Usually, both the staffing level tool and Professional Judgement tool are run concurrently for a
	designated 2-week period for local runs. Some tools may run for a longer or shorter period. This is
	dependent on local and national decisions and should be clarified prior commencing your run.
Q4	How many days/weeks should the tool run for?
	The Professional Judgement tool is run for two weeks, fourteen consecutive days. It is advisable the run
	commences on a Monday and includes weekends. If your service area does not have a specialty tool
	the PJ tool can still be run for a 2 week period but decide locally the regularity of these runs. If the
	service is unavailable during these times please reflect this with entering '0' for requirements. Boxes left
	empty will register as incomplete records.
	The Defensional hydrogenetical sheet while a second to desce have to second a design of a descent of
	The Protessional Judgement tool should be completed once by a team leader or designated person on
	benalt of the team. Local arrangements should be established so information from the whole team is
	You should check with your local workforce team for detail about when the tool has been scheduled for
	the local area
Q5	Should other tools be completed at the same time as the Professional Judgement?
• -	
	Yes.
	Staffing Level Tool: Speciality specific staffing level tools are available for 98% of nursing and
	midwifery areas and should be completed alongside the Professional Judgement tool. Like the
	Professional Judgement tool, all of these tools can be accessed via the SSTS platform. User
	guides on how to input data are available for each tool. Please refer to this during the run.
	Quality Tool: The Quality Tool is designed specifically for use in conjunction with the
	Community Staffing Level Tool and Community Children's' & Specialist Nurse staffing level
	Tool. It is essential the Quality Tool is completed alongside these staffing level tools to provide
	data for evidencing best practice
	Where no specific staffing level tool is available the Professional Judgement Tool can still be
	used by those service areas
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Q6	How does the tool work?
	While the staffing level tools are developed to take an evidence-based objective approach, the professional judgement approach is subjective, seeking professional opinion on how many staff are needed to carry out the workload required in a defined period of time.
	The Professional Judgement tool is a single 24 hour tool. This is broken down into 4-hourly blocks over a 7 day cycle. The designated local lead for the Professional Judgement Tool after consulting the wider team would populate in each 4 hourly block the number of staff required to undertake the workload as a headcount for that period. If there is no workload then 0 can be entered. If the service doesn't usually operate in this 4 hourly section by leaving this column unticked it will remain 'greyed out' and therefore not affect the calculation for Whole Time Equivalent (WTE).
	The calculator of the Professional Judgement tool will then use the information inserted for both registered and un-registered staff to calculate a WTE. The Professional Judgement tool WTE automatically includes a 22.5% Predicted Absence Allowance for nursing and midwifery staff and a 25% Predicted Absence Allowance for doctors. There is also a deduction for unpaid breaks. If only 8 hours of data is entered, the deduction for unpaid break is 15 minutes per 4- hourly block. If more than 8 hours is entered, the deduction for unpaid break is 20 minutes per 4-hourly block.
	It is important that the judgement is based on the number of staff required to carry out the workload during the period. This may be more, less or the same as the staff rostered on duty. Please enter the reason behind the decision in the comments box provided which will be used to inform discussions locally as part of the Common Staffing Method.
Q7	What constitutes 'workload' for completion of the Professional Judgement Tool?
	 Workload is defined as comprising: Direct care: workload that is carried out to or with a patient. Indirect Care: the additional work directly related to the patient, e.g. record keeping, telephone calls, liaising with other about the patient Associated Workload: All of the other work not directly related to a patient e.g. general communication, repairs, off duty, appraisal and training Personal time: General breaks
Q8	Should the SCN / SCM be included in the workforce required?
	The SCN / SCM should be included in the required headcount figures if they are on duty and contributing to the workload of the area to ensure safe and effective care.
	If the SCN is rostered for managerial duties out with the ward / department then this would not be captured to prevent 'double counting'.
	i.e. If a SCN /SCM is 1.0 WTE for a ward environment but is only contributing 0.4 WTE to workload on the ward then this should be reflected in the skill mix on page 2.
Q9	The 4 hourly blocks do not capture the shift pattern. How do I record this?
	The Professional Judgement tool records the professional opinion of the user on the required staffing for the service area, during a particular timeframe. This is the number of staff needed to carry out the workload safely and effectively.

The time periods within the Professional Judgement Tool do not correlate to any particular shift pattern. Instead, they are a guide on what is considered morning, afternoon, evening and night time hours.

If the staff work for a portion of the 4 hourly block, then enter the number of staff required but be mindful this will be pro rata. i.e.

If for 2 hours of the 4 hourly period you require 4 staff to undertake the workload, the headcount would be captured as 2 for that 4 hourly block.

It is possible to input decimal points up to a maximum of two decimal places if necessary, e.g. if for 2 hours of the 4 hourly period you required 3 staff to undertake the workload, the headcount could be captured as 1.5

Number of staff required	Portion of 4-hour time block and head count			
	30 min (1/8)	1 hour (1/4)	2 hours (1/2)	3 hours (3/4)
1	0.12	0.25	0.50	0.75
2	0.25	0.50	1.00	1.50
3	0.37	0.75	1.50	2.25
4	0.50	1.00	2.00	3.00
5	0.62	1.25	2.50	3.75
6	0.75	1.50	3.00	4.50
7	0.87	1.75	3.50	5.25
8	1.00	2.00	4.00	6.00
9	1.12	2.25	4.50	6.75
10	1.25	2.50	5.00	7.50

Table 1.

Q10	Why does it ask for skill mix on page 2 weekly data entry?
-----	--

The skill mix is a local decision whereby the senior professional completing the Professional Judgement tool would utilise the WTE to break down their requirements for registered and unregistered staffing.

The skill mix figures entered have to add up to the total for registered and unregistered in both Day and Night columns.

Q11 Our service has an overlap of shifts. Is this calculated into the WTE?

The Professional Judgement Tool is developed on 4-hourly time periods. The workload that is carried out during each of these periods determines the staffing need. Therefore if there are more staff on during certain periods and the workload identifies that more staff are needed for that corresponding period then the numbers of staff recorded would reflect this.

Q12	When should the comments box be used?
	The comments box is useful as an aide memoire and as rationale for the figures entered and the decisions taken as some time may pass before you have your local discussion on the outcomes of running the staffing level tools. Examples of what may arise include:

- You have an emergency requiring more staff for a period of time.
- Preceptorship of staff within an area has increased the number of staff required to undertake the workload.
- Member of staff was off sick at the last minute, but the workload was still manageable therefore they would not be captured in the figures.
- Staff missed breaks due to increased workload.

These real time issues can have an impact on your capacity to maintain the quality of patient care and additional staff may be needed for identified time periods to undertake the workload. The information in the comments box would help you explain the rationale for your decisions at the time.

Appendix D

Trouble Shooting

1. SSTS

I am getting an error message when trying to login to SSTS. What should I do?

SSTS and the staffing level tools can only be accessed on a Board approved computer network or portable network.

If you are experiencing login problems when using a board approved network, contact your local SSTS team for advice

What should I do if I lose my login details?

Contact your local SSTS Team.

The staffing level tool I need to access is greyed out. What do I do?

Double check that you are trying to access the correct tool. Double check the working location is correct Contact your local SSTS manager to change your permissions if you are unable to access the correct tool

The working location shown is incorrect – how do I change this?

See section 2.1

My service area/ working location isn't shown on the list. What do I do?

Contact your local SSTS manager to ensure that you have the right permissions to access the tool for your specialty

What happens if the internet goes down whilst during data entry to SSTS?

You will have to re-enter any unsaved data once you are able to access SSTS again

What happens if I enter the wrong information by mistake e.g. wrong dates or staff numbers?

You will be able to amend any unsaved data while still logged into SSTS

If you have Editor permissions, you should be able to amend the entry even after it has been saved using the edit function

Why can't I move onto the "skill mix" tab

You will only have access to the "skill mix" and "results" tabs of you have editor permissions If you have editor permissions, please make sure you have added data into all of the relevant data entry cells and clicked on "save and proceed" to progress to the skill mix tab. This should then let you open the next screen

2. The Staffing Level Tool

I am unable to download the paper data capture template. What do I do?

1. You can try using a different web browser to download the template

2. You can print Appendix B from this document

3. You can speak to the local IT team as permissions may be needed for accessing and downloading documents

4. Speak to your workforce lead and they should be able to assist in providing paper copies of the template

There are data capture sheets missing for some of my shifts – what should I do?

Best practice would be to enter the data on to SSTS as near to real-time as possible e.g. at the end of your shift. This should reduce the risk of misplacing data capture sheets

Double check all areas where you store or carry paperwork. If you are unable to find them you may be able to complete the data retrospectively using your appointment diary for example

Inform your manager if you are unable to find the data capture sheets, and feel that you may not be able to fully recall all the activities for the dates in question

You should enter the data you do have onto SSTS and this will pull through to the BOXI report. Gaps will show in the charts for any dates you do not have any data for.

The Team Leader is off sick. Who takes responsibility for the Tool Run now?

Each CCSN, CNS and CN (including non-registered CN) clinicians are responsible for their own data collection and upload to SSTS

The workforce lead will be able to provide support with completing the tool run in the absence of Team Leader

A nominated person should lead with the Professional Judgement Tool and the Quality Tool in the absence of the Team Lead

The Workforce Lead can also assist with Quality Assuring the data in the absence of the Team leader, although there is up to 2 months to do this

Why is there such a difference in the actual workload and hours worked on the summary screen?

These totals do not have to match exactly.

If there is a significant difference between the totals – more than 30 minutes either way – please review the data entered as soon as possible to ensure everything has been captured accurately

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You can read and download this document from our website. We are happy to consider requests for other languages or formats. Please contact our Equality and Diversity Advisor on 0141 225 6999 or email contactpublicinvolvement.his@nhs.net

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