

How one NHS Trust used Optima to manage daily staffing levels during the pandemic



Summary

Tameside and Glossop Integrated Care NHS Foundation Trust employs approximately 4,200 staff. Operating from the Tameside General Hospital site and other community locations across Tameside and Glossop, the organisation serves a population of around 250,000 people. The Trust successfully used Optima throughout the first wave of the pandemic to manage staffing levels. By working closely with RLDatix, the Trust developed a short-term work around to ensure roster data was automatically refreshed and fed into Covid-19 Situation Reports for NHSI requirements.

Monitoring staffing levels during the pandemic

Prior to the Covid-19 pandemic, each department within the Trust was responsible for managing its own staff. However, there was no system in place to monitor staffing levels and staffing needs.

In many instances, this was done by transferring data from Optima on to a paper template, often resulting in data that was quickly out of date. For example, the medicine team employed an administrator who was solely responsible for updating staffing numbers and movements between 7am and 3pm, which left room for error during non-working hours.

Rise in demand for care led to need for trust-wide view of staffing levels

As the demand for care increased and more people were admitted with Covid-19, senior management at the Trust requested a trustwide view of nursing levels.

The Trust had more than 2,500 staff rostered on the system and approximately 995 nursing staff over 26 wards – all of which had to be monitored daily. The senior team needed to establish absences, particularly in relation to Covid-19 for the NHSI return, and also wanted to know where staff were available so that they could be redeployed if necessary.

Putting a project team in place

Rostering Manager, Dawn Downing was tasked with creating the trust-wide view of daily staffing levels and turned to Optima for the answer. Dawn approached her Finance Improvement Team (FIT) colleagues (as they had been redeployed from their usual duties) for support.

With no existing patient acuity software in place, the team decided on a short-term work around and created a Microsoft Excel document that could be uploaded with data from Optima four times a day at 7am, 11am, 4pm and 6pm, to provide an updated view of the current staffing numbers and absences. The information would be fed in to one summary slide for ease of view.

The dashboard would be used for the frequent wards calls; checking registers of those working, not working due to leave or absence, or due to work on that day. The team, led by Dawn, would update the rosters and refresh the data ready to be shared with the clinical managers for their daily meetings. They were also supported with a nurse who provided clinical decisions and dealt with staffing issues to help managers identify shortfalls of staff.

“The overall reaction has been extremely positive - it answered the two main requirements. We’re now finding that other departments are coming forward and asking for the same report after having sight of it at daily staffing meetings.”

Dawn Downing,
Rostering Manager,
Tameside and Glossop Integrated Care
NHS Foundation Trust

Developing a fast and flexible bespoke report with support from RLDatix

Updating and refreshing the report took around 20 minutes four times a day, with further requirements prior to the weekend as the clinical teams needed. This was time-consuming and as the pressure on the clinical teams started to build, the Trust approached RLDatix for support and guidance on how to reduce administration time for the report preparation.

Dawn says: **“The RLDatix team was able to take what we had built and create a bespoke report with a live data feed. It is fast and flexible and easy to understand. It is effective and saves us time every day which we are now able to spend adding value to our organisation in other ways.”**

Initially, RLDatix created the data source with a one-day view. This developed in to a three day and finally seven-day view of staffing levels, providing a greater visibility of future movements. A successful outcome has led to new developments

Operational teams across the Trust now depend on the dashboard for its contribution to daily in-patient staffing meetings and to review where an average of 100 clinical staff are each day and night. It also feeds into the daily NHSI absence reports required each day.

Dawn says: **“The overall reaction has been extremely positive – it answered the two main requirements. We’re now finding that other departments are coming forward and asking for the same report after having sight of it at daily staffing meetings.”** The Trust’s next requirement is to develop a dashboard for the district nursing team, following interest from their senior managers. Dawn is also developing a new report that uses the data from the existing dashboard. The new report will provide a daily and weekly nurse-topatient ratio report.

She says: **“Thanks to the support from RLDatix, the dashboard works very well and produces trust-wide overview of staffing for the next seven days which is quick and easy to refresh. The dashboard allows us to view by location, grade/specialities but also enables a clear view of our temporary staff placement too.”**

Anita Fleming, Head of Nursing & Midwifery Workforce Development said: **“We knew that the requests we presented the team with would be challenging without dedicated software to support. It was however, a requirement that we needed to achieve given the importance of staff and patient safety at such a crucial time. With RLDatix’s development support, the dashboard provides assurance that staffing levels match our patient demand. It also provides more confidence with the accuracy of staff redeployment alongside temporary staffing usage, which helps to maintain the current services and demand across the trust.”**

The team will now look to move some of the processes from the rostering team, encouraging ward managers to be responsible for updating their own rosters, enabling them to understand how to change and add to them, whilst having a clear view of staffing levels. Dawn says that using SafeCare – software that matches staffing levels to patient acuity, is potentially the next step as this would ultimately mean the Trust could move on from Excel documents and manual workarounds.

“We’re now at a very good point with the data from Optima and the fact that it’s been accepted and adopted throughout the Trust shows just how much it was needed and how people rely on it as a tool to use our workforce more efficiently.”

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