Healthcare Staffing Programme (HSP)
Learning Resource – Quality Assurance Checklist

Roster Name -   **Run Dates**: Start Date - __/__/__   End Date - __/__/__

- This checklist can be utilised as an aid for quality assurance, before during and after a scheduled tool run.
- It is recommended that any tool run preparation should be carried out 6 to 8 weeks prior to the tool run commencing.
- During the preparation stage, named contacts should be confirmed to provide quality assurance for the duration of the run.

Preparation Start Date:__ / __/__

Preparation (6-8 weeks before run)			
Actions, considerations and pointers	**Named Lead**	**Comment**	**Date Completed**
Tools: Confirm which tools are to be run for the roster**:** *Note:* • *Where available, speciality specific tools should be completed alongside Professional Judgement (PJ).* • *For areas with no speciality specific tool only PJ should be completed.* • *For Community Nursing, CCSN and CNS (the 3Cs) the Quality Tool (QT) should also be completed.*			
Housekeeping: **SSTS**: confirm the following are correct, where applicable: • Rosters (Tool Alignment, specialty etc), • Bed Numbers (actual and occupancy for previous financial year) • Funded Establishment • Tool access for all relevant staff also requires confirmation **BOXI:** Confirm access for appropriate reports and rosters			

Preparation (Continued)			
Actions, considerations and pointers	**Named Lead**	**Comment**	**Date Completed**
Communicate to all relevant staff: • The planned dates for the tool run • Training dates			
Staff Training: Including: • Tool training • Expectations • Provision of guidance documents, learning resources and data collection templates e.g. via HSP toolkit • Common Staffing Method (CSM)			
Confirm: • Who will provide quality assurance throughout the run and feedback to staff when required? • Who will assure the data on a shift-by-shift basis? • Who will validate the data (senior staff member)? • Who will enter the data on SSTS? • Who will complete the issues log?			

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During Run (The first 24 hours)			
Actions, considerations and pointers	**Named Lead**	**Comment**	**Date Completed**
Ensure the data collection starts on time			
Complete the professional judgement tool for each 4 hour block and record variations			
Ensure workload is being captured and correct levels of care identified			
Communicate and feedback resolution of issues/ clarifications/ glitches			
Collate completed paper templates and store in line with local governance policies, ready for quality assurance and upload to SSTS			
During Run (Week 1)			
Ensure workload and professional judgement data is being collected correctly for all relevant shifts and data capture templates are being collated and stored as above.			
If data entry into the SSTS tool has begun – Consider the following: • If data is being entered from data collection templates, has all information been collected? • Have senior staff had sight of information prior to tool input for quality assurance, if necessary? • 3Cs - have all planned staff began entering their data?			
Are issues being recorded in the issues log, and escalated where required?			

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During Run (At the end of week 1)			
Actions, considerations and pointers:	**Named Lead**	**Comment**	**Date Completed**
Does the tool reflect the workload activity over the past week? If not has all activity been correctly captured?			
Are any variations and exceptions in workload activity recorded within the tool or professional judgement, where appropriate?			
Is the first week of professional judgement data reflective of the workload activity?			
Have concerns been flagged with the team leader and or senior charge nurse/midwife where appropriate?			
Communicate with the team as to: • how the first week has gone and any required changes for week 2 • feedback resolution of issues/ clarifications/ glitches			
3Cs Tools: • Have all planned staff completed the tool? • Have data quality issues (including missed days or significant differences between actual hours worked and workload total) been identified and fed back to the appropriate staff members?			
Quality Tool (3Cs Specific): • Has this been completed with input from the team? • Is this reflective of the service provision?			

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During Run (Week 2)			
Actions, considerations and pointers:	**Named Lead**	**Comment**	**Date Completed**
Ensure workload and professional judgement data is being collected correctly for all relevant shifts and data capture templates are being collated and stored as above.			
If data entry into the SSTS tool has begun – Consider the following: • If data is being entered from data collection templates, has all information been collected? • Have senior staff had sight of information prior to tool input for quality assurance, if necessary? • Community tools (CN, CCSN & CNS) - have all planned staff began entering their data?			
Are issues being recorded in the issues log, and escalated where required?			
During Run (At the end of week 2)			
Actions, considerations and pointers	**Named Lead**	**Comment**	**Date Completed**
Does the tool reflect the workload activity over the past week? If not has all activity been correctly captured?			
Are any variations and exceptions in workload activity recorded within the tool or professional judgement, where appropriate?			
Is the professional judgement data complete? Is this reflective of workload activity?			

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During Run (At the end of week 2 continued)			
Actions, considerations and pointers:	**Named Lead**	**Comment**	**Date Completed**
Have any identified issues been fedback to the appropriate staff member?			
Have any ongoing issues been escalated or unexpected scores flagged to senior staff?			
Communicate with the team as to: • how the second week has gone • feedback resolution of issues/ clarifications/ glitches • the plan for discussing tool run outputs and application of CSM			
3Cs Tools: • Have all planned staff completed the tool? • Have data quality issues (including missed days or significant differences between actual hours worked and workload total) been identified and fed back to the appropriate staff members?			
Quality Tool (3Cs Specific): • Has this been completed with input from the team? • Is this reflective of the service provision?			

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After the Tool Run			
Actions, considerations and pointers	**Named Lead**	**Comment**	**Date Completed**
Has all relevant data been collected (including the data on paper templates)?			
Has the data been quality assured?			
Has all relevant data been entered onto SSTS			
Have all of the points previously highlighted been resolved/ discussed as required? Review Issues Log, which may inform learning and improvements for next tool run			
Have any relevant concerns been escalated to senior staff?			
Have senior staff accessed and validated the tool outputs?			
Does the tool recommended whole time equivalent (rWTE) reflect workload and existing actual WTE where applicable?			
Has the appropriate tool BOXI report be run and checked for data quality issues? Is the report reflective of workload?			
Quality Tool (3Cs specific): Has the tool been completed for both weeks? (can be checked via BOXI report) If scores are below 70%, has this been escalated to senior staff?			

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After the Tool Run (continued)			
Actions, considerations and pointers	**Named Lead**	**Comment**	**Date Completed**
Have the tool outputs been viewed and analysed as part of the Common Staffing Method?			
Has feedback from the tool run been communicated to staff?			

Checklist Completion Date:__/__/__   Final Sign Off: _____   Final Comments on checklist: _____