

## eWorkforce Planning Template - Sign Off Guidelines

### Who needs to sign off the plan?

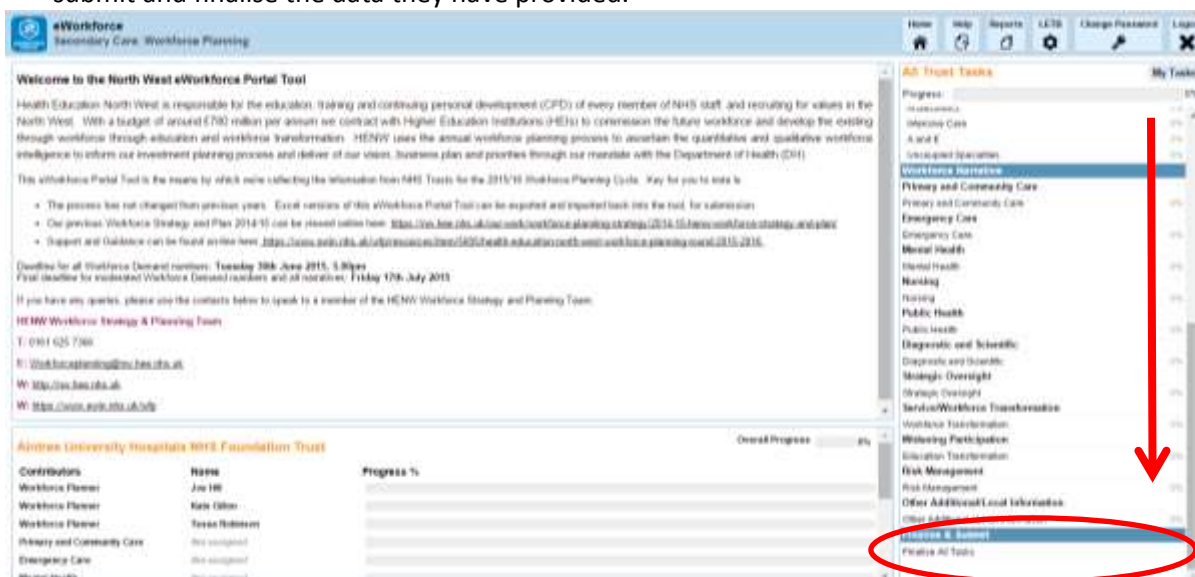
Health Education North West would expect evidence of sign off from the following:

Chief Executive  
 Medical/Clinical Director  
 Director of Nursing  
 Director of Finance  
 Director of HR/Workforce  
 Workforce Planner  
 Staff Side Representative  
 CCG Accountable Officer

- We appreciate it may be difficult to get actual sign off through the eWorkforce Tool from all colleagues – however, through the confirm and challenge process HENW will be asking for evidence (e.g. an email/meeting notes) of a meeting or Board minutes to ratify sign-off.
- We know this process falls at during a time when colleagues may be taking annual leave – so if you have agreements within your organization that Deputies can sign off – then please do so.

### Workforce Planner Contributor

- Please review the FAQ's and "Confirm and Challenge" guidelines ([posted on eWIN](#)) to assure that you have filled the templates out correctly/in their entirety. This will then show on your homepage as 100% completion.
- The 'Finalise and Submit' section allows you to review all your tasks and submit your data and narratives once completed.
- Contributor's own task finalisation / submission - a contributor will have one or more tasks to complete in the application. Once a contributor has completed their tasks, they will be able to submit and finalise the data they have provided.



- Workforce planners are predominantly contributors to the plan. Although, they have elevated privileges enabling them to oversee and manage elements of the trust's collection, this area will only show their own tasks.
- A contributor will be able to unfinalise and modify their data until finalisation is at stage 3 (below).

### Workforce Planner's collection status overview

- Available only to Workforce Planners, this feature will provide a detailed overview of the collection status, as seen in the previous version. This page will give a WP the opportunity to review, chase and tidy up any outstanding detail prior to finalisation and submission for board level sign-off.

### Board Sign-off

- The sign-off process will also be contributor led. These may include contributors assigned earlier in the process (Chief Exec), or a new contributor role, e.g. Sign-off Board Member (remember we can assign multiple individuals to a contributor role). This is the Sign-Off Board Member. This must include the:

- Chief Executive,
- Clinical / Medical Director
- Director of Nursing
- Director of Finance
- Director of HR / Workforce
- Staff Side Representative

but may also include others.

- Once the planner has submitted the final collection data, sign-off board contributors will be emailed and asked to provide final sign off for the data provided.
- The sign-off contributor will be asked to provide confirmation (or evidence) that the workforce demand forecast:
  - Aligns with financial, commissioning and service plans of the organisation
  - Aligns with commissioners plans
  - Assures safe staffing levels
  - Once these contributors sign off the collection – the data is locked and available for the LETB and HEE to work with.

### Awaiting Board Sign-off

The screenshot displays the eWorkforce Secondary Care Workforce Planning portal. At the top, there is a navigation bar with 'Home', 'Help', 'Reports', 'LETB', 'Change Password', and 'Logout'. The main content area is titled 'Welcome to the North West eWorkforce Portal Tool' and contains introductory text and links. Below this, there is a table of contributors for 'Countess of Chester Hospital NHS Foundation Trust'. The table has columns for 'Contributors', 'Name', and 'Progress %'. The progress bars are highlighted with a large red oval. On the right side, there is a 'My Tasks' sidebar with a 'Awaiting Board Sign Off' button highlighted in red. The sidebar also lists various categories like 'All Trust Tasks', 'My Tasks', 'Trial Details', 'Assign Contributor', 'Workforce Demand', 'Non-Medical', 'Medical & Dental', 'Surgery', 'Specialist Services', 'Physiotherapy', 'Occupational Services', 'Workforce Narrative', and 'Primary and Community Care'.

Contributors	Name	Progress %
Workforce Planner	Dave James	100%
Workforce Planner	Tara Roberts	100%
Workforce Planner	Linda Wilton	100%
Workforce Planner	Dee Appleton Cairns	100%
Workforce Planner	Marka Gough	100%
Primary and Community Care	Tara Roberts	100%

## Incomplete template

**NHS Secondary Care Workforce Planning**  
NHS Health Education Yorkshire & the Humber

Home Help Change Password Logout

**Finalise & Submit** Incomplete

My Trust	Completed	Finalised By	On	At
Trust details	22/05/2014	-	-	-
Assign Contributors	-	-	-	-
Workforce Demand	Completed	Finalised By	On	At
<b>Non-Medical</b>	22/05/2014	-	-	-
Clinical	22/05/2014	-	-	-
Non-Clinical	22/05/2014	-	-	-
Additional	22/05/2014	-	-	-
<b>Healthcare Science</b>	22/05/2014	-	-	-
Consultant Healthcare Scientists	22/05/2014	-	-	-
Manager Healthcare Science	22/05/2014	-	-	-
Healthcare Scientists	22/05/2014	-	-	-
HCS Practitioners (incl BMS, Physiologists, Technologists)	22/05/2014	-	-	-
Healthcare Science Associates	22/05/2014	-	-	-
Healthcare Science Assistants	22/05/2014	-	-	-
<b>Medical &amp; Dental</b>	22/05/2014	-	-	-
Surgery	22/05/2014	-	-	-
Psychiatry	22/05/2014	-	-	-
Anaesthetics	22/05/2014	-	-	-
Intensive Care	22/05/2014	-	-	-
A and E	22/05/2014	-	-	-
Unoccupied Operatives	22/05/2014	-	-	-
Runthrough Operatives	22/05/2014	-	-	-

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Once all sections have completed, click

Finalise & Return

**All Sections Completed**

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NHS Health Education Yorkshire & the Humber

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**Finalise & Submit** Finalise & Return

**Finalise & Return?**

If you are satisfied the data you provided is complete, please choose "Yes" to submit the data.

You can still change your return but you will need to Finalise again.

Workforce Narrative	Completed	Finalised By	On	At
Section 4 - Human Resources Director	22/05/2014	-	-	-
Section 5 - Non-Medical prescribing	22/05/2014	-	-	-
Section 5 - Healthcare Science prescribing	22/05/2014	-	-	-
Section 5 - Children and Maternity Services	22/05/2014	-	-	-
Section 5 - Diagnostic Radiographers	22/05/2014	-	-	-
Section 5 - Physiotherapy and Occupational Therapy	22/05/2014	-	-	-
Section 5 - Allied Health Professionals	22/05/2014	-	-	-
Section 5 - Primary and Community Care	22/05/2014	-	-	-
Section 5 - Skill Sharing - Advancing Clinical Practice	22/05/2014	-	-	-
Section 5 - Skill Sharing - Values and Behaviours	22/05/2014	-	-	-
Section 5 - Skill Sharing - Clinical skills Facilitate	22/05/2014	-	-	-
Section 5 - Skill Sharing - Training Needs Analysis	22/05/2014	-	-	-
Section 5 - Leadership and Development	22/05/2014	-	-	-

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Click 'Yes' to submit your return. Once submitted the section will reflect this.

## Submitted Return

**NHS** Secondary Care: Workforce Planning  
NHS Health Education Yorkshire & the Humber

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Finalise & Submit Finalised & Returned

Workforce Narrative	Completed	Finalised By	On	At
✓ Section 4 - Human Resources Director	22/05/2014	Mutsa Gunjira	22/05/2014	13:24
✓ Section 5 - Non-Medical prescribing	22/05/2014	Mutsa Gunjira	22/05/2014	13:24
✓ Section 5 - Healthcare Science prescribing	22/05/2014	Mutsa Gunjira	22/05/2014	13:24
✓ Section 5 - Children and Maternity Services	22/05/2014	Mutsa Gunjira	22/05/2014	13:24
✓ Section 5 - Diagnostic Radiographers	22/05/2014	Mutsa Gunjira	22/05/2014	13:24
✓ Section 5 - Physiotherapy and Occupational Therapy	22/05/2014	Mutsa Gunjira	22/05/2014	13:24
✓ Section 5 - Allied Health Professionals	22/05/2014	Mutsa Gunjira	22/05/2014	13:24
✓ Section 5 - Primary and Community Care	22/05/2014	Mutsa Gunjira	22/05/2014	13:24
✓ Section 5 - Skill Sharing - Advancing Clinical Practice	22/05/2014	Mutsa Gunjira	22/05/2014	13:24
✓ Section 5 - Skill Sharing - Values and Behaviours	22/05/2014	Mutsa Gunjira	22/05/2014	13:24
✓ Section 5 - Skill Sharing - Clinical Skills Facilities	22/05/2014	Mutsa Gunjira	22/05/2014	13:24
✓ Section 5 - Skill Sharing - Training Needs Analysis	22/05/2014	Mutsa Gunjira	22/05/2014	13:24
✓ Section 6 - Leadership and Development	22/05/2014	Mutsa Gunjira	22/05/2014	13:24

My Tasks View All

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