#### 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.

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- 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:
  - $\circ$   $\;$  Aligns with financial, commissioning and service plans of the organisation
  - $\circ \quad \text{Aligns with commissioners plans}$
  - o 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**

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## **Submitted Return**

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