

Software standard operating procedures

Purpose

This document sets out the business rules for administering the CCDM software. The purpose is to:

- Achieve national consistency in the application of software administration.
- Preserve the integrity of the technology and CCDM programme processes and
- Ensure technology and processes are well integrated for delivering the work analysis and FTE calculation results.

Definitions

'The software' in this document refers to the CCDM software. The software provides a cloud-based facility for inputting and producing the collated data for the work analysis and FTE calculation. The software can be used for work analysis and FTE calculation.

Roles and responsibilities

The Safe Staffing Healthy Workplaces (SSHW) Unit is responsible for:

- Providing District Health Boards (DHBs) with access to the software
- Maintaining the software set-up using a partnership approach as per the Letter of Agreement.

DHBS, Health Unions and SSHW Unit are responsible for:

- Adhering to the data collection and sharing principles set out in the Letter of Agreement
- Observing good faith principles in dealing with sensitive information that is shared with them through participation in the CCDM programme.

CCDM councils are responsible for:

- The on-going use of the software upon meeting the pre-requisites for access as set out below.

Software access

The DHB will have a current signed Letter of Agreement to implement the CCDM Programme or has been assessed as having met the CCDM Programme Standards. To enable initial access to the software the

CCDM council will:

- Have an agreed and documented programme of work that includes work analysis and FTE calculations scheduled to commence within the next 3 months.
- Have an agreed and documented process for running work analysis and FTE calculation studies based on the SSHW Unit plan, do, study, act (PDSA) process.

- Define and agree who has access to the software and with what access permissions (see Appendix 1).
- Identify a designated person as the DHB Administrator – the CCDM Coordinator (where in post) who:
 - Administers the DHB studies and gives access to key stakeholders as agreed for that DHB.
 - Disables access where an individual changes roles and is no longer directly involved in the CCDM Programme or leaves the organisation.
- Authorise the DHB Administrator to assign the following roles for software access (see Figure 1)
 - Additional DHB Site Administrators (DHB administration and read/write access to all studies).
 - Read-Write User (read/write access to all DHB work analysis and FTE calculation studies that have been setup by the DHB Site Administrator).
 - View Only User (read only of individual studies that have been shared)

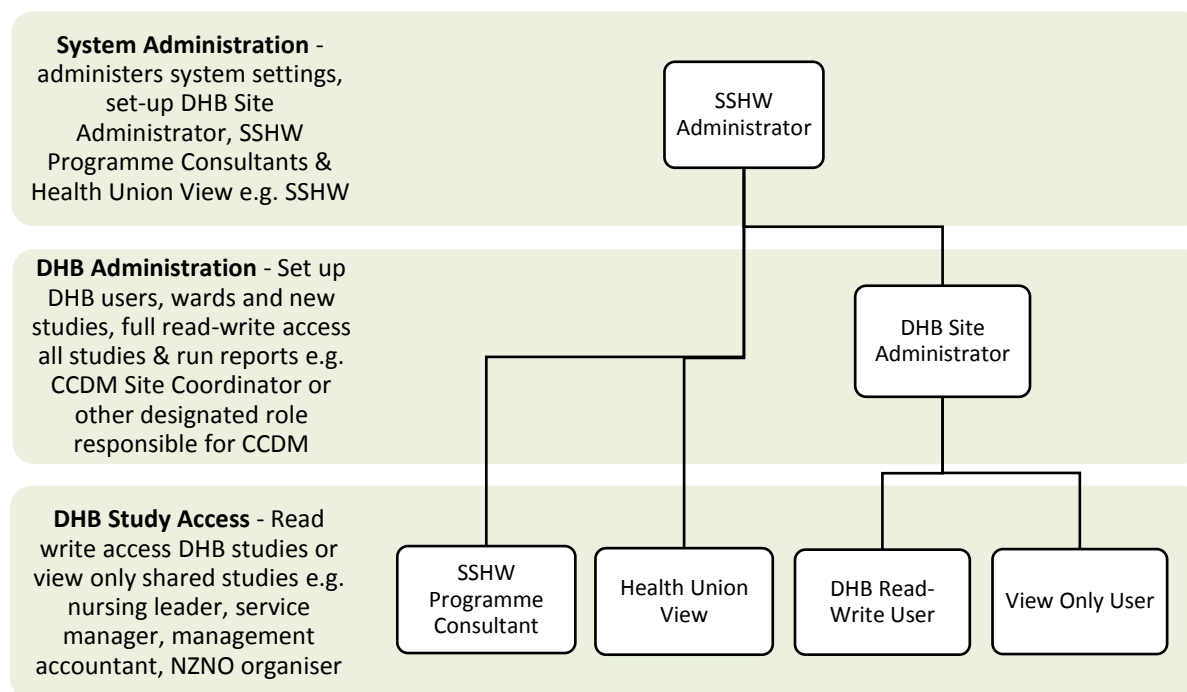
SSHWS Unit will:

- Verify DHB pre-requisites have been met prior to enabling access to the software.
- Enable access to the software to a designated DHB person (the CCDM Coordinator where in post).
- Enable access to SSHWS Programme Consultant (read/write access to individual studies that have been shared) to provide DHB support with undertaking studies.
- Enable access to the Health Union (view only access to individual studies that have been shared) to enable a partnership approach to studies being undertaken.
- Disable access where an individual changes roles and is no longer directly involved in the CCDM Programme or leaves the organisation.
- Notify the full CCDM council by email that access has been initiated.
- Be enabled by the software to assign the following roles (see Figure 1):
 - One or more DHB Administrators (DHB administration and read/write access to all studies)
 - Health Union View (for designated health union personnel)
 - SSHWS Administrator (system administration)
- Have access to the software as a DHB Site Administrator with prior DHB permission for trouble shooting and to provide expert advice.

Health Unions will:

Identify Union staff to have access e.g. Professional Nurse Adviser and/or Organiser.

Figure 1: Software Access Tree



Software process

The CCDM councils will:

- Authorise the DHB Administrator to pass on upgrade/outage notifications to the DHB users as relevant/necessary.
- Have appropriate security measures in place to ensure that DHB data is secure and remains confidential to designated individuals.
- Monitor and manage access/use of the software for the DHB. This includes regular review of the software access audit reports provided by the Programme Consultant at the CCDM council meeting.
- Ensure the software is used to undertake all work analysis and FTE calculations once access has been enabled.

The SSHW Unit will:

- Develop and regularly update software user guides.
- Provide ongoing advice to DHBs and health unions about the process to support effective software use.
- Support ongoing software use and provide training to DHB Site Administrators, SSHW Programme Consultants and designated health union staff.
- Maintain the software set-up i.e. service types, study roles, activity lists, end of shift survey, quality checks, and stretch factor for the FTE calculation.
- Maintain a change request log to collate stakeholder feedback for consideration in software enhancements.

- Be the first port of call for software trouble shooting via the DHB Programme Consultant. (Unresolved technical issues are then escalated to Designertech, if required).
- Notify software upgrades and outages to the DHB Site Coordinator and SSHW Unit Director.
- Provide quarterly audit reports at CCDM council meetings on the software activity.
- Conduct an annual check of the SSHW Administrator user list (i.e. DHB Site Administrators, Programme Consultants and Health Union) and [update with staff appointments/resignations, as needed](#).
- Research and incorporate best practices into the software as they become available.
- Provide updates to the Governance Group and escalates major changes for decision-making as required.

The health unions will:

- Ensure that staff are provided with appropriate time and support to enable them to participate in the use of the staffing methodology software – view only access set up as a Health Union View.
- Communicate relevant and agreed (by the CCDM council) information to their delegates and members, and nationally within their organisations.

Appendix 1: Software access permissions

System Role Name	Setup DHBs	Set up system	Set up users	Set up studies	Enter data	See other DHBs	Access a shared study	View access audit	Run Multi Ward Report	Usage & technical details	Error Logs
SSHW Administrator	✓	✓	✓	X	X	X	✓VO	✓ All DHBs	X	X	X
DHB Site Administrator	X	X	✓	✓	✓	X	✓VO	✓ Own DHB	✓	X	X
SSHW Programme Consultant	X	X	X	X	✓	X	✓RW	X	X	X	X
Read-Write User	X	X	X	X	✓	X	N/A*	X	✓	X	X
View Only User	X	X	X	X	X	X	✓VO	X	X	X	X
Health Union View	X	X	X	X	X	X	✓VO		X		
Technical Admin	X	X	X	X	X	X	✓VO	✓ All DHBs	X	✓	✓

Key: VO = View-only access to shared study; RW = Read-write access to shared study; * Read-Write Users have access to all DHB studies, so no need to share a study with them.