

STANDARD OPERATING PROCEDURE	
Title	Adding Skills
Purpose	You can add/track skills for a person in HealthRoster. Including training, qualifications and Professional Registrations for clinical staff.
Aim	You can create the demand for people with specific skills on selected shifts. You can also use Skills record and reports to identify who needs training, and incorporate training and study days into the rosters.

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A) Adding Skills

- Use the filters in the 'Person Search' screen to locate the record for the staff member whose details you wish to change.
- Select the person by clicking on their name to highlight.

The screenshot shows the 'Person Search' interface in a web browser. The search filters are: Unit: Any, Staff Group: Any, Working Unit: Any, Team: Any, Grade Type Category: Any, Surname: 'clarke', Grade Type: Any, Staff No: (empty), and Grade: Any. The search results table is as follows:

Surname	Forenames	Current Unit	Contracted Time	Grade
Clarke	Claire	ZTest Project Support	37:30	Band 8a Service Improv...

- Select the 'Skills' tab in the details pane that displays to the right of your screen.
- You can filter the information display to show either Current & Future or All.

The screenshot shows the 'Person Skills' details pane. The 'Person' is Management Clarke, Claire (Band 8a Service Im...). The 'Unit' is ZTest Project Support. The 'Skills' tab is selected, showing a table of skills with filters for 'Current & Future'.

Skill	Cluster	Certificate Number	Valid From	Valid To
NMC	Prof Registration	TEST12345	-	-
Venapuncture	General Skills		-	-

- Click on 'Assign Skill' at the bottom of the screen.

View Date: 06/11/2017

Summary Work Contracts Unavailabilities Sickness Entitlements Skills Attributes Contacts
Restrictions Patterns Notes Hours Accounts Visa Rules Skill Shortfalls Earned Accruals
Attendance Ids iCals Unavailability Interface Roster Snapshots Availability Unit Preferences

Person: Management Clarke, Claire (Band 8a Service Im... Grade: Band 8a Service Improv.
Unit: ZTest Project Support Bank: No

Person Skills 2 Records Find

Current & Future All Find

Skill	Cluster	Certificate Number	Valid From	Valid To
NMC	Prof Registration	TEST12345	-	-
Venapuncture	General Skills		-	-

Assign Skill Edit Skill Delete Person Skill Send Notification

- The 'Assign Skill' form is displayed.
- Select the skill group from the drop down menu, followed by Cluster and the Skill.
- Enter the Valid from and Valid to dates for this skill as well as Date Gained.
- Click OK to save.

Assign Skill - Claire Clarke (Test 3456)

Skill

Skill Group: Skills
Cluster: -
Skill: Take Charge

Details

Valid From: 01/01/1900 Valid To: 31/12/9999
Date Gained: 01/01/1900 Obtained From Reason:
Certificate Number:

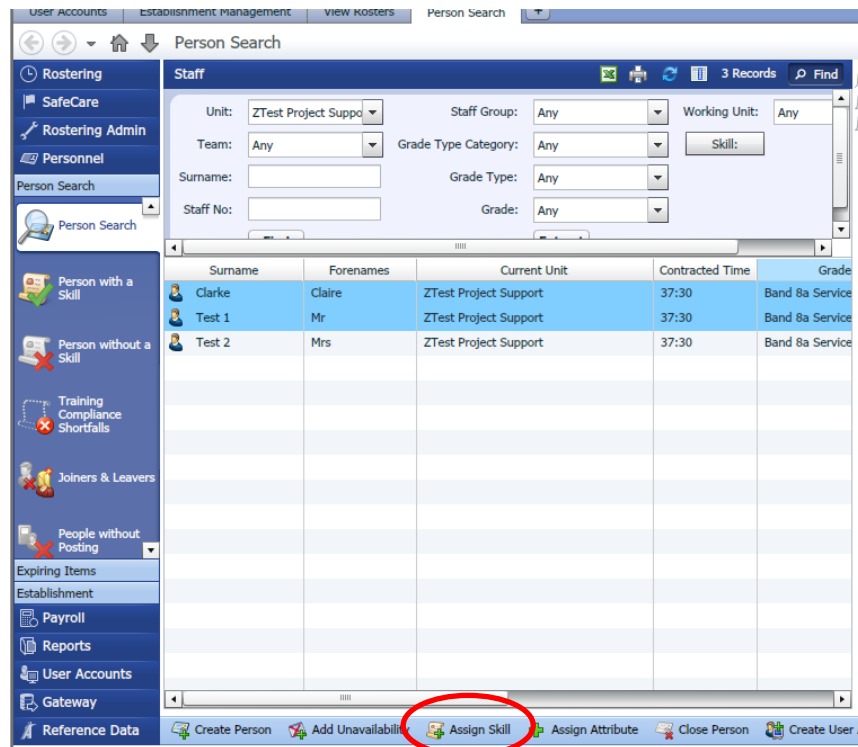
Notes

OK Cancel

- **Note:** The newly added skills will be displayed under the Skills tab in the details pane.

B) Adding Skills in Bulk

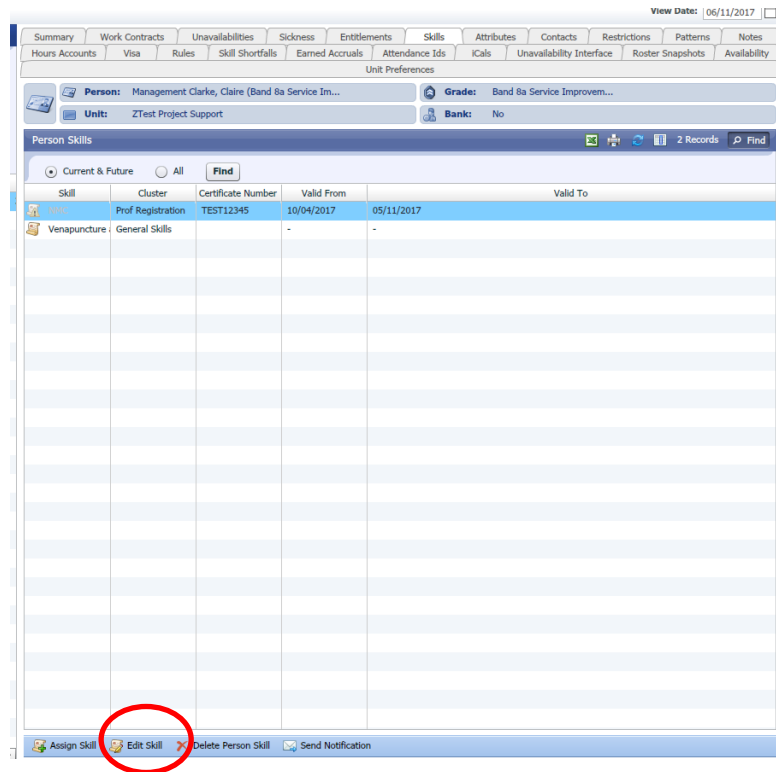
- You can add the same Skill to multiple people at the same time. This is useful when several people attend the same training event.
- Note: You can only add Skills to multiple people at the same time if the 'Valid From' & 'Valid To' dates are the same.



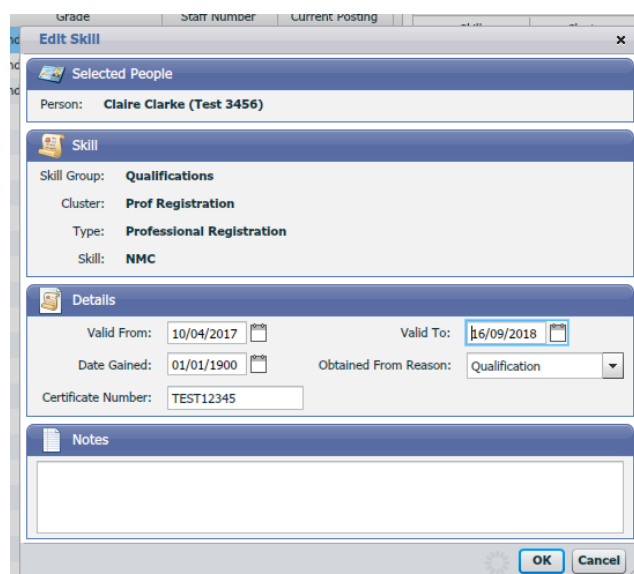
- Use the filters in the 'Person Search' screen to return a list of all staff for your ward/unit, whose details you wish to change.
- Use the 'CTRL' key on your keyboard to highlight/select a number of people.
- Click on 'Assign Skill' at the bottom of the screen, or right click and select the 'Assign Skill' option.
- The Assign Skill form will open.
- Select the skill group from the drop down menu, followed by Cluster and the Skill.
- Enter the Valid from and Valid to dates for this skill as well as Date Gained.
- Click OK to save.

C) Editing a Skill

- Use the filters in the 'Person Search' screen to find the person whose details you wish to change/update.
- Click on the skill to highlight and select 'Edit Skill'



- Update the details of the skill and select OK.



- **Note:** The newly updated skills will be displayed under the Skills tab in the details pane.