

Toolkit on HWF planning User Guide



Joint Action Health Workforce
Planning and Forecasting

<http://hwftoolkit.semmelweis.hu>

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Introduction

The present user guide aims to support users when browsing at the webportal. This manual helps to find the easy way of use. Please read the manual carefully, where the subtitles will direct you to different topics.

What is the Joint Action?

The Joint Action (JA) on European Health Workforce (HWF) Planning and Forecasting is a three-year programme running from April 2013 to June 2016 that brings together partners representing countries, regions and interest groups from across Europe and beyond, including non-EU countries and international organisations. The JA is supported by the European Commission within the framework of the European Action Plan for the Health Workforce, which highlights the risk of critical shortages of health professionals in the near future.

The main objective of the Joint Action on European Health Workforce Planning and Forecasting (JA EUHWF 20122201) is to provide a platform for collaboration and exchange between partners, in order to better prepare Europe's future health workforce. The JA aims to improve the capacity for health workforce planning and forecasting by supporting collaboration and exchanges between Member States (MS) and by providing state-of-the-art knowledge on quantitative and qualitative planning. By participating in the Joint Action, competent national authorities and partners are expected to increase their knowledge, improve their tools, and succeed in achieving greater effectiveness in workforce planning processes. By forecasting the impact of healthcare engineering policies and re-designing education capacity for the future, the outcomes of the Joint Action should contribute to the development of a sufficient number of health professionals and aid in minimising the gaps between the need for and supply of health professionals equipped with the right skills.

For more details, please visit the website of the project: <http://healthworkforce.eu/>

What is the Toolkit on Health Workforce Planning?

The Toolkit is a collection of practical tools: protocols, guidelines, checklists, check-sheets, fact-sheets and rating scales developed and designed to help countries to adapt standardised HWF planning processes. These newly designed tools are collected to address the gaps and provide directions for achievable and manageable solutions that foster the development and support the daily operation of HWF planning.

What is the utility of using the Toolkit on Health Workforce Planning?

- ∅ The tools provide support through the identification of process bottlenecks, key components of HWF planning and the stakeholders to be involved. Additionally, they aim to formulate appropriate questions and develop a plan for implementation.
- ∅ The Toolkit helps understanding the current state and existing weaknesses of HWF planning and directs attention to possible points of improvement.
- ∅ Countries can adapt the toolkit to suit their own circumstances and choose the tools they find the most useful. (Although this document mostly refers to national-level HWF planning, the Tools can also be used at the regional level. Depending on the structure of HWF planning, even less formal planning systems can benefit from it.)
- ∅ Tools do not address every situation in HWF planning, nor do they explain everything in detail. However, they support and facilitate the implementation of the minimal steps, processes and actions, thereby enabling an overall improvement in HWF planning.

What are the main tool types of the Toolkit on Health Workforce Planning?

- PROTOCOL: a detailed written set of instructions to guide the performance of HWF planning; a detailed plan for a procedure on how professionals should act under certain circumstances (DeRoche, 2012)
- GUIDELINE: a series of recommendations by experts; a compilation of successful actions (DeRoche, 2012)
- CHECKLIST: a list of items required, things to be done, or points to be considered. Checklists usually offer a yes/no format in relation to the demonstration of specific criteria. Checklists are used to encourage or verify that a number of specific lines of inquiry, steps, or actions are being taken (Andrews, 2008)
- SKILL LIST: A list that attempts to identify and define the requirements for effective performance by setting up diverse sets of skills and competencies that are required for team success as well as to enhance team performance (Leggat 2007); a list containing personal attributes that enhance an individual's interactions, job performance and career prospects (Madden 2014)
- RATING SCALES: Rating scales state criteria and provide three or four response selections to describe quality, level of agreement or frequency (Alberta Assessment Consortium 2005)

What do the colours mean?

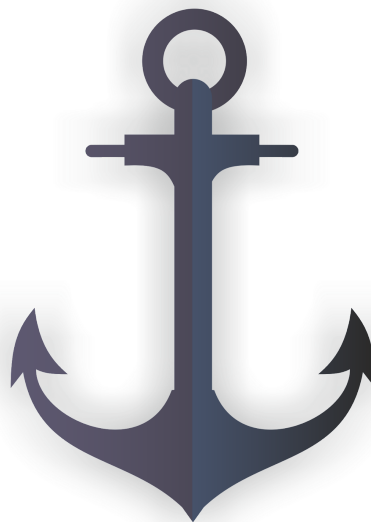
- HWF planning process and preconditions = data collection, data reporting, data flows and data management
- HWF planning data = data sources, data categories, data availability and methodology
- HWF planning evaluation phase
- Warning of problematic points that should be improved/developed

What do the pictograms symbolise?

1) Meet Captain Planning, who will guide you at the webportal. Captain Planning will instruct you on your evaluation journey, tell you how to fill in different tools or advice you what to do next.



2) The Anchor is an important button. Whenever you fill in a tool and provide your thoughts, you should press the Anchor that saves your scores.



3) The lighthouse shows us the ideal, optimal way, calling our attention to the important goals in HWF planning.



4) The compass will focus your attention on the process related steps, the pathway, your journey towards your HWF planning goals.



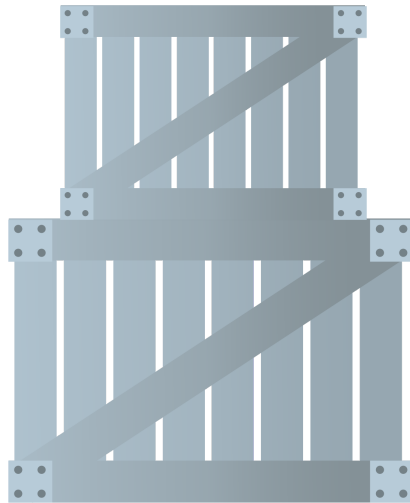
5) The steering connects to the detailed processes in HWF planning, e.g. management, assessment, development etc.



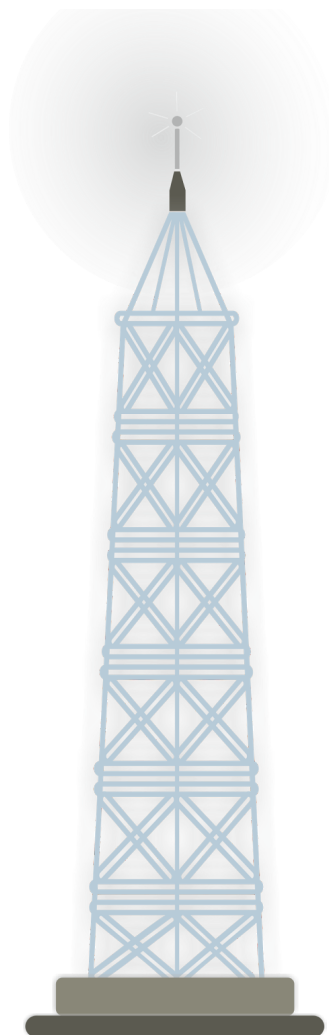
6) The ship is also linked to the processes, since it covers the preconditions required for HWF planning.



7) The shipment/cargo summarizes the information and data, data sources, data bases, data categories, any pieces of information.



8) The Radio tower refers to the information flow and coordination mechanisms within communication.



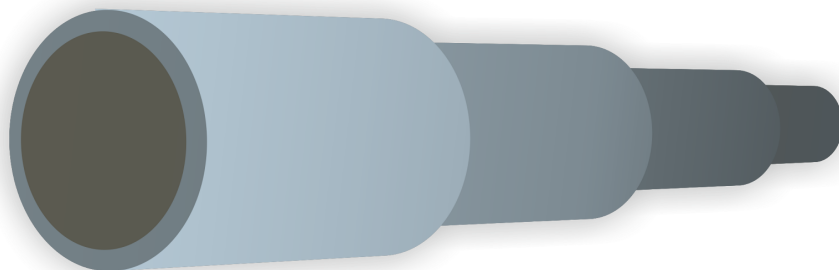
9) The Sailors represent the stakeholders to be involved, committed and engaged in HWF planning.



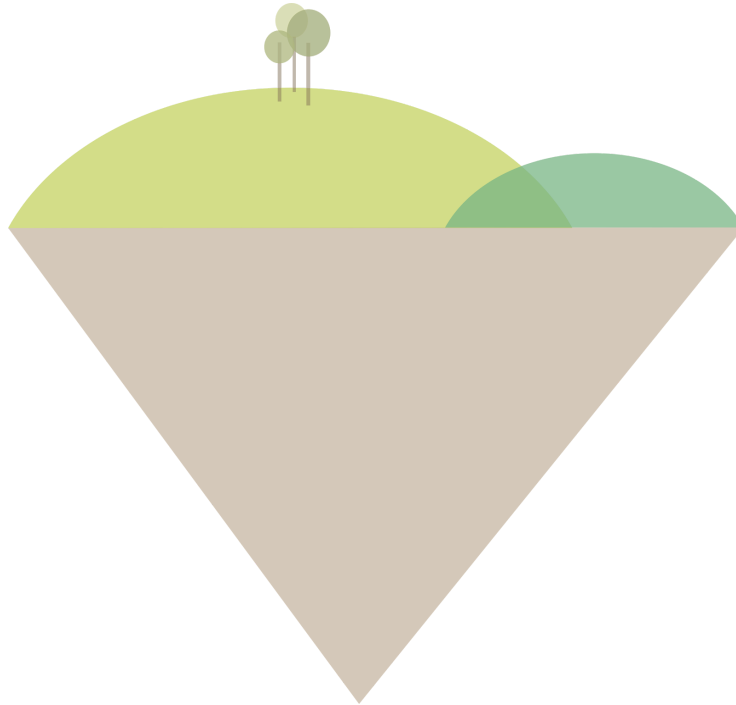
10) The lifebelt is found at the skill island, which calls the urgency for paying attention and improvements in lacking competency areas of the HWF Planning Committee or data specialists.



11) The telescope symbolises the evaluation process of HWF planning, where continuous fine tuning, revision and supervision shall be needed.



12) In your journey towards HWF planning goals, you will sail to different islands, significant shores or harbours, which are important steps or activities in HWF planning.



13) If you see the Pirate, that means you are in a dangerous situation and you must be careful to overcome the difficulties and problems.



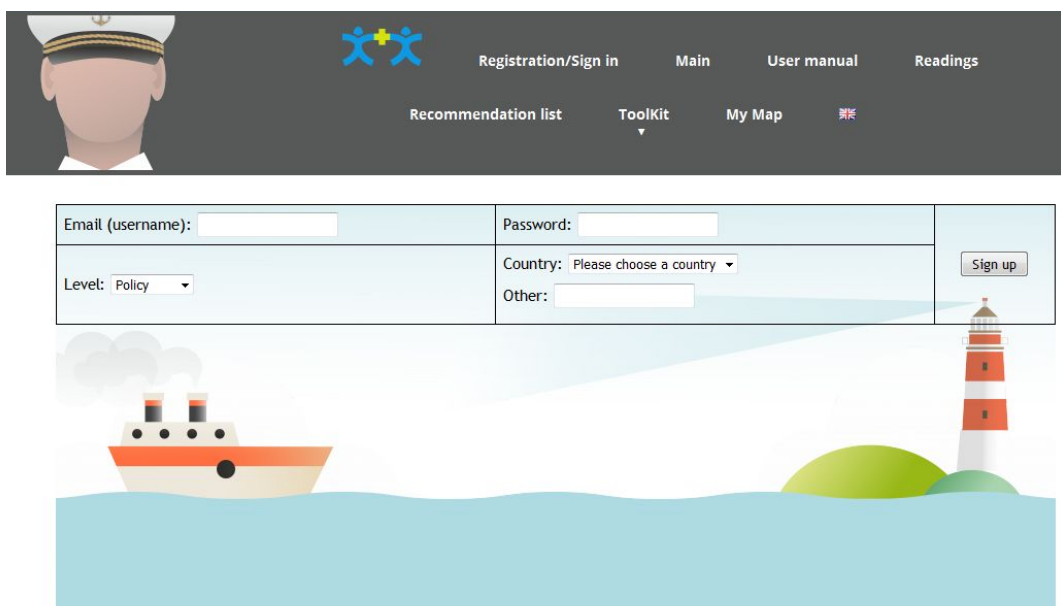
How to use the Toolkit on Health Workforce Planning?

- 1) Click on Registration and log in
- 2) On the main page you can see several points that cover different topics in HWF planning
- 3) Read the background materials uploaded to the menu (user manual, e-learning, full report)
- 4) Carefully read the general description of the Toolkit and the Tool types
- 5) Read the recommendations, since they are interlinked with the tools
- 6) Set the date for your first self-evaluation and use the Toolkit annually/biannually to follow up the improvements (revision of the tools are first possible 3 months after the first fill in)
- 7) Start from the introductory tool of “HWF planning Pathway Model” and Captain Planning will guide you to the next steps
- 8) Pick one question on the main page or at the Toolkit overview that matches your interest the best and browse within the tools
- 9) Complete the whole toolkit and always **save** your scores at the bottom, otherwise your scores will be lost
- 10) Revise your previous scores annually/biannually and add your new ones after a developmental phase.

Menu

Registration / Sign-in

The webpage can be used without registration with limited functionality, for instance you can print our results on the spot but no follow up or comparison will be possible.



The screenshot shows the registration/sign-in form on the Health Workforce Planning Toolkit website. The form is set against a dark grey header with navigation links and a light blue background with a ship and lighthouse illustration.

Navigation links in the header: Registration/Sign in, Main, User manual, Readings, Recommendation list, ToolKit, My Map.

Form fields:

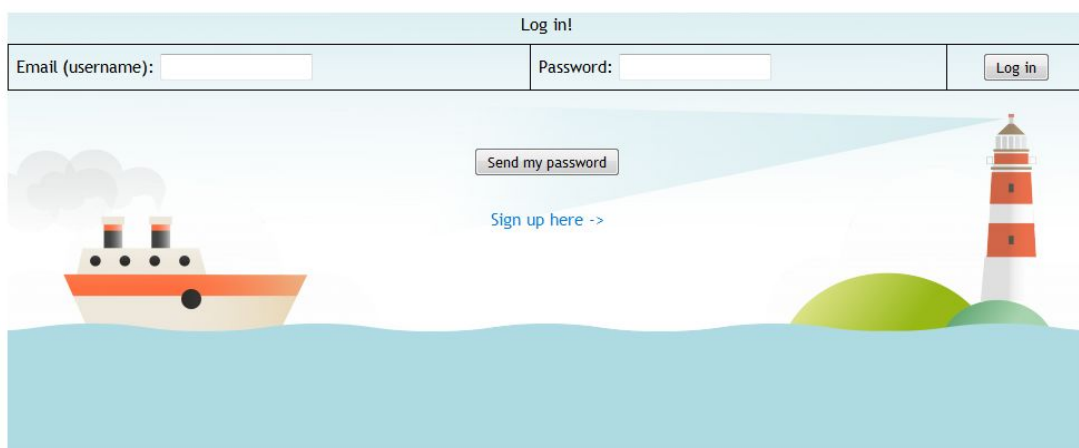
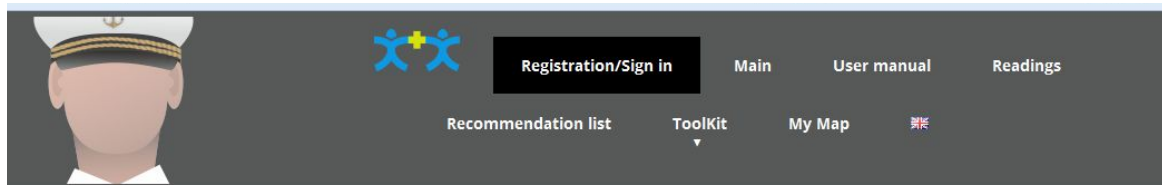
Email (username): <input type="text"/>	Password: <input type="password"/>	Sign up
Level: Policy <input type="text"/>	Country: Please choose a country <input type="text"/>	
Other: <input type="text"/>		

In order to get the appropriate user experience you need to register. In the Registration/Sign in page you can register with your personal e-mail address, a password, your country, and expertise (policy or technical level), which are mandatory fields but confidential. You can add any other comments (e.g.: region, institution etc.), but this is not mandatory field. In terms of expertise,

- policy level means people involved in policy making, establishing strategic directions for decision-making, or implementation, e.g.: minister of health, head of planning department, administrative staff of policy makers etc.
- technical level means people involved in daily activities, data collection, data management, data analysis, carrying out modelling, e.g.: data analyst, reporting specialist etc.

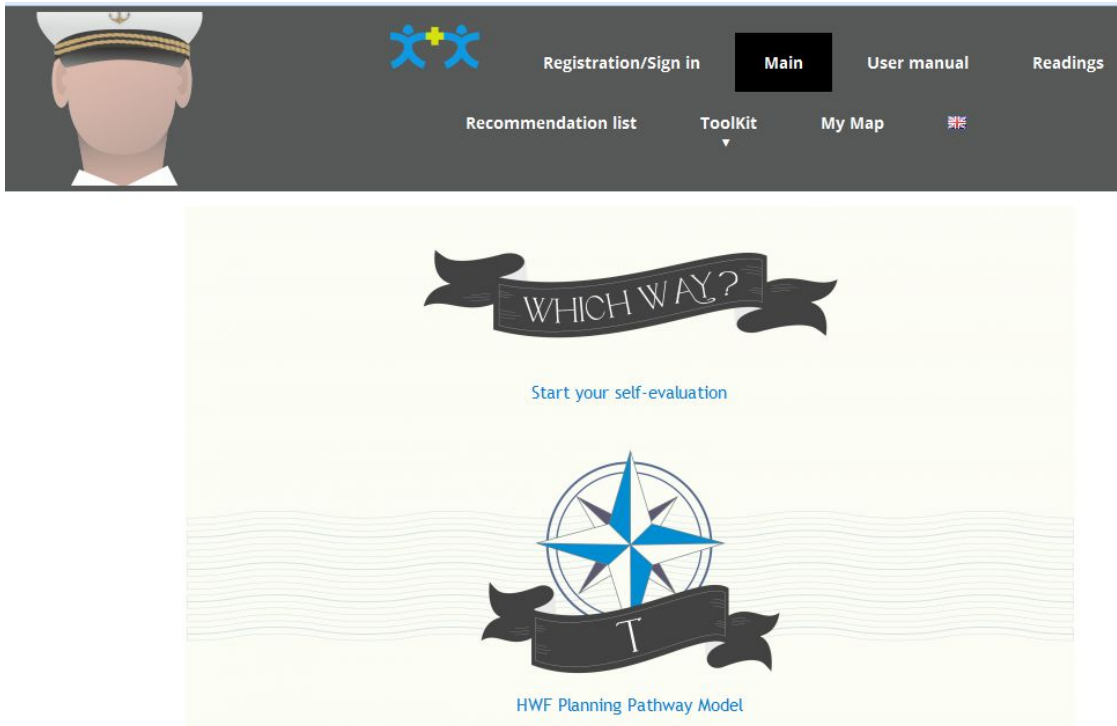
After registration you will be automatically signed in and redirected to the main page, where you can immediately start using the toolkit. You can return to your account anytime with any of your devices and analyse, monitor and follow up your improvements (e.g. scores in different tools, comparisons and your own map).

If you are a registered user you can sign in with your email address and password. If you wish to leave the webportal for a while, you can log out in the Registration/Sign in page.



Main

This is the main page of the toolkit webportal. Here you can browse the main topics and start the self-evaluation immediately.

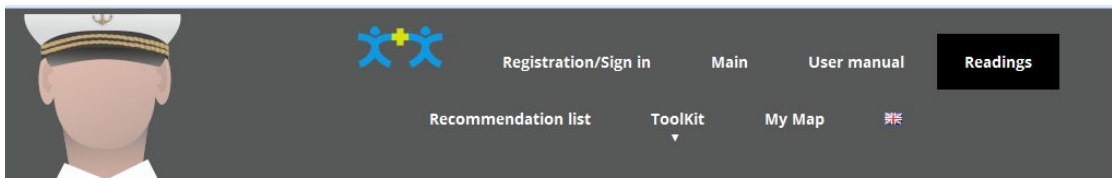


User manual

This contains all practical information and details that help you when using the webportal.

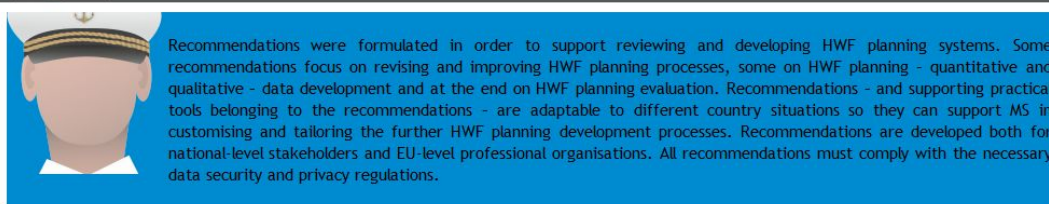
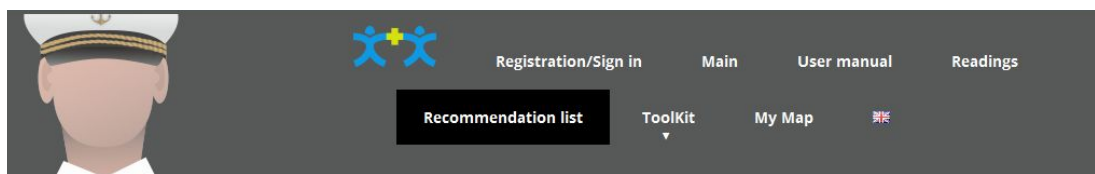
Readings

On this page the user can download the Report on Health Workforce Planning Data. This is a Joint Action deliverable (D043), which results played the background role of the toolkit development. The full report is downloadable in pdf format and the paper version of the toolkit is available besides brief country cases that discuss 12 country environments in details. Further useful readings can also be read hereby.



Recommendation list

Recommendations were formulated in order to support reviewing and developing HWF planning systems. Some recommendations focus on revising and improving HWF planning processes, some on HWF planning - quantitative and qualitative - data development and at the end on HWF planning evaluation. Recommendations are adaptable to different country situations so they can support MS in customising and tailoring the further HWF planning development processes. Recommendations are developed both for national-level stakeholders and EU-level professional organisations. All recommendations must comply with the necessary data security and privacy regulations.



Recommendations on HWF planning processes	
R1	Since some countries identified the lack of a systematic approach and unstructured line of steps in HWF planning, a feasible and achievable HWF planning process should rely on minimal common guiding steps .
R2	Considering the path towards systematic and strategic HWF planning, a measurement instrument could be supportive for listing the objective criteria of systematic HWF planning . An evaluation list providing a set of elements for systematic and comprehensive HWF planning could facilitate self-evaluation and additionally reveal areas for improvement and/or expansion.
R3	In light of the fact that several countries face problems with respect to setting up national-level collaboration (e.g. coordination and communication management as a typical bottleneck, information and data flow failures, roles and responsibilities are often unclear), special attention should be paid to information flow and communication management . Quick tools, instruments should be designed and developed to help realising national-level collaboration and tackle emerging difficulties.

In the recommendation list items cover the recommendations elaborated in the full report (D043), they can be read in the report as well. Recommendations were elaborated on the following topics:

- Recommendations on HWF planning processes
- Recommendations on HWF planning data
- Recommendation on HWF planning evaluation

Toolkit

How to use the Toolkit?

- 1) Click on "Registration" and log in
- 2) On the "Main" page you can see several points that cover different topics in HWF planning
- 3) Read the background materials uploaded to the menu ("User manual", final report at "Readings")
- 4) Carefully read the general description of the Toolkit, Symbols and the Tool types in the "User manual" and at the "Toolkit" menu
- 5) Read the Recommendations, since they are interlinked with the tools
- 6) Set the date for your first self-evaluation and use the Toolkit annually/biannually to follow up the improvements (revision of the tools are first possible 3 months after the first completion of the Toolkit)
- 7) Start from the Introductory tool of "HWF Planning Pathway Model" and Captain Planning will guide you to the next steps
- 8) You can also pick one question on the "Main" page or at the "Toolkit" that matches your interest the best and browse within the tools
- 9) Complete the whole Toolkit and always save your scores at the bottom - otherwise your scores will be lost - then check your results at "My map"
- 10) Revise your previous scores annually/biannually and add your new ones after a developmental phase.

<i>Tools to improve HWF planning processes</i>	<i>Focus of the Tool</i>	<i>Target group Technical experts</i>	<i>Target group Policy experts</i>
Introductory Tool	The HWF Planning Pathway Model is a guideline that summarises general steps leading towards systematic HWF planning.	X	X

Toolkit overview

In this menu, the user gets the instructions about "How to use the Toolkit". A summary table presents a brief description about each tool, their focus and target group.

Symbols

All symbols, pictograms and colour coding is explained in this part to support the user in understanding during the platform use.

Tool types

This part describes the tool types in the Toolkit, and gives an overview about their aims and specificity.

Introductory tool

This tool provides an overview of the HWF planning pathway model. After reading the text, please press the 'Go to Tool 1' button.

Tool 1

Tool 1 measures the maturity level of HWF planning.

Filling in: Please rate the items in each row with values of '0=not at all' '1=somehow' and '2=completely'. After completing the three-coloured table, please press 'Save' using the Anchor button.

Graph and visualisation: Your scores will be presented on a graph and Captain Planning will show you the visual result, which you can also find at your end-results under "My maps".

Revision: When you return and complete the table again, the previous scores stay visible on the graph and the table as well to enable follow up and comparison.

Tool 2

Tool 2 measures the information and coordination flow in three columns.

Filling in: Please mark the Table column by column by answering 'Yes' or 'No'. If you tick the 'No' answer wherever in the table, a relevant material opens in new page/tab of your browser. Please note, the table you are filling stays in the original page where you can continue to work. Please return to the original page to complete this tool and press 'Save' using the Anchor button. The aim of these window openings is to promote the utilisation of the JA professional products. This is matching to the original objective of the Joint Action programme.

Graph and visualisation: After completing the whole three-coloured table, please press 'Save' using the Anchor button and your scores will be presented on a graph. Captain Planning will show you the visual result, which you can also find at your end-results under "My maps".

Revision: When you return and complete the table again, the previous scores stay visible on the graph and the table as well to enable follow up and comparison.

Tool 3

This tool provides an overview of the Protocol for information flow and communication management. After reading the text, please press the button and go on.

Tool 4

Tool 4 measures the Optimal Skill list of the HWF Planning Committee.

Filling in: Revise the competence dimensions and fill in the table. Please mark 'Yes' by ticking the existing dimensions in the last column. This will present you which are the lacking competences, therefore actions could be built in order to develop the current situation.

Graph and visualisation: After completing the table, please press the 'Save' button and your scores will be presented on a graph. Captain Planning will show you the visual result, which you can also find at your end-results under "My maps".

Revision: When you return and complete the table again, the previous scores stay visible on the graph and the table as well to enable follow up and comparison.

Tool 5

Tool 5 measures and evaluates the stakeholder coverage in your country. Stakeholders are represented by sailor pictograms.

Filling in: Add the name of the first, 2nd, 3rd, 4th ... stakeholder, and consider the five dimensions. Apply the tool for each separate stakeholder by adding stakeholders with the 'Add new stakeholder' button. New stakeholders can be added within 24 hours. Select Yes or No in the table, then save your scores after each stakeholder. Please note that you cannot modify the scores after saving. After the completion of Tool5 (each relevant stakeholder added) you can continue the toolkit with clicking to the next tool.

Graph: After completing one stakeholder table, always press save; and then all your stakeholder scores will be presented on a graph. On your graph only the saved stakeholders will be presented, so please make sure to press the 'Save' button after completing the table. When you would like to check the graph (next time without adding new stakeholders), please click on one of the blue stakeholder line, you added before.

Visualisation: Next to the graph Anchor button / Captain Planning will show your visual result, which you can also find at your end-results under "My maps".

Revision: Consider the following dimensions for each stakeholder and check for changes regularly. You can revise your stakeholder coverage evaluation after 3 months. When you return and complete the and table again, the previous scores stay visible in table to enable follow up and comparison.

Tool 6

This tool provides an overview of the HWF planning training modules. After reading the text, please press the 'Go to Tool 7' button.

Tool 7

Tool 7 measures the data management and handling in two columns.

Filling in: Please mark the Table column by column by answering 'Yes' or 'No'. If you mark 'No', please consider further suggestions for improvement provided in the brackets. If you tick the 'No' answer wherever in the table, a relevant material opens in new page/tab of your browser. Please note, the table you are filling stays in the original page where you can continue to work. Please return to the original page to complete this tool and use the 'Save' button. After completing the whole two-coloured table, please press the 'Save' button.

Graph and visualisation: Your saved scores will be presented on a graph and Captain Planning will show you the visual result, which you can also find at your end-results under "My maps".

Revision: When you return and complete the table again, the previous scores stay visible on the graph and the table as well to enable comparison.

Tool 8

Tool 8 measures the Optimal Skill list of data specialists.

Filling in: Revise the competence dimensions and fill in the table. Please mark 'Yes' by ticking the existing dimensions in the last column. This will present you which are the lacking competences, therefore actions could be built in order to develop the current situation.

Graph and visualisation: After completing the table, please press the 'Save' button and your scores will be presented on a graph. Captain Planning will show you the visual result, which you can also find at your end-results under "My maps".

Revision: When you return and complete the table again, the previous scores stay visible on the graph and the table as well to enable follow up and comparison.

Tool 9

Tool 9 measures the data improvements in four phases.

Filling in: Revise your current HWF planning data processes. Please indicate which PHASE you are in by picking one PHASE in each row. The red colour and the Pirate will warn you when you experience difficulties. Therefore actions could be built in order to develop the current situation.

Graph and visualisation: After completing the four-coloured table, please press the 'Save' button and your scores will be presented on a graph. Captain Planning will show you the visual result, which you can also find at your end-results under "My maps".

Revision: When you return and complete the table again, the previous scores stay visible on the graph and the table as well to enable follow up and comparison.

Tool 10

This tool provides an overview of the qualitative methods in HWF planning. After reading the text, please press the 'Go to My map' button.

My map

This item visualises your results achieved in the toolkit by summarising all visual results of different tools. The map is your own evaluation on HWF planning in one sheet, which helps to overview the whole HWF planning strengths and weaknesses and the suggested actions for improvements. When completing the toolkit regularly, you can track HWF planning and compare the points of improvements in different times. The arrows will show your journey towards the lighthouse and support you in identifying the failures of the route.

