

Back to Basics: TimeClocks



What are Timeclocks?



How do they work with Optima?



Customer Voice – hear from Maria at Royal Free



Troubleshooting Top Tips & Useful Links



Q&A

What are TimeClocks?

TimeClocks are a way for staff to clock-in and clock-out of duties, either via the clock in device or employee access tools. This then makes it easy for managers to get an accurate picture of which staff are on-site at any point of the day, in real time, without having any unnecessary admin.

They provide:



Paperless Time Keeping
Staff electronically record attendance without timesheet burden



Improve Patient Flow
Live, operational view of all staff highlights areas where underutilised staff can be redeployed



Total Workforce Visibility
All staff groups are accurately seen in real time, with working hours and locations logged

Benefits of TimeClocks

- Simple device allows for quick recording of attendance for all staff groups, including DRs, Nurses, AHP's and more
- Operational insight provided by unique live operational view of all staff on shift, provides proof of attendance and non-attendance
- Smooth on-boarding of temporary staff
- Improved security and fraud prevention with validated start and finish times
- Alert and exception reporting where staff clock in or clock out outside of defined tolerances
- Improved visibility of live staffing levels benefits safety and patient flow
- Automation of timesheet creation speeds up the payroll process, can also automate finalisation of validated shifts to improve this even further

How do they work with Optima?

- *Information held on Device & Middleware**
- Forename & Surname
 - Timeclock Identifier
 - Time & Attendance Info



Organisation Network via Mini Router

- Direct Wifi
- VLAN
- Data Sim Card



Airstack Middleware (RLDatix Cloud)



Allocate **Optima**

Optima Timeclock Config – Reference Data

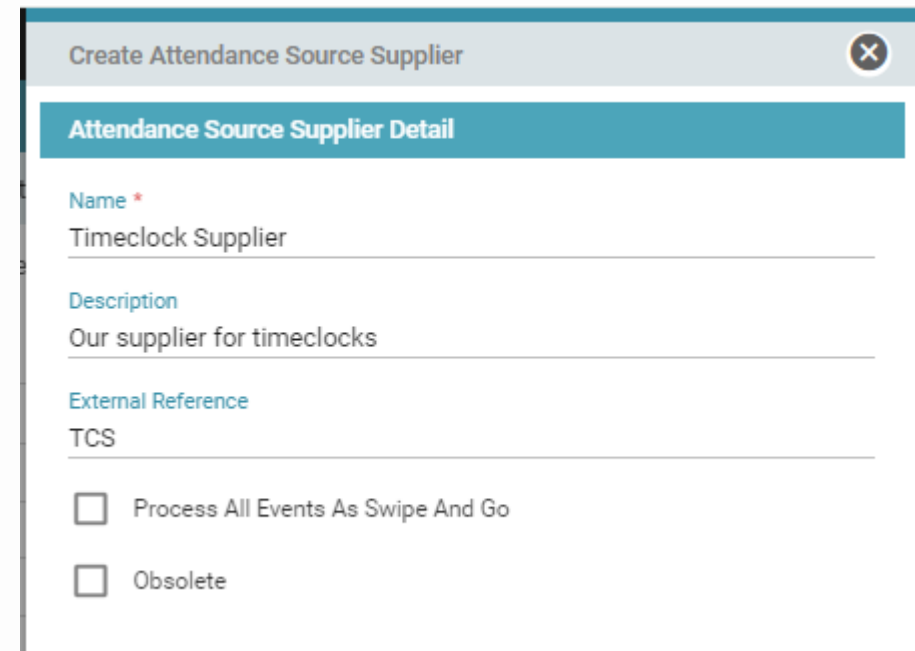
Reference Data > Attendance > Attendance Source Suppliers. This allows organisations to create details for the supplier, i.e. ClockedIn

Add in:

- Name
- Description
- External Ref

If 'Process All Events as Swipe And Go' is ticked this enables employees to clock in/out without having to manually select clock in/out it will just use the next event.

The most common set up is having the option to select if the employee is clock in or out



Create Attendance Source Supplier

Attendance Source Supplier Detail

Name *

Timeclock Supplier

Description

Our supplier for timeclocks

External Reference

TCS

Process All Events As Swipe And Go

Obsolete

Optima Timeclock Config – Reference Data

Reference Data > Attendance > Attendance Devices. This enables the set up to represent the physical location of the devices

- Name is used to easily identify the device and location
- Device ID is unique to identify the device and is on the physical device as well to be used when identifying issues
- Device type this will typically be timeclock but could be mobile
- Supplier, this is linked to the supplier of the device
- Valid From & To, when the device is active
- Unit Applicability, which unit(s) is this applicable to

Create Attendance Device

Attendance Device Detail

Name *
Dept. B - Timeclock

Device Identifier *
DBTC 1

Device Type *
Timeclocks

Supplier *
Timeclock Supplier

Valid From *
01/01/1900

Valid To *
31/12/9999

Unit Restriction (leave blank for unrestricted)

+ Assign Units Remove Units

Short Title ↑	Full Title	Code
Dept. B	Department B	

Optima Timeclock Config – Reference Data

Reference Data > Attendance > Clock In/Out Tolerances. Set up the tolerance levels for clocking in/out – this is setting the buffer period of time before or after a duty it is acceptable to clock in/out.

- Name to be easily identifiable what the tolerance is
- Select what you are applying to the tolerance too
- Pick planned time (duty start/end time) or clocked time for the recording
- Set your valid from & to dates
- Add your tolerances (most common is 15mins before and 5mins after)

The screenshot shows the 'Create Clock In/Out Tolerance' configuration form. It includes a title bar with a close button, a 'Timeclocks Tolerance Detail' section with a 'Name' field containing '15 mins before/5 mins after', and an 'Apply Tolerances to' section with checkboxes for 'Clock In', 'Clock Out', and 'Rest', all of which are checked. There are also radio buttons for 'Use Planned Time' (selected) and 'Use Clock Time'. Below this is a 'Tolerance Settings' section with 'Valid From' and 'Valid To' date pickers set to '01/01/1900' and '31/12/9999' respectively. At the bottom, there are two numeric input fields: 'TimeClock Tolerance' with 'Valid Minutes Before' set to 15 and 'Valid Minutes After' set to 5, each with minus and plus adjustment buttons.

Optima Timeclock Config – Reference Data

Reference Data > Attendance > Clock In/Out Tolerances – adding in Grace Period Tolerances.

It is the same configuration as the standard tolerances, but when using clock time, it offers the ability to add an additional grace period tolerance as well.

This is mostly used when working flexibly to allow for a reduction in exception reporting.

This is controlled via a feature toggle, so if required please raise a support case to get turned on.

Clock In/Out Tolerance

Timeclocks Tolerance Detail

Name *
15mins before/5mins after


Apply Tolerances to


- Clock In
- Clock Out
- Rest

Clock Time Recording



- Use Planned Time
- Use Clock Time



Tolerance Settings

Valid From * 01/01/1900 



Valid To * 31/12/9999 



TimeClock Tolerance

Valid Minutes Before 15  

Valid Minutes After 5  

Grace Period Tolerance

Valid Minutes Before 120  

Valid Minutes After 120  

Optima Timeclock Config – Reference Data

Reference Data > Attendance > Clock In/Out Reasons. Here you set the reasons that are added when clocking in/out after the tolerance buffer period.

The reasons are used when managers are resolving exceptions and become important in identifying why the manager has had to intervene.

Example could be – manually clock in to resolve exception.

There are some standard reasons ‘out of the box’ but organisations can add in their own as required.

These can be set to just be a clock in reason, a clock out reason or both.

Create Clock In/Out Reason

Clock In/Out Reason Detail

Name *
Clock Issues/not responding

Clock In

Clock Out

Valid From *
01/01/1900

Valid To *
31/12/9999

Optima Timeclock Config – Settings

Reference Data > Organisation > Settings. There are two settings that require consideration when thinking about Timeclocks.

1. Auto Finalise Shifts If Times Are Within Tolerances
2. Automatic Assigning Timeclocks Identifiers

Setting ✕

Auto Finalise Shifts If Times Are Within Tolerances

True or false if Timeclocks enabled duties have a Clock In and Out (and is within tolerances), should it be automatically finalised.

Value

true false

Setting ✕

Automatic Assigning Timeclocks Identifiers

Automatically assign Staff Number as Timeclocks Identifier on person creations (excluding via data loader)

Value

true false

Optima Timeclock Config – User Roles


Admin > User Accounts > User Roles. There are some standard user roles that are set up as part of the Timeclocks implementation.

- Admin
- Manager
- Supplier

Name ↑	Is Obsolete	Description	External Reference
Timeclock Admin	-	Allows admin access for timeclocks	
TimeClock Interface	-	Grants access to the TimeClock Interface	
Timeclock Supplier	-	Access using Time Clocks	
Timeclocks manager	-	Timeclocks manager	
Timeclocks Supplier	-	Allows suppliers access to people using Timeclocks	

Optima Timeclock Config – Person


Personnel > Person Search > Person Search. When visible can use the Timeclock ID column to easily view if a timeclock is linked to a person.

Surname	Forename:	Staff Number	Grade ↓	Current Po	Assignment Nc	Current Unit	Contracted Time	Date of Birth	Timeclocks Identifier
 Al Jamil	Tahani	Johnson34	Band 5 RN	B5 RN	Johnson34	Johnson Ward	37:30		Johnson34

Then on the person record via the Attendance IDs tab, you can view the link between the Optima record and corresponding Airstack person record, or add a link if not already established.

Attendance Ids

Attendance Ids

 Import Staff Number

Attendance Identifier

Timeclocks Identifier

Johnson34

Timeclocks Card Number

Timeclocks Pin

Attendance Attributes Last Updated

22/01/2024 13:35

Optima Timeclock Config – Demand Template

Admin > Rostering Admin > Demand Template.

This is the more common way of adding in the timeclock configuration for the unit.

Best practice is that all the requirement under the same folder, i.e. 01 RN, should have the same timeclock configuration/tolerances.

To configure tick 'Use Timeclocks Configuration' then select the clock in/out tolerances.

Edit Requirement

Requirement Details

Shift _____ Early (E) Location _____

Cost Centre _____ Override Headroom % _____

In Charge Standby

Exclude from SafeCare Calc

Use Timeclocks Configuration

Timeclocks Configuration

Clock In *
15mins before/5mins after (-15, +5)

Clock Out *
15mins before/5mins after (-15, +5)

Back to Back Mode
 Rest Mode

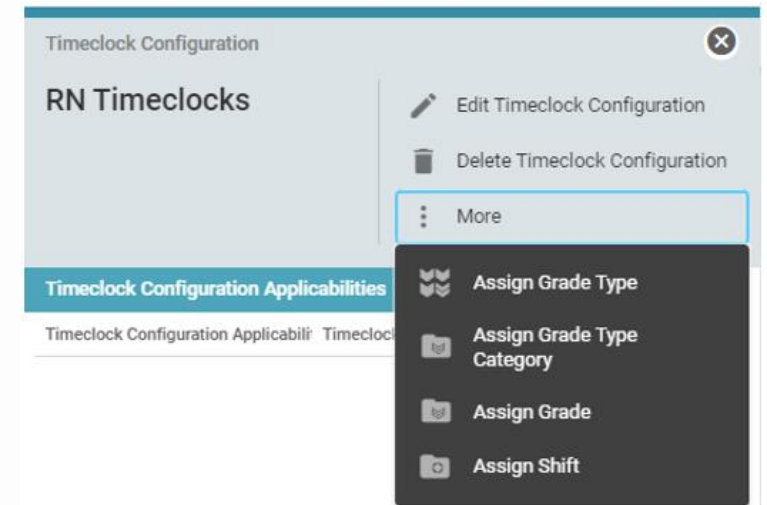
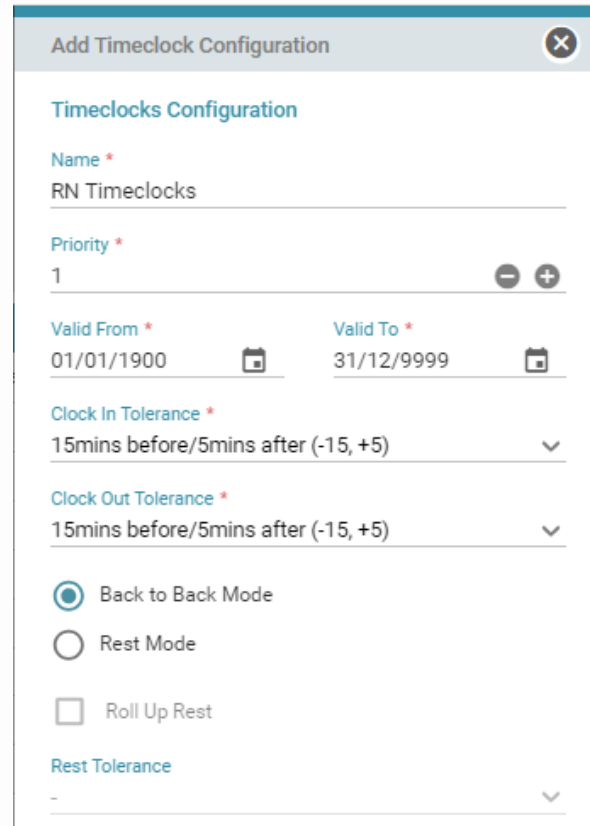
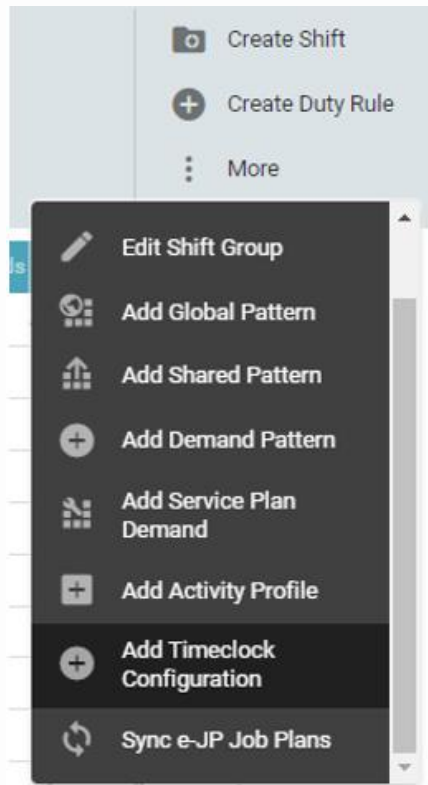
Use Roll-up Rest

Rest

Optima Timeclock Config – Shift Group

Admin > Rostering Admin > Shifts, Patterns & Rules.

This is less common, applies the same way as on the demand template but these also have a priority assigned. If the timeclock configuration is against the demand template as well that takes priority over the shift group set up.



Rostering with TimeClocks – How this looks

Once created the timeclock configuration for the unit, lay down your demand template and when the duty is assigned it will show as a 'Timeclocks enabled duty'.

When staff then clock in/out it will register the clock activity against this duty.

Duty Assignment

Helena Brettschneide
RN (Band 6 RN)

Early (E) Cole Ward

07:00 - 15:00 · 7hrs 30mins Rest · 30mins

Summary | Duty Details | Timesheet | Audit Trail

Tue 02 Apr 2024

Demand	07:00 - 15:00 · 7hrs 30mins
Clock	--
PA Value	0

Attributes

- Timeclocks enabled duty

Rostering with TimeClocks – Re-Applying Demand

If the timeclock configuration needs to be changed it must be done from the start of a roster period and from the main demand template, not from the roster screen via edit roster.

Edit Requirement

Requirement Details

Shift Location

Cost Centre Override Headroom %

In Charge Standby

Exclude from SafeCare Calc

Use Timeclocks Configuration

Timeclocks Configuration

Clock In *
15mins before/5mins after (-15, +5)

Clock Out *
15mins before/5mins after (-15, +5)

Back to Back Mode
 Rest Mode

Use Roll-up Rest

Rest

Demand Templates

Unit

Name	Duration	Unit	Roster Type
Cole W:	28	Cole W:	Nursing
Cole W:	28	Cole W:	
Cole W:	28	Cole W:	

- Edit Demand Template
- Duplicate Demand Template
- Delete Demand Template
- Print Demand Template
- Reapply Timeclocks from Template**
- Copy Demand Template To Different Unit

Reapply Timeclocks from Template

Reapply Timeclocks Configuration Starting From *

Rostering with TimeClocks - Reporting

Navigate to Rostering > Assigned Hours > Assigned Duties by Person. Use this report to report on timeclock enabled duties for staff.

Assignment Info	Owning Unit	Duty Date	Shift	Resourcing Unit	Actual Start	Actual End	Payroll State	Clock In	Clock Out	Clock Work Time	Clock Events Count
Angla Herron - I	A&E Nurses	23/11/2023	Night (N)	A&E Nurses	19:15	08:10	Filled	19:15	08:10	11.92	2
Wonda Druckh	A&E Nurses	23/11/2023	Night (N)	A&E Nurses	19:00	07:30	Filled	19:30	08:00	11.50	4
Nadia Policz - N	A&E Nurses	24/11/2023	Night (N)	A&E Nurses	19:30	08:00	Filled	19:30	08:00	11.50	2
Wonda Druckh	A&E Nurses	24/11/2023	Night (N)	A&E Nurses	19:30	08:00	Filled	19:30	08:00	11.50	2
Wonda Druckh	A&E Nurses	25/11/2023	Night (N)	A&E Nurses	19:30	08:00	Filled	19:30	08:00	11.50	2

Managing Exceptions - Manually

Rostering > Attendance Exceptions. Exceptions are raised if there is an issue with the clock activity, i.e., late or overdue clock in/out. Commonly managers will review and resolve the exceptions manually via this report.

Navigation: Rostering | SafeCare | Personnel | Payroll | Admin | Gateway | Reference Data

Sub-navigation: View Rosters | Bank Requests | Daily Staffing | Unavailability | Assigned Hours | Roster Stats | **Attendance Exceptions** | Timesheet Corrections | Swap Requests | Reports | External Community Visit Exceptions

Attendance Exceptions 47 Records

Filters:

- Unit: A&E Nurses
- Grade Type Category: Any
- From: 31/10/2023
- Exception Type: Any
- Exception: Any
- Team: Any
- Grade Type: Any
- To: 01/12/2023
- Attendance Device: Any
- Exception Status: Pending

Buttons: Extract, Search

Exception	Event Date/Time	Name	Timeclocks ID	Event Type	On Date ↓	Exception Status	Resourcing Org Unit	Owning Org Unit	Staff Number	Posting	Grade	Shift Name	Planned
Overdue Clock In		Shelli Siket			01/12/2023 19:30	Pending	A&E Nurses	A&E Nurses	675A250A259	A&E Nurses (B	Band 6 RN	Night	19:30 -
Unknown Attendance		Angla Herron			01/12/2023 19:30	Pending	A&E Nurses	A&E Nurses	8E4DF52C260	A&E Nurses (B	Band 6 RN	Night	19:30 -
Overdue Clock In		Wonda Druckhammer			01/12/2023 19:30	Pending	A&E Nurses	A&E Nurses	9A267	A&E Nurses (B	Band 7 WM	Night	19:30 -
Overdue Clock Out		Angla Herron			01/12/2023 08:00	Pending	A&E Nurses	A&E Nurses	8E4DF52C260	A&E Nurses (B	Band 6 RN	Night	19:30 -

Managing Exceptions – Unit Summary

Unit Summary

Unit * Underwood Ward ▼

Reminders

Roster Approvals

- ⚠ 08 January 2024 Approval overdue by 98 Days: 27 Nov
- ⚠ 05 February 2024 Approval overdue by 70 Days: 25 Dec
- ⚠ 04 March 2024 Approval overdue by 42 Days: 22 Jan

Finalisations

March ✓
This period is fully Finalised. Thank you.

February ⚠
30 duties & 4 unavailabilities overdue

January ⚠
156 duties & 16 unavailabilities overdue

Awaiting Approval

🌴 Leave Requests - >	🎓 Study Requests - >
🔒 Bank Duties to Finalise -	👤 Bank Approval Required - >
	🚨 Pending Attendance Exceptions - 31 Days 2 >

Managing Exceptions - Manually

Attendance Monitor ✕

Attendance Data for 'A&E Nurses' 20/11/2023 < >

Shift Summary Attendance Exceptions

Attendance Exceptions 47 Records ✓ || ✕ ↻

Exception	On Date	Exception Status	Resolution	Event Type	Resourcing Org U	Owning Org Unit	Name	
Overdue Clock Out	21/11/2023 08	Pending			A&E Nurses	A&E Nurses	J 11.3.1 Thi	↑
Overdue Clock In	20/11/2023 19	Pending			A&E Nurses	A&E Nurses	J 11.3.1 Thi	
Overdue Clock Out	21/11/2023 08	Pending			A&E Nurses	A&E Nurses	J Siobhan F	
Overdue Clock In	20/11/2023 19	Pending			A&E Nurses	A&E Nurses	J Siobhan F	
Overdue Clock Out	22/11/2023 08	Pending			A&E Nurses	A&E Nurses	J Angla Her	
Overdue Clock In	21/11/2023 19	Pending			A&E Nurses	A&E Nurses	J Angla Her	
Overdue Clock Out	22/11/2023 08	Pending			A&E Nurses	A&E Nurses	J 11.3.1 Thi	
Overdue Clock In	21/11/2023 19	Pending			A&E Nurses	A&E Nurses	J 11.3.1 Thi	
Overdue Clock Out	23/11/2023 08	Pending			A&E Nurses	A&E Nurses	J 11.3.1 Thi	

Managing Exceptions - Auto Approve

From 11.3.3 we have introduced new functionality to auto approve a particular type of exception that is always resolved in the same way.

For example, early clock ins on Smith Ward are always resolved using planned time or for late clock outs on Jones Ward we always use clock time.

This is feature access controlled and sits in Reference Data > Attendance > Auto Approve Attendance Rules.

Feature accesses required:

- Ref Data Actions: Create Auto Approve Attendance Rules
- Ref Data Actions: Manage Auto Approve Attendance Rules

There are some pre-defined folders already set up in the system, this is based on the type of exceptions we believe organisations would want to auto approve.

Managing Exceptions - Auto Approve

To set up - click on required.

This processes as a background task overnight, it will look back 5 days but will ignore the previous day.

Create Auto Approve Attendance Rule

then in the form that slides in, as below, fill out the details

Create Auto Approve Attendance Rule

Name *
Early Clock In - Use Planned Time

Exception *
Early Clock In

Action *
Use Planned Time

Valid From *
01/01/1900

Valid To *
31/12/9999

Is Obsolete

Visible Units

+ Assign Units - Remove Units

Short Title ↑	Full Title	Code
Cole Ward	Cole Ward	

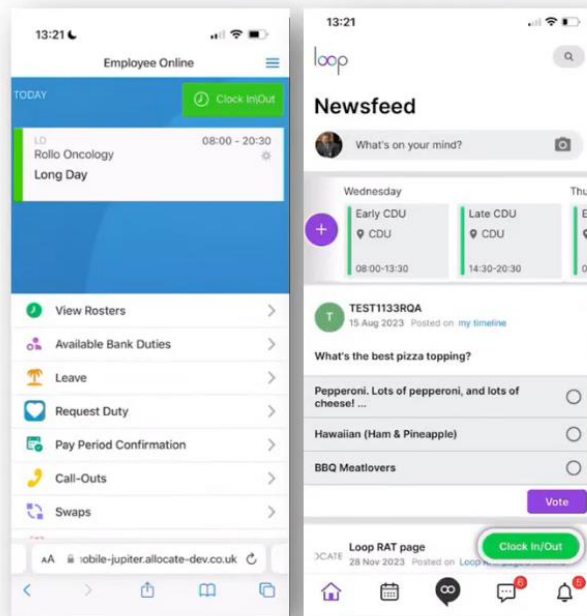
Top Tips:

- Cannot create multiple rules for the same exception & action config
- Cannot have two rules for the same unit where it uses the same exception but different actions
- Will not allow auto finalisation of the duty as an exception was raised

Clocking via Loop & EOL

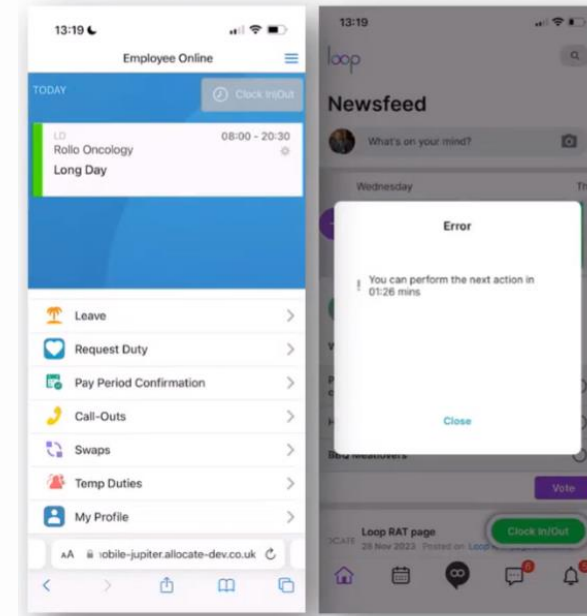
Staff can also clock in and out via the staff access systems Loop & EOL. This is feature access controlled and is up to the organisation if you allow staff to clock in/out outside of the clock devices.

The feature access required to enable this is: Loop: Timeclocks Clock In and Out. Please note before 11.3.4 this will be EOL: Timeclocks Clock In and Out.



On the left where the clock in/out buttons sit in Loop & EOL

On the right when clock in/out action is disabled



Attendance via SafeCare

Attendance monitoring enables you to use the system to mark staff on shift as in attendance, not there or status unknown.

This can be used for standalone rostering attendance to provide benefits and assurance.

Attendance marking will further enhance your CHPPD calculations based on staff status, providing assurances that only those staff who are physically there are included.

SafeCare creates an exception for duties with an 'Unknown' attendance, these must be resolved before finalising for pay.

These SafeCare exceptions can be managed in SafeCare or Optima, and can be resolved by

- changing attendance status
- adding an unavailability if appropriate
- manually changing the status of the duty to 'Attended' in Optima

Rostered Staff – Early

INCLUDED IN SAFECARE CALCULATION

Attend.	Name
✓	Alison Couzens
✓	Susan Wooley

EXCLUDED IN SAFECARE CALCULATION

Attend.	Name
?	Rosa ROMA
✓	Maxine Macafee

Troubleshooting Top Tips

- If Clock events are not appearing in Optima, check that:
 - The device is switched on and connected to the internet; restarting the device can resolve some of these issues
 - Clock events are appearing in Airstack and being sent to Optima
 - Clock events are appearing in Optima
 - Raise a support ticket if still an issue
- Duties are not laying down on a roster as Timeclock enabled, check that:
 - Timeclock configuration on demand template and/or shift group is set up correctly
- Timeclock config changes not re-applying from template, check that:
 - Selected date to re-apply from is the start of the roster period
 - Requirements on the roster still match the requirements in the demand template

Troubleshooting Top Tips contd.

****To view both these tools the features access 'Roster Tools: Attendance Events' is required****

View Timeclock attendance events in Optima

- Admin > Logs > Attendance Events; this can be used as an additional tool for diagnosing issues in receiving clock events. If this list is empty, then you are not getting events from Airstack into Optima

The screenshot shows the 'Attendance Events' page in the Optima system. The navigation bar includes 'Rostering', 'SafeCare', 'Personnel', 'Payroll', 'Admin', 'Gateway', and 'Reference Data'. Under 'Admin', there are sub-menus for 'Rostering Admin', 'User Accounts', 'Planning Interface', 'Audit Reports', 'Logs', and 'Imports'. The 'Attendance Events' page shows a search filter with the following fields: 'Owning Unit' (Any), 'Event Source' (Any), 'From' (17/01/2024), 'Surname', 'Attendance Device' (Any), and 'To' (17/01/2024). The table below the filter has columns: 'Event Date/Time', 'Event Type', 'Attendance Event State', 'Event Source', 'Attendance Device', 'Duty Assignment', 'Person', 'User', 'Owning Unit', 'Location', and 'Device Identifier'. The page indicates '0 Records'.

- Admin > Logs > Attendance Pending External Events; this can be useful to see if Optima is not receiving some events. You can see her events from Airstack that have issues & where Optima cannot process the event – this could be due to an Optima or data issue from Airstack

The screenshot shows the 'Attendance Pending External Events' page in the Optima system. The navigation bar is the same as the previous screenshot. Under 'Admin', there are sub-menus for 'Rostering Admin', 'User Accounts', 'Planning Interface', 'Audit Reports', 'Logs', and 'Imports'. The 'Attendance Pending External Events' page shows a search filter with the following fields: 'Event Time', 'Date Event Received', 'Person Identifier', 'Trust Site', 'Location', 'Failure Message', 'Attendance Event Type', 'State', and 'Event Date/Time From User'. The table below the filter has columns: 'Event Time', 'Date Event Received', 'Person Identifier', 'Trust Site', 'Location', 'Failure Message', 'Attendance Event Type', 'State', and 'Event Date/Time From User'.

Troubleshooting Top Tips contd.

- Timeclock config
 - ✓ Demand template > all requirements under the same 'folder' to have the same Timeclock config
 - ✓ If there is a Timeclock Configuration set up against a requirement on the Demand Template – this will take precedent over the Timeclock Configuration set up on the Shift Group
- Re-applying Timeclock config changes
 - ✓ Always make changes from the demand template/shift group (rather than edit roster)
 - ✓ Always re-apply from the start of the roster period
 - ✓ Requirements on the roster must still match the requirements in the demand template
- Finalisation / payroll
 - ✓ Ensure all exceptions are resolved in order to finalise for payroll
 - ✓ Once Timeclocks is installed it is recommended that Bank duties should be finalised on Optima not BankStaff. This would follow your rostering best practice for finalisation.
- Timeclock ID against a person
 - ✓ If need to change the Timeclock ID > ensure to remove the 'old' person account from Airstack to ensure no duplicates & enable clocking again
 - ✓ If need to update the person's name > remember to go to the Attendance ID tab against that person and hit save after editing/updating the name

Useful Links

- URL's for more information on ClockedIn Services
 - <https://etimeclocks.uk/ask-me-anything/>
 - <https://etimeclocks.uk/user-manuals/>
 - <https://etimeclocks.uk/release-notes/>
 - <https://etimeclocks.uk/others/>
- Timeclock guidance available via the RLD Customer Portal: <https://www.allocate.support/hc/en-us/sections/360002574220-Allocate-TimeClocks>
- Attendance via SafeCare guide: <https://www.allocate.support/hc/en-us/articles/4407443499026-SafeCare-Live-Attendance-Monitoring>
- Clocking in and out via Loop guide: <https://www.allocate.support/hc/en-us/articles/5316124272156-Loop-Mobile-Clock-in-and-out>



Q & A



**Thank you for
your time.**



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@AllocatES