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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

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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

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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)

Clock Device

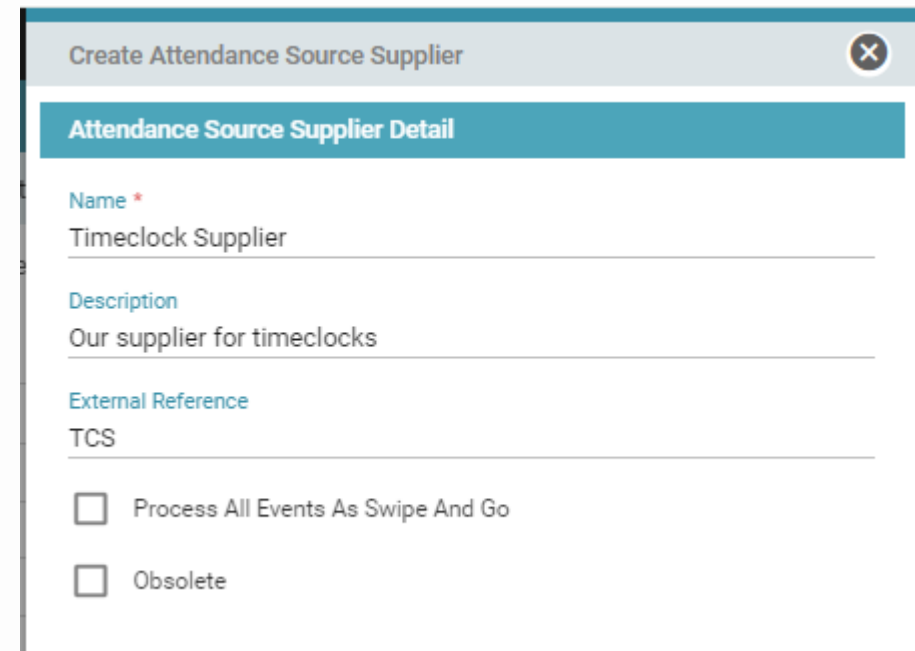Allocate Optima

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

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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	

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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)

Create Clock In/Out Tolerance

Timeclocks Tolerance Detail

Name *
15 mins before/5 mins 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

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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 Time Recording

☑ Clock In   ○ Use Planned Time
☑ Clock Out   ● Use Clock Time
☑ Rest

Tolerance Settings

Valid From *   Valid To *
01/01/1900   31/12/9999

TimeClock Tolerance   Grace Period Tolerance

Valid Minutes Before   Valid Minutes Before
15   120

Valid Minutes After   Valid Minutes After
5   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.

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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

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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

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	Forenames	Staff Number	Grade ↓	Current Po	Assignment No	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.

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.
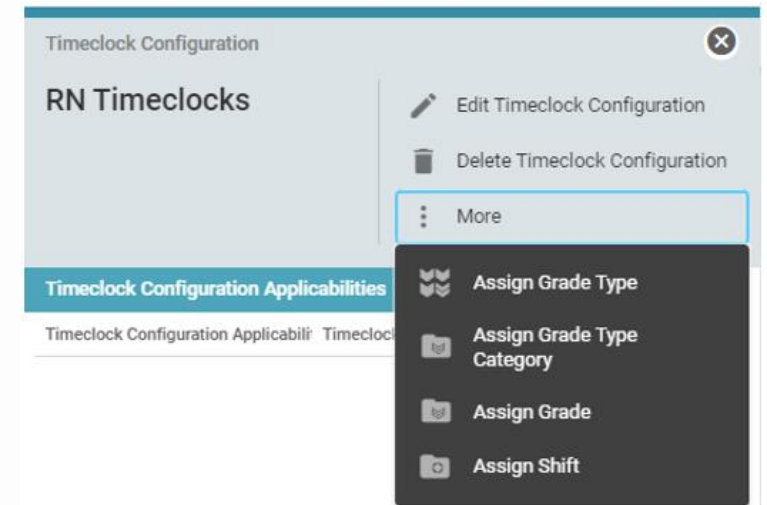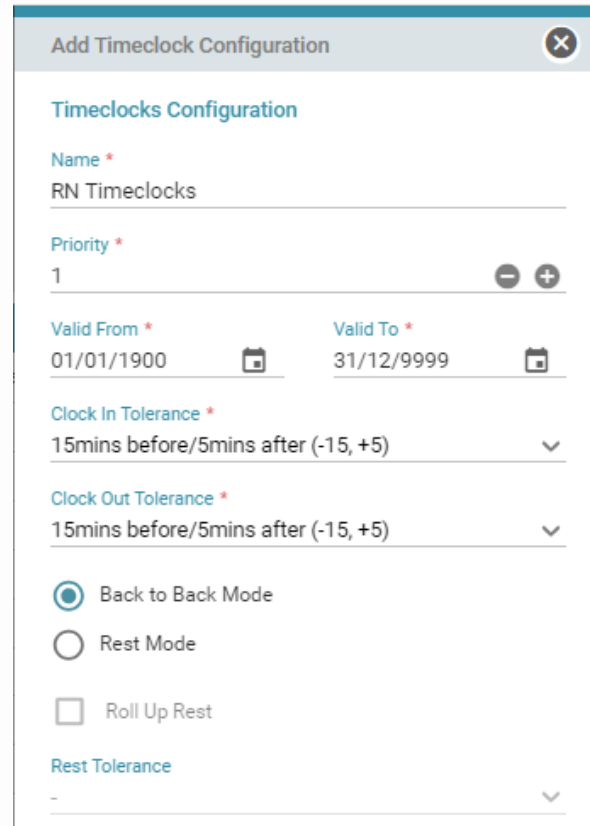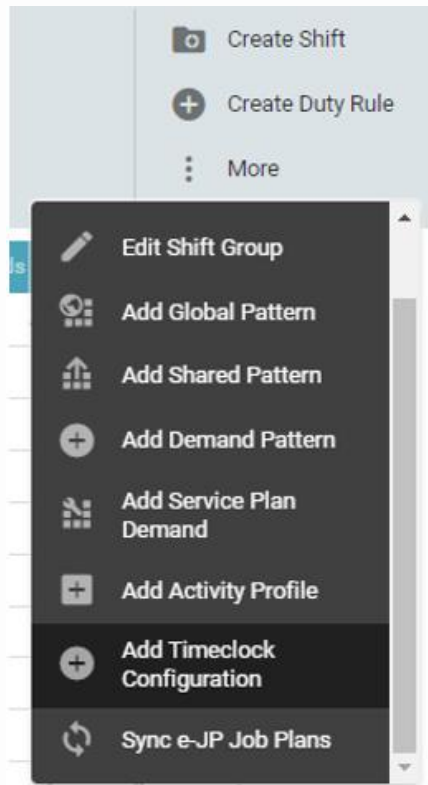
Rostering with TimeClocks – How this looks

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.

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.

Rostering with TimeClocks - Reporting

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

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.

Managing Exceptions – Unit Summary

Managing Exceptions - Manually

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.

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Managing Exceptions - Auto Approve

To set up - click on [🕐 Create Auto Approve Attendance Rule] then in the form that slides in, as below, fill out the details 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 ⊗

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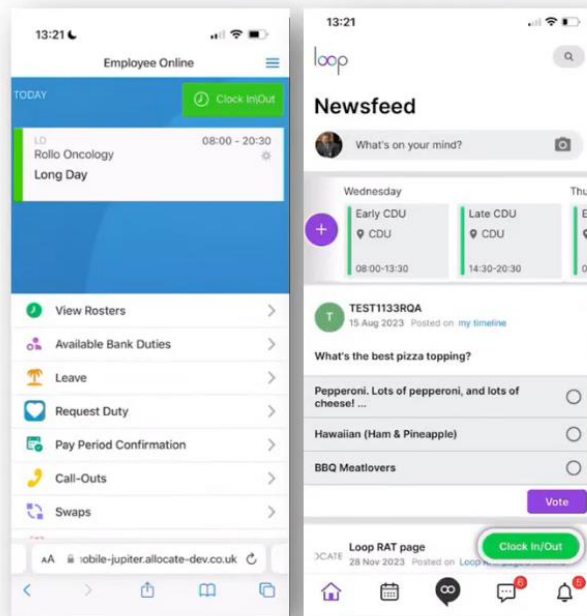
On the left where the clock in/out buttons sit in Loop & EOL

On the right when clock in/out action is disabled

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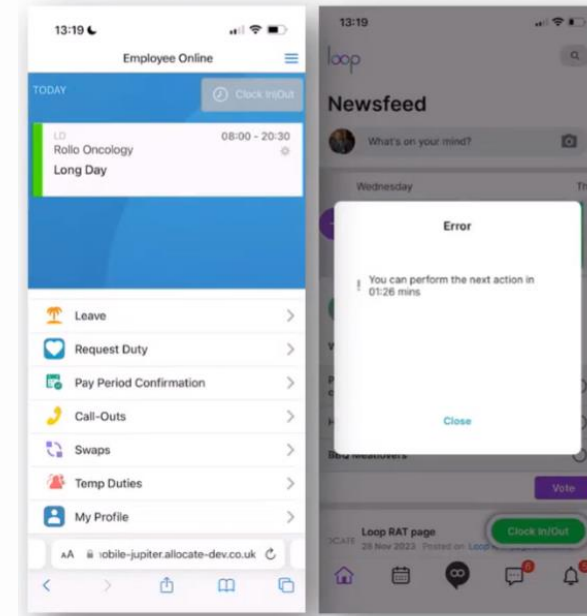
Attendance via SafeCare

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

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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

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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

- 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

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

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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

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Thank you for your time.

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