

Roster Approval

All rosters should be fully approved and published to staff 8 weeks before the actual roster period.

Why is this important?

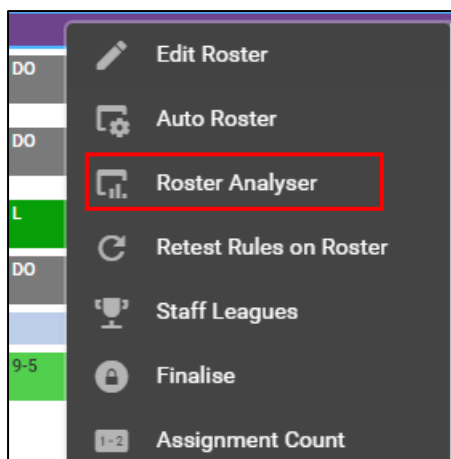
- Enables you as managers to decide whether the roster is good, including whether it is in budget, fair, safe, efficient and within policy thresholds for leave, study and sickness.
- Enables early identification of gaps within the roster and if assigned to bank, the Temporary Staffing Bank team have a greater chance of filling.
- An engaged workforce as staff have advance notification of their working pattern. This is fairer on staff, helps with morale and may also benefit the Trust as staff may be able to work additional hours or accept additional bank shifts as they have greater visibility on when they might be available.

Approving your Rosters

Your roster requires 2 stages of roster approval – partial and full – and this should be completed by two separate people.

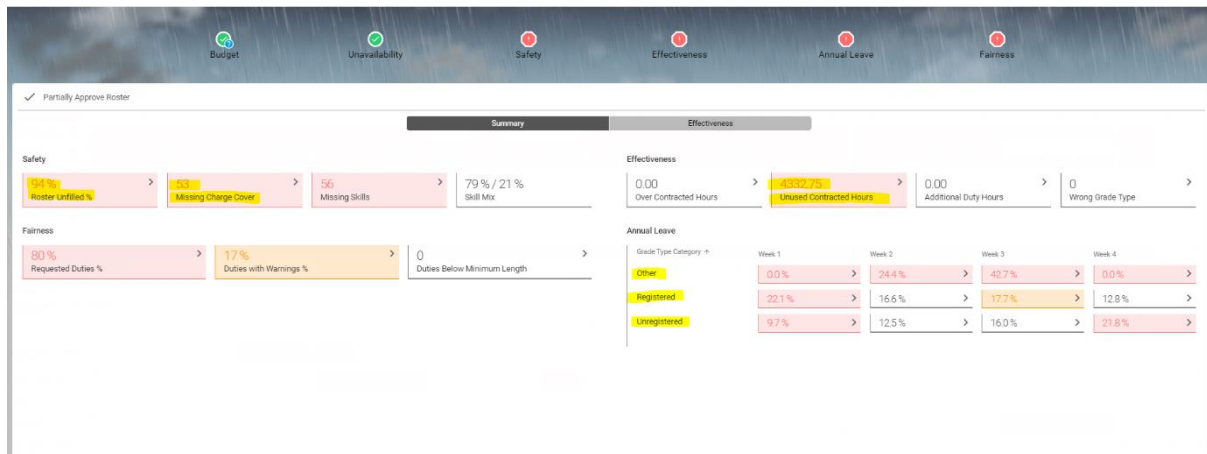
1.1 Partial Roster Approval

1. Each roster period is identified by a purple bar at the top of your roster. If you change your view to '4 weeks' you will be able to see the whole roster period.
2. Ensure that all shifts have been assigned correctly and all requests have been approved for the relevant roster period.
3. Right click on the **purple Roster Bar** and select **Roster Analyser**



4. The Roster Analyser summary then appears. This allows you to assess the performance of the roster created, against each roster's establishment data and demand. It is designed to enable roster creators and ward/unit managers to consider the quality and fairness of their rosters, and the impact on their budget, before the roster is worked, in order to make an informed decision on whether adjustments should be made.

The Roster Approval buttons are incorporated in this view to encourage managers to check and analyse the roster quality and stats **before** approving.



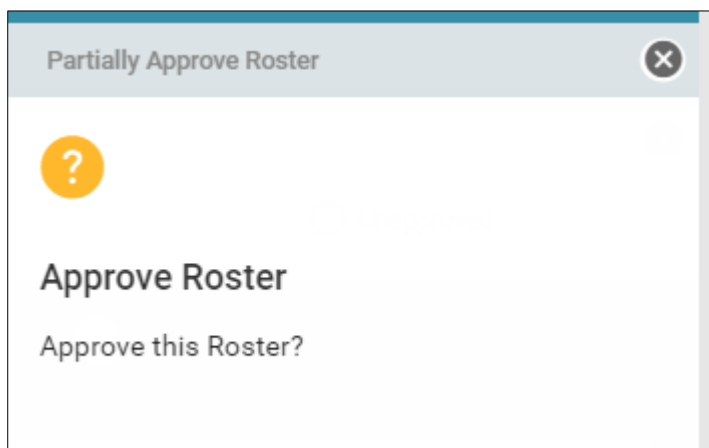
Before approving, please check the following:

- Annual leave % for the period – your matron/senior manager will be able to confirm targets for your area.
- Roster Unfilled % – any unfilled duties that are required to safely staff your ward/unit will need to be sent to bank to be filled.
- Missing charge cover – ensuring that all shifts have a take charge shift allocated
- Unused contracted hours – this identifies how many staff do not have their full contracted hours allocated to them.

5. Click on the **Partially Approve Roster** button at the top left of the Analyser screen



A panel will appear on the right confirming the approve roster. If you have any unapproved requests – the system may be unable to complete this action. Click on **OK**.

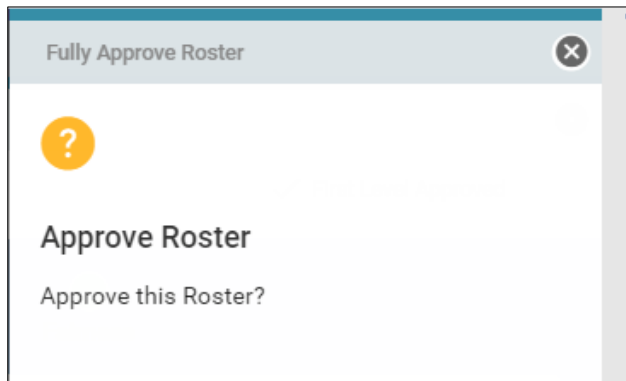
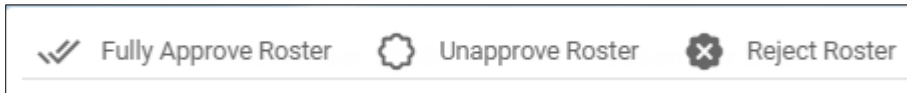


The status of the roster will be updated on the roster bar and on the right hand side with a single, yellow tick.

08 November 2021 : Partially Approved

1.2 Full Roster Approval

1. Right click on the purple Roster Bar and select Roster Analyser as before
2. Select the **Fully Approve Roster** button at the top of the Analyser screen



3. Click **OK**.

The status of the roster will be updated on the roster bar and on the right-hand side with a double green tick.

03 January 2022 : Fully Approved

Once your roster is fully approved – this will then become visible to your staff in Employee Online.