Email: e-rostering@bfwhospitals.nhs.uk
Website: http://www.bfwh.nhs.uk/working-for-the-trust/e-rostering-and-corporate-bench
Phone: 01253 953690

HealthRoster
Managers User Guide

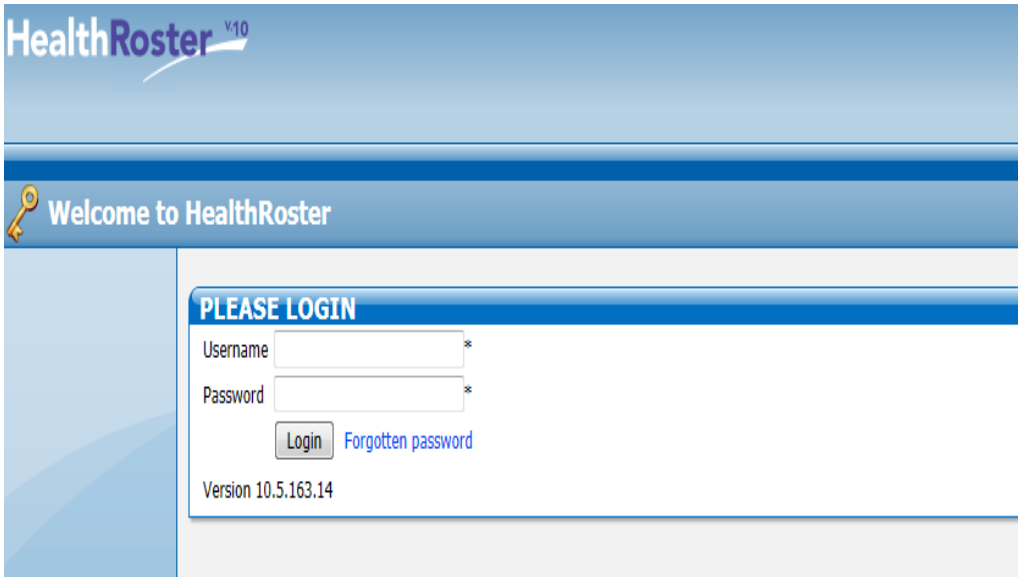
Together we care

Blackpool Teaching Hospitals NHS
NHS Foundation Trust

People Centred	Positive	Compassion	Excellence

Accessing HealthRoster

1. Click onto the e-Rostering homepage
2. Select the 'HealthRoster' link
3. Enter your username and password
4. Select 'Login'



If you have forgotten your password to re-set it click on the forgotten password link.

Unit Summary

The unit summary page gives you an overview of your roster and any tasks which need completing

Roster Approval and Finalising Reminders

Unit Name

Mandatory duties which are unfilled

Outstanding Leave and Study Requests

Expiring Skills to be reviewed

Assigning Shifts Manually

Assigning Shifts Manually

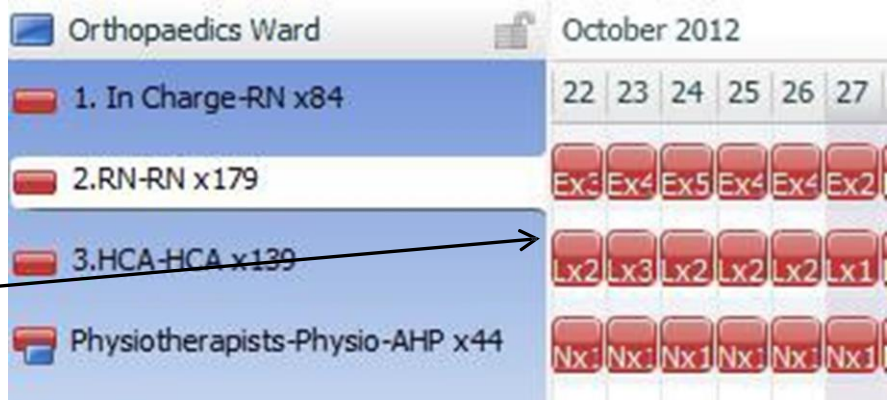
1. Your vacant duty window should automatically appear at the top of your roster. If it is not showing

   select 'Show Vacancies' from the top tool bar

2. Select the correct staff group from the selection on the left hand side of the vacant duty window (i.e. here we have selected RNs)

3. Select duty (red square) from the vacant duty window by clicking on the duty

4. Drag and drop duty onto the roster



TIPS: You can multi select duties using the CTRL key

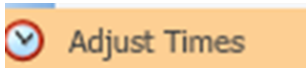
Adjust Shift Times

Modifying Shift Times

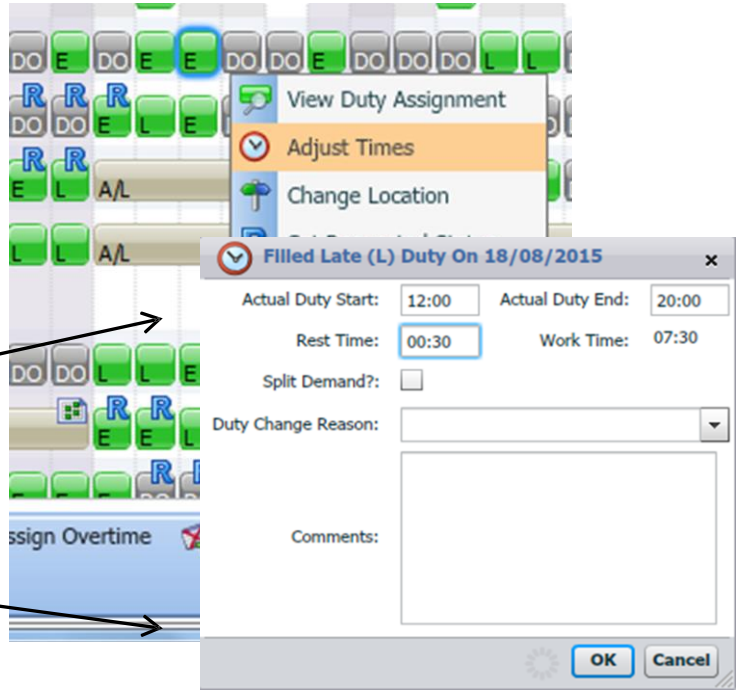
1. Select duty/duties

TIP: You can change the time of many duties at once by using the CTRL key

2. Select adjust times



or right click and select from drop down list



3. Edit start and end times

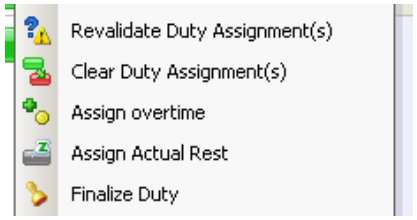
4.Click OK

Assigning Overtime / Excess Hours

Entering Overtime / Excess Hours

1. Manually assign the extra duty and/or adjust the duty times to reflect hours worked

2. Right click on the duty and select 'Assign Overtime'

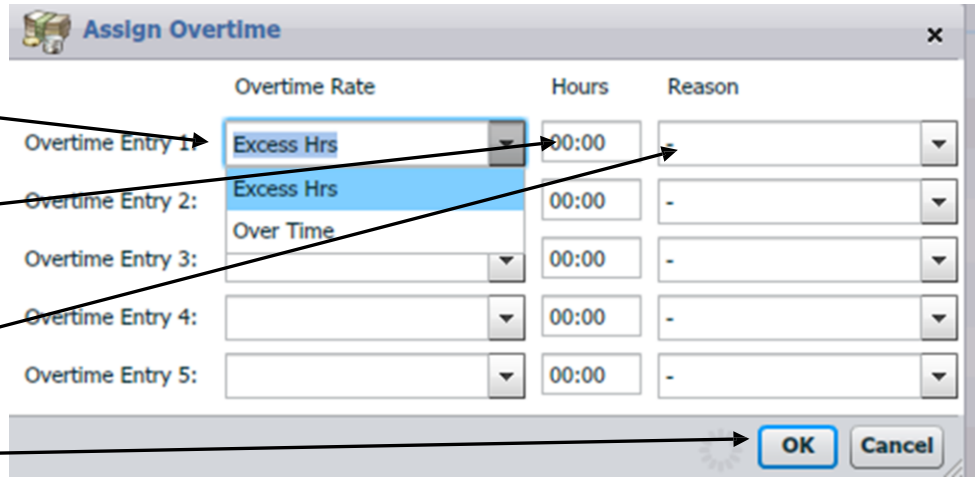


3. Select the rate from the drop down list

4. Type the amount of overtime hours to be paid

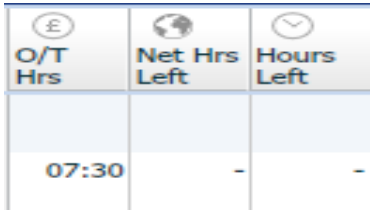
5. Select Reason for overtime

6. Click 'OK'



7. A gold coin symbol indicates that overtime is assigned

8. When you have assigned Overtime or Excess hours it shows in the OT hours column (right hand side) how much has been assigned in the roster period on the screen



Assigning Call Out

Assigning Call Out for On Calls

1. Right click on the relevant On Call Shift

2. Select 'Assign Callout'

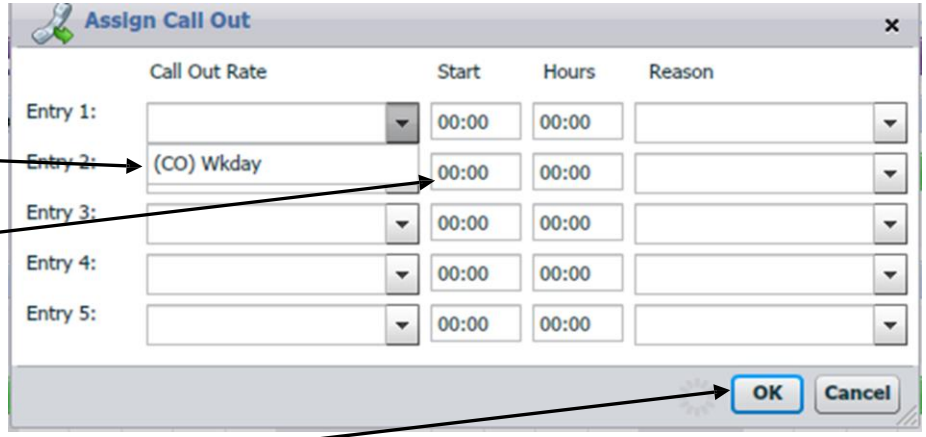
TIP: 'Assign Callout' option is not available for shifts other than on-call and cannot be assigned until after the On call has been worked.

3. Select the rate from the drop down list

4. Type the start time and the hours (duration) of the call out

5. Select reason from drop down box

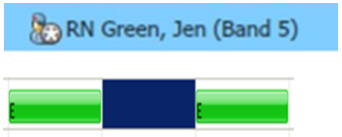
6. Click 'OK'



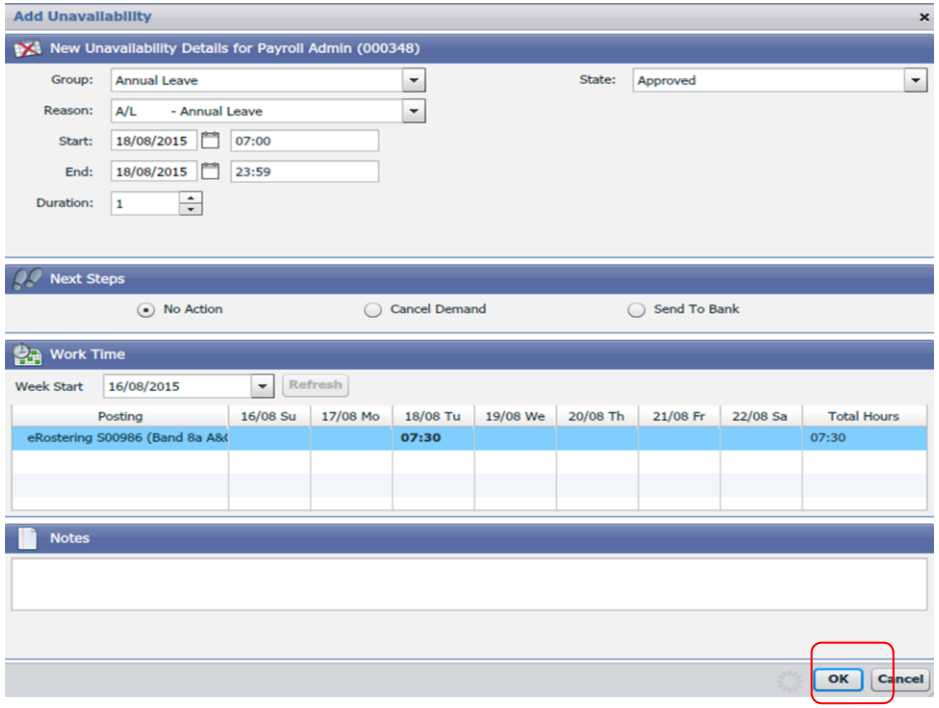
7. When call out is assign the following symbol will appear on the shift

Adding A Full Day Unavailability

Unavailability includes Annual Leave, Sickness, Study Days, Maternity, TOIL etc.



1. Click on a person's name or date
2. Click on 'Add unavailability' (bottom blue tool bar)
3. An unavailability form will appear
4. Enter the group, reason & dates
5. Check the 'Work Time' calculated, amend if necessary
6. Click 'ok'



Tip: A note can be added to the annual leave

Adding Part Day Unavailability

Adding part day Unavailability

1. Select duty/duties

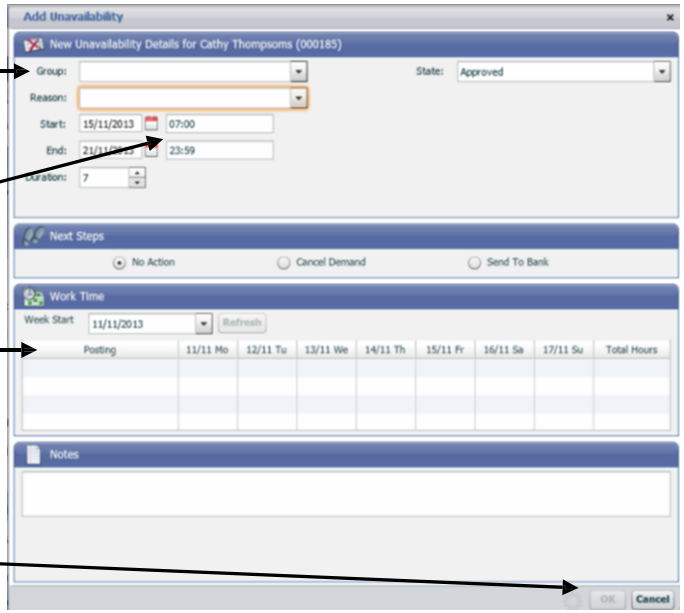
2. Click ‘Add unavailability’ button (bottom blue tool bar)

3. Enter Leave Group & Reason

4. Enter exact start and end times

5. Check that the correct amount of Work Time is assigned (minus breaks)

6. Select ‘ok’



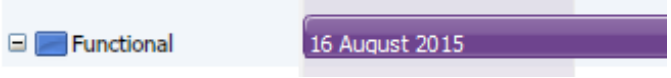
7. The shift is adjusted to show hours worked prior to Unavailability. Unavailability is added

Auto Roster

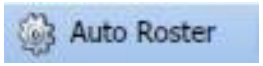
Auto Rostering

User Notes:

1. Select the purple Roster Bar



2. Click on the Auto Roster button located at the bottom of the screen



3. A selection of settings will be displayed

4. Select the setting you wish to run the auto-roster on

NOTE: Personal Patterns will only lay down duties which are specified to be worked by specific individuals within fixed Shared and Personal Patterns.

When run on Full, auto-roster will try to allocate as many duties as possible in accordance with rules and restrictions.

5. Select 'ok'

6. The status of the roster will change to Auto Roster Requested, and the roster bar will change from purple to yellow

7. The screen will need to be refreshed to view the progress of the auto-roster

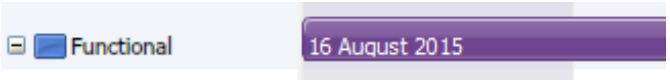
Approving The Roster

(Page 1 of 2)

Approving the Roster (Part 1)

Approving the roster should be completed at least 12 weeks prior to the roster being worked. By approving the roster you are verifying that this is what you are currently expecting staff to work. Approving the roster allows staff to see what they have been rostered to work in Employee Online.

1. Click on the roster bar



2. Click on the Roster Analyser button (bottom blue tool bar)

3. Summary tab provides an overview of the roster

4. To find out more information about a field Click on the highlighted field and details will appear in a new window

Analysis Details

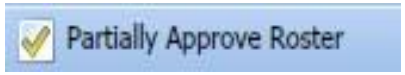
UNFILLED DUTIES BREAKDOWN

Shift Name	Duties	Hours	Percentage of Total
Duty	37	277:30	44%
Early Start	25	187:30	30%
Late Start	22	165:00	26%
∑ TOTAL	84	630:00	100%

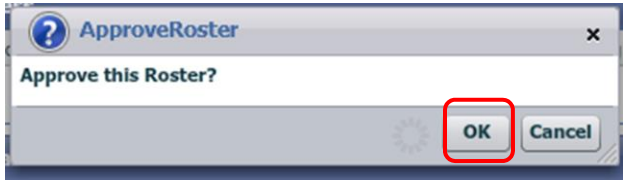
Approving The Roster

Approving the Roster (Part 2)

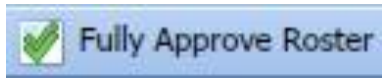
5. Once the data has been reviewed and you are satisfied with your roster, click 'Partially Approve Roster'



6. A message will appear asking if you wish to approve this roster



7. To fully approve the roster select ' Fully Approve Roster'



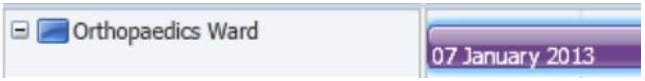
8. The status of the roster will be updated on the roster bar

TIP: You will only be able to fully approve the roster if you are a Roster Approver. If you are a Roster Creator you will only be able to partially approve the roster.

All leave requests for the roster period must be dealt with prior to the roster being approved. If you have not approved leave you will receive an error message. If this happens please follow the guide to Approving Annual Leave and then repeat the approval process.

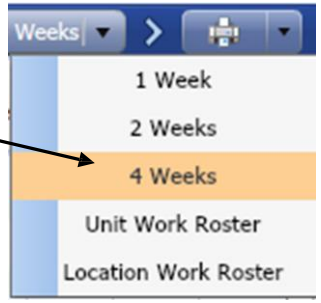
Printing The Roster

1. Click on the roster bar



2. Select the printer icon
(top right hand side screen)

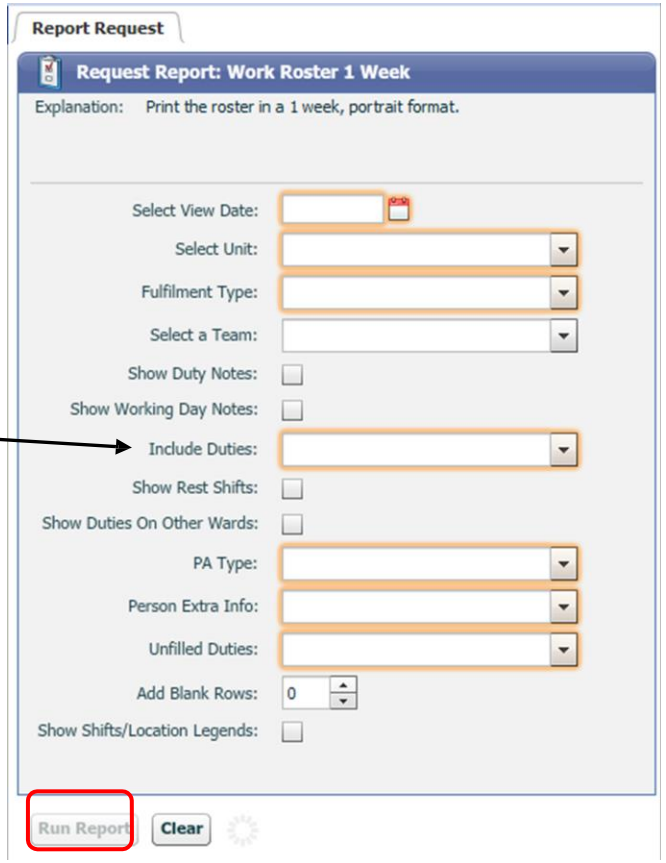
3. Select the number of weeks to print



4. Select options as necessary

5. Select 'Run Report'

5. Select print



Managing Sickness

Extending Sickness Episodes

TIP: Sickness episodes should always be extended and not added as separate incidents. Recording sickness episodes separately will impact sickness warnings for the member of staff

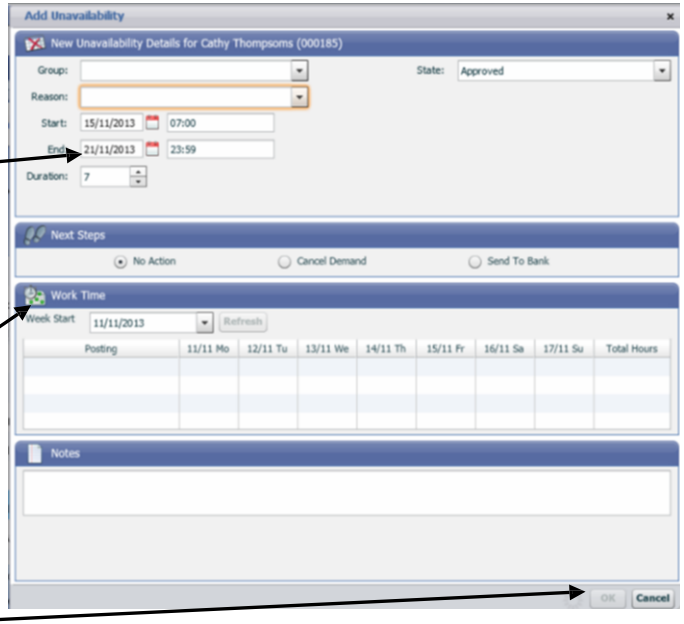
1. Select the unavailability you need to extend

2. Click on 'Edit Unavailability' (bottom blue tool bar)

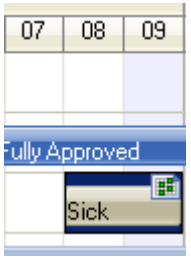
3. Adjust the end date as required

4. Check the work time information has updated to reflect the correct number of hours the person would have worked

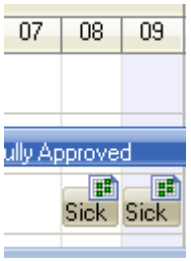
5. Select 'OK'



Example of a correctly input two day sickness episode



Example of an incorrectly input two day sickness episode



Swapping Duties

Swapping Duties **User Notes:**

1. Select the duties to be swapped by clicking on one duty, holding down the CTRL key, and clicking on the other duty to be swapped

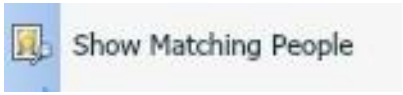
2. Click on 'Swap Duties' (bottom blue tool 

bar)

Moving a Member of Staff

Moving a Member of Staff from another Roster

1. Right click on the vacant duty and select 'Show Matching People'



2. Select 'Roster Unit' to locate the member of staff

3. Click 'Find'

4. Select the member of Staff

5. Click 'Assign Candidate'

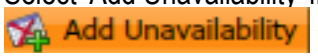
6. Close window

7. Scroll to the bottom of your roster to see the assigned duty under 'External Staff'

How to record Time off in Lieu (TOIL)

NB: TOIL can only be claimed when a person has previously worked over their contracted hours. This will be demonstrated by their net hours showing as a negative figure i.e -7:30.

1. Click on the cell when the TOIL was taken

2. Select 'Add Unavailability' from the bottom of the 

screen/roster.

3. Select the 'Other Leave' from the Group box

4. Select 'Time Owing' from the Reason box. You will note that when time owing is selected the hours per day default to 00:00.
Do not adjust this, it must remain as zero.

5. Check dates, start and end times

6. Click OK

7. You will now see that the negative net hours has been reduced.

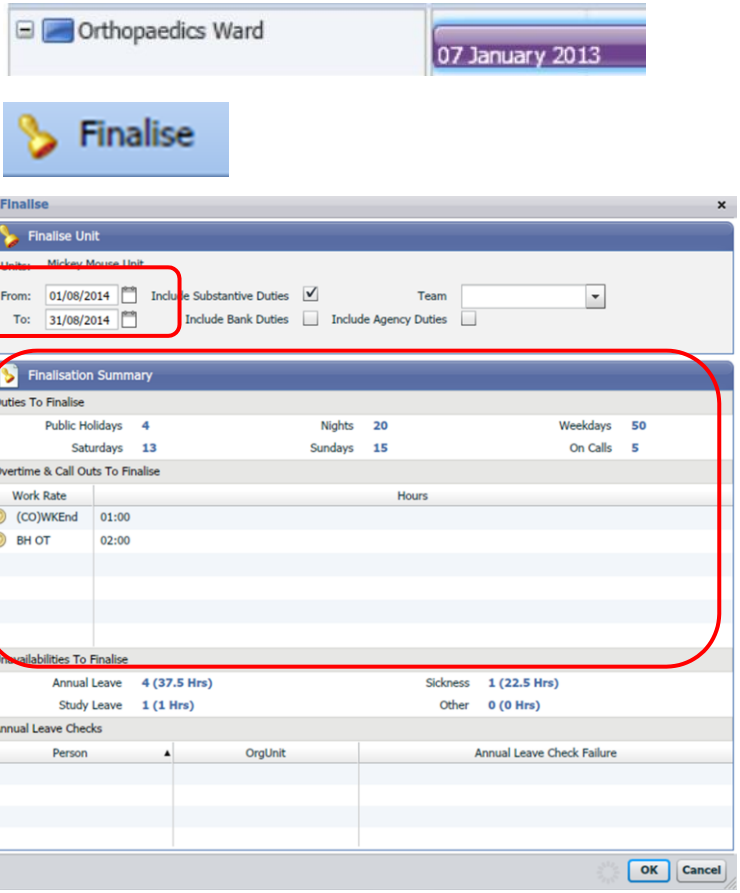
TIP: If the person is taking TOIL for the entire shift remember to remove any shifts previously assigned

Finalising a Roster

Finalising the roster for Payroll

Finalising is completed on a monthly basis. Finalising is confirming what hours your staff have worked; informing payroll of any excess hours/overtime/enhancements etc. to be paid. It also confirms the sickness record for the team.

1. Click on the roster bar



2. Select 'Finalise' (bottom blue tool bar)

3. Check dates to finalise

4. Using the Finalisation Summary check you are happy with the duties, OT and Call Out being sent to payroll

5. If you are happy select 'OK'

Once finalised padlocks will appear on all the shifts.

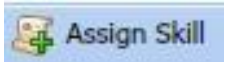
TIP: You will need to check all leave is approved prior to finalisation. If you have not approved leave you will receive an error message. Please follow the guide for Approving Annual Leave and then repeat the finalisation process.

NOTE: You are unable to finalise your own duties. Approvers who finalise will need to ensure that they have a secondary Approver who can finalise their duties.

Adding a Skill

Adding a Skill

1. Click on the person's name 

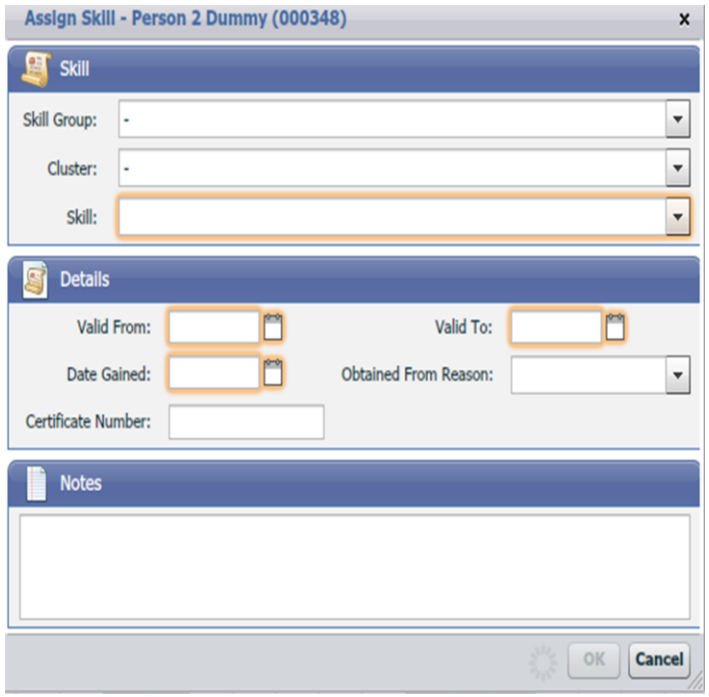
2. Select 'Add Skill' (bottom blue tool 

bar)

3. Select 'Skill' from drop down box

4. Enter Valid From, Valid To and Date Gained using the calendar icons

5. Click OK



TIP: Mandatory Fields are highlighted orange

Adding Leave Entitlements

(Page 1 of 2)

Inputting Leave Entitlements For New Starters to the Trust

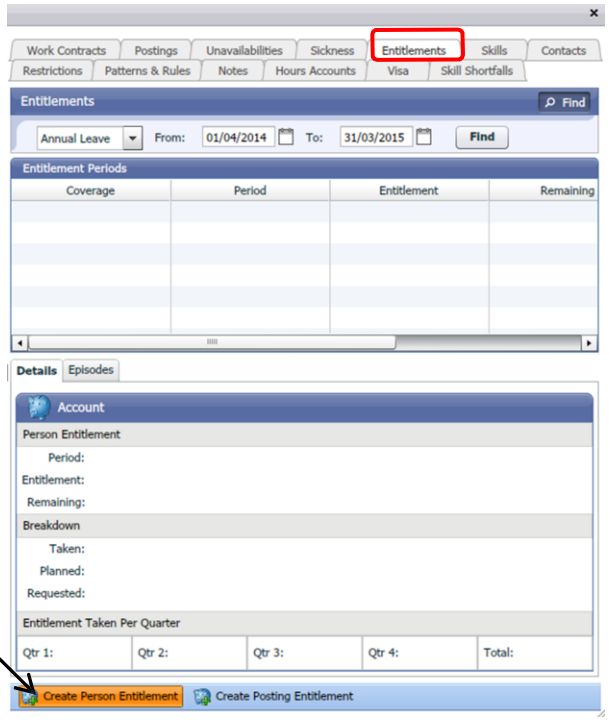
TIP: to calculate a member of staff's annual leave entitlement please use the annual leave calculator available through Southern Health Intranet

To Add Leave entitlement go to Personnel (Blue tab on the left hand side) and Person Search

1. Enter the persons surname and click FIND

2. Select the 'Entitlements' tab on the right hand side

3. If the person does not have an entitlement select 'Create Person Entitlement'



Adding Leave Entitlements

Inputting Leave Entitlements For New Starters (Continued from Previous Page)

4. Enter Annual Period Start 1 April

5. Hours Per Year: entitlement for that person for a full annual leave year

6. Effective From:
   For New starters to the Trust the effective from date will be their start date.

7. Initial Balance: The part year entitlement is for New members of staff to the Trust Showing their entitlement from their start date for the current leave year.

8. Select ‘OK’

Updating Leave Entitlement

Updating Leave Entitlements

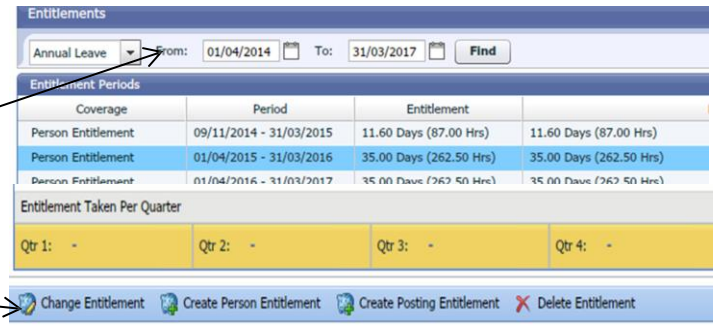
To Update Leave entitlement go to Personnel (Blue tab on the left hand side) and Person Search

1. Enter the persons surname and click FIND

2. Select the 'Entitlements' tab on the right hand side

3. Click on the current leave entitlement or select the from/To date of the leave year and click find.

4. Select ' Change Entitlement'



5. Enter the number of hours leave the person is due for the year

6. Select the date you want the change in leave entitlement to be effective From (for Agenda for Change Employees this should be 1st April)

Personal Patterns

(Part 1 of 4)

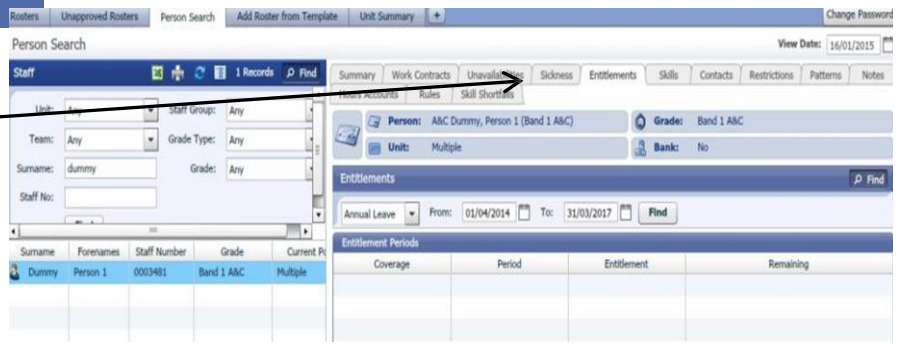
Adding a Personal Pattern

TIP: Personal patterns should only be added for members of staff who works a set pattern

1. To Add a Personal Pattern go to Personnel (Blue tab on the left hand side) and Person Search

Enter the persons surname and click FIND

2. Select the Patterns tab on the right hand side. Add Personal pattern down the bottom of the screen



3. Select 'Add Personal Pattern' down the bottom of the screen

TIP. If the staff member already has a pattern, click on their current pattern and select 'Edit Personal Pattern' down the bottom of the screen.

4. If the staff member has more than 1 week personal pattern then select the number of 'lines' (weeks) the pattern is for.

Continue Personal Patterns on next page….

Personal Patterns

(Part 2 of 4)

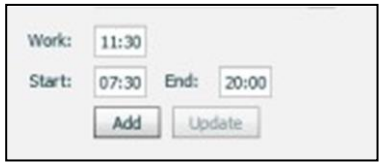
Adding a Personal Pattern (Continued from previous page)

TIP: To add regular unavailability to a personal pattern select the 'unavailability' button

5. The only box you need to complete is the 'Shift'. Select the Shift type in the drop down box.

6. Select the day you wish to add the shift on.

7. To adjust times from the standard. Click on the shift and Edit the Start and End time.



8. Click 'Add'. Repeat steps 5 & 6 until you have completed the persons pattern.

TIP: Changing someone's personal pattern will not change anything that has already been auto rostered. You may need to go back and make manual adjustments for these shifts. Personal patterns will take effect next time the auto roster is run.

Personal Patterns

(Part 3 of 4)

Adding a Personal Pattern continued…….

1. To set up a monthly recurring pattern select 'Monthly Recurring Activities'

2. The only box you need to complete is the 'Shift'. Select the Shift type in the drop down box you wish to add .

3. To adjust times from the standard. Click on the shift and Edit the Start and End time. Click 'Update'

4. Select the Recurrence criteria and the From date that the pattern commences.

5. Click 'Add'.

TIP: Changing someone's personal pattern will not change anything that has already been auto rostered. You may need to go back and make manual adjustments for these shifts. Personal patterns will take effect next time the auto roster is run.

Personal Patterns

(Part 4 of 4)

Editing a Personal Pattern

1. To Edit a Personal Pattern go to Personnel (Blue tab on the left hand side) and Person Search

2. Enter the person's surname and click FIND

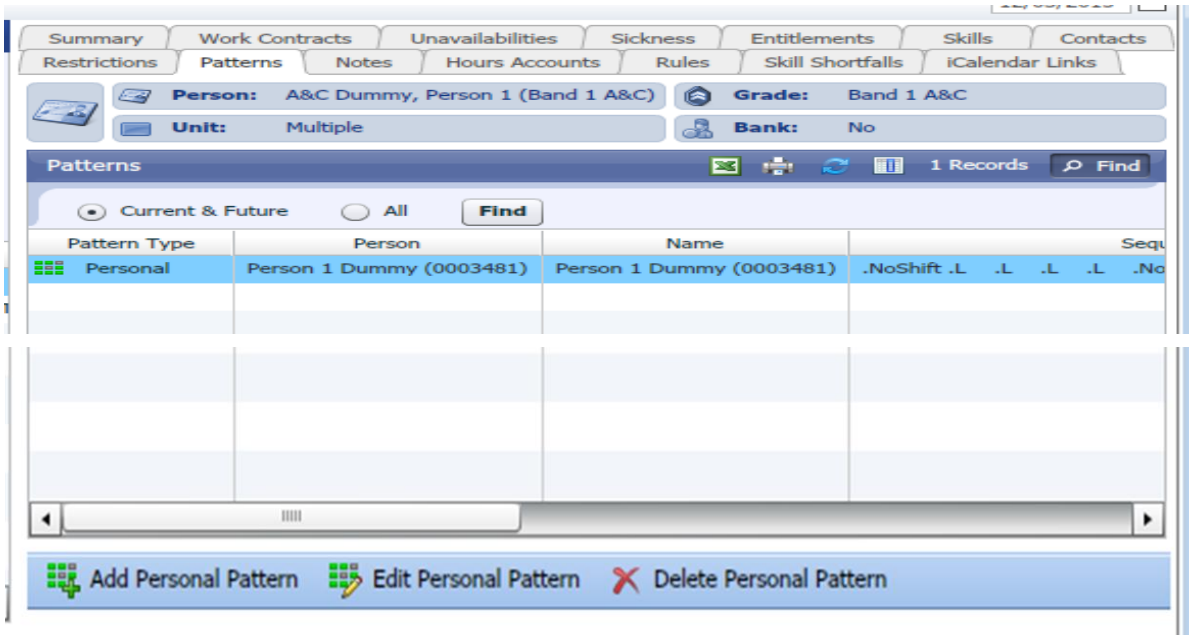
3. Select the 'Patterns' tab on the right hand side

4. Highlight the current Personal Pattern

5. Click on 'Edit Personal Pattern'

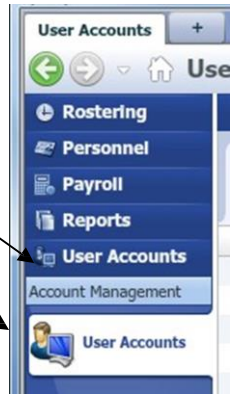
6. Update the personal pattern using steps 5-8 in the guide to adding a personal pattern

7. Select 'OK'



Reset EOL Passwords

Resetting Employee Online Passwords



TIP: The new password will be emailed directly to the member of staff

1. Click on the 'User Accounts' master group

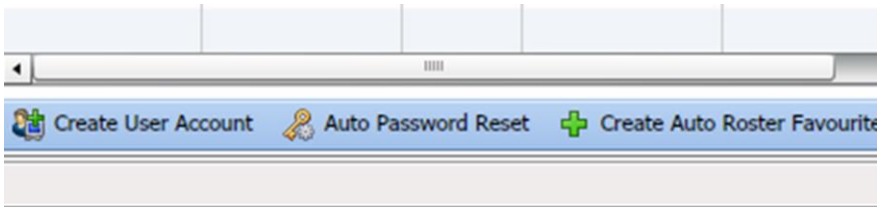
2. Select 'User Accounts' short cut

3. Use the filters to search for the user account and click on 'Find'

Alternatively, leave the filters blank and click on 'Find' to return a list of all User Accounts.

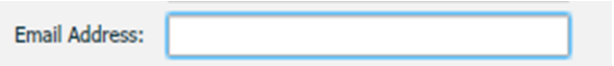
4. Highlight/click on the person's name

5. Use the scroll bar at the bottom of the screen to check if the staff member has an email address in the system.



If an email address is in the system follow steps 6 & 7

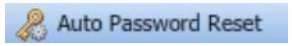
If an email is incorrect click on the staff's name and on the right hand side update the email address in the box required and Click 'SAVE' at the bottom.



Reset EOL Passwords

Resetting Employee Online Passwords Continued

6. Select 'Auto Password Reset' (located on the bottom blue tool bar)



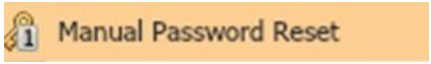
7. Click 'OK' to confirm you wish to proceed

TIP: The new password will be emailed directly to the member of staff

To Manual Password Reset:

8. Right click on the staff members name

9. Select 'Manual Password Reset'



10. Enter a temporary password for the member of staff (in both boxes)

11. Select 'OK'

Reports

Generating Reports

1. Click on the 'Reports' master group to show list of reports available.

2. Click on the reports you would like to view

3. Then click on the report you would like to run

4. Complete the required fields.

TIP: All fields that are outlined in orange are mandatory fields.

5. Select 'Run Report'

Reports

Generating Reports

6. Once you have click run report, to view the report click on the Green Arrow which is located top right hand side of the screen next to the home icon.

7. All reports requested will be listed. Select the reports you would like to view

8. Click 'View Report'.

9. Select 'open'

TIP: All Reports requested are saved for 7 days and can be viewed by clicking on the Green Arrow.

Reports
(Part 3 of 4)

Exporting Data to Excel

1. Click in the report

2. Click on the Excel icon

3. Your Excel report will open in another tab

Tip:
The Export to Excel Icon appears in many screens throughout HealthRoster

Reports

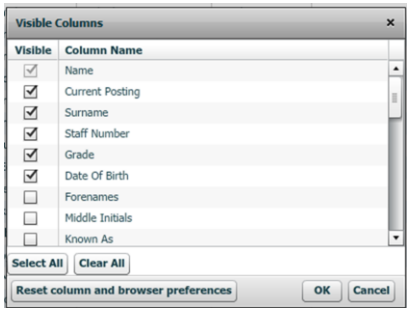
(Page 4of 4)

Changing Visible Columns

1. Click in the report

2. Select the Visible Columns icon

3. Select the columns to be made visible by placing a tick in the box or untick the columns to hide them.



4. Click OK

Tip:
The change visible columns Icon appears in many screens throughout HealthRoster

TIP: To re-order the columns click and drag the column heading