HealthRoster FAQs

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<u>Working with the roster:</u>

Q – When I logged into HealthRoster to create my next roster, I noticed that all the shifts had disappeared. Why?

Click on the [Show Vacancies] button on the top right of the screen. The shifts should appear.

Q – New staff who are working on my unit are not appearing on my roster. Why?

Check your View Date (top right hand corner of the screen). If your view date is set to a date before to the date the person actually started they will not be visible on your roster. Change the View Date to today's date and check again.

Q – Staff who started on my unit last week are still not appearing on my roster. Why?

Has a variation/starter form been completed, submitted and processed? HealthRoster is updated by ESR (the RosterTeam does not have to manually add contracts or make changes to contracts). Once the form has been fully processed the member of staff will appear at the top of your roster. Please see next question.

Q – New staff on my team are displayed above our unit manager/Band 7. What should I do?

Click on the person, then right click and choose Change Team. This will allow you to move the person down the roster to join other staff of the same grade/type. Make sure that the date in 'Change Team On' is correct for your needs. It will default to today. You may need to change the date to start on the first day of a new roster period (to avoid having the person showing on two lines on the roster).

Q – A member of staff has left/retired. Why is he/she still on my roster?

As long as a member of staff still has shifts on your roster in that roster period the staff member will remain visible to you. Any shifts which are appearing on the roster will prevent the assignment being closed. Contact Payroll to action leavers' form. Do not add an Unknown unavailability as it will prevent closure or bank working. In addition any shifts elsewhere worked during the same roster period will also be visible and that cannot be changed.

Q – We are running a Saturday clinic. This is a day we don't normally work. How do we get a shifts on that day so that we can allocate them to staff.

Move demand from previous rosters where it has not been used.

Q – Why are some of the worked shifts on my roster grey? And why can't I finalise them?

Any shifts on your roster which are appearing in grey have been worked on another unit. It is the other unit's responsibility to finalise the shift.

Q – I don't have the HealthRoster icons on the PC I'm using. What should I do?

Email the RosterTeam with a list of the PCs you use and we will ask for the icons to be added for you.

ghn-tr.rosterteam@nhs.net

Q – I am not able to allocate a bank shift to one of my own staff. Why?

Check whether the staff member has an active Bank contract. Click on the person on your roster. Choose Edit Person > Work Contracts. If the staff member has no Bank contract you will need to request one from Payroll.

Q – I have just realised I need to make changes to a finalised shift. What do I do?

If there is a blue dot on the finalised shift padlock, it means that the shift has been involved in a payroll run. If the change impacts on payroll because it affects enhancements you will need to complete the "unlock request grid" and submit it to the RosterTeam. If the shift does not impact on anything other than time balances, make simple written request to the RosterTeam. If there is no blue dot, it is a simple unlock which you can probably do yourself. Click on the shift, right click and choose Unlock.

Q – Time balances for some staff do not appear to be correct. What should I do?

Do not leave this in the hope that it will correct itself. Best practice: This requires monitoring at all stages of roster production. But if it has gone wrong you will need to investigate urgently.

Before you start this activity, check what the system thinks the person's contracted hours are by hovering over their name. It will reveal this pop-up box. NB the Contracted Time.
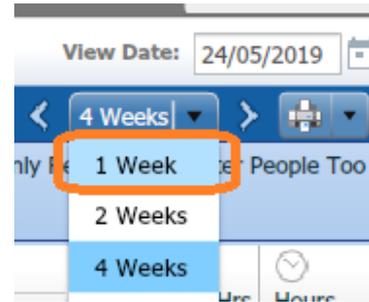
When you know how many hours they work per week (according to the system), you need to check your rosters week by week to make sure that you have been allocating the correct number of hours (per that person's contract). To do this, line up a four week roster in the usual way, then select the 1 week option as shown.

Now read the far right column (Hours left). Any value up or down will be within *this roster period*.

Correct any errors. See **Unlocking Guide**.

My roster template:

Q – We have new staff on our unit and don't have enough shifts for them. What should I do?

The RosterTeam can adjust your template, adding shifts as necessary. The request must come from your unit's budget holder.

Working with sickness and annual leave:

Q – Do I have to add leave entitlements again at the start of the new leave year?

No – the base hours you input last year will be carried over to the new year automatically. You only need to check if:

1) The staff member did not work the full year
2) The staff member increased or decreased their weekly hours
3) The staff member is now entitled to long service increasing eg. 5 years+ and 10 years+
4) Check the entitlement notes against the entitlement in case there were other adjustments (see next item).

Q – A member of staff has purchased more annual leave. What do I need to do on HealthRoster?

So that you will be able reflect the annual leave on your roster when it is taken, you need to add the purchased hours to the base hours of the leave entitlement. Make sure, however that you make a note about this against the relevant entitlement, so that you can adjust the following year. Remember to do this!

Q – I'm trying to allocate sickness/annual leave and I am getting this message:

> The unavailability [whichever] cannot be approved for [Staff member] because it has zero contracted hours assigned.

What does this mean?

The system is checking to see whether you have recorded the actual number of hours for the sickness or holiday day. If it is zero it will not allow you to save. Please note: It won't check that the value is correct for you, it will only check that the value input is not zero.

Q – I understand that orange shifts on a roster have broken rules, such as an NMC PIN has run out (amongst other reasons). But when the PIN comes through, the shifts stay orange. Why?

At the time when the roster was created, the missing PIN will have caused a shift to go orange. It is imperative that you check why they are orange and take appropriate action.

Each time you open the roster it does not check again to see whether the PIN is now in place. To do this, you have to right click on the roster and choose the option to Retest Rules on Roster . It will then check the rules again that had been previously broken, and if they now pass the test, the shifts will become green.

Partially approving my roster:

Q – When I partially approve my roster, roster analyser always has the percentage leave being taken in red or orange. I don't understand why.

The system is set up to monitor the proportions of annual leave being taken, in line with the Trust's rostering policy. If staff are not adhering to the rules, your roster analyser will reflect this. The current rule is a weekly unavailability of approximately 14%.

Printing a roster:

Q – My roster won't print. Why?

The most common reason why the roster will not print is because the roster has not been selected by clicking on the purple bar.

When you click the Print icon on HealthRoster it creates a printable file rather than sending the file straight to a printer. Allow HealthRoster to create the file for you, then you can a) save it, b) email it to yourself or someone else or c) send the file to the printer.

Split postings:

Q – I share a member of my team with another unit. How do I sort out Annual Leave entitlements?

Your member of staff is entitled to annual leave for each posting/contract he or she has. Work out the number of hours that belong to each contract and create a **posting** entitlement for each contract/posting not a **person** entitlement.

When the person books leave they MUST book it against the correct entitlement. This is an option in the EOL interface – they simply choose the right contract from the dropdown box before adding the number of hours leave they wish to take and submitting the request.

Q – One of my staff, who has a split posting, is taking annual leave/is sick. How do I record this whilst still reflecting the hours against the correct unit?

Whether sickness or annual leave, you must make sure you record the hours against the correct unit/posting to ensure that time balances remain accurate.

Work Time							
Week Start 06/05/2019 ▼ Refresh **Reset to default values**							
Posting	06/05 Mo	07/05 Tu	08/05 We	09/05 Th	10/05 Fr	11/05 Sa	12/05 S
Bank (Bank Monthly - Band 6 Nurse)	00:00	00:00	00:00	00:00	00:00	00:00	00:0
GRH Recovery 76022 (Agenda For Change Monthly -	09:30	09:30	00:00	00:00	00:00	00:00	00:0
GRH Head & Neck Theatre - Pay Only 74722 (Agenda	00:00	00:00	09:30	07:30	07:30	00:00	00:0

AutoRoster

Q – Sometimes, when I autoroster, a staff member's shifts go purple. I understand that they are cancelled, but why has this happened?

Drop a normal shift over the cancelled one and it will immediately go orange. When you hover over the orange shift you will be able to see the rule that was broken (normally, but not always, the lack of a valid NMC PIN).

Always check the reason for a cancellation – don't just ignore it.

Just allocate shifts manually and retest the rules on the roster once the PIN is in place.

Q – Sometimes, when I autoroster, there aren't enough shifts left to accommodate a member of staff's personal pattern. Why?

Before you autoroster you should always ensure that staff annual leave has been added by your teams through EOL. This will mean that there will be more shifts available to allocate.

When you are ready to autoroster you have to carry out the activities in a specific order to ensure that your roster will auto-populate as required.

1) AutoRoster personal patterns
2) AutoRoster nights (if appropriate)
3) AutoRoster days

The Home page:

Q – My home page is telling me that there are two unfinalised shifts on my roster. I have checked the Unfinalised Shift report, but nothing is showing. I don't understand.

The detail on the home page adds together both unfinalised shifts and unfinalised unavailabilities. When you looked at the report did you switch the tab on the top right to see if the system was actually reporting unfinalised unavailabilities?

Making requests:

Q – My staff are telling me that they cannot make the same number of requests against a roster. Why are there differences?

The number of requests that can be made are dependent on the number of weekly hours on their contract.

Staff Working Hours	Maximum Number of Requests per 4 Week Roster
32.1 - 37.5 hours	5 requests
22.1 - 32 hours	3 requests
12.1- 22 hours	2 requests
1 - 12 hours	1 request

Q – One of my staff works full-time but is still only able to make 4. Why?

Check if they have split postings.

If your staff member works 30 hours on one posting and 7.5 hours on another, they would only be able to make 3 requests against the larger contract and 1 against the smaller one – totalling 4.

If the member of staff does not have split postings, contact the RosterTeam.