

Flexible Working - Roster Guide

Rostering Overview

LUHFT currently uses Allocate Optima (Health Roster) and Employee Online electronic rostering systems. Optima breaks each year into 13 four-week roster periods, that are built and approved in accordance with the trust's rolling roster timeline.

Every four weeks Roster Support open a new roster period, roughly 100 days prior to the period start date. This opens a 30-day window for staff to submit requests for duties or non-working days in that period through Employee Online. These requests are unlimited, but subject to local establishments and local management approval. After a request window closes, no further requests can be submitted for that roster period. Local management must then complete and approve the roster in line with KPI's, with a minimum 42-day lead time to the first date of the roster period. No duties should be assigned by management before the request window closes.

Fixed Patterns and Auto Roster

Fixed working patterns (either personal or shared) should not be assigned by the standard rostering process above but should be input to roster via Auto Roster to increase the speed and accuracy with which these patterns are rostered.

Previously, fixed patterns have been communicated directly from local roster managers to Roster Support either at roster onboarding or ad-hoc, via email or telephone. Moving forwards, these requests must now be submitted to ESR and the approved patterns will be communicated to Roster Support for input from ESR. You can access the ESR supportive guide using the QR code at the end of this document.

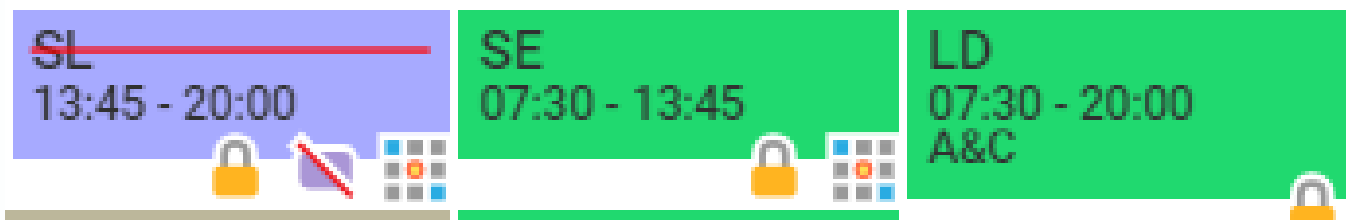
Roster Support are responsible for setting up the fixed working patterns in Optima, but it will be the responsibility of local roster managers to roster these patterns out each period.

To roster out fixed patterns, please follow the below instructions when a new roster period is opened.

- Right click on the purple roster bar for the relevant period > Auto Roster.
- You will notice that the '1. Shared & Personal Patterns' radio dial is ticked > OK.
- The purple roster bar will turn amber. Refresh until the bar returns to purple, signifying that the auto-roster run is completed.
- Duties that have auto-rostered show a grid icon as below and should be green. Any purple duties have failed to auto-roster. In this event, please contact Roster Support for advice.

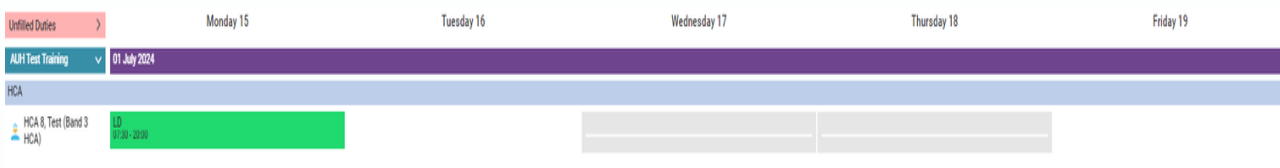
Select Auto Roster Build

-  1. Shared & Personal Patterns
-  2. Nights Only
-  3. Final Run
-  4. DO Only
-  Medics



Working Restrictions

Roster Support will also format the roster to reflect agreements around staff availability, such as staff members being unable to work specific days. In the below scenario, this staff member has an agreement to not work Wednesdays or Thursdays, so those dates are greyed out. You can still manually assign duties on those days.



A staff member may have a different agreement in place to not work specific times, e.g. they cannot work between 20:00 – 08:00. Any duty assigned outside of their agreed working hours will be orange, signifying that a warning has been triggered. Left click on the duty to see further details of the warning in the 'Summary' tab, as below. This will not stop you assigning and finalising the duty.



Global Working Hours Rule

The duty ends at 08:00. The person cannot work later than 20:00, due to their working restrictions.

Working From Home

If an agreement is in place for staff members to work from home, there are multiple ways to assign this, depending on local approach. Please contact Roster Support for advice if needed.

Using a duty:

- Add a note to the assigned duty to confirm the duty was WFH, by right-clicking > Add Note.
- Roster Support may create a WFH duty within your unit establishment if appropriate.

Using an unavailability:

- Right-click on the assigned duty > Add Unavailability.
- Set Group: 'Working Day'; Reason: 'WFH – Working From Home'.
- Ensure that the Work Time section reflects the correct number of hours worked > OK.

Group *		State *	
Working Day v		Approved v	
<hr/>			
Reason *			
WFH - Working From Home v			
<hr/>			
Start *		Duration *	
09/07/2024 📅	07:00	1	- +
<hr/>			
End *			
09/07/2024 📅	23:59		

Work Time Refresh

Week Start	08/07/2024 v							Reset to default values
Posting ↑	Mon 08/07	Tue 09/07	Wed 10/07	Thu 11/07	Fri 12/07	Sat 13/07	Sun 14/07	1
AUH Test Trair		07:30						(

Flexi-Time

Electronic rostering is used to track hours balances, so the roster is a good tool for managing Flexi-Time.

Any hours assigned in the roster are calculated against contracted hours to determine a rolling hours balance. When viewing this in Optima, please ensure that you can view full calendar weeks – i.e. the first column must be a Monday, and the last column must be a Sunday. If this is not done, incorrect balances will be displayed.

There are two columns on the View Rosters page that relate to hours balance: 'Hrs Left' and 'Net Hrs Left'. Hrs Left considers the hours balance for the on-screen period only, whilst Net Hrs Left is a rolling balance and therefore shows staff members' total aggregate hours balance with the trust. The balance is effective at the end of the Sunday date in the final column.

- A minus balance shows hours owed to the staff member.
- A positive balance shows hours owed to the trust (staff has worked under-contract).

In the example below, the Hrs Left column shows that the staff member has worked three hours under their contract in the on-screen weeks, but the trust still owes that staff member an additional two hours and fifteen minutes at the end of that period.

O/T Hrs	Hrs Left	Net Hrs Left
-	03:00	-02:15
-	03:00	-02:15

If a staff member is taking back time owed to them, please use the Add Unavailability option:

- Set Group: 'Other Leave'; Reason: 'TOIL – Time Owing'.
- Set the start and end date and time.

Group *
 Other Leave v

State *
 Approved v

Reason *
 TOIL - Time Owing v

Start *
 18/06/2024 📅 14:00

Duration *
 1 - +

End *
 18/06/2024 📅 17:00

Work Time Refresh

Week Start 17/06/2024 v Reset to default values

Posting ↑	Mon 17/06	Tue 18/06	Wed 19/06	Thu 20/06	Fri 21/06	Sat 22/06	Sun 23/06	T
AUH Test Train		00:00						0

- Ensure that the hours in Work Time are 00:00 so that this period is deducted from their hours balance.

Please use this document as a high-level guide only and email Roster.Support@liverpoolft.nhs.uk or call 0151 706 0715 for further guidance.

For ESR guidance use this [link](#) or the QR code to the right.

