Health Roster V.11 User Guide

https://luh.allocate-cloud.co.uk/HealthRoster/LUHLIVE/Login.aspx?client=eleven

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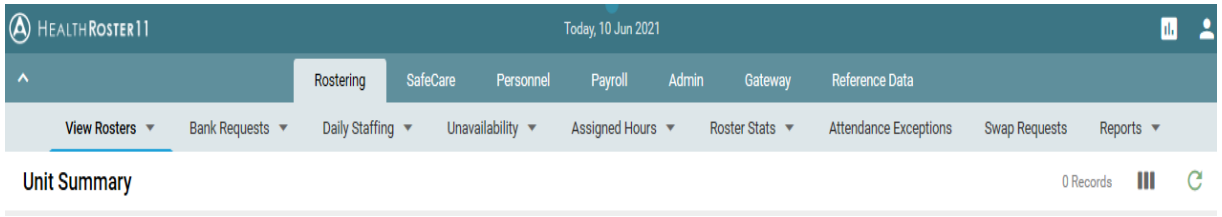
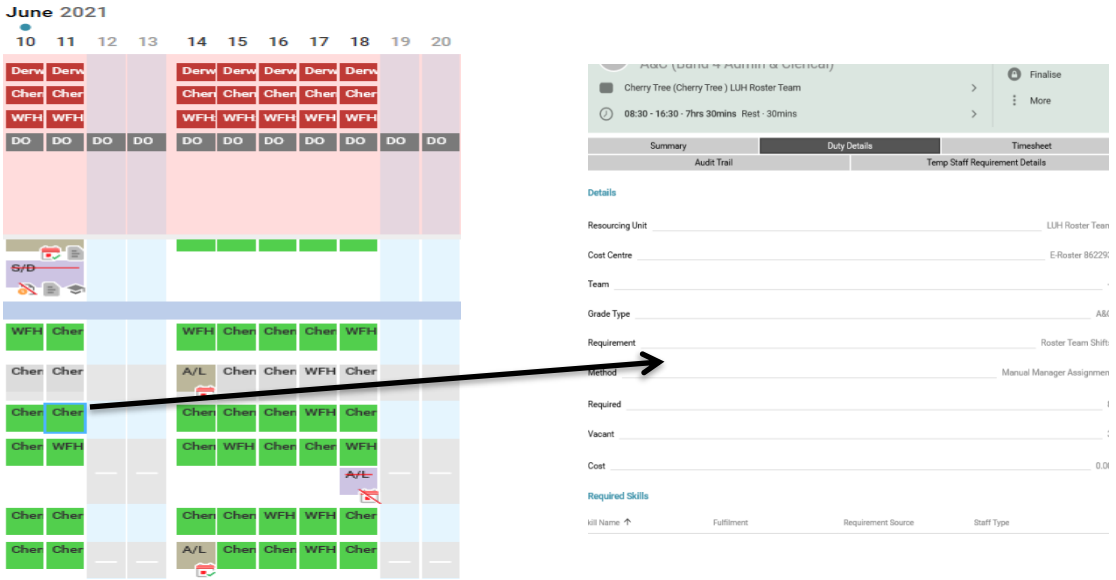
Navigating the Roster

1.



2.



On health Roster Version 11, the tab bar appears on the top rather than down the left hand side. By clicking into each tab, sub options will appear below as shown in image 1. *(the unit summary is the first page that will appear when you log into health roster)*

When Viewing a shift in the 'view rosters' page, clicking on the shift will open up page on the right hand side of the screen which will contain all of the shift information. Here you will find all the options to make any amendments and find any info about the staff member or shift. *(clicking 'more' will open the drop down list will all options)*

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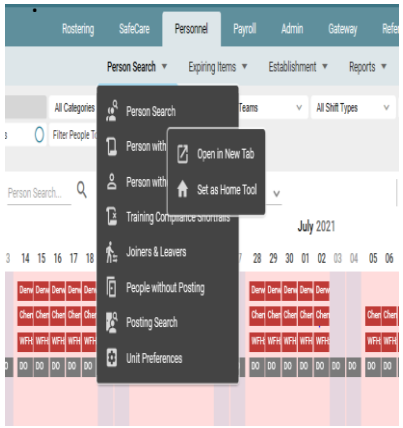
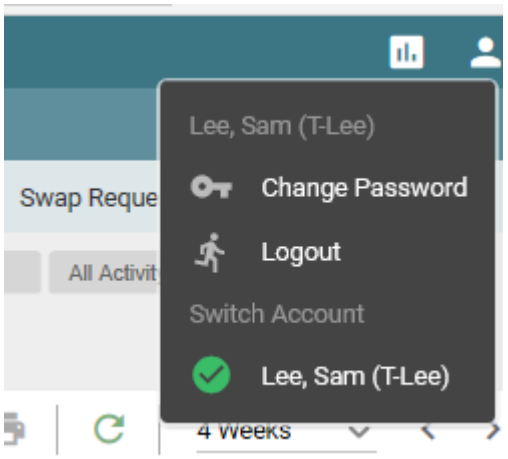
Navigating The Roster

3



When on a page, e.g. 'View Rosters' and need another screen open at the same time, e.g. 'person search', go to the tab you need and before you proceed, right click and select 'open in new tab'.
This way you can open multiple screens at once. Doing this allows you to flick between different sections of the roster at any time.

4.

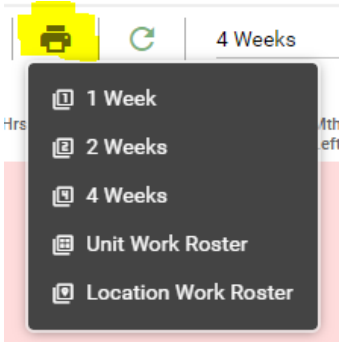


In the top right hand corner of whatever screen you are, if you click the 'person' icon you can change your password or log out once you have finishing using Health Roster.

5.

This bar will appear when clicking on shifts on your roster. Clicking more will provide additional options.

6.



When highlighting a shift, this symbol will become available to click. It can run detailed reports of the staff who have been input on your roster for the dates you are looking at.

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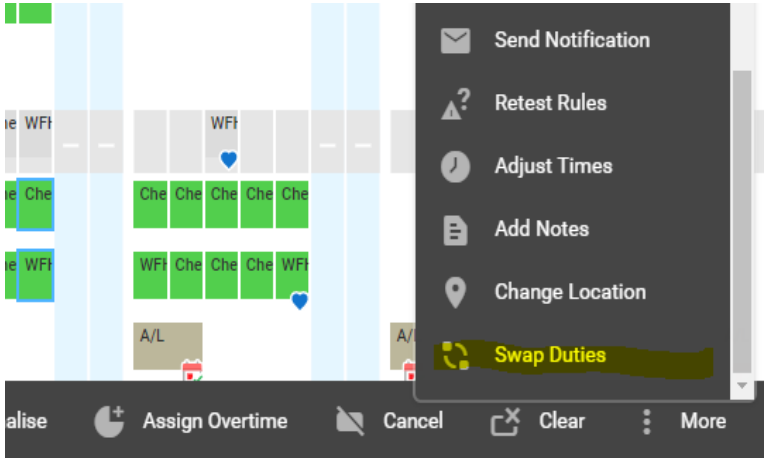
Swapping Duties

With dropped duties on v.11, by selecting the two duties you wish to swap it will come up with the option bar below. Select ‘more’.



‘more’ will produce a drop down list, by just clicking ‘swap duties’ the two highlighted shifts will change places on the roster.
(holding down the ‘control key’ allows you to select multiple shifts)

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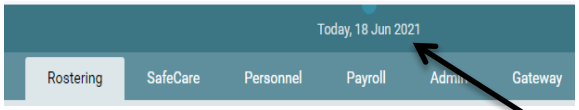
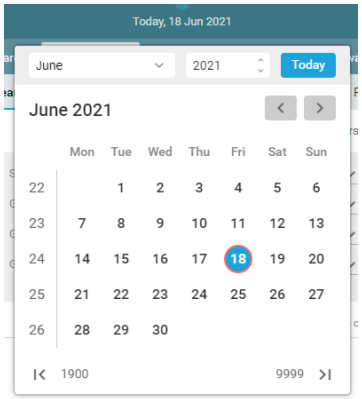
Adjusting Date and Time Ranges

1.



When logging into the roster, the date will default to the current date at the very top of the page.

2.

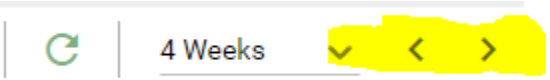


By clicking on the date the calendar will appear. Here you can adjust the date to look back at previous rosters or go forward to plan new roster periods.

3.

On the 'view rosters' page, you can adjust the time range that you want to view. Clicking the down arrow on the highlighted image above, you will have a choice of time ranges you wish to view in. This can make planning your roster easier.

4.



By clicking the arrows highlighted above, you can click to move forward or backwards by however long you have your time range set to.

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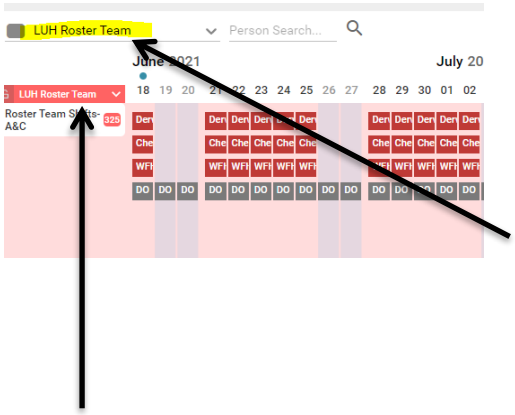
Assigning Shifts

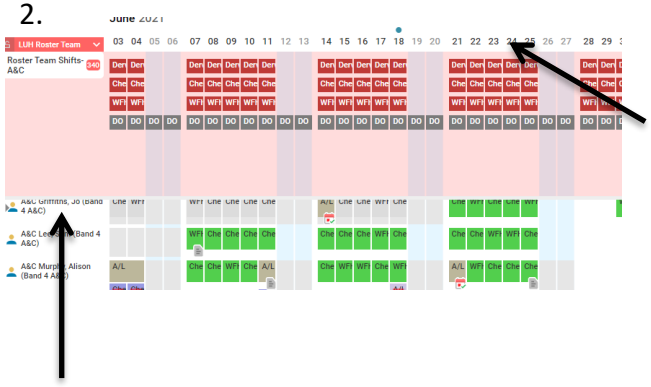
1.



From your options along the top, select ‘rostering’, ‘view rosters’. The relevant rosters will have been assigned to your access. The highlighted image shows an example of a chosen roster being selected.

By clicking this red bar, it will show your ‘available duties’ which are the red boxes which can be seen in the above image. *These duties are built into your roster and cover the daily allocation needed to staff your department correctly.*

2.



The list of staff that sit within your roster appear down the side. You can drag one of the available shifts on the relevant date to the individuals name and it will put the shift in place for you.

The date bar runs across the top. You can move the date along by holding down anywhere along the date line and dragging your mouse left/right.

shift drop.MOV

Click image to view example of shift being dropped.

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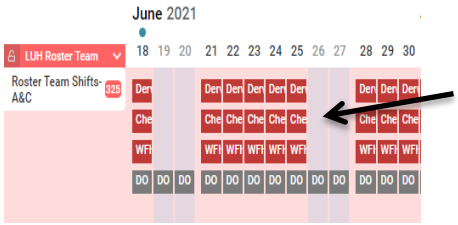
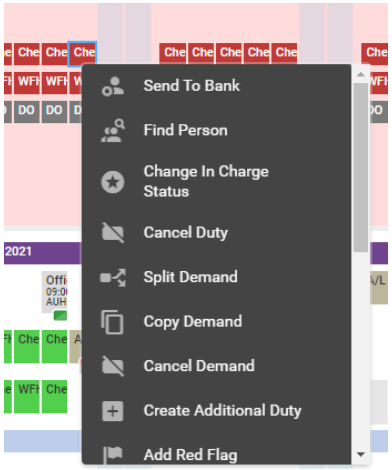
Assigning Bank Shifts

1.



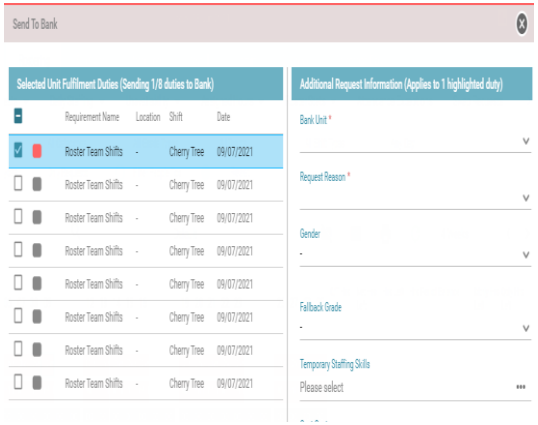
Select the relevant shift on the relevant date from the available duties at the top of your view.

2.



When you have found the shift you wish to send bank, right click on it and simply select ‘sent to bank’

3.



After selecting ‘send to bank’, you will come to this window where you then fill in the ‘unit’ and ‘request reason’. Once you have filled in the information just press ‘ok’.

4.

Once you have done this, the shift you have sent to bank will appear with this symbol, this represents a bank shift.

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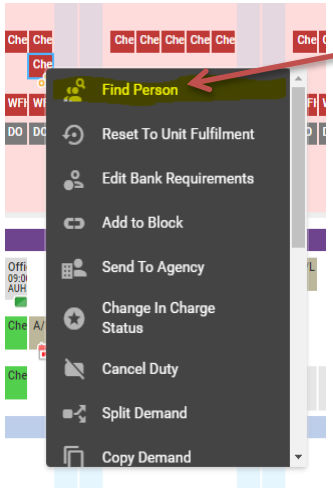
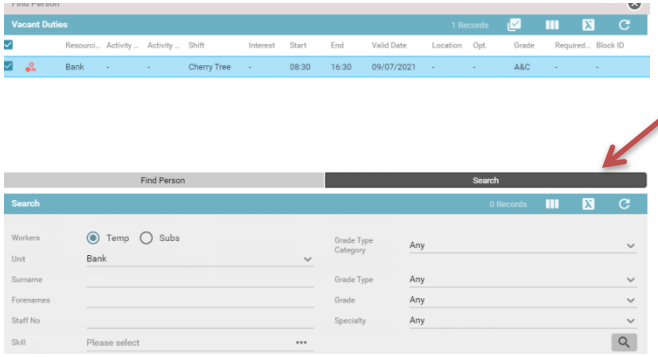
Assigning Bank Shifts

5.



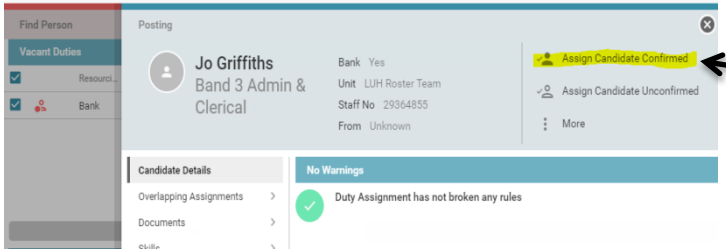
Once you have created the bank shift, right click it and select 'find person'

6.



When clicking 'find person' this screen will appear. Be sure to click the 'search' function to be able to request the staff member you wish to book.

7.



Once you have found the person you wish to book into the shift and select them, this window will appear. It will show you if there are any warnings with the booking such as wrong grade type.

Once you have found the correct person and are ready to book them into the bank shift, select 'assign candidate confirmed' and it will drop the shift into place on the roster.

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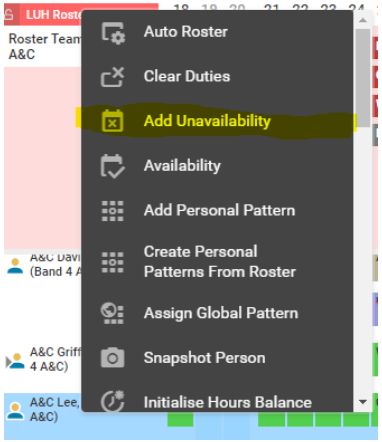
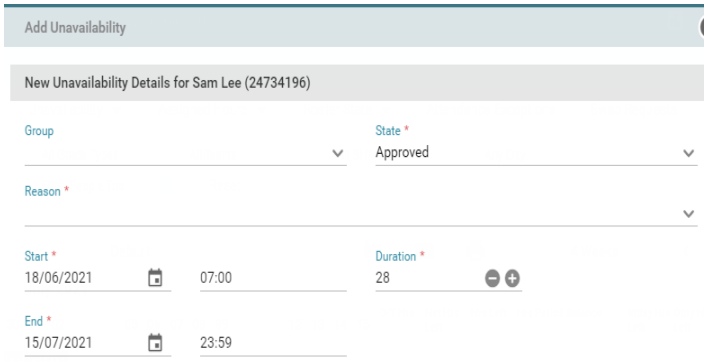
Adding Unavailabilities

1.



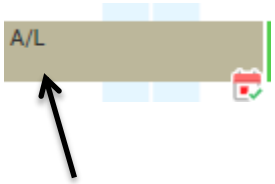
Go to your 'view rosters' screen. Find appropriate staff member from the list of names down the left hand side of the screen. Once located right click and select 'add unavailability' from the list.

2.



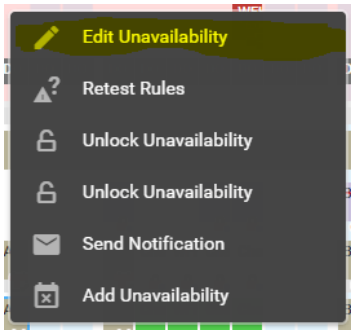
Select type of unavailability from the 'group' drop down, this will include Annual Leave, Sickness, Study Leave etc.
Select the appropriate reason and enter the start and end date of the unavailability.
Once done, just press 'ok'.

3.



Once done, the unavailability will appear on the roster just as the shifts would. The type of unavailability will be displayed on the bar that is inputted onto the roster.

4.



To edit dates or hours on an unavailability, simple right click on the unavailability and select 'edit unavailability'.

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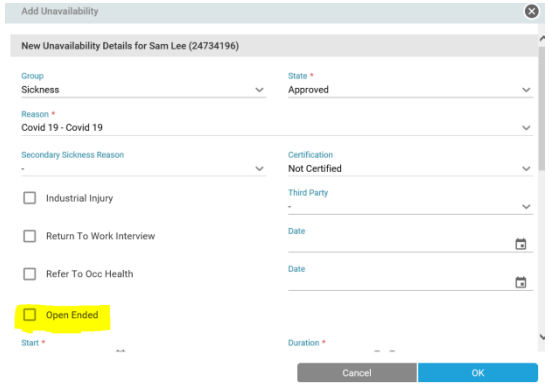
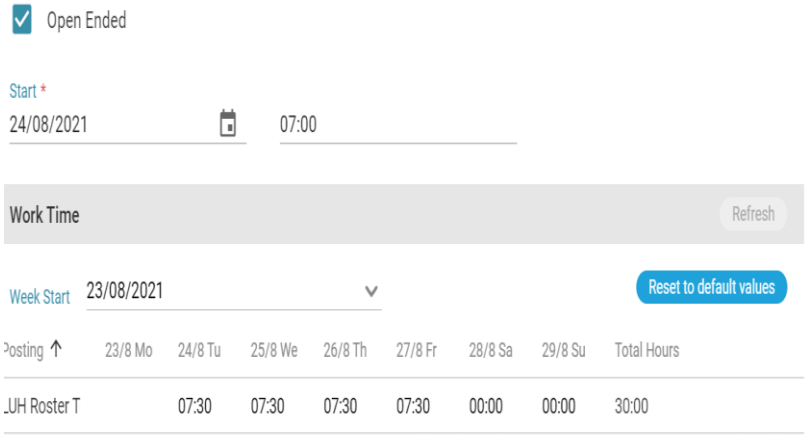
Open Ended Sickness

1.



When adding a sickness, go to 'add unavailabilities' as shown in the previous slide.

2.



In the image shown above, there is an option for open ended sickness. By clicking this, the sickness, if the staff member has given no end date, will automatically extend the sickness. This will stop you having to request for the sickness to be unlocked in order to extend.

Just enter the start date and check that the hours per day are correct for the staff member. Then just press ok and the sickness will drop onto the roster. To end the sickness, right click and 'edit unavailability' click the open ended box to untick and you will then be able to add an end date.

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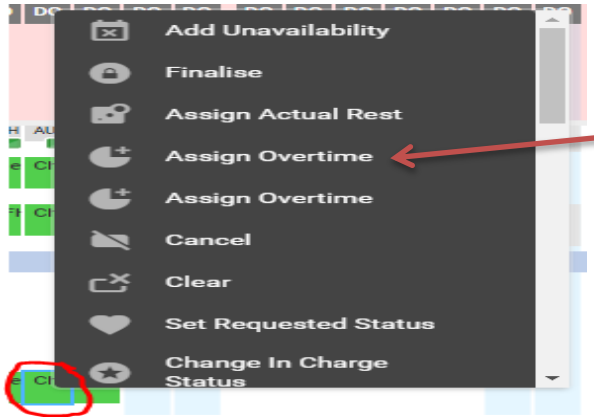
Assigning Overtime

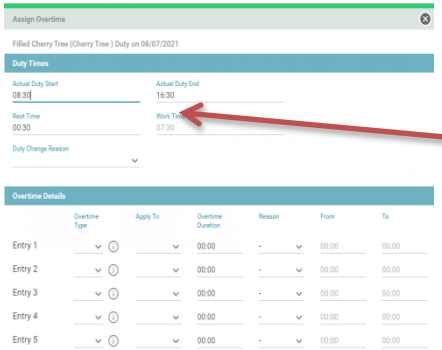
1.

To assign over time, firstly you need to input a shift from your available duties and drop it next to the person you are assigning overtime for.



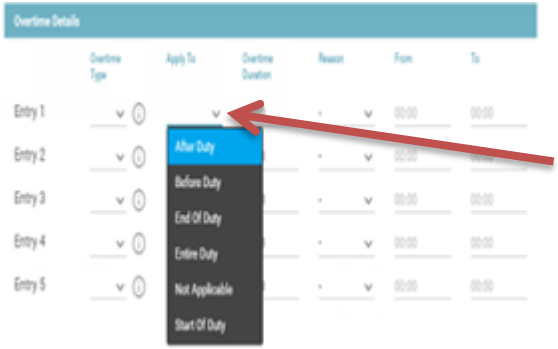
Once the shift has been added in, right click on it and press ‘assign overtime’.

2.



The Overtime form will appear as shown. Adjust the times of the shift in this section, entering your start and end date.

3.



If you have adjusted the times as shown in image 2, you can then select what part of the duty you wish to assign the overtime to from the ‘apply to’ drop down shown here in image 3.

When done, press ok. The shift will show with a gold coin icon which represents Overtime.

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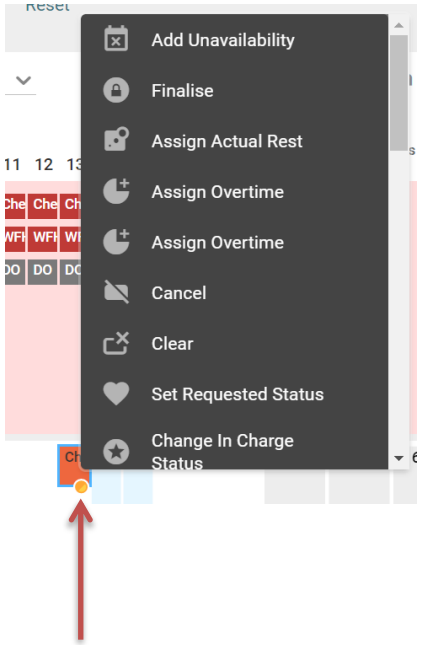
Removing Overtime

4.



Here a shift with overtime assigned to it has been dropped onto the roster. This can be seen by the 'gold coin' icon on the bottom left corner of the shift.

Right clicking on the shift will bring up the list as shown here. To remove the shift, press 'clear' and it will send the shift back up to the available duties section and reset the shift to its default setting. If you select cancel, the shift will turn purple and stay dropped on the roster, doing this will show you that a shift was entered but then cancelled.

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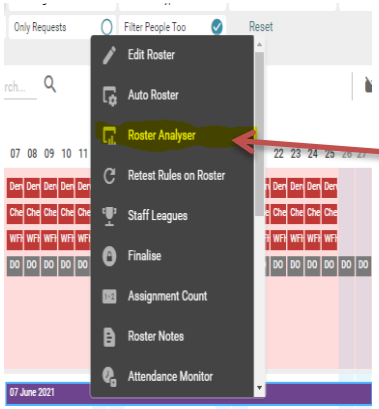
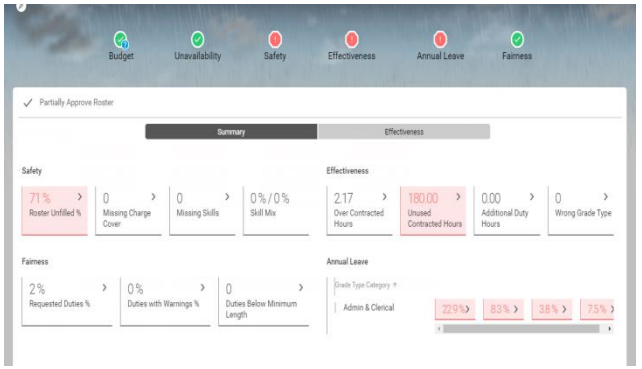
Roster Analyser & Approving The Roster

1.



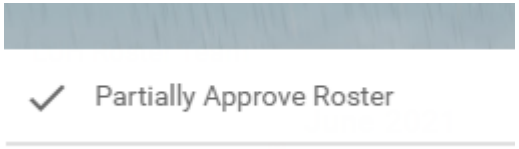
Open the 'view rosters' page and right click on the **purple bar** to bring up the list as shown. Select the 'Roster Analyser' option.

2.



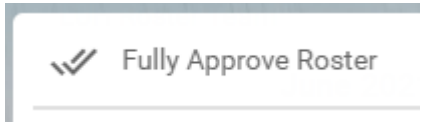
The Roster Analyser will let you view how effectively you have rostered your staff. It will break down all the data which has been inputted by the manager.

3.



In the Roster Analyser window, you will see the partially approve option. Once you are happy with your roster, the partially approve will have to be ticked.

4.



Once you have partially approved, the option will change to fully approve roster. This needs to be ticked as well. Doing this will allow staff to view their duties on employee online.

5.

A fully approved roster will show as above. Two green ticks will appear on the purple bar.

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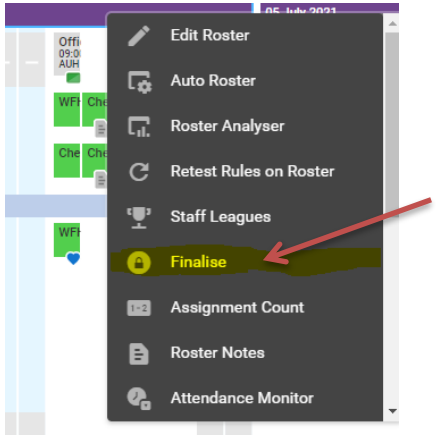
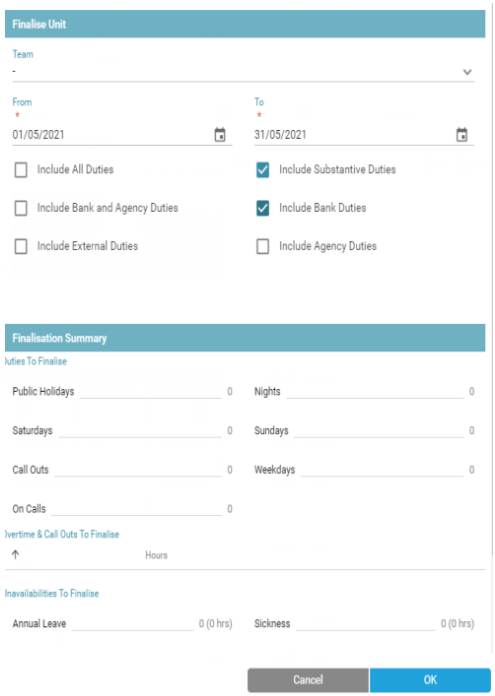
Finalising the Roster

1.



The roster must be finalised before the cut off for payroll. If you right click the purple bar, the option of 'finalise' will appear in the drop down list.

2.



The finalising window will appear as shown. Be sure dates are set from the beginning to the end of the month you are finalising. If you have input bank duties on the roster, tick include bank duties.

3.

Once finalised, the duties and unavailabilities will appear with padlocks, representing that they have been finalised.

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