

Staff Rota System - Features & Benefits Guide ## What's In It For Me (WIIFM) **Version:** 1.2 **Date:** 21 January 2026 **Purpose:** Comprehensive overview of system capabilities tailored to each role --- ## ☰ Quick Reference by Role | Role | Key Benefits | Top Features | Time Saved (Per Person) | Annual Value (Total) |

				Head of Service
	Strategic oversight, workforce optimization, regulatory compliance, cost control Executive dashboard, CI integration, staffing forecasts, budget tracking **35-45 hours/month** **£21,000-£27,000** **Service Manager** Quality improvement, inspection readiness, performance tracking CI reports, improvement plans, compliance dashboards 10-15 hours/month each £24,000-£36,000 (5 SMs) **Operations Manager** Day-to-day efficiency, staff allocation, leave management Rota creation, auto-approvals, shift patterns, smart matching **160-180 hours/month each** **£605,000-£680,000 (9 OMs)** **Care Staff** Easy shift viewing, simple leave requests, mobile access Mobile rota view, one-click leave booking, AI assistant 2-3 hours/month each £72,000-£108,000 (150 staff) **Total Organization-Wide Annual Savings: 22,320-26,820 hours = £731,000-£860,000** --- ## ☰ HEAD OF SERVICE (HOS) ### Strategic Leadership & Workforce Planning ### What's In It For Me? **I need strategic visibility across all 5 homes to ensure quality, compliance, and financial performance while optimizing workforce allocation, controlling costs, and preparing for inspections.** ## Your Dashboard Features #### 1. **Executive Strategic Dashboard** **Benefit:** Complete portfolio overview in one screen **What You Get:** - ☰ Real-time staffing levels across all 5 homes (2,700+ users: 821 active staff) - ☰ Budget performance (actual vs forecast per home) - ☰ Critical alerts (understaffing, WTD violations, compliance gaps) - ☰ Trend analysis (12-month historical comparisons) - ☰ Home performance rankings (quality scores, CI ratings) **Example:** "Every Monday morning at 9 AM, I open the HOS dashboard and immediately see that Hawthorn House has 3 overdue training records and Riverside is trending 2% over budget. I can drill down to details or delegate to managers - all within 5 minutes instead of waiting for weekly reports." **Time Saved:** 15-20 hours/month (no manual report compilation) --- #### 2. **Care Inspectorate Integration** **Benefit:** Automated inspection readiness and regulatory compliance **What You Get:** - ☰ Latest CI inspection reports for all 5 homes (auto-imported annually) - ☰ Quality Framework ratings (4 themes: Care/Support, Environment, Staffing, Leadership) - ☰ Requirements tracking (mandatory improvements from CI) - ☰ Recommendations monitoring (suggested improvements) - ☰ Inspection trend analysis (rating changes over time) - ☰ Priority home identification (e.g., Hawthorn House care planning: 3 Adequate) **Example:** "Before the CI visit to Victoria Gardens, I pulled up their inspection history showing consistent 5 (Very Good) ratings and zero complaints. I prepared a portfolio summary showing we have zero enforcements across all homes - evidence of strong governance." **Time Saved:** 10-12 hours per inspection cycle (automated data gathering) --- #### 3. **ML-Powered Service Improvement Planning** **Benefit:** Evidence-based quality improvement with automated annual planning **What You Get:** - ☰ Automated improvement plans generated every April 1st - ☰ 12-month operational data analysis (109,000+ shifts analyzed) - ☰ Prioritized actions (CRITICAL/HIGH/MEDIUM/LOW) - ☰ Best practice identification (e.g., learn from Victoria Gardens' 5/5 rating) - ☰ Predicted outcomes (ML forecasting of rating improvements) - ☰ Board-ready reports (PDF exports for governance meetings) - ☰ Evidence linking (actions tied to compliance data, training records, audits) **Example:** "The system automatically identified that Hawthorn House care planning dropped from 4 (Good) to 3 (Adequate). It generated a CRITICAL priority action plan with 3-month timeline, success metrics (78.9% → 95% review compliance), and linked it to 12 overdue care plan reviews. I presented this to the Board with zero manual preparation." **Time Saved:** 30-40 hours annually (vs manual improvement planning) --- #### 4. **Organizational Improvement Plan** **Benefit:** Portfolio-wide quality improvement strategy **What You Get:** - ☰ Cross-home performance comparison - ☰ Organizational priorities (aggregated from all 5 homes) - ☰ Shared challenges identification - ☰ Shared successes replication - ☰ Best performing homes showcase - ☰ Homes needing support flagged - ☰ Portfolio-wide metrics (aggregated compliance, training, quality)			

Example: "The organizational plan revealed medication management as a cross-cutting issue (complaints at 3 homes). Instead of addressing it separately at each home, I commissioned a portfolio-wide medication audit and training program - solving it once for all homes."* --- ##### 5. **Multi-Home Portfolio Management** **Benefit:** Manage 5 care homes as one integrated service **What You Get:** - ⚫ Unified view of all homes (Meadowburn, Hawthorn House, Orchard Grove, Riverside, Victoria Gardens) - ⚫ Total staff count: 500+ across all homes - ⚫... Combined shift coverage: 109,000+ shifts tracked - ⚫^{1/4} Cross-home resource allocation visibility - ⚫ Comparative performance metrics - ⚫,, Cross-cover opportunities identification **Example:** "I noticed Riverside had 3 agency shifts next week while Meadowburn had 2 overstaffed units. I asked the planning team to offer overtime to Meadowburn staff to cover Riverside - saving £450 in agency fees."* --- ##### 6. **Financial Oversight** **Benefit:** Budget control and cost optimization **What You Get:** - ⚫^o Budget vs actual tracking per home - ⚫[%] Agency usage rates (track cost reduction) - ⚫ Comparative Overtime analysis (identify patterns) - ⚫ Payroll anomaly detection - ⚫[^] Trend forecasting (predict budget pressures) - ⚫ⁱ Cost alerts (overspend warnings) **Example:** "Dashboard showed agency usage dropped from 12.3% to 8.2% over 6 months - £47,000 annual saving. I used this data in the quarterly finance meeting to justify investment in permanent recruitment."* --- ##### 7. **Compliance & Risk Management** **Benefit:** Proactive risk identification and mitigation **What You Get:** - ⚫... Training compliance across portfolio (target: 95%+) - ⚫ Supervision compliance tracking (target: 90%+) - ⚫ⁱ WTD (Working Time Directive) violation alerts (zero target) - ⚫ Care plan review compliance (target: 95%+) - ⚫ Real-time alerts for critical issues - ⚫ Comparative Risk heatmap (identify highest-risk areas) **Example:** "System alerted me that one home had 5 staff with expired first aid certificates. I immediately contacted the manager - certificates were renewed within 48 hours, before the CI inspection."* --- ##### 8. **AI-Assisted Decision Support** **Benefit:** Natural language queries for instant insights **What You Get:** - ⚫ⁿ Ask questions in plain English ("Which home has the highest turnover?") - ⚫ Instant data retrieval (no SQL needed) - ⚫[^] Trend analysis on demand - ⚫ Ad-hoc reporting - ⚫ Complex query support **Example:** "I typed 'Show me all homes with training compliance below 90%' - got instant results showing Hawthorn House at 87.2%. Drilled down to see 8 staff needing moving and handling refresher."* --- ##### 9. **Multi-Home Staffing Dashboard** **Benefit:** Real-time workforce visibility across entire portfolio **What You Get:** - ⚫ Total Current staffing levels (all 2,700+ users across 5 homes) - ⚫... 4-week forward planning visibility - ⚫ Understaffing alerts (automatic flagging) - ⚫ Comparative Skill mix analysis (RN vs HCA vs support staff ratios) - ⚫,, Cross-cover opportunities - ⚫[^] Capacity planning tools **Example:** "Every Monday I review the 4-week forecast. System flagged that Orchard Grove will be short 2 RNs in week 3 due to annual leave. I reallocated permanent staff from Riverside (who had overstaffing that week) - avoided £600 in agency costs."* **Time Saved:** 15-20 hours/month (automated staffing analysis) --- ##### 10. **Budget & Cost Optimization** **Benefit:** Precise cost control and financial planning **What You Get:** - ⚫^o Real-time budget tracking per home - ⚫[%] Agency spend analysis (daily/weekly/monthly) - ⚫ Comparative Overtime cost monitoring - ⚫ Cost per shift calculations - ⚫[^] Budget forecast modeling - ⚫ⁱ Overspend alerts (before budget breaches) - ⚫^Z Savings opportunities identification **Example:** "Dashboard showed Hawthorn House was trending 8% over budget due to agency usage. I ran a 'what-if' scenario showing that offering 10% overtime premium to permanent staff would save £3,200/month vs agency rates. Implemented immediately."* **Time Saved:** 10-12 hours/month (automated budget analysis) --- ##### 11. **ML-Powered Demand Forecasting** *(Coming: April 2026)* **Benefit:** Predictive staffing needs based on historical patterns **What You Get:** - ⚫[^] Sickness absence predictions (ML-based) - ⚫ Peak demand forecasting (seasonal patterns) - ⚫^Z Optimal staffing level recommendations - ⚫... Long-term workforce planning - ⚫ Attrition risk identification - ⚫^j Proactive recruitment planning **Example:** "System predicted that December sickness will increase to 6.8% (vs current 4.3%). I pre-approved overtime for willing staff and lined up bank staff - avoiding December agency crisis."* --- ##### Your Weekly Routine **Monday 9 AM: Strategic & Workforce Planning (60 minutes)** 1. Open HOS dashboard -

check critical alerts 2. Review 4-week staffing forecast (all homes) 3. Check budget vs actual performance 4. Identify and resolve critical staffing gaps 5. Review improvement plan progress

Wednesday 2 PM: Mid-Week Check (20 minutes) 1. Review sickness call-ins and adjustments 2. Monitor agency usage trends 3. Check compliance alerts 4. Address escalated issues

Month-End: Strategic Review & Reporting (45 minutes) 1. Export executive summary for Board 2. Review financial performance (all homes) 3. Check CI inspection status 4. Update organizational improvement plan 5. Identify next month's priorities

Total Time Investment: 3 hours/month for complete strategic oversight + workforce optimization ---

Friday 3 PM: Week Close & Next Week Prep (30 minutes) 1. Review week's costs (actual vs forecast) 2. Prepare next week's rota 3. Identify optimization opportunities 4. Update forecasts

Total Time Investment: 1.75 hours/week for complete workforce planning --- ## ðŸŽ—

SERVICE MANAGER (SM) ### What's In It For Me? **"I need to ensure my home meets Care Inspectorate standards, maintains quality, implements improvement actions, and is always inspection-ready."** ### Your Dashboard Features ##### 1. **Care Inspectorate Inspection Dashboard** **Benefit:** Complete visibility of your home's regulatory status **What You Get:** - ♦ Latest CI inspection rating (all 4 themes) - ŸŠ Historical inspection trends (track improvements) - Ÿ< Current requirements (mandatory actions) - Ÿ♦ Recommendations (suggested improvements) - âš i,♦ Complaint history tracking - âœ... Enforcement status (zero target) - ðŸŽ— Next inspection preparation checklist **Example:** "My last inspection showed care planning rated 3 (Adequate). Dashboard immediately showed me 8 overdue reviews and 3 incomplete care plans. I assigned these to senior carers with 7-day deadlines. Follow-up inspection: rating improved to 4 (Good)."** **Time Saved:** 6-8 hours per inspection cycle (vs manual evidence gathering) --- ##### 2. **Service Improvement Plan Dashboard** **Benefit:** Track quality improvement actions from plan to completion **What You Get:** - Ÿ< Your home's improvement plan (auto-generated annually) - ðŸŽ— Active improvement actions (title, priority, timeline) - ŸŠ Progress tracking (% complete, status) - âš i,♦ Overdue action alerts - Ÿ¥ Action ownership (who's responsible) - Ÿ“^ Outcome monitoring (expected vs actual results) - Ÿ♦ Evidence repository (link documents, photos, records) **Example:** "Had 8 improvement actions for Q2. System showed 5 completed (green), 2 in progress (amber), 1 overdue (red - staff training delayed by COVID). I added progress notes weekly and linked training certificates as evidence. Ready for audit in minutes."** **Time Saved:** 10-15 hours/month on improvement plan admin --- ##### 3. **Quality Metrics Dashboard** **Benefit:** Real-time quality indicators for your home **What You Get:** - âœ... Training compliance (all staff, all mandatory courses) - Ÿ< Supervision compliance (1:1s, team meetings) - ðŸŽ“ Induction tracking (new starters) - ŸŠ Care plan review compliance (28-day target) - Ÿ“% Incident rates (falls, medication errors, complaints) - Ÿ♦† Quality score (overall performance) - Ÿ“ Trend analysis (improving or declining) **Example:** "Dashboard showed training compliance dropped to 89% (below 95% target). I clicked through to see 6 staff needing fire safety refresher. Booked training session for next week - back to 96% compliance before month-end."* --- ##### 4. **Inspection Readiness Checker** **Benefit:** Always be prepared for unannounced CI visits **What You Get:** - âœ... Compliance checklist (all CI Quality Framework themes) - âš i,♦ Red flag identification (critical gaps) - ŸŠ Evidence availability (proof of compliance) - Ÿ< Staff file completeness (qualifications, training, supervision) - ðŸŽ— Action plan status (improvement actions completed) - Ÿ‘; Quick fixes list (resolve within 24-48 hours) **Example:** "CI called Friday 4 PM to announce Monday 9 AM inspection. I ran the readiness checker Saturday morning. Flagged 3 issues: 2 missing supervision records (completed Saturday), 1 incomplete care plan (completed Sunday). Monday inspection: 5 (Very Good) rating."** **Time Saved:** 15-20 hours pre-inspection panic prep (vs always being ready) --- ##### 5. **Staff Performance Management** **Benefit:** Track individual staff quality and development **What You Get:** - Ÿ¥ Staff profile view (qualifications, training history) - ŸŠ Performance metrics (attendance, compliance, incidents) - Ÿ< Supervision record tracking - ðŸŽ“ Training needs identification - Ÿ“ Development plan monitoring - âš i,♦ Performance issue flagging (automatic alerts) **Example:** "Noticed Jane had 6 sickness absences in 8 weeks (flagged amber on dashboard). I scheduled absence review meeting using the

guided template. Discovered undiagnosed medical issue - referred to Occupational Health. Absences resolved."* --- ##### 6. **Complaint & Incident Management** **Benefit:** Track, investigate, and resolve quality issues **What You Get:** - ☈ Complaint tracking (status, response deadlines) - ☈ Incident analysis (patterns, trends) - ☈ Root cause identification - ☈ Resolution tracking - ☈ Evidence storage (investigation notes, actions taken) - ☈ Learning outcomes (prevent recurrence) **Example:** *"Had 3 medication errors in one month (unusual pattern). Dashboard showed all involved new agency staff unfamiliar with our MAR system. I created induction checklist for agency staff - errors dropped to zero next month."* --- ##### 7. **Team Compliance Dashboard** **Benefit:** Ensure your team meets all regulatory requirements **What You Get:** - ☎ Team-wide training matrix (who needs what, when) - ☈ Supervision schedule (upcoming 1:1s) - ☈ Qualification expiry calendar (RN registration, PVG, SVQ) - ☈ Compliance trends (team improving or declining) - ☈ Proactive alerts (renewals due in 30/60/90 days) - ☈ Benchmarking (your home vs other homes) **Example:** *"Compliance matrix showed 4 staff SVQ Level 2 expired. I arranged assessment visits with college. All 4 renewed within 6 weeks. Avoided CI finding during inspection."* --- ##### 8. **CI Quality Framework Alignment** **Benefit:** Map your operations directly to CI assessment criteria **What You Get:** - ☈ Theme 1 (Care & Support): Care plan compliance, resident outcomes - ☈ Theme 2 (Environment): Safety checks, equipment maintenance - ☈ Theme 3 (Staffing): Training, supervision, skill mix - ☈ Theme 4 (Leadership): Governance, improvement planning, audits - ☈ Self-assessment tools - ☈ Gap analysis (where to improve) **Example:** *"Used self-assessment tool 2 weeks before inspection. Identified Theme 3 (Staffing) as weakest area (supervision records incomplete). I completed all outstanding supervisions before inspection. Inspector commented on excellent supervision compliance."* --- ### Your Monthly Routine **Week 1: Performance Review (2 hours)** 1. Review quality metrics dashboard 2. Check improvement plan progress 3. Update action statuses 4. Identify new improvement needs **Week 2: Compliance Check (2 hours)** 1. Review training compliance 2. Check supervision completion 3. Verify care plan reviews 4. Address any red flags **Week 3: Staff Development (2 hours)** 1. Review individual performance 2. Schedule supervisions 3. Book training 4. Update development plans **Week 4: Inspection Readiness (2 hours)** 1. Run readiness checker 2. Complete any quick fixes 3. Update evidence files 4. Review complaint/incident trends **Total Time Investment:** 8 hours/month for complete quality management --- ## ☈ OPERATIONS MANAGER (OM) ### What's In It For Me? **"I need to create rotas efficiently, manage leave, handle sickness, fill shifts, control costs, and ensure smooth day-to-day operations."** ###### 1. **Smart Rota Creation** **Benefit:** Build 4-week rotas in minutes, not hours **What You Get:** - ☈... Template-based rota generation (one-click creation) - ☈ Shift pattern library (Day, Late, Night, Long Day, custom) - ☈,, Rotation management (ensure fairness) - ☈ Staff preference matching - ☈ Conflict detection (double-booking, WTD violations) - ☈; Smart suggestions (optimal staff-shift assignments) - ☈ Coverage verification (no gaps) **Example:** *"Building the January rota used to take 12 hours. Now I select 'Generate 4-week rota for Snowdrop Unit' and the system creates base rota in 2 minutes. I spend 30 minutes adjusting preferences and reviewing - done in under an hour. 11 hours saved."** **Time Saved:** 25-30 hours/month on rota creation --- ##### 2. **Automated Leave Management** **Benefit:** Leave requests approved automatically based on staffing rules **What You Get:** - ☎ Team calendar view (who's off when) - ☈ Leave pattern analysis (identify trends) **Example:** *"Staff submit leave request at 11 PM. If staffing is safe, it's auto-approved by midnight - they get text confirmation. I used to process 20-30 requests per week manually (4 hours) - now I review only 2-3 exceptions (15 minutes)."** **Time Saved:** 15-18 hours/month on leave admin --- ##### 3. **Real-Time Shift Management** **Benefit:** Handle sickness, swaps, and last-minute changes instantly **What You Get:** - ☈ Sickness call-in recording (mobile-friendly) - ☈,, Shift swap approval (staff can self-organize) - ☈ Urgent shift alerts (unfilled shifts

flagged red) - ØÝ'¥ Available staff finder (who can cover) - ØÝ'¡ Smart cover suggestions (based on skills, proximity, preferences) - ØÝ'Š Agency vs overtime comparison (cheapest option) - â♦° Real-time rota updates (changes reflected immediately) **Example:** *"Sarah called in sick at 6:30 AM for her 7 AM shift. I opened the app, system showed 3 staff available (off today, live within 3 miles, worked this unit before). I texted Emma - she confirmed within 5 minutes. Shift covered by 6:45 AM. Zero resident impact."* **Time Saved:** 5-8 hours/week on emergency cover --- ##### 4. **WTD Compliance Checker** **Benefit:** Automatic Working Time Directive compliance monitoring **What You Get:** - âš-ï, ♦ 48-hour week limit monitoring (automatic flagging) - ØÝ'♦i, ♦ 11-hour rest period checking (between shifts) - ØÝ'... Weekly rest verification (24 hours in 7 days) - âš i, ♦ Violation alerts (before assigning shift) - ØÝ'Š Compliance trends (identify at-risk staff) - ØÝ'< Opt-out management (48-hour waiver tracking) **Example:** *"Tried to assign John to Saturday night shift. System blocked it: 'John will exceed 48 hours this week (already at 46 hours)'. I assigned to Lisa instead (32 hours this week). Avoided potential WTD violation and £5,000 fine."* **Time Saved:** 3-4 hours/week on manual hour calculations --- ##### 5. **Budget-Aware Staffing** **Benefit:** Real-time cost tracking and optimization **What You Get:** - ØÝ'° Shift cost calculator (permanent vs agency vs overtime) - ØÝ'Š Daily/weekly/monthly budget tracking - âš i, ♦ Overspend alerts (before committing to expensive shifts) - ØÝ'¡ Cost optimization suggestions - ØÝ'~ Budget forecast (projected month-end position) - ØÝ'Z Savings opportunities (highlight cheaper options) **Example:** *"Needed to fill 2 RN shifts Friday night. System showed: Agency = £340, Overtime (existing staff) = £180, Bank staff = £220. I offered overtime first - saved £160. Track savings like this monthly - averaging £2,400/month."* **Time Saved:** 2-3 hours/week on cost analysis --- ##### 6. **Staff Availability Management** **Benefit:** Know who can work when before asking **What You Get:** - ØÝ'... Staff availability calendar (part-time hours, preferred shifts) - ØÝ'♦ Home preference tracking (some staff prefer certain homes) - â♦° Shift preference recording (days, nights, weekends) - ØÝ'Š Availability patterns (historical data) - ØÝ'¡ Best-fit matching (most likely to accept) - ØÝ'± Quick contact (one-click call/text from system) **Example:** *"Need RN for weekend. Filtered by 'Available Saturdays' + 'Prefers Long Day' + 'Works Riverside' â†' 4 matches. Called first match - immediate yes. Previously I'd call 8-10 staff before finding someone willing."* **Time Saved:** 4-6 hours/week on shift filling --- ##### 7. **Mobile Rota Access** **Benefit:** Manage rotas from anywhere, anytime **What You Get:** - ØÝ'± Mobile-optimized rota view - âœ... Mobile leave approvals - ØÝ's Mobile shift alerts - ØÝ'ž One-tap staff contact - ØÝ'„ On-the-go shift swaps - ØÝ'Š Mobile dashboards (key metrics) **Example:** *"Saturday 2 PM, I'm at home when I get alert: 'Late shift uncovered tomorrow'. I open mobile view, check available staff, text Fiona (she's free, confirmed in 10 minutes). Shift filled from my couch in 15 minutes."* --- ##### 8. **AI-Assisted Rota Queries** **Benefit:** Ask questions in plain English, get instant answers **What You Get:** - ØÝ'¬ Natural language queries ("Who's working Monday night?") - ØÝ'Š Instant data retrieval - ØÝ'♦ Complex pattern searching ("Show me all RNs with less than 35 hours next week") - ØÝ'~ Ad-hoc reporting - ØÝ'¡ Staffing insights - âš; Fast decision support **Example:** *"Typed: 'How many agency shifts did we use last month?' Answer: '12 shifts, £4,080 total cost, down from 18 shifts previous month'. Used this data in budget meeting without creating manual report."* --- #### Your Daily Routine **Morning (15 minutes)** 1. Check overnight sickness calls 2. Review today's rota (any gaps?) 3. Approve overnight leave requests 4. Check critical alerts **Midday (10 minutes)** 1. Check afternoon/evening staffing 2. Respond to shift swap requests 3. Monitor WTD compliance 4. Address any red flags **Evening (10 minutes)** 1. Review tomorrow's rota 2. Fill any remaining gaps 3. Confirm agency bookings 4. Check weekend staffing **Friday PM (30 minutes)** 1. Review week's costs 2. Prepare next week's rota 3. Approve pending leave 4. Weekend prep **Total Time Investment:** 4.5 hours/week for complete operational control --- ## ØÝ'„â€♦âš-í, ♦ CARE STAFF ## What's In It For Me? **I need to see my shifts easily, book leave quickly, swap shifts when needed, and get help fast - all without calling the office."** #### Your Features ##### 1. **Easy Shift Viewing** **Benefit:** See your rota anytime, anywhere **What You Get:** - ØÝ'± Mobile-friendly rota (phone, tablet, any device) - ØÝ'... Your shifts highlighted (color-coded) - ØÝ'♦ Location shown (which home,

which unit) - \diamond Times clearly displayed (start/end, break times) - \checkmark Weekly hours total (know your income) - \checkmark Email notifications (rota published, changes made) - \checkmark SMS alerts (last-minute changes) **Example:** "My daughter asked if I'm free for her school concert Wednesday. I opened the app on my phone \dagger Wednesday: Day shift 7-3 PM. I can make the 7 PM concert. Checked in 30 seconds." **Time Saved:** 1-2 hours/month (vs calling office, checking paper rotas) --- ##### 2. **One-Click Leave Booking** **Benefit:** Book annual leave in seconds, get instant decisions **What You Get:** - \checkmark ... Calendar view (see available dates) - \diamond ... One-click booking (no forms, no phone calls) - \checkmark Instant approval (auto-approved if staffing safe) - \checkmark Leave balance shown (how many days you have left) - \checkmark Leave targets (reminder to use your leave) - \checkmark Confirmation email (proof of approval) - \checkmark \pm Mobile booking (request from anywhere) **Example:** "Saw cheap flights to Spain for May. Opened leave booking page, clicked May 10-17 (8 days), submitted. Got email 2 minutes later: 'Approved - enjoy your holiday!' Booked flights immediately. Total time: 5 minutes." **Time Saved:** 2-3 hours/month (vs forms, waiting for approval, chasing managers) --- ##### 3. **Shift Swap Made Easy** **Benefit:** Arrange swaps with colleagues yourself **What You Get:** - \checkmark , Swap request system (find colleagues willing to swap) - \checkmark Available staff finder (who's off when you're working) - \diamond ... Manager approval (automatic if no issues) - \checkmark \diamond Block if unsafe (WTD violation, skill mismatch) - \checkmark Both parties notified (swap confirmed) - \checkmark \pm Mobile swap requests **Example:** "I'm scheduled Saturday but my son's football final is Sunday. I need Sunday off instead. I sent swap request to Emma (who's off Saturday). She accepted. Manager auto-approved (no WTD issues). Done in 10 minutes." **Time Saved:** 1-2 hours per swap (vs phone tag, finding manager, paper forms) --- ##### 4. **AI Assistant Help** **Benefit:** Get answers fast without calling the office **What You Get:** - \checkmark \neg Ask questions in plain English - \checkmark Instant answers (shifts, leave balance, policies) - \checkmark \langle Guidance on procedures (sickness reporting, leave booking) - \checkmark \diamond Policy search (find info fast) - \checkmark \rangle How-to help (training videos, step-by-step guides) - \diamond \circ 24/7 availability (no waiting for office hours) **Example:** "Typed: 'How much leave do I have left?' Answer: 'You have 12 days remaining (used 16 of 28 days). You should book 6 more days before March 31st to meet your target.' Knew instantly." --- ##### 5. **Training Tracking** **Benefit:** Know what training you need and when **What You Get:** - \checkmark \langle Your training record (all courses, dates) - \checkmark \diamond Expiry alerts (courses due for renewal) - \checkmark ... Upcoming courses (what's booked for you) - \diamond ... Compliance status (green = compliant, amber = due soon, red = overdue) - \checkmark \checkmark Development plan (courses for progression) - \checkmark \checkmark Progress tracking (qualifications in progress) **Example:** "Got email: 'Your manual handling refresher expires in 30 days'. I clicked 'View available courses' \dagger 3 dates shown. Clicked Feb 15th. Booked. Confirmation email sent. 2 minutes total." --- ##### 6. **Sickness Reporting** **Benefit:** Report sickness quickly from home **What You Get:** - \checkmark \pm Mobile sickness reporting (no need to call) - \diamond \circ 24/7 reporting (night or day) - \checkmark \checkmark Confirmation sent (proof you reported) - \checkmark \langle Return-to-work tracking (book RTW meeting) - \checkmark \checkmark Your sickness record (see your absences) - \checkmark \rangle Support info (Occupational Health, PAM Assist) **Example:** "Woke up 5:30 AM with flu, too unwell to work 7 AM shift. Used mobile sickness form (30 seconds). Manager got alert at 6 AM, arranged cover. I didn't have to call while feeling terrible." --- ##### 7. **Payroll & Hours** **Benefit:** Track your hours and earnings **What You Get:** - \checkmark \checkmark Weekly hours total (regular, overtime) - \checkmark \circ Estimated earnings (before payslip) - \checkmark ... Pay period tracking (know when you get paid) - \checkmark \diamond Payroll anomaly alerts (hours don't match expectations) - \checkmark \langle Shift history (what you worked last month) - \checkmark \rangle \times **API available for future integration** with HR/payroll systems (SWISS, etc.) **Example:** "Checked 'Hours this month' \dagger 168 hours (baseline 140, overtime 28). Knew I'd have extra £420 in my paycheck. Planned accordingly." \gt **Note on Third-Party Integrations:** Integration APIs are available for future connectivity with external HR systems, payroll platforms (e.g., SWISS), and other tools. Contact Dean.sockalingum@sw.glasgow.gov.uk for API specifications. --- ##### 8. **Mobile Notifications** **Benefit:** Stay informed without constantly checking **What You Get:** - \checkmark \checkmark Email alerts (rota published, leave approved, training due) - \checkmark \pm SMS alerts (urgent - shift cancelled, last-minute request) - \checkmark \checkmark Push notifications (optional - for real-time updates) - \checkmark \checkmark Customizable (choose what you want to be

600-900 hours | £24,000-£36,000 | Improvement plan automation | **Operations Manager**
| 9 | 160-180 hours each | **17,280-19,440 hours** | **£605,000-£680,000** | Smart rota creation (was 4-6 hrs/day) | **Care Staff** | ~150 | 2-3 hours each | 3,600-5,400 hours | £72,000-£108,000 | One-click leave booking | **Total Annual Time Savings (all roles):** **21,900-25,880 hours** **Total Annual Value:** **£722,000-£851,000** *Based on average hourly rates: HOS £50, SM £40, OM £35, Care Staff £20 *** Head of Service Time Breakdown **Before System (Manual Process):** - Strategic reporting: 10 hours/month (quarterly board reports, monthly summaries) - CI report gathering: 8 hours/year (manually downloading reports for 5 homes) - Improvement planning: 4 hours/month (reviewing plans, action tracking) - Budget analysis: 8 hours/month (compiling financial data from all homes) - Staffing oversight: 6 hours/month (analyzing staffing levels, forecasts) - Compliance monitoring: 4 hours/month (training, supervision, care plans) - **Total: 40-45 hours/month = 480-540 hours/year** **After System (Automated Process):** - Strategic reporting: 1 hour/month (automated dashboard, 1-click exports) - CI report gathering: Automated (0 hours - annual April automation) - Improvement planning: 30 mins/month (ML-generated plans, progress tracking) - Budget analysis: 1 hour/month (real-time dashboard, automated alerts) - Staffing oversight: 45 mins/month (4-week forecast, automated alerts) - Compliance monitoring: 15 mins/month (automated tracking, exception reporting) - **Total: 3-4 hours/month = 36-48 hours/year** **Time Saved: 420-540 hours/year = £21,000-£27,000 value** > **Note on Time Savings:** The 40% administrative time reduction figure is based on observations and feedback from Service Managers, Operations Managers, Head of Service, and the IDI team regarding the current "as-is" position. Actual savings may be greater when accounting for system speed, automation capabilities, and interoperability features. *** Operations Manager Time Breakdown (9 OMs)
Before System (Manual Process): - Rota creation: 4-6 hours/day per OM = 45-54 hours/day across all 9 OMs - Leave administration: 1 hour/day per OM = 9 hours/day - Staff queries (shifts/leave): 1 hour/day per OM = 9 hours/day - Compliance checking: 2 hours/week per OM = 18 hours/week - **Total: 63-72 hours/day = 16,380-18,720 hours/year** **After System (Automated Process):** - Rota creation: 30-45 mins/day per OM = 4.5-6.75 hours/day across all 9 OMs (90% reduction) - Leave administration: 15 mins/day per OM = 2.25 hours/day (75% reduction) - Staff queries: 15 mins/day per OM = 2.25 hours/day (75% reduction via AI assistant) - Compliance checking: 30 mins/week per OM = 4.5 hours/week (75% reduction) - **Total: 9-12 hours/day = 2,340-3,120 hours/year** **Time Saved: 17,280-19,440 hours/year = £605,000-£680,000 value** *** By Activity (Organization-Wide) | Activity | Manual Time | System Time | Time Saved/Cycle | Annual Savings (All Homes) |

Rota Creation (9 OMs) | 4-6 hours/day each | 30-45 mins/day each | 31.5-47.25 hours/day | 11,700-14,040 hours/year || **Leave Admin (9 OMs)** | 1 hour/day each | 15 mins/day each | 6.75 hours/day | 2,340 hours/year || **Inspection Prep (5 SMs)** | 20 hours/inspection | 5 hours/inspection | 15 hours each | 450 hours/year (6 inspections) || **Improvement Planning (5 SMs)** | 40 hours/year | 4 hours/year | 36 hours each | 180 hours/year || **Compliance Tracking (9 OMs)** | 2 hours/week each | 30 mins/week each | 13.5 hours/week | 702 hours/year || **Staff Queries (9 OMs)** | 1 hour/day each | 15 mins/day each | 6.75 hours/day | 2,340 hours/year || **Leave Requests (150 staff)** | 15 mins each | 2 mins each | 13 mins each | 3,250 hours/year || **Shift Swaps (150 staff)** | 20 mins each | 5 mins each | 15 mins each | 1,950 hours/year | **Total:** 22,912 hours/year saved = **£802,000+ value** --- ## QUICK START BY ROLE ### Head of Service 1. **Login:** <https://staffrota.yourdomain.com> with your credentials 2. **Dashboard:** Click "HOS Dashboard" (see all 5 homes at once) 3. **Check CI Status:** Click "Care Inspectorate" tab → see latest ratings 4. **Review Staffing:** Click "Workforce Planning" → see 4-week forecast 5. **Check Budget:** View actual vs forecast per home 6. **Review Improvement Plans:** Click "Service Improvement" → see all home plans 7. **Get Help:** Click AI Assistant → type your question **First Week Goals:** - [] Review CI ratings for all 5 homes - [] Check improvement plan progress (% complete) - [] Review current staffing levels and forecasts (all homes) - [] Identify any budget variances or critical alerts - [] Run inspection readiness check for each home - [] Review agency usage trends ### Service Manager

1. **Login:** <https://staffrota.yourdomain.com> 2. **Dashboard:** Click "Quality Dashboard" 3. **Check Your Home:** View your home's CI rating, compliance metrics 4. **Review Actions:** Click "Improvement Plan" → see your active actions 5. **Update Progress:** Add notes to improvement actions **First Week Goals:** - [] Review your home's CI inspection status - [] Check training compliance (target 95%+) - [] Update improvement action progress - [] Run inspection readiness check ### Operations Manager 1. **Login:** <https://staffrota.yourdomain.com> 2. **Rota:** Click "Rota View" → see current week 3. **Create Next Week:** Click "Generate Rota" → select template 4. **Approve Leave:** Click "Leave Approvals" → review pending requests 5. **Fill Gaps:** Use smart matching for unfilled shifts **First Week Goals:** - [] Review this week's rota (any gaps?) - [] Create next week's rota - [] Approve pending leave requests - [] Check WTD compliance (zero violations target) ### Care Staff 1. **Login:** <https://staffrota.yourdomain.com> (Progressive Web App - install on mobile for offline access!) 2. **View Rota:** See your shifts for next 4 weeks 3. **Book Leave:** Click "Request Leave" → select dates → submit 4. **Ask Questions:** Click ⓘ AI Assistant if stuck 5. **Check Training:** View your training record **First Week Goals:** - [] View your rota (make sure it's correct) - [] Check your leave balance - [] Book any upcoming leave you need - [] Install Progressive Web App (PWA) on mobile device --- ## ⓘ TRAINING & SUPPORT ### Training Videos (Available in System) 1. **Getting Started** (5 mins) - Login, navigation, basic features 2. **Rota Management** (10 mins) - Creating rotas, shift patterns 3. **Leave Management** (8 mins) - Booking, approving, managing leave 4. **CI Integration** (12 mins) - Understanding ratings, improvement plans 5. **Compliance Tracking** (10 mins) - Training, supervision, WTD 6. **AI Assistant** (7 mins) - How to ask questions, get help ### Quick Reference Guides - **Operations Manager Quick Start** (2 pages) - **Service Manager Quality Guide** (3 pages) - **Staff Leave Booking Guide** (1 page) - **HOS Executive Dashboard Guide** (2 pages) - **Troubleshooting Common Issues** (3 pages) ### Support Options - ⓘ AI Assistant: 24/7 instant help (in-system) - ⓘ § **Email Support:** support@staffrota.yourdomain.com - ⓘ 0141 XXX XXXX (9 AM - 5 PM, Mon-Fri) - ⓘ Knowledge Base: 30+ detailed guides - ⓘ Video Library: 20+ training videos - ⓘ User Forum: Share tips with other users --- ## ⓘ... SUCCESS METRICS ### How You'll Know It's Working **Head of Service:** - ⓘ... Can answer Board questions about all 5 homes in minutes - ⓘ... Always prepared for CI inspections (no panic) - ⓘ... Improvement plans track progress automatically - ⓘ... Budget variances identified and explained immediately - ⓘ... 4-week staffing forecast always visible across all homes - ⓘ... Agency usage reduced by 20%+ through strategic optimization - ⓘ... Cost control real-time, not month-end surprise **Service Manager:** - ⓘ... Training compliance consistently above 95% - ⓘ... Inspection readiness checker always green - ⓘ... Improvement actions completed on time (80%+) - ⓘ... CI ratings stable or improving **Operations Manager:** - ⓘ... Rota creation time reduced from 12 hours to 1 hour - ⓘ... Leave approval automated (90%+ auto-approved) - ⓘ... Zero WTD violations - ⓘ... Shift coverage maintained (no unfilled gaps) **Care Staff:** - ⓘ... Can view rota anytime, anywhere (mobile) - ⓘ... Leave approved instantly (within minutes) - ⓘ... Questions answered quickly (AI assistant) - ⓘ... Training record always up to date --- ## ⓘ GETTING STARTED ### Next Steps 1. **Request Access:** - Contact your Operations Manager or HOS - Provide: Full name, email, phone, role, home(s) - Receive login credentials within 24 hours 2. **First Login:** - Go to <https://staffrota.yourdomain.com> - Use provided SAP number and password - Change password on first login 3. **Complete Onboarding:** - Follow interactive setup wizard (5-10 minutes) - Watch 5-minute getting started video - Take guided tour of your role's features 4. **Start Using System:** - View rota (if staff) - Create rota (if manager) - Review dashboard (if senior leader) 5. **Get Help Anytime:** - Click ⓘ AI Assistant for instant help - Email Dean.sockalingum@sw.glasgow.gov.uk - Call 07562940494 --- ## ⓘ DOCUMENT VERSIONS ### Available Formats This document is available in: - ⓘ... **PDF:** (for printing, email sharing) - ⓘ... **Word:** (for editing, customization) - ⓘ... **Web Page:** (in-system access, always current) - ⓘ... **Mobile-Optimized:** (read on phone/tablet) ### Download Links - [Download PDF Version](./SYSTEM_CAPABILITIES_WIIFM.pdf) (78 KB) - [Download Word Version](./)

SYSTEM_CAPABILITIES_WIIFM.docx) (32 KB) - [View Web Version](<https://demo.therota.co.uk/help/wiifm>) ### Progressive Web App (PWA) **Production Status:** âœ... Fully Operational **Install Instructions:** - **Desktop (Chrome/Edge):** Visit <https://demo.therota.co.uk> â†' Click install icon in address bar - **iOS (Safari):** Visit site â†' Tap Share â†' "Add to Home Screen" - **Android (Chrome):** Visit site â†' Tap menu â†' "Install app" or "Add to Home Screen" **PWA Specifications:** - **Name:** Staff Rota Management System - **Version:** 1.0.5 (Service Worker) | Cache v8 - **Features:** Offline functionality, background sync, smart caching, push notifications - **Icons:** 10 sizes (72px to 512px) for all devices - **Security:** Chosen over native apps for enhanced security and simplified updates - **Cache Strategy:** Network-first for APIs, cache-first for static assets - **Storage:** Local caching for offline access to rotas, schedules, and critical data **Supported Platforms:** - âœ... iOS (Safari 11.3+) - âœ... Android (Chrome 40+) - âœ... Windows (Edge, Chrome) - âœ... macOS (Safari, Chrome, Edge) > **Why PWA vs Native Apps:** We chose Progressive Web App technology for superior security, instant updates without app store delays, and cross-platform compatibility. The PWA provides the same offline functionality and home screen installation as native apps while maintaining tighter security controls and eliminating the need for separate iOS/Android codebases. --- **Document Version:** 1.2 **Last Updated:** 21 January 2026 **Next Review:** April 2026 (after annual CI integration cycle) **Contact:** Dean.sockalingum@sw.glasgow.gov.uk | 07562940494 **Change Log:** - v1.2 (21 Jan 2026): Added complete PWA specifications, updated download links - v1.1 (21 Jan 2026): Updated contact details, staff capacity, ROI disclaimers, clarified integrations --- *This guide is maintained by the Staff Rota System team and updated quarterly to reflect new features and improvements.*