

# 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 --- ## ðŸ“‹ 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\*\* --- ## ðŸŽˆ 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:\*\* - ðŸ“Š Real-time staffing levels across all 5 homes (2,700+ users: 821 active staff) - ðŸ’° Budget performance (actual vs forecast per home) - âšŒ Critical alerts (understaffing, WTD violations, compliance gaps) - ðŸ“ˆ Trend analysis (12-month historical comparisons) - ðŸ“† 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:\*\* - ðŸ”Œ Latest CI inspection reports for all 5 homes (auto-imported annually) - âšŒ Quality Framework ratings (4 themes: Care/Support, Environment, Staffing, Leadership) - ðŸ“‹ Requirements tracking (mandatory improvements from CI) - ðŸ“ˆ Recommendations monitoring (suggested improvements) - ðŸŽˆ Inspection trend analysis (rating changes over time) - ðŸ“Š 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:\*\* - ðŸ“ˆ Automated improvement plans generated every April 1st - ðŸ“Š 12-month operational data analysis (109,000+ shifts analyzed) - ðŸŽˆ Prioritized actions (CRITICAL/HIGH/MEDIUM/LOW) - ðŸ“ˆ Best practice identification (e.g., learn from Victoria Gardens' 5/5 rating) - ðŸ“ˆ Predicted outcomes (ML forecasting of rating improvements) - ðŸ“ˆ Board-ready reports (PDF exports for governance meetings) - ðŸ”Œ 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% â†’ 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:\*\* - ðŸ“ˆ Cross-home performance comparison - ðŸ“Š Organizational priorities (aggregated from all 5 homes) - ðŸ”Œ Shared challenges identification - âœ… Shared successes replication - ðŸ“† Best performing homes showcase - âšŒ Homes needing support flagged - ðŸ“ˆ 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 - ¼ 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:\*\*** - Budget vs actual tracking per home - % Agency usage rates (track cost reduction) - Overtime analysis (identify patterns) - Payroll anomaly detection - Trend forecasting (predict budget pressures) - 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%+) - WTD (Working Time Directive) violation alerts (zero target) - Care plan review compliance (target: 95%+) - Real-time alerts for critical issues - 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:\*\*** - 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:\*\*** - Current staffing levels (all 2,700+ users across 5 homes) - 4-week forward planning visibility - Understaffing alerts (automatic flagging) - 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:\*\*** - Real-time budget tracking per home - % Agency spend analysis (daily/weekly/monthly) - Overtime cost monitoring - Cost per shift calculations - Budget forecast modeling - Overspend alerts (before budget breaches) - 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) - Optimal staffing level recommendations - ... Long-term workforce planning - Attrition risk identification - 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:\*\***

- â€” Latest CI inspection rating (all 4 themes) - ðŸŽ“ Historical inspection trends (track improvements) - ðŸŽ“ Current requirements (mandatory actions) - ðŸŽ“ Recommendations (suggested improvements) - â€” Complaint history tracking - â€” 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:\*\***

- ðŸŽ“ Your home's improvement plan (auto-generated annually) - ðŸŽ“ Active improvement actions (title, priority, timeline) - ðŸŽ“ Progress tracking (% complete, status) - â€” Overdue action alerts - ðŸŽ“ Action ownership (who's responsible) - ðŸŽ“ Outcome monitoring (expected vs actual results) - ðŸŽ“ 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:\*\***

- â€” Training compliance (all staff, all mandatory courses) - ðŸŽ“ Supervision compliance (1:1s, team meetings) - ðŸŽ“ Induction tracking (new starters) - ðŸŽ“ Care plan review compliance (28-day target) - ðŸŽ“ Incident rates (falls, medication errors, complaints) - ðŸŽ“ Quality score (overall performance) - ðŸŽ“ 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."

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**##### 4. \*\*Inspection Readiness Checker\*\* \*\*Benefit:\*\* Always be prepared for unannounced CI visits**

**\*\*What You Get:\*\***

- â€” Compliance checklist (all CI Quality Framework themes) - â€” Red flag identification (critical gaps) - ðŸŽ“ Evidence availability (proof of compliance) - ðŸŽ“ Staff file completeness (qualifications, training, supervision) - ðŸŽ“ Action plan status (improvement actions completed) - ðŸŽ“ 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:\*\***

- ðŸŽ“ Staff profile view (qualifications, training history) - ðŸŽ“ Performance metrics (attendance, compliance, incidents) - ðŸŽ“ Supervision record tracking - ðŸŽ“ Training needs identification - ðŸŽ“ Development plan monitoring - â€” 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:\*\*** - ðŸ“ˆ Complaint tracking (status, response deadlines) - ðŸ“ˆ Incident analysis (patterns, trends) - ðŸ“ˆ Root cause identification - ðŸ“ˆ Resolution tracking - ðŸ“ˆ Evidence storage (investigation notes, actions taken) - ðŸ“ˆ 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:\*\*** - â€¦ Team-wide training matrix (who needs what, when) - ðŸ“ˆ Supervision schedule (upcoming 1:1s) - ðŸ“ˆ Qualification expiry calendar (RN registration, PVG, SVQ) - ðŸ“ˆ Compliance trends (team improving or declining) - â€¦ Proactive alerts (renewals due in 30/60/90 days) - ðŸ“ˆ 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:\*\*** - ðŸ“ˆ Theme 1 (Care & Support): Care plan compliance, resident outcomes - ðŸ“ˆ Theme 2 (Environment): Safety checks, equipment maintenance - ðŸ“ˆ Theme 3 (Staffing): Training, supervision, skill mix - ðŸ“ˆ Theme 4 (Leadership): Governance, improvement planning, audits - ðŸ“ˆ Self-assessment tools - ðŸ“ˆ 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 --- ## ðŸ“ˆ 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."**\*\*** ### Your Dashboard Features ##### 1. **\*\*Smart Rota Creation\*\*** **\*\*Benefit:\*\*** Build 4-week rotas in minutes, not hours **\*\*What You Get:\*\*** - ðŸ“ˆ Template-based rota generation (one-click creation) - ðŸ“ˆ Shift pattern library (Day, Late, Night, Long Day, custom) - ðŸ“ˆ, Rotation management (ensure fairness) - ðŸ“ˆ Staff preference matching - â€¦ Conflict detection (double-booking, WTD violations) - ðŸ“ˆ Smart suggestions (optimal staff-shift assignments) - ðŸ“ˆ Coverage verification (no gaps) **\*\*Example:\*\*** "Building the January rota used to take 12 hours. Now I select 'Generate 4-week rota for Snowdrop Unit' â†’ 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:\*\*** - â€¦ Auto-approval when staffing safe (instant notification to staff) - â€¦ Auto-rejection when staffing critical (with clear reason) - ðŸ“ˆ Manual review queue (borderline cases) - ðŸ“ˆ Leave balance tracking (real-time) - ðŸ“ˆ Leave target monitoring (ensure staff take breaks) - ðŸ“ˆ Team calendar view (who's off when) - ðŸ“ˆ 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:\*\*** - ðŸ“ˆ Sickness call-in recording (mobile-friendly) - ðŸ“ˆ, Shift swap approval (staff can self-organize) - ðŸ“ˆ Urgent shift alerts (unfilled shifts

flagged red) - Available staff finder (who can cover) - Smart cover suggestions (based on skills, proximity, preferences) - Agency vs overtime comparison (cheapest option) - 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:\*\*** - 48-hour week limit monitoring (automatic flagging) - 11-hour rest period checking (between shifts) - Weekly rest verification (24 hours in 7 days) - Violation alerts (before assigning shift) - Compliance trends (identify at-risk staff) - 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:\*\*** - Shift cost calculator (permanent vs agency vs overtime) - Daily/weekly/monthly budget tracking - Overspend alerts (before committing to expensive shifts) - Cost optimization suggestions - Budget forecast (projected month-end position) - 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:\*\*** - Staff availability calendar (part-time hours, preferred shifts) - Home preference tracking (some staff prefer certain homes) - Shift preference recording (days, nights, weekends) - Availability patterns (historical data) - Best-fit matching (most likely to accept) - Quick contact (one-click call/text from system) **\*\*Example:\*\*** "Need RN for weekend. Filtered by 'Available Saturdays' + 'Prefers Long Day' + 'Works Riverside' 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:\*\*** - Mobile-optimized rota view - Mobile leave approvals - Mobile shift alerts - One-tap staff contact - On-the-go shift swaps - 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:\*\*** - Natural language queries ("Who's working Monday night?") - Instant data retrieval - Complex pattern searching ("Show me all RNs with less than 35 hours next week") - Ad-hoc reporting - Staffing insights - 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 call-ins 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 --- ## 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:\*\*** - Mobile-friendly rota (phone, tablet, any device) - Your shifts highlighted (color-coded) - Location shown (which home,

which unit) - ⬢° Times clearly displayed (start/end, break times) - ⚡° Weekly hours total (know your income) - ⚡° Email notifications (rota published, changes made) - ⚡° 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 ⬆ 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:\*\*** - ⚡° ... Calendar view (see available dates) - ⬢° ... One-click booking (no forms, no phone calls) - ⬢° Instant approval (auto-approved if staffing safe) - ⚡° Leave balance shown (how many days you have left) - ⚡° Leave targets (reminder to use your leave) - ⚡° Confirmation email (proof of approval) - ⚡° 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:\*\*** - ⚡°, Swap request system (find colleagues willing to swap) - ⚡° Available staff finder (who's off when you're working) - ⬢° ... Manager approval (automatic if no issues) - ⬢° Block if unsafe (WTD violation, skill mismatch) - ⚡° Both parties notified (swap confirmed) - ⚡° 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:\*\*** - ⚡° Ask questions in plain English - ⚡° Instant answers (shifts, leave balance, policies) - ⚡° Guidance on procedures (sickness reporting, leave booking) - ⚡° Policy search (find info fast) - ⚡° How-to help (training videos, step-by-step guides) - ⬢° 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:\*\*** - ⚡° Your training record (all courses, dates) - ⬢° Expiry alerts (courses due for renewal) - ⚡° ... Upcoming courses (what's booked for you) - ⬢° Compliance status (green = compliant, amber = due soon, red = overdue) - ⚡° Development plan (courses for progression) - ⚡° Progress tracking (qualifications in progress) **\*\*Example:\*\*** "Got email: 'Your manual handling refresher expires in 30 days'. I clicked 'View available courses' ⬆ 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:\*\*** - ⚡° Mobile sickness reporting (no need to call) - ⬢° 24/7 reporting (night or day) - ⚡° Confirmation sent (proof you reported) - ⚡° Return-to-work tracking (book RTW meeting) - ⚡° Your sickness record (see your absences) - ⚡° 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:\*\*** - ⚡° Weekly hours total (regular, overtime) - ⚡° Estimated earnings (before payslip) - ⚡° ... Pay period tracking (know when you get paid) - ⬢° Payroll anomaly alerts (hours don't match expectations) - ⚡° Shift history (what you worked last month) - ⚡° **\*\*API available for future integration\*\*** with HR/payroll systems (SWISS, etc.) **\*\*Example:\*\*** "Checked 'Hours this month' ⬆ 168 hours (baseline 140, overtime 28). Knew I'd have extra £420 in my paycheck. Planned accordingly." > **\*\*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](mailto:Dean.sockalingum@sw.glasgow.gov.uk) for API specifications. --- ##### 8. **\*\*Mobile Notifications\*\*** **\*\*Benefit:\*\*** Stay informed without constantly checking **\*\*What You Get:\*\*** - ⚡° Email alerts (rota published, leave approved, training due) - ⚡° SMS alerts (urgent - shift cancelled, last-minute request) - ⚡° Push notifications (optional - for real-time updates) - ⚡° Customizable (choose what you want to be

notified about) - âŸ; Instant updates (know immediately) \*\*Example:\*\* "Got text at 2 PM: 'Your Thursday late shift has been cancelled due to low occupancy. Updated rota published.' I made other plans for Thursday evening. Appreciated the heads-up."\* --- #### Your Monthly Routine

**\*\*Week 1: Check Rota (5 minutes)\*\*** 1. View this month's rota 2. Check for any issues 3. Note any changes

**\*\*As Needed: Leave Booking (5 minutes)\*\*** 1. Check leave balance 2. Select dates 3. Submit request 4. Get instant confirmation

**\*\*As Needed: Shift Swaps (10 minutes)\*\*** 1. Request swap if needed 2. Wait for colleague acceptance 3. Get manager approval 4. Confirmed

**\*\*Monthly: Training Check (5 minutes)\*\*** 1. View training record 2. Check for expiring courses 3. Book renewals 4. Done

**\*\*Total Time Investment:\*\*** 25 minutes/month for complete shift/leave management --- ## ðŸ“Š FEATURE COMPARISON MATRIX #### Core Scheduling & Rota | Feature | HOS | IDI | SM | OM | Staff | |-----|-----|-----|-----|-----| | Multi-home rota view | âœ… Portfolio + All homes | âœ… Portfolio + All homes | âœ… Portfolio + All homes | âœ… Portfolio + All homes | âœ… Portfolio + All homes | âœ… Portfolio + All homes | | 4-week forward planning | âœ… | âœ… | âœ… | âœ… | âœ… | | Shift pattern library | âœ… All homes | âœ… All homes | âœ… All homes | âœ… All homes | âœ… All homes | âœ… All homes | | Smart rota generation | âœ… All homes | âœ… All homes | âœ… All homes | âœ… All homes | âœ… All homes | âœ… All homes | | Mobile rota access | âœ… | âœ… | âœ… | âœ… | âœ… | | Real-time updates | âœ… | âœ… | âœ… | âœ… | âœ… | #### Leave Management | Feature | HOS | IDI | SM | OM | Staff | |-----|-----|-----|-----|-----| | Leave request submission | âœ… | âœ… | âœ… | âœ… | âœ… | | Auto-approval configuration | âœ… All homes | âœ… All homes | âœ… All homes | âœ… All homes | âœ… All homes | âœ… All homes | | Submit | | Leave balance tracking | âœ… Portfolio + All staff | âœ… Portfolio + All staff | âœ… Portfolio + All staff | âœ… Portfolio + All staff | âœ… Portfolio + All staff | | Leave calendar | âœ… All homes | âœ… All homes | âœ… All homes | âœ… All homes | âœ… All homes | | Leave target monitoring | âœ… All homes | âœ… All homes | âœ… All homes | âœ… All homes | âœ… All homes | | #### Compliance & Quality | Feature | HOS | IDI | SM | OM | Staff | |-----|-----|-----|-----|-----| | Training compliance | âœ… Portfolio + All homes | âœ… Portfolio + All homes | âœ… Portfolio + All homes | âœ… Portfolio + All homes | âœ… Portfolio + All homes | | Supervision tracking | âœ… Portfolio + All homes | âœ… Portfolio + All homes | âœ… Portfolio + All homes | âœ… Portfolio + All homes | âœ… Portfolio + All homes | | WTD compliance | âœ… Portfolio + All homes | âœ… Portfolio + All homes | âœ… Portfolio + All homes | âœ… Portfolio + All homes | âœ… Portfolio + All homes | | View | | Care plan reviews | âœ… Portfolio | âœ… Portfolio | âœ… Portfolio | âœ… Portfolio | âœ… Portfolio | | Incident tracking | âœ… Portfolio | âœ… Portfolio | âœ… Portfolio | âœ… Portfolio | âœ… Portfolio | | Report | #### Care Inspectorate Integration | Feature | HOS | IDI | SM | OM | Staff | |-----|-----|-----|-----|-----| | CI inspection reports | âœ… All homes | âœ… All homes | âœ… All homes | âœ… All homes | âœ… All homes | | Quality Framework ratings | âœ… Portfolio | âœ… Portfolio | âœ… Portfolio | âœ… Portfolio | âœ… Portfolio | | Requirements tracking | âœ… Portfolio | âœ… Portfolio | âœ… Portfolio | âœ… Portfolio | âœ… Portfolio | | Auto-import (annual) | âœ… | âœ… | âœ… | âœ… | âœ… | | #### Service Improvement Planning | Feature | HOS | IDI | SM | OM | Staff | |-----|-----|-----|-----|-----| | Improvement plans | âœ… Organizational + All homes | âœ… Organizational + All homes | âœ… Organizational + All homes | âœ… Organizational + All homes | âœ… Organizational + All homes | | ML-generated actions | âœ… All homes | âœ… All homes | âœ… All homes | âœ… All homes | âœ… All homes | | Action tracking | âœ… Portfolio | âœ… Portfolio | âœ… Portfolio | âœ… Portfolio | âœ… Portfolio | | Progress monitoring | âœ… Portfolio | âœ… Portfolio | âœ… Portfolio | âœ… Portfolio | âœ… Portfolio | | Evidence linking | âœ… View all | âœ… View all | âœ… View all | âœ… View all | âœ… View all | | Annual auto-generation | âœ… | âœ… | âœ… | âœ… | âœ… | | #### Financial Management | Feature | HOS | IDI | SM | OM | Staff | |-----|-----|-----|-----|-----| | Budget tracking | âœ… Portfolio + All homes | âœ… Portfolio + All homes | âœ… Portfolio + All homes | âœ… Portfolio + All homes | âœ… Portfolio + All homes | | Agency cost analysis | âœ… Portfolio + All homes | âœ… Portfolio + All homes | âœ… Portfolio + All homes | âœ… Portfolio + All homes | âœ… Portfolio + All homes | | Overtime monitoring | âœ… Portfolio + All homes | âœ… Portfolio + All homes | âœ… Portfolio + All homes | âœ… Portfolio + All homes | âœ… Portfolio + All homes | | Cost per shift | âœ… All homes | âœ… All homes | âœ… All homes | âœ… All homes | âœ… All homes | | Budget forecasting | âœ… Portfolio + All homes | âœ… Portfolio + All homes | âœ… Portfolio + All homes | âœ… Portfolio + All homes | âœ… Portfolio + All homes | | #### Analytics & Reporting | Feature | HOS | IDI | SM | OM | Staff | |-----|-----|-----|-----|-----| | Executive dashboard | âœ… | âœ… | âœ… | âœ… | âœ… |

Strategic reports | âœƒ... All homes | âœƒ... All homes | âœƒ... All homes | âœƒ... All homes | âœƒ...  
Operational reports | âœƒ... All homes | âœƒ... All homes | âœƒ... All homes | âœƒ... All homes |  
âœƒ... Benchmarking | âœƒ... Portfolio + All homes | âœƒ... Portfolio + All homes | âœƒ...  
Portfolio + All homes | âœƒ... Portfolio + All homes | âœƒ... Trend analysis | âœƒ... All homes |  
âœƒ... All homes | âœƒ... All homes | âœƒ... All homes | âœƒ... PDF exports | âœƒ... | âœƒ... | âœƒ... |  
âœƒ... | âœƒ... #### AI & Automation | Feature | HOS | IDI | SM | OM | Staff |  
|-----|----|----|---|---|-----| | AI assistant queries | âœƒ... | âœƒ... | âœƒ... | âœƒ... | âœƒ... | | Auto-leave approval | âœƒ... Configure all homes | âœƒ... Configure all homes | âœƒ... Configure all  
homes | âœƒ... Configure all homes | âœƒ... Receive || Smart matching | âœƒ... All homes | âœƒ...  
All homes | âœƒ... All homes | âœƒ... All homes | âœƒ... ML forecasting | âœƒ... All homes | âœƒ...  
All homes | âœƒ... All homes | âœƒ... All homes | âœƒ... Automated alerts | âœƒ... | âœƒ... | âœƒ... |  
âœƒ... | âœƒ... | --- ## ðŸ’° TIME SAVINGS SUMMARY ### By Role (Organization-Wide) | Role  
| Staff Count | Time Saved/Person/Month | Annual Hours (Total) | Value\* | Top Time-Saver |  
|-----|-----|-----|-----|-----| \*\*Head of Service\*\* | 1 | \*\*35-45 hours\*\* | \*\*420-540 hours\*\* | \*\*£21,000-£27,000\*\* | CI integration + staffing forecasts + budget optimization || \*\*Service Manager\*\* | 5 | 10-15 hours each | 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\*\*** --- **## ðŸŽ“ 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 â†’ see latest ratings 4. **\*\*Review Staffing:\*\*** Click "Workforce Planning" â†’ see 4-week forecast 5. **\*\*Check Budget:\*\*** View actual vs forecast per home 6. **\*\*Review Improvement Plans:\*\*** Click "Service Improvement" â†’ see all home plans 7. **\*\*Get Help:\*\*** Click ðŸŒ™ AI Assistant â†’ 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" â†’ 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" â†’ see current week 3. **\*\*Create Next Week:\*\*** Click "Generate Rota" â†’ select template 4. **\*\*Approve Leave:\*\*** Click "Leave Approvals" â†’ 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" â†’ select dates â†’ submit 4. **\*\*Ask Questions:\*\*** Click ðŸŒ™ 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 --- **## ðŸŒ™ 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 - ðŸŒ™ AI Assistant:** 24/7 instant help (in-system) - ðŸŒ™ **\*\*Email Support:\*\*** [support@staffrota.yourdomain.com](mailto:support@staffrota.yourdomain.com) - ðŸŒ™ **\*\*Phone Support:\*\*** 0141 XXX XXXX (9 AM - 5 PM, Mon-Fri) - ðŸŒ™ **\*\*Knowledge Base:\*\*** 30+ detailed guides - ðŸŒ™ **\*\*Video Library:\*\*** 20+ training videos - ðŸŒ™ **\*\*User Forum:\*\*** Share tips with other users --- **## âœ… SUCCESS METRICS ####**

**How You'll Know It's Working \*\*Head of Service:\*\*** - âœ… Can answer Board questions about all 5 homes in minutes - âœ… Always prepared for CI inspections (no panic) - âœ… Improvement plans track progress automatically - âœ… Budget variances identified and explained immediately - âœ… 4-week staffing forecast always visible across all homes - âœ… Agency usage reduced by 20%+ through strategic optimization - âœ… Cost control real-time, not month-end surprise **\*\*Service Manager:\*\*** - âœ… Training compliance consistently above 95% - âœ… Inspection readiness checker always green - âœ… Improvement actions completed on time (80%+) - âœ… CI ratings stable or improving **\*\*Operations Manager:\*\*** - âœ… Rota creation time reduced from 12 hours to 1 hour - âœ… Leave approval automated (90%+ auto-approved) -

âœ… Zero WTD violations - âœ… Shift coverage maintained (no unfilled gaps) **\*\*Care Staff:\*\***  
- âœ… Can view rota anytime, anywhere (mobile) - âœ… Leave approved instantly (within minutes) - âœ… Questions answered quickly (AI assistant) - âœ… Training record always up to date --- ## ðŸ“š 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 ðŸ“š - AI Assistant for instant help - Email [Dean.sockalingum@sw.glasgow.gov.uk](mailto:Dean.sockalingum@sw.glasgow.gov.uk) - Call 07562940494 --- ## ðŸ“š, DOCUMENT VERSIONS #### Available Formats This document is available in: - âœ… **\*\*PDF\*\*** (for printing, email sharing) - âœ… **\*\*Word\*\*** (for editing, customization) - âœ… **\*\*Web Page\*\*** (in-system access, always current) - âœ… **\*\*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](mailto: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.\*