

# 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 - ⚫<sup>1/4</sup> 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:\*\* - ⚫<sup>o</sup> Budget vs actual tracking per home - ⚫<sup>%</sup> Agency usage rates (track cost reduction) - ⚫ Comparative Overtime analysis (identify patterns) - ⚫ Payroll anomaly detection - ⚫<sup>^</sup> Trend forecasting (predict budget pressures) - ⚫<sup>i</sup> 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%+) - ⚫<sup>i</sup> 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:\*\* - ⚫<sup>n</sup> Ask questions in plain English ("Which home has the highest turnover?") - ⚫ Instant data retrieval (no SQL needed) - ⚫<sup>^</sup> 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 - ⚫<sup>^</sup> 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:\*\* - ⚫<sup>o</sup> Real-time budget tracking per home - ⚫<sup>%</sup> Agency spend analysis (daily/weekly/monthly) - ⚫ Comparative Overtime cost monitoring - ⚫ Cost per shift calculations - ⚫<sup>^</sup> Budget forecast modeling - ⚫<sup>i</sup> Overspend alerts (before budget breaches) - ⚫<sup>Z</sup> 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:\*\* - ⚫<sup>^</sup> Sickness absence predictions (ML-based) - ⚫ Peak demand forecasting (seasonal patterns) - ⚫<sup>Z</sup> Optimal staffing level recommendations - ⚫... Long-term workforce planning - ⚫ Attrition risk identification - ⚫<sup>j</sup> 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](mailto: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





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 ðŸ’¬ 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 ðŸ’¬ 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 --- ## ðŸ“š 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 - ðŸ’¬ \*\*AI Assistant:\*\* 24/7 instant help (in-system) - ðŸ“§ \*\*Email Support:\*\* support@staffrota.yourdomain.com - ðŸŽ \*\*Phone Support:\*\* 0141 XXX XXXX (9 AM - 5 PM, Mon-Fri) - ðŸ’¬ \*\*Knowledge Base:\*\* 30+ detailed guides - ðŸŽ¥ \*\*Video Library:\*\* 20+ training videos - ðŸ‘¥ \*\*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“ž 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’¬ AI Assistant for instant help - Email [Dean.sockalingum@sw.glasgow.gov.uk](mailto:Dean.sockalingum@sw.glasgow.gov.uk) - Call 07562940494 --- ## ðŸ“„ 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.\*