

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 OM)s** | | **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“Š 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“ˆ 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“ˆ 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."

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 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 | SM | OM | Staff | |-----|-----|-----|-----|-----| | Multi-home rota view | âœ… Portfolio + All homes | âœ… My home | âœ… My home | âœ… | 4-week forward planning | âœ… | âœ… | âœ… | âœ… | | Shift pattern library | âœ… All homes | âœ… My home | âœ… | âœ… | | Smart rota generation | âœ… All homes | âœ… | âœ… | âœ… | | Mobile rota access | âœ… | âœ… | âœ… | âœ… | | Real-time updates | âœ… | âœ… | âœ… | âœ… | **###** Leave Management | Feature | HOS | SM | OM | Staff | |-----|-----|-----|-----|-----| | Leave request submission | âœ… | âœ… | âœ… | âœ… | | Auto-approval configuration | âœ… All homes | âœ… Approve | âœ… Approve | âœ… Submit | | Leave balance tracking | âœ… Portfolio + All staff | âœ… My staff | âœ… My staff | âœ… Mine | | Leave calendar | âœ… All homes | âœ… My home | âœ… | âœ… | | Leave target monitoring | âœ… All homes | âœ… My home | âœ… | âœ… | **###** Compliance & Quality | Feature | HOS | SM | OM | Staff | |-----|-----|-----|-----|-----| | Training compliance | âœ… Portfolio + All homes | âœ… My home | âœ… My staff | âœ… Mine | | Supervision tracking | âœ… Portfolio + All homes | âœ… My home | âœ… My staff | âœ… Mine | | WTD compliance | âœ… Portfolio + All homes | âœ… My home | âœ… Real-time | âœ… View | | Care plan reviews | âœ… Portfolio | âœ… My home | âœ… | âœ… | | Incident tracking | âœ… Portfolio | âœ… My home | âœ… Report | âœ… Report | **###** Care Inspectorate Integration | Feature | HOS | SM | OM | Staff | |-----|-----|-----|-----|-----| | CI inspection reports | âœ… All homes | âœ… My home | âœ… | âœ… | | Quality Framework ratings | âœ… Portfolio | âœ… My home | âœ… | âœ… | | Requirements tracking | âœ… Portfolio | âœ… My home | âœ… | âœ… | | Auto-import (annual) | âœ… | âœ… | âœ… | âœ… | **###** Service Improvement Planning | Feature | HOS | SM | OM | Staff | |-----|-----|-----|-----|-----| | Improvement plans | âœ… Organizational + All homes | âœ… My home | âœ… | âœ… | | ML-generated actions | âœ… All homes | âœ… My home | âœ… | âœ… | | Action tracking | âœ… Portfolio | âœ… My home | âœ… | âœ… | | Progress monitoring | âœ… Portfolio | âœ… My home | âœ… | âœ… | | Evidence linking | âœ… View all | âœ… Manage | âœ… | âœ… | | Annual auto-generation | âœ… | âœ… | âœ… | âœ… | **###** Financial Management | Feature | HOS | SM | OM | Staff | |-----|-----|-----|-----|-----| | Budget tracking | âœ… Portfolio + All homes | âœ… View | âœ… My home | âœ… | | Agency cost analysis | âœ… Portfolio + All homes | âœ… View | âœ… Track | âœ… | | Overtime monitoring | âœ… Portfolio + All homes | âœ… View | âœ… Track | âœ… Mine | | Cost per shift | âœ… All homes | âœ… | âœ… | | Budget forecasting | âœ… Portfolio + All homes | âœ… | âœ… | | **###** Analytics & Reporting | Feature | HOS | SM | OM | Staff | |-----|-----|-----|-----|-----| | Executive dashboard | âœ… | âœ… | âœ… | âœ… | | Strategic reports | âœ… All homes | âœ… View | âœ… | âœ… | | Operational reports | âœ… All homes | âœ… | âœ… | âœ… | | Benchmarking | âœ… Portfolio + All homes | âœ… My home | âœ… | âœ… | | Trend analysis | âœ… All homes | âœ… | âœ… | âœ… | | PDF exports | âœ… | âœ… | âœ… | âœ… | **###** AI & Automation | Feature | HOS | SM | OM | Staff | |-----|-----|-----|-----|-----| | AI assistant queries | âœ… | âœ… | âœ… | âœ… | | Auto-leave approval | âœ… Configure all homes | âœ… Configure | âœ… Configure | âœ… Receive | | Smart matching | âœ… All homes | âœ… | âœ… | | ML forecasting | âœ… All homes | âœ… View | âœ… | âœ… | | Automated alerts | âœ… | âœ… | âœ… | âœ… | | **--- ##** ðŸ“Š° **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**** | ****Â£21,000-Â£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 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‘™š ****Email Support:**** support@staffrota.yourdomain.com - ðŸ‘™ž ****Phone Support:**** 0141 XXX XXXX (9 AM - 5 PM, Mon-Fri) - ðŸ‘™ - ****Knowledge Base:**** 30+ detailed guides - ðŸ‘™ž ****Video Library:**** 20+ training videos - ðŸ‘™š ****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 - 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:** Fully Operational **Install Instructions:** - **Desktop (Chrome/Edge):** Visit https://demo.therota.co.uk Click install icon in address bar - **iOS (Safari):** Visit site Tap Share "Add to Home Screen" - **Android (Chrome):** Visit site Tap menu "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:** - iOS (Safari 11.3+) - Android (Chrome 40+) - Windows (Edge, Chrome) - 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.*