



Rota Management App Briefing

Introduction:

Special Needs Care Limited (SNC) is a supported living provider for young people and adults with learning disabilities and part of the Special Needs Group. SNC currently provides care and support across 27 supported living homes and within an emergency respite service called The Arc – All within the Chester and Ellesmere Port area. Each service has its own two week rolling rota that ensures each staff team working within a service have a structured and consistent rota enabling them to achieve a good work life balance.

Below details the functions required for an SNC service specific rota app to enable both rota and staff management for the wider management team but also give staff the opportunity to view their rotas, pick up overtime, monitor achievement of contracted hours and communicate effectively with colleagues whilst maintaining confidentiality and adhering to GDPR. Functions will be written with regards to who they are applicable to as there will be a clear discrepancy between what staff are able to do compared to rota managers (Admin).

	Function	Applicable to:
1	Write New Rotas – This will need the functionality of inputting start and finish times on specific days and dates – Once a new rota is written we will need the option of repeating this for specific time periods i.e. One week, two weeks, one month, two months, indefinitely etc. We will need to be able to assign staff to shifts once the shift start and finish times have been written.	Rota Managers – Admin Role
2	Edit Rotas – We will need the ability to edit rotas easily once written as shifts and staffing levels may change based upon service user plans.	Rota Managers – Admin Role
3	Outstanding/Unassigned Shifts – We will need a function to be able to create a list of all unassigned shifts from across all rotas for specified timescales (dates) – This will be needed to enable rota managers to see what they need to cover and where but also for staff to see so they can choose overtime shifts and assign themselves to the shifts. Rota managers will have the ability to assign and unassign. Staff members will only have the ability to assign themselves to shifts.	Rota Managers – Admin Role – To create the list, assign/unassign staff. Staff Members – To view list and assign themselves.
4	Create Staff Profiles/Invite New Staff – We will need to be able to create staff profiles so we can assign the staff members to a shift or shift pattern when a rota is being written. We will need to be able to invite each staff member to use the app via an email link. Rota managers will need to be able to deactivate staff profiles when a staff member leaves so they will no longer have access to the rota app or any information, chats or rotas held on it – Rota Managers will need to be able to go back and view deactivated staff members rotas, information etc in case it is required.	Rota Managers – Admin Role – To input staff data. Staff Member – To view their own information.



5	Staff Profile Information – We will need to be able to build a staff profile of information – This will only be visible to that staff member whose information it is and rota managers. Information we will need: Full name, designation, weekly contracted hours, driving status, services worked in, annual leave entitlement.	Rota Managers – Admin Role – To input and view all staff profiles. Staff Members – To view only their staff profile.
6	Hours Monitoring – We will need the ability to monitor each staff members monthly amount of hours worked for each month against their contracted amount of hours i.e. Staff member son a 35 hours per week contract need to achieve 151.67 hours per month – We will need a function to monitor this from the beginning of the month to ensure rota managers are providing the correct amount of hours to be worked and that staff are achieving the correct amount of hours they need to work to ensure no breach of contract. We will need a staff members monthly amount of hours to be projected from the first until the end of the month & this will need to flag up as underachieving if staff are not going to achieve their monthly contracted hours – This will enable us to provide more shifts in good time before the end of the month.	Rota Managers – Admin Role – To be able to view a staff members monthly hours to be worked – This to flag up if under contract. Staff Member – To be able to see their monthly hours to be worked – This to flag up if under contract.
7	Annual Leave – To be able to input annual leave dates for each staff member – We will need the functionality to be able to input the dates a staff member is on leave – If a staff member is on leave & a rota manager tries to assign the staff member to a shift this will need to flag up a prompt – This is the same if a staff member tries to pick up an unassigned overtime shift. We will need to be able to input each staff members annual leave entitlement for the year and for this amount to decrease as the staff member takes leave so we can monitor the amount of annual leave being taken, how many hours are left for each staff member etc.	Rota Manager – Admin Role Staff Member
8	Sickness Absence – We will need to be able to remove staff (unassign) them from shifts and set them as on sick leave when they have reported sickness absence. We will need the functionality to be able to input sickness dates if staff are off sick – This will need to show up on the staff members rota schedule – We will need a prompt for rota managers or the staff member themselves if they try to assign to a shift. We will need to be able to monitor an individual staff members sickness levels when looking at their staff profile.	Rota Manager – Admin Role Staff Member
9	Messaging Platform - We will need an integrated messaging service within the app (Similar to WhatsApp) to be able to communicate directly with each staff member and for staff to communicate with each other – This will need to adhere to all GDPR guidelines. We will need the ability to create group chats for each service (Each service will have a rota) so that teams and managers can communicate effectively and confidentially. We will need the ability for Rota Managers to view all chats to monitor communication to ensure this maintains confidentiality at all times – We will need a function so that when a staff member leaves their profile is disabled and they can no longer view or access any chats or any part of the rota app.	Staff Members – To send messages to managers & other employees – They will need to be able to send messages to the wider work force. Rota Managers – Admin Role – To view group chats, create messages to send to all staff members directly or globally.
10	Individual Employee Schedule/Rota View – We will need to be able to view an individual staff members rota for specified timescales (dates) previously and in the future – We will need to ability to generate individual rotas to monitor staff members working hours.	Rota Manager – Admin Role Staff Member – View their individual record.



11	View Rotas – Staff members will need the ability to view only the rotas they are assigned shifts on – Staff will not be able to view rotas they are not working on.	Rota Managers – Admin Role – To view ALL rotas. Staff Member – View their own rotas.
12	Training – We will need to be able to create a rota/list for training dates and assign staff onto training – Rota managers will need to be able to assign and unassign staff to training. Staff members will only be able to assign themselves to training. Hours for training will need to be added onto an employee's individual rota/schedule and will contribute to their hours worked.	Rota Managers – To assign and unassign staff to training sessions. Staff Members – To view all training dates and assign themselves to training.