



Creating and managing rotas in Workforce

A Workforce Hub is structured as follows:

Modules

-Sites

-Shifts

-Clinicians

-Attributes

Modules

Initially, a Hub is divided into one or more Modules. A Module is a notional concept used to group a number of sites. **Each Module has a rota.**

The rota is comprised of Clinics. A Clinic is a combination of any number of shifts into the same segment of a day, at the same site.

As an example, a clinic is all the shifts in the morning, at xyz site on Monday the 1st Dec.

Clinic shifts are made using any combination of staff – clinical and non-clinical.

Each shift within a clinic can have varied start and end times but only within the scope of the segment of a day.

Tip

When building rotas, Hub admins only create shifts and the clinics are created automatically where shifts match date, location and segment of the day.

By the same token, when shifts are added to a rota later, they will naturally blend into the right clinic or generate a new clinic, as appropriate.

Each Clinic is shown as a separate row in the rota view and is manageable separately from the whole rota. Each clinic row can have its assignments committed individually.

Sites

Sites are the sub-structure of modules. A site serves as the location for a clinic.

Shifts

These are the most complex and powerful aspect of a rota.

To create shifts in a rota for a Module, a Hub admin navigates to that module in their Assignment screen and to the month they wish to create rota items for. Shown below.

Assignments

Jan 2020 / Feb 2020 / Mar 2020 / Apr 2020 / May 2020 / Jun 2020 / Jul 2020

Central Hove Hub

East Brighton Hub

North Brighton Hub

South Brighton Hub

Clinics can be created one at a time, by clicking the 'Add shift' button and using a simple visual tool, shown below.

Add new shift 

Shift date: 23/04/2020

Start time: 18 : 30

End time: 20 : 30

Location: Charter Medical Centre

No of GPs: 2

No of Nurses: 1

No of Paramedics: 0

No of Pharmacists: 0

No of Practice admins: 1

No of HCAs: 0

Cancel **Add shift**

When creating Clinics, the Hub admin can choose its site from the sites connected to that Module, specify the date, the start and end time and the number of each type of staff member required. The shifts can be individually adjusted later without breaking the Clinic.

Shifts can be created for all the current staff types. (**note:** there is a conversation around a new staff type being created for the COVID hub as part of the Hub customisation)

- GP
- Nurse
- Paramedic
- Pharmacist
- Practice admin
- HCA

Once shift is created with associated staff type, there are some shift attributes that be managed in the Clinic view as shown below.

Key attributes

Nurse shifts have an attribute to set the requirement in the shift to a ANP or or leave it as a Practice nurse

HCA shifts have an attribute to set to the requiremtns in the shift to a **Phlebotomist only** or leave it as a general HCA

These attributes affect the way the system matches the availability of its workofrce to the requirements in the shifts.

When choosing practice admins from auto matched results, the Hub admin can see a small symbol which tells them if staff users are keyholders for the site the shift is located at

When choosing any staff user for a shift, the Hub admin can see a small symbol that tells them if the user has worked at the location before (in historical shifts)

Bulk rota creation

Clinics can also be created in bulk, by clicking the 'Import' button and uploading a simple spreadsheet containing an unlimited number of shifts. An example of the data file is included for download in the Assignment screen.

When the data file is uploaded the system will bulk generate the shifts into logical clinics using the same rules and, within the shifts, it will auto match all the shift requirements to the Hub account workforce using the same logic as when Clinics are manually created.

Managing shifts.

Once shifts have been created, by either method, the Hub admin can edit shifts, add shifts or delete shifts. Shift start and end time can be edited and, depending on the type of clinician, shifts have some additional attributes such as notes and travel incentives.

Shift time cannot be edited once an Assignment is confirmed but times can be edited once a shift has started or when a shift is in the past. Doing this is very important in order to keep the actual shift time connected to real events and pay the clinician the right amount.