

Rota Team Handbook - IUC Operational

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Purpose

The purpose of this handbook is to set out the management of the rota including role, time frames and handovers.

Shift Bookings

Responsibilities

Rota Team

The Rota Team are responsible for the following tasks.

- Weekly (no later than Tuesday) send out the following weeks vacant shifts via email looking to cover as many as possible.
- Weekly checking the following 4 weeks vacant shifts are visible in shift bookings.
- Linking in at the beginning of the week with next week's IUC SDT Rota Person of the week to gain a list of possible swaps and proactively reaching out to the individuals to seek if available to swap.
- Releasing batches of shifts every 4 weeks.
- Regularly monitoring Shift Bookings. It is expected that Shift Bookings are checked a minimum of 3 times a day. Ideally first thing in the morning, lunch time and at the end of the day.

IUC Service Delivery Team

The IUC Service Delivery Team are responsible for the current week's operational Rota. The Rota Team will hand over the Rota at 1pm on a Friday for the following week to the Rota Person of the week. They will use the template shown in **Appendix A**

Rota Team shift availability weekly email

Sending the email

The Rota Team will send out weekly a list of vacant shifts within RotaMaster for the week following.

The following steps need to be taken before sending the email.

- check the Shift Booking Tab and process all booked shifts here before sending out the email.
- check all vacant shifts that are going to be advertised have the shift status **SHOW IN WEB BOOKINGS** and the category is set to **First Come First Served**.

collate the list removing any shift that are

- blocked shifts
- on-call Manager Shifts

Use the template in Appendix A to draft the email.

When ready to send, it is important that we **always BCC** the email addresses into the email. The email needs to be sent from brisdoc.rotateam@nhs.net

To gain a list of emails you will need to download from RotaMaster the email lists for the following Rota Groups.

- IUC Operational Rota
- IUC PL Operational Rota.

Allocating shifts from weekly email

If we get a reply for a shift via email or via shift bookings, please carefully check the date and time of the requests so that we are allocating on a first come first served basis.

On occasions there may be members of the team who have restricted bookings. These people will be communicated to the team via the Rota Team Manager. For these bookings, please forward these to iuc.Managers@nhs.net for their review.

If someone tries to book a shift after the week has been handed over to the SDT, if this is via Shift Bookings, please flag to the Rota Person of the Week and if it is via email please forward to iuc.Managers@nhs.net.

All other shifts applied for should be dealt with by the Rota Team.

Planning for the following week

Alongside sending out the vacant shifts we need to speak with next week's Rota Person of the Week to understand if there are any changes they may ask us to explore.

This could be asking people to swap to fill critical shifts. In this case we can work on as many of the requests as possible ahead of the next week and then report back to them on the handover at the end of the week. See **Appendix B**.

Handover

The Rota Team will hand over the rota to the rota person of the week on a Friday afternoon at 1pm. This will ideally be in person, on teams or over the phone. If they are not working, then this will be sent via email. See **Appendix B**.

The handover will consist of

- an overview of each day
- key gaps
- offers we are holding

Shift Release – Following 16 weeks

Advertising

The following process will need to be completed for both the **IUC Operational ROTA** and **IUC PL Operational ROTA**.

Every 4 weeks, we need to release the next batch of shifts.

Shifts will be released on a week 2 Wednesday

This will consist of

- The next week 1-4 all vacant shifts. These shifts will be set to the status **FIRST COME FIRST SERVED**, regardless of whether the shifts have been advertised before.
- The following week 1-4 (this will be 5-8 weeks out) both leave and vacant defaults. These shifts will be set to the status **FIRST TIME ALLOCATION**.
- The following 8 weeks (this will be 9-16 weeks out and 2x week 1-4) any vacant shifts due to annual leave. These shifts will be set to the status **FIRST TIME ALLOCATION**.

To process this follow the steps below:

1. set the rota date range to be the next week 1-4, then change the filters so that you have all the vacant shifts. You will need to exclude the following.
 - Blocked shifts

- Shifts already set to the status **SHOW IN WEB BOOKINGS** and the category **FIRST COME FIRST SERVED**
 - Then select all the vacant shifts and edit the status to **SHOW IN WEB BOOKINGS** and the category **FIRST TIME ALLOCATION**
2. Next set the rota date range to be the following 4 weeks (weeks 5-8), then change the filters so that you have all the vacant shifts. You will need to exclude the following.
- Blocked shifts
 - Shifts already set to the status **SHOW IN WEB BOOKINGS** and the category **FIRST COME FIRST SERVED.**
 - Then select all the vacant shifts and edit the status to **SHOW IN WEB BOOKINGS** and the category **FIRST TIME ALLOCATION**
3. Next set the rota date range to be the following 8 weeks (Weeks 9-16), then change the filters so that you have all the vacant shifts. You will need to exclude the following.
- Blocked shifts
 - Shifts already set to the status **SHOW IN WEB BOOKINGS** and the category **FIRST COME FIRST SERVED.**
 - Also, you will need to exclude the shift codes for all vacant default shifts, this may take a few minutes to process but will ensure we are only advertising the vacant shifts people are on leave. Vacant shift codes can be found in the shift pattern manager,
 - Then select all the vacant shifts and edit the status to **SHOW IN WEB BOOKINGS** and the category **FIRST TIME ALLOCATION**
4. Once complete for both rota groups, please send the template email updating the dates from **Appendix C** via RotaMaster setting the Rota Groups to **IUC Operational ROTA** and **IUC PL Operational ROTA**.

Allocation first time advertised shifts

Shifts will be allocated on a week 3 Wednesday.

To do this you will need to review all the Shift Bookings.

Check through all set to **FIRST TIME ALLOCATION** and review who has booked the shift allocating as fair as possible.

It is important to review all shifts requested before allocating. This will help you have an overview of who has requested what shifts. Allocate with fairness in mind ensuring, if possible, everyone who has applied for a shift is allocated at least one and everyone is treated equally as possible.

Where multiple people request the same shifts review other vacant shifts to check if there are suitable alternatives that can be offered.

Once allocated you will need to edit any of the shifts that remain with the category **FIRST TIME ALLOCATION** to **FIRST COME FIRST SERVED**.

Other tasks Rota Team

Shift bookings

Please ensure that Shift Bookings are checked a minimum of 3 times a day. Ideally first thing in the morning, lunch time and at the end of the day.

Reviewing vacant shifts

Each week the team will need to review the following 4 weeks shifts and check if there are any additional vacant shifts. If any new vacant shifts are found, please change the Status to **SHOW IN WEB BOOKINGS** and category to **FIRST COME FIRST SERVED**.

Emails for shifts for the current week

If someone tries to book a shift after the week has been handed over to the SDT, if this is via Shift Bookings, please flag to the Rota Person of the Week and if it is via email please forward to iuc.Managers@nhs.net .

Unsure what to do

Please speak with the Rota Team Manager before progressing.

Other tasks Team Managers

Annual leave or sickness

If someone is taken out of the Rota, the SDT will leave the status, the Rota Team will review the shifts in the processes above and will advertise the shift. The only exception to this is the current week. In this instance, the SDT will change the Status to **SHOW IN WEB BOOKINGS** and category to **FIRST COME FIRST SERVED**.

Emails for shifts for the following week

SDT should email requests to brisdoc.rotateam@nhs.net, this way we can check there was no one that had asked to pick the shift up before and the shifts are allocated fairly.

Appendix A – Weekly shift email

Subject

Shift available next week

Main Body

Good **Afternoon**,

If anyone able to help with any of the following shifts next week, please book online or reply to this email.

As these shifts have already been advertised, they will be allocated on a first come first served basis.

If you have any availability this current week, please contact the team managers

iuc.managers@nhs.net

Insert shifts here

Appendix B – Handover

Day	Number of vacant shifts	Overview (including key gaps and offers)
Monday		
Tuesday		
Wednesday		
Thursday		
Friday		
Saturday		
Sunday		

Appendix C – Shift release email

Subject

Shift Bookings open until **Sunday 9th June**

Main Body

Good **Afternoon**,

Shift bookings are open to book for both the IUC Operational Rota's until **Sunday 10th June**.

The following 2 Shift Groups will be allocated

- **FIRST COME FIRST SERVED** - Will be allocated first come first served
- **FIRST TIME ALLOCATION** - Will be allocate **Wednesday 6th March**

Change Log

Version	Date	Author	Changes
0.1	28/02/2024	Dan Cotton	Initial draft
1.0	17/04/2024	Dan Cotton	Final document following feedback