

# Rota Team Handbook

## IUC Operational

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## Purpose

This handbook aims to outline the responsibilities of the rota team with regards to filling the SevernSide IUC Operational Rotas. The handbook outlines the required time frames, escalation and handover expected with the Service Delivery Team (SDT) Its purpose is to ensure that the rota is consistently staffed to maintain the safe and efficient operation of all SevernSide IUC services

The IUC operational rota consists of three primary teams:

- Out of Hours
- Weekday PL
- IAP Mental Health CAS

## Responsibilities

### Rota Team

The Rota Team is responsible for the following tasks

#### Daily

- Ensuring the operational rota is fully covered, including supporting with last minute absences, escalating any shifts that are unable to be covered to the service delivery team
- Ensure all efforts are made to fill shifts in full; where this is not possible, develop and implement a safe and effective contingency plan to maintain minimum safe staffing levels
- Covering any shifts still vacant for the current week, proactively seeking cover through contacting individuals either by phone or text message
- Regularly monitoring Shift Bookings.

#### Weekly

- Send out the following weeks vacant shifts via email looking to cover as many as possible.
- Ensuring the following 4 weeks vacant shifts are visible in shift bookings.

#### Monthly

- Releasing the next batch of shifts for web booking

### IUC Service Delivery Team

The IUC Service Delivery Team are responsible for supporting the Rota Team with any queries around the operational rota and being a point of escalation when a shift cannot be filled.

## Daily Tasks

### Current Rota Week

During the current rota week, the rota team is responsible for filling all vacant shifts. In the preceding week, the SDT manager overseeing that rota week will review the unfilled shifts and provide guidance on requesting shift swaps or potential rota adjustments.

The rota team should then proactively work to fill these vacancies. Since most of the available shifts have already been advertised on web bookings and communicated twice via email, all further requests for cover should be made by phone or text message.

Shifts for the current day that remain unfilled, after all possible attempts for cover have been made, must be promptly escalated to the SDT manager to allow sufficient time for alternative arrangements.

Since some teams operate 24/7 weekend shifts, all efforts to secure cover must be completed by Thursday of the current week. This deadline allows the SDT team to make informed decisions about weekend staffing.

### Unexpected Absence

The SDT team must promptly notify the rota team of any absences to allow sufficient time for arranging cover. If cover cannot be secured, the issue should be escalated as outlined above.

### Shift bookings daily check

Shift bookings awaiting approval must be checked at least three times daily: morning, lunchtime, and end of day

### Reviewing vacant shifts

Daily 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.** - *please see below for more information.*

## Weekly Tasks

### Email Requesting Shift Cover

The Rota Team will send out weekly emails listing vacant shifts in RotaMaster twice a week:

- Fridays, containing shifts for the following week
- Tuesdays, containing shifts for the two weeks after the following week (i.e. weeks 2 and 3, excluding the current week)

### Sending the email

Before sending, the following steps must be completed:

- Process all booked shifts in the Shift Booking tab.
- Confirm all advertised vacant shifts have the status **SHOW IN WEB BOOKINGS** and category **FIRST COME FIRST SERVED**.
- Remove any shifts that are:
  - Blocked shifts
  - On-call Manager shifts
  - IT support shifts

Use the template in Appendix A and B to draft the emails. Three separate emails should be sent, one for each rota group.

When ready to send, it is important that we **always BCC** the email addresses into the email. The email needs to be sent from [brisdock.rotateam@nhs.net](mailto:brisdock.rotateam@nhs.net)

To gain a list of emails you will need to download from RotaMaster the email lists for the Rota Group being sent.

- IUC Operational Rota
- IUC PL Operational Rota.
- IAP Operational Rota

### Weekly Rota Checks

Each week, review the previous week's rota for all operational rotas and check:

- That statuses are set correctly.
- Any shift queries from staff are addressed and flagged appropriately.
- No flags or sticky notes remain unprocessed.

If unsure, consult with the Rota Team Manager before proceeding

## Allocating shifts

When shift requests are received via email or shift bookings, allocate shifts on a first-come, first-served basis by checking request dates and times.

Note that some team members may have restricted bookings communicated by the Rota Team Manager; these should be reviewed with the Service Delivery Team.

## Monthly Tasks

Releasing shifts on Rotamaster

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

The rota should be open for bookings up to 16 weeks in advance. Shift status and allocation

### Advertising shifts in Rotamaster

This applies to the IUC Operational, IUC PL Operational, and IAP Operational rotas.

- The rota should be open for bookings up to 16 weeks in advance.
- Shift status and allocation methods vary depending on how long shifts have been advertised.
- All shifts start as **FIRST TIME ALLOCATION**, and are open to all staff and may potentially be requested by multiple individuals. The rota team review and allocate these to ensure fair distribution.
- After 8 weeks, shifts switch to **FIRST COME FIRST SERVED**, allowing automatic booking.
- To maintain a 16-week booking window, new shifts are released every 4 weeks on Wednesday of week 2.

### Advertising Shifts in Rotamaster

The process involves:

- Weeks 1-4: All vacant shifts set to **FIRST COME FIRST SERVED**, regardless of previous advertisement.
- Weeks 5-8: Both annual leave and vacant defaults set to **FIRST TIME ALLOCATION**.
- Weeks 9-16: Vacant shifts due to annual leave set to **FIRST TIME ALLOCATION**.

#### Steps:

1. Set date range to weeks 1-4, filter vacant shifts (exclude blocked shifts and shifts already set to **SHOW IN WEB BOOKINGS** with **FIRST COME FIRST SERVED**), then

change status to **SHOW IN WEB BOOKINGS** and category to **FIRST TIME ALLOCATION**.

2. Repeat for weeks 5-8 with the same exclusions.
3. For weeks 9-16, exclude blocked shifts, shifts already set as above, and shift codes for all vacant default shifts (found in the Shift Pattern Manager), then set remaining vacant shifts to **SHOW IN WEB BOOKINGS** and category **FIRST TIME ALLOCATION**.
4. After completion, send the updated dates email template (Appendix C) via RotaMaster to the IUC Operational and IUC PL Operational rota groups.

### Allocation 'first time allocation' shifts

On Wednesday of week 3, review all **FIRST TIME ALLOCATION** shift bookings and allocate shifts fairly. Ensure each applicant is allocated at least one shift where possible. If multiple people request the same shift, explore other suitable vacant shifts to offer alternatives.

After allocation, change any remaining **FIRST TIME ALLOCATION** shifts to **FIRST COME FIRST SERVED**.

### Annual leave or sickness within rotamaster

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**.





## Appendix A – Next Weeks 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.

Insert shifts here

## Appendix B – Next 2 Weeks Shift Email

### Subject

**Shift available next 2 weeks**

### Main Body

Good Afternoon,

If anyone able to help with any of the following shifts next 2 weeks, 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.

Insert shifts here

## 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 10<sup>th</sup> 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 6<sup>th</sup> 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
1.1	09/05/2025	Dan Cotton	Review and update to Team Responsibilities.
1.2	02.09.2025	Sarah Eaton	Full review to include updates and explanation of process held within this handbook