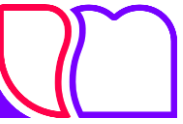


# Lunchtime Learners

June 2023

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# Agenda

1. Exchange
2. Administrator Roles, Types & Permissions
3. Annual Leave Configuration (People+)
4. New Functionality



# 1. Exchange

What is the exchange and how do I turn it on?

This allows your staff to swap, deposit & pick-up shifts and can be managed between themselves or with admin approval.

The exchange can be switched on/off per rota group and is configured in Rota Settings.

## Approve or automate shift swapping

 Setting the exchange type to approved means that once the two members of staff have agreed what shifts to swap, an administrator will need to review and approve this.

 Setting the exchange type to direct means that the shifts are automatically swapped, once both members of staff have agreed which shifts to offer each other.



# 1. Exchange

## Depositing



This is where a member of staff offers their shift to be picked up, without the expectation of receiving a shift in return.

## Swapping



This is where a member of staff will offer a shift that they no longer can or wish to work, and another member of staff offers one of their shifts in return.

## Who works the shift?






Until the swap or deposit is agreed by staff – and approved by admin if configured – whomever the shift belonged to originally is still expected to work that shift.







## 2. Administrator Roles, Types & Permissions

There are three administrator roles...

-  System Administrator - full access to add; edit & view everything across all Rota Groups
-  Local Administrator - full access to add; edit & view everything for specified Rota Groups
-  User - configurable access to either add; edit or view each part of RotaMaster

There are also four types of administrator accounts...

-  RotaMaster Only - Access to RotaMaster and not the Admin Hub
-  Staff Hub Only - Access to the Admin Hub and not RotaMaster
-  Both - Access to both RotaMaster and the Admin Hub
-  T&A Only - Access to sign into the Time & Attendance App (Attendance+)










# Annual Leave Configuration (People+)

## What does it do?

Annual leave configuration automates the calculation of annual leave allowances for your staff...

-  Pro-rata annual leave for staff working less than full time
-  Pro-rata annual leave for staff starting / leaving part way through an annual leave year
-  Automatic allowance for length of service
-  Automatic allowance for Bank Holidays
-  Re-calculate allowance when working hours change

## How does it work?

Based on your whole time equivalent (WTE), designating an allowance, if relevant, a tier for length of service and handling of Bank Holidays; the configuration can then be allocated to each Post.



## 5. New Functionality

### + Add Shift Adjustments in bulk

There is now the option to add shifts adjustments in bulk from the View Rota screen, simply select multiple shifts by holding CTRL on your keyboard and press the new Bulk Add Shift Adjustments icon.

### ✉ Email Multiple Payroll Runs

It is now possible to select multiple payroll runs within a Rota Group and email these out to staff. Hold CTRL on your keyboard, select your payroll runs then select the email icon.

The screenshot displays the 'View Rota' screen with a list of payroll runs for 'Beech Grove Practice'. The list includes:

- 71: 18/05/2023
- 49: 10/02/2023
- 36: 31/10/2022

Below the list, several other rotas are visible, each with a 'Not L' status:

- Bentley Court
- Enhanced Access
- Extended Access
- Grove Hill
- Musgrove Park Hospital
- NHS Model Hospital
- Summer Lane Surgery

An 'Email Payroll Run' dialog box is open, showing the following details:

- Style: Gross Pay Statement with Avg Hourly Rate
- Subject: Gross Pay Statement
- Body: (Empty text area)
- Characters remaining: 0/12000

The dialog box also features an 'Insert fields into body' section with the following options:

- Today's date (dd/mm/yyyy)
- Payroll Date (dd/mm/yyyy)
- Payroll Run Start Date (dd/m
- Payroll Run End Date (dd/mm
- Payroll Date Range (dd/mm/)

Buttons for 'Email' and 'Cancel' are located at the bottom of the dialog box.





## 5. New Functionality

### + Add Staff to Multiple Rota Groups

There is now the option to add everyone within one Rota Group to one or more, additional Rota Groups. Simply click the Bulk Update icon in Personnel Manager and select the Rota Group(s) you'd like to add staff to.

### 📄 Export Proposed Allocation

You can now export the list of reasons why someone was not allocated to a shift if you would like a record of these reasons when running the Allocation Wizard.

### 🔔 Notification for Contract Amendments (People+)

There is a new notification available for when a staff member's contract is amended.

The screenshot shows a software interface with a toolbar at the top containing icons for adding, editing, deleting, and bulk update. The bulk update icon is highlighted with a red box. Below the toolbar, a dialog box is open, titled 'Notification Types'. The 'Notification Types' dropdown is set to 'Contract Amendment'. The 'Notifications' section is expanded, showing a title 'New Contract Amendment' and a 'Rota Group' dropdown set to 'Beech Grove Practice, Bentley Court, Enhan...'. There are several checkboxes for notification options: 'Notify user', 'Notify line manager', 'Email notification', 'RotaMaster notification', and 'Enabled' (which is checked). A 'Notified Users' table is visible on the right side of the dialog, with a header 'First Name'. The dialog has 'OK' and 'Cancel' buttons at the bottom.



## 5. New Functionality

### Set-up notifications per Rota Group

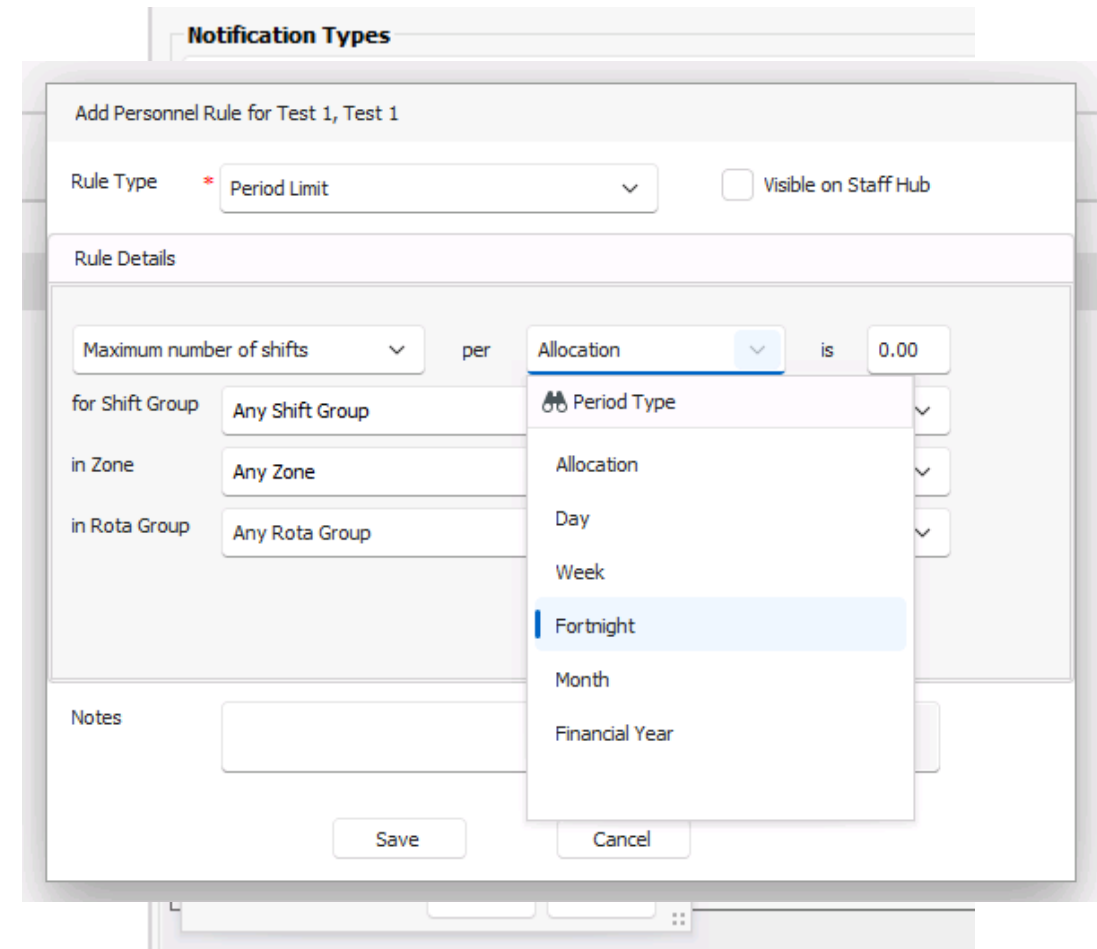
When setting up notifications, you are now able to specify different triggers & recipients for your different Rota Groups.

### Configure Rules per Fortnight

There is now the option to select fortnight when creating Period Limit rules.

### User Defined Controls – Report 544

This report is now available to all customers and permission to run this report can be granted in the Rota Permissions screen.



**Notification Types**

Add Personnel Rule for Test 1, Test 1

Rule Type \* Period Limit  Visible on Staff Hub

Rule Details

Maximum number of shifts per Allocation is 0.00

for Shift Group Any Shift Group

in Zone Any Zone

in Rota Group Any Rota Group

Notes

Save Cancel

Thank you

