

eRostering in Pharmacy: North Bristol NHS Trust's Success Story

The pharmacy department at North Bristol NHS Trust had one roster for nearly 200 staff. It covered teams in different areas and those doing weekday and weekend working. The roster was unwieldy to use, neither accurate nor manageable and there was a lack of engagement and understanding from staff. Heads of pharmacy and payroll met with all stakeholders to discuss the problems with the roster and look for solutions.

Our challenge

The issues all stemmed from the fact that there was only one pharmacy roster for nearly 200 staff. The roster had become unmanageable because:

- **It could not be subdivided by team**

This meant that all pharmacy personnel were listed for each shift. Team managers had just one roster to access between them and it wasn't possible to allocate a team within a team. This also meant that annual leave percentage and reports were for the whole unit when they needed to be by team. Confidentiality was also an issue as sickness reasons were visible to all managers even for staff in teams they did not manage.

- **Recording weekend working created problems**

Full-time staff are paid 37.5 hours per week but work 36.5 hours per week on their normal roster. They then save up the extra hour up to work 13 weekend shifts per year. These shifts are not necessarily spread evenly throughout the year so there was no way of recording whether these shifts had been worked or not. As weekend working wasn't recorded accurately it resulted in inaccurate net hours balances. The problem was further exacerbated by the fact that not every member of staff was part of the weekend roster, on call was not paid through roster and some staff did a different frequency of weekend shifts, for example by saving half hour each week.

- **There was no clear roster management**

There was a lack of understanding from some managers about how to use the roster which, alongside the time it took to load, led to a lack of engagement. Responsibility for the roster and its management was haphazard and made worse by the procedures in place to record information. One person could lock the whole roster even when they were not responsible for all staff members listed and were not aware of what shifts they had worked. At the same time the roster was never approved which always left outstanding annual leave or leave requests recorded with inaccurate hours. Finally, not all staff had the correct grade (e.g. Registered Pharmacist, Registered Technician) recorded on the roster, but no one was responsible for amending these errors.

Our approach

We met with the heads of pharmacy and payroll to discuss these issues and look for solutions. It was decided that separate rosters and cost centres would be built for each team. We met with each team manager to gather data and discuss the build of their individual rosters and the finance team created corresponding cost centres. Staff were moved over to the new rosters and a separate weekend roster was created so staff could identify their different working patterns more easily.

The eRostering team then delivered drop-in sessions for staff to relaunch EmployeeOnline. As part of the relaunch, a decision was made to zero net hours and start afresh. Inaccuracies were also corrected in relation to default leave, working patterns and staffing grades. Managers, administrators and roster updaters were all retrained in using the roster software to ensure engagement with the relaunch. New roster procedures were also implemented so that all managers had view only access to the weekend roster and manager level access solely to their team's roster.

Our achievements

In all 12 new, fully patterned rosters were created. Managers can use auto roster to fully build rosters quickly and with confidence. This means rosters are now finalised and published on time and can be updated in real time. A spreadsheet has been created to record changes in patterns, hours, annual leave entitlements, grades and submitted to payroll, employment services and the eRostering team to ensure all teams receive the same information in timely manner.

As a result, reporting is more meaningful and accurate so reports on overtime, temporary staffing and net hours can now be used to make informed decisions.

Managers are happier, more engaged and more knowledgeable. The shared responsibility for rostering makes it a more manageable task and means there is no one point of failure. Staff are happier too as they know they can rely on the information in EmployeeOnline to be correct and so they have more confidence in the system.



Lessons for others

It was important to involve all stakeholders in the development of the new rosters and their design.

By having an input in the process to create a solution to the challenges we were experiencing they are now fully engaged with using the rosters, they meet the departments needs and together we have created something accurate, reliable and easy to use.

