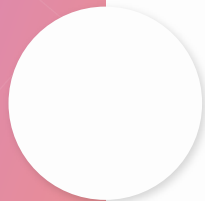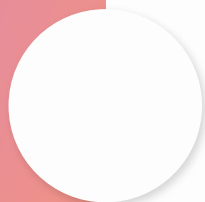# Back to Basics: AutoRoster – Identify
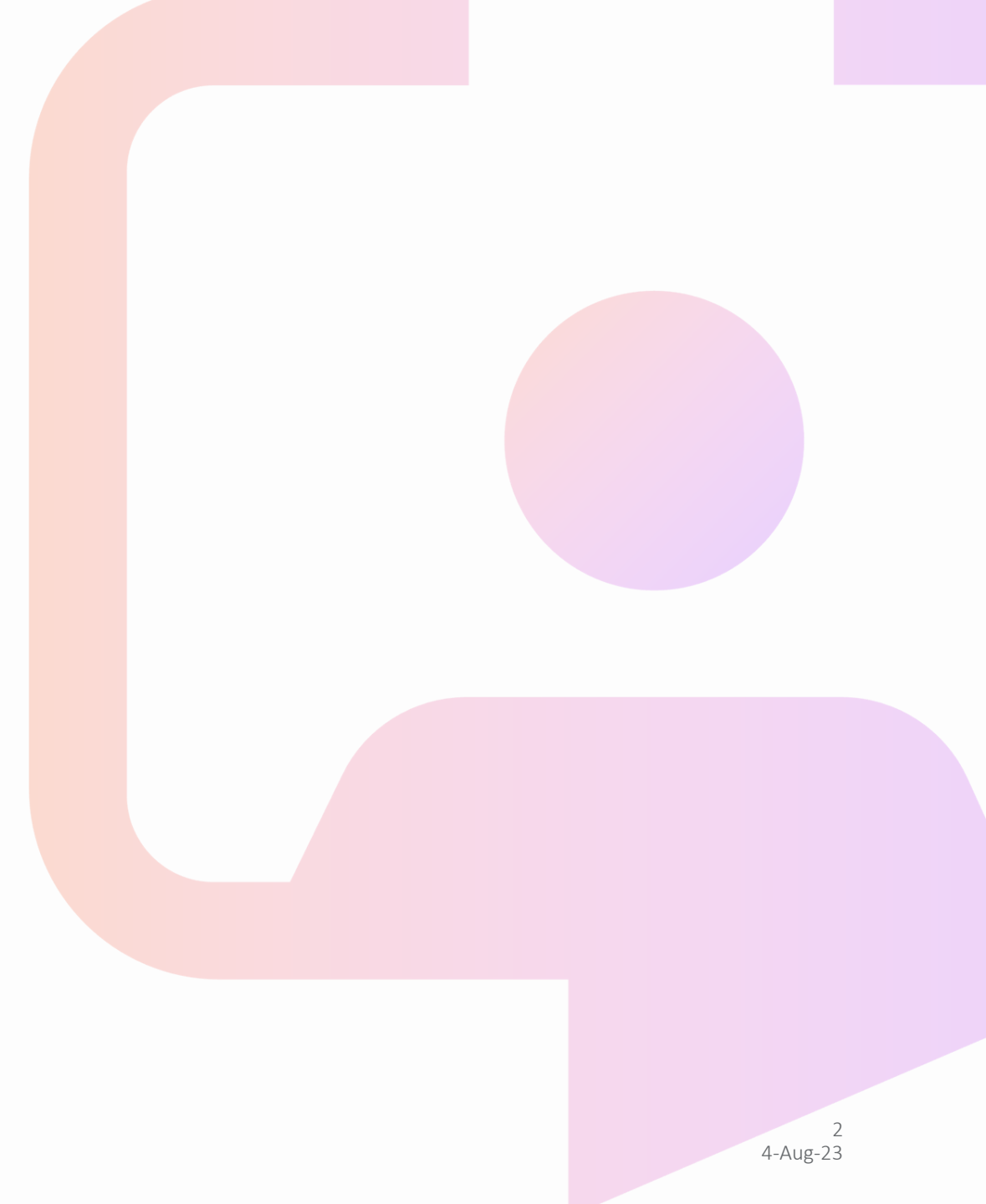
What is AutoRoster?

Benefits of AutoRoster

Identifying Areas for Improvement

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What is AutoRoster?

Allocate Optima has functionality to assign duties to staff automatically – this is known as the AutoRoster. It is an automated rostering engine, which will take the unit/areas demand (as laid down from the demand template) and automatically assign duties to staff in that unit/area whilst considering rules, working restrictions and ideal patterns of work.

The Auto Roster will not complete the entire roster. It is not going to assign every duty, nor make an ideal roster for everyone. One reason why is that the AutoRoster is generally told not to break rules, and a completed roster may break rules; but the AutoRoster will not have all the intelligence of a roster creator.

It will however create a good first draft roster. It will change the rostering process from staring at a blank screen wondering where to start, to having a good first draft roster to tweak and finish as desired. It will significantly reduce the time taken to create a roster and remove a lot of mundane work.

For example, if most rosters have 15% of the roster filled by staff requests, it is expected that 60% or so of the roster would be filled by the AutoRoster – leaving about 25% completed manually. For less complex areas up to 90% of the roster may be Auto Rostered.

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What is AutoRoster – Use Cases

AutoRoster can be used for all staff groups/grade types – this includes:

- Nursing

- Admin & Clerical

- Estates & Facilities

- Medics – Jnr Drs & Consultants

- Activity based rostering

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Benefits of AutoRoster

Using AutoRoster as part of your roster creation process can offer several benefits, below are some of the advantages:

- Time Saving

- Reduction in Rule Breakages

- Improved Efficiency

- Enhanced Fairness & Transparency

- Open Roster Creation

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Identifying Areas for Improvement

So how can we identify a roster/area that is maybe not rostering as efficiently or could benefit from utilising AutoRoster as part of the roster creation process?

There are several ways to identify units/areas that are not rostering efficiently, or are experiencing barriers/challenges to roster creation.

- High Rule Breakages
- Low/Non-existent AutoRoster Usage
- High/Low AL Requests
- Incorrect Demand
- High Additional Duty Creation
- Staffing Vacancies

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Roster Stats

Rostering > Roster Stats > Roster Stats

	Rostering	SafeCare	Personnel	Payroll	Admin	Gateway	Reference Data

View Rosters ▼	Bank Requests ▼	Daily Staffing ▼	Unavailability ▼	Assigned Hours ▼	Roster Stats ▼	Attendance Exceptions	Timesheet Corrections ▼

Roster Stats

Unit ↑	Name	% Auto Rostered	% Manually Rostered	% Requested	% Duties With Warnings	% Changed Since Approval	% Unfilled	Date Partially Approved	Date Fully Approved	Full Approver	Partial Approver
☐ Cole Ward	21 August 2023	78.87 %	18.58 %	2.55 %	4.03 %	0.00 %	0.42 %	12/06/2023	12/06/2023	kiri.hargreaves	kiri.hargreaves
☐ Cole Ward	18 September 2023	85.35 %	13.24 %	1.41 %	1.53 %	0.00 %	0.00 %	07/06/2023	07/06/2023	kiri.hargreaves	kiri.hargreaves
☐ Ellis Ward	21 August 2023	49.93 %	50.07 %	0.00 %	5.57 %	7.87 %	4.60 %	09/06/2023	09/06/2023	kiri.hargreaves	kiri.hargreaves
☐ Ellis Ward	18 September 2023	22.19 %	75.77 %	2.04 %	8.85 %	5.99 %	5.83 %	07/06/2023	07/06/2023	kiri.hargreaves	kiri.hargreaves
☐ Johnson Ward	21 August 2023	0.00 %	93.03 %	6.97 %	17.12 %	3.55 %	3.84 %	09/06/2023	09/06/2023	kiri.hargreaves	kiri.hargreaves
☐ Johnson Ward	18 September 2023	0.00 %	98.30 %	1.70 %	16.15 %	3.76 %	1.82 %	08/06/2023	08/06/2023	kiri.hargreaves	kiri.hargreaves
☐ Tigers Ward	21 August 2023	75.24 %	24.35 %	0.41 %	1.71 %	8.71 %	3.70 %	14/06/2023	14/06/2023	kiri.hargreaves	kiri.hargreaves
☐ Tigers Ward	18 September 2023	49.80 %	48.44 %	1.77 %	3.18 %	9.12 %	3.70 %	14/06/2023	14/06/2023	kiri.hargreaves	kiri.hargreaves

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Duties with Warnings

Rostering > Assigned Hours > Duties with Warnings

Name	Instances ↓
> 📁 Weekend Rule	86
> 📁 WTD Min Rest Per Day Rule	56
> 📁 Matching Grade Type Rule	13
> 📁 Exceeding Hours On Roster Rule	10
> 📁 Invalid Combinations Rule	9
> 📁 WTD Max Hrs Per Week T1 Rule	6
> 📁 Overlapping On Call Duty Rule	6
> 📁 WTD Min Rest In Ref Period Rule	2
> 📁 Max Shifts In Ref Period Rule	2
> 📁 Matching Grade Rule	1
> 📁 Keep Staff Apart Rule	1

Name	Instances ↓		Surname	Forename	Grade Type	Grade	Valid Date	Start Time	End Time	Work Time	Rest Time	Assigned By
∨ 📁 Weekend Rule	86											
⚠ Johnson Ward	Min Two Free We		Ward	Abbie	HCA	Band 3 H	26/08/2	07:00	15:00	07:30	00:30	Manual Manager Assignment
⚠ Johnson Ward	Min Two Free We		Matthew	Alex	HCA	Band 3 H	26/08/2	07:00	15:00	07:30	00:30	Manual Manager Assignment
⚠ Johnson Ward	Min Two Free We		Millar-M	Harriet	HCA	Band 3 H	27/08/2	07:00	15:00	07:30	00:30	Manual Manager Assignment
⚠ Johnson Ward	Min Two Free We		Ward	Abbie	HCA	Band 3 H	02/09/2	07:00	15:00	07:30	00:30	Manual Manager Assignment
⚠ Johnson Ward	Min Two Free We		Matthew	Alex	HCA	Band 3 H	03/09/2	07:00	15:00	07:30	00:30	Manual Manager Assignment
⚠ Johnson Ward	Min Two Free We		Harper	Detysha	HCA	Band 3 H	09/09/2	07:00	15:00	07:30	00:30	Manual Manager Assignment
⚠ Johnson Ward	Min Two Free We		Matthew	Alex	HCA	Band 3 H	09/09/2	07:00	15:00	07:30	00:30	Manual Manager Assignment
⚠ Johnson Ward	Min Two Free We		Harper	Detysha	HCA	Band 3 H	10/09/2	07:00	15:00	07:30	00:30	Manual Manager Assignment

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Additional, Optional, Standby Duties

Rostering > Daily Staffing > Additional, Optional, Standby Duties

	Rostering	SafeCare	Personnel	Payroll	Admin	Gateway	Reference Data

| View Rosters ▾ | Bank Requests ▾ | Daily Staffing ▾ | Unavailability ▾ | Assigned Hours ▾ | Roster Stats ▾ | Attendance Exceptions | Timesheet Correct |

Additional, Optional, Standby Duties

Owning Unit Short Name	Resourcing Unit Sh	Short Nam	Resource R	Duty Type	Day of Week	Date	Actual Sta	Actual End	Work Time	Name	Grade Typ	Additional Duty	Fulfilment	Legitimate Additional Duty
Johnson Ward	Johnson Ward	E	02 HCA	Additional	Monday	24/07/2023	07:00	15:00	7.50	Emily Robinson (johnson23)	HCA	High Acuity	Local	Y
Johnson Ward	Johnson Ward	L	01 RN	Additional	Monday	24/07/2023	13:00	21:00	7.50	Jason Mendoza (Johnson35)	RN	1:1 Special	Local	Y
Johnson Ward	Johnson Ward	E	01 RN	Additional	Monday	24/07/2023	07:00	15:00	7.50	Hanro Liebenberg (johnson11)	RN	1:1 Special	Local	Y
Johnson Ward	Johnson Ward	E	01 RN	Additional	Monday	24/07/2023	07:00	15:00	7.50	Eleanor Shellstrop (Johnson33)	RN	1:1 Special	Local	Y
Johnson Ward	Johnson Ward	E	01 RN	Additional	Monday	24/07/2023	07:00	15:00	7.50	Ben Smith (johnson54)	RN	1:1 Special	Local	Y
Johnson Ward	Johnson Ward	L	01 RN	Additional	Tuesday	25/07/2023	13:00	21:00	7.50	Jason Mendoza (Johnson35)	RN	1:1 Special	Local	Y
Johnson Ward	Johnson Ward	E	02 HCA	Additional	Tuesday	25/07/2023	07:00	15:00	7.50	Emily Robinson (johnson23)	HCA	High Acuity	Local	Y

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Template vs Budget

Rostering > Roster Stats > Template vs Budget

Templates vs Budget

Unit	Duration In Days	Number Of Beds	Roster Type ↑	Registered Budgeted WTE	Registered Mandatory Demand WTE	Unregistered Budgeted WTE	Unregistered Mandatory Demand WTE	Other Budgeted WTE	Other Mandatory Demand WTE
Cole Ward	28	0	Nursing	12.74	17.32	10.53	11.69	1.00	1.28
Johnson Ward	28	0	Nursing	13.00	15.52	13.00	14.24	1.00	1.28
Borthwick Day Unit	28	0	Nursing	15.50	12.05	13.00	10.77	-	4.87
Ellis Ward	28	0	Nursing	13.00	17.56	13.00	12.68	1.00	1.28
Tigers Ward	28	0	Nursing	13.00	17.32	13.00	16.03	1.00	1.28

Rostering > Roster > Roster Analyser > Effectiveness

Demand Vs Availability

Grade Type Category	Demand Inc LD Factor	Staff Available	Difference	Unfilled by Substantive
Admin & Clerical	1.00 WTE (150.0 Hrs)	0.00 WTE (0.0 Hrs)	1.00 WTE (150.0 Hrs)	1.00 WTE (150.0 Hrs)
Nursing	14.31 WTE (2146.0 Hrs)	15.25 WTE (2287.5 Hrs)	-0.94 WTE (-141.5 Hrs)	0.00 WTE (0.0 Hrs)
Nursing Support	11.96 WTE (1793.5 Hrs)	12.00 WTE (1800.0 Hrs)	-0.04 WTE (-6.5 Hrs)	0.00 WTE (0.0 Hrs)

Demand, Budget & Staffing

Grade Type Category	Demand Inc Headroom & LD	Budgeted WTE	Staff Contracted WTE
Admin & Clerical	1.28 WTE (192.3 Hrs)	1.00 WTE (150.0 Hrs)	0.00 WTE (0.0 Hrs)
Nursing	18.34 WTE (2751.3 Hrs)	13.00 WTE (1950.0 Hrs)	18.60 WTE (2790.0 Hrs)
Nursing Support	15.33 WTE (2299.4 Hrs)	13.00 WTE (1950.0 Hrs)	14.00 WTE (2100.0 Hrs)

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Entitlement Report

Rostering > Unavailability > Entitlement Report

	Rostering	SafeCare	Personnel	Payroll	Admin	Gateway	Reference Data

| View Rosters ▾ | Bank Requests ▾ | Daily Staffing ▾ | Unavailability ▾ | Assigned Hours ▾ | Roster Stats ▾ | Attendance Exceptions | Timesheet Corrections ▾ | Reports ▾ | External Community |

Entitlement Report

Unit	Surname	Forenames	Staff Number	Period	Total Entitlement (Hrs)	Remaining (Hrs)	Entitlement Used (Hrs)	Planned (Hrs)	Total Entitlement (Days)	Remaining (Days)	Entitlement Used (Days)	Planned (Days)	Q1 AL %	Q2 AL %	Q3 AL %	Q4 AL %
Johnson Ward	Johnson	Martin	johnson1	01/04/2023 - 31/03/2024	202.5	202.5	0.0	0.0	27.00	27.00	0.00	0.00	0.00 %	0.00 %	0.00 %	0.00 %
Johnson Ward	Leatigaga	Nephi	johnson10	01/04/2023 - 31/03/2024	202.5	202.5	0.0	0.0	27.00	27.00	0.00	0.00	0.00 %	0.00 %	0.00 %	0.00 %
Johnson Ward	Liebenberg	Hanro	johnson11	01/04/2023 - 31/03/2024	202.5	165.0	37.5	37.5	27.00	22.00	5.00	5.00	0.00 %	18.52 %	0.00 %	0.00 %
Johnson Ward	Kabeya	Sadia	johnson16	01/04/2023 - 31/03/2024	202.5	127.5	75.0	75.0	27.00	17.00	10.00	10.00	0.00 %	37.04 %	0.00 %	0.00 %
Johnson Ward	Matthews	Alex	johnson17	01/04/2023 - 31/03/2024	202.5	127.5	75.0	75.0	27.00	17.00	10.00	10.00	0.00 %	37.04 %	0.00 %	0.00 %

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Other Points to Consider

- Current roster creation process
  - What order?
  - Time taken
  - KPIs
  - Barriers/challenges
- Staff requests
- Training – does this include AutoRoster?
- Roster timetable
- If AutoRoster is used – any repetitive issues/themes?
- If AutoRoster not used – barriers/issues/challenges experienced when manually rostering?

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Next Session - Review

Thursday August 10th at 11am

In this second session we'll go through the areas of the current roster and AutoRoster set up to ensure that everything is fit for the needs of the unit/area to compliment successful rostering.

This will include:

- Shifts, Patterns & Rules

- Top tips for Global Patterns

- In depth review of AutoRoster settings and what they mean

By the end of this session, you should have:

- A better understanding of what all the AutoRoster settings are and how they can be configured

- A clear checklist of areas to review to ensure successful rostering overall

- A greater understanding of how global patterns can be used to support the AutoRoster

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Thank you for your time

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