StaffPlan Roster

At a glance:
An advanced rostering and business administration system offering unparalleled functionality and flexibility to deliver genuine operational and business benefits.

StaffPlan Roster can be used competently with a minimum amount of training yet is powerful enough to meet the most demanding needs of community care providers.

All the elements of your business, from service user data, referral handling, carer training, holidays, continuity of care, double handers, minimising expenses – StaffPlan Roster has it, and much more. Yet, because simplicity has always been a primary concern throughout the years of development, the product is completely intuitive and easy to learn and use.

The system contains an extensive service user and care worker database, allowing information to be shared across an organisation and it is renowned for its ease of use, functionality and flexibility.

Employing a rich graphical interface using on-screen wall charts with drag and drop technology, it enables users to respond quickly and easily to ever-changing circumstances, whilst maintaining an overall view of care provision and available resources. The graphics and colour used throughout the system allow easy visualisation of situations and solutions.

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Key Features

Service User Record

StaffPlan Roster stores a comprehensive case file for each service user in a compact and easy to navigate notebook tab format: personal, medical and social details; and key contacts such as family, GP and other care providers can all be recorded. A full history of the referral and the care plan is maintained, along with a complete record of all care planned and delivered.

Care Worker Record

A detailed personnel record is held for each care worker. Like the service user file, the care worker record also has several notebook tabs and contains extensive information relating to the care worker and their employment history: contact details; training and qualifications; preferences; comments; journal (contact / activity log + record of communications); employment details (area located, payroll number, contracted hours, reviews due etc); availability shift pattern; holiday record; regular schedule and booking (visit) diary.

Additionally, full details of the recruitment process including POVA and CRB checks are maintained. Based on this information carers can be easily matched with the requirements of the service users.
Key Features

Team Management

Care workers and service users can be allocated to teams (often set up to reflect geographical areas or patches). These teams work both as a rostering and reporting aid. Care Managers can be set up to control a team or team group and only care workers and service users allocated to those teams will appear on their screen. Control of the teams can be updated and reallocated as required.

Larger care providers can make use of StaffPlan Roster’s 3-tier organisational hierarchy, in which teams belong to team groups and team groups to offices. With StaffPlan Roster’s powerful reporting tools, management information can be analysed across the enterprise.

Allocation Assistance

StaffPlan Roster has a search feature that suggests carers for a booking, taking into account such things as compatibility with the service user, number of previous visits, skills (qualifications, languages), location (requires additional route planning product), and contracted hours.

If a carer cannot be found for the exact booking time, a ‘Fuzzy’ search is available that looks for unallocated carers near to the optimal booking time. The booking envelope feature ensures that time critical bookings, such as calls that involve medicine, do not get moved.

Automatic Allocation is an advanced tool, unique in this market place, that can accept any number of unfilled bookings and examine the best way to allocate staff resources without human involvement. The Care Manager defines the most important search factors and Auto Allocation rapidly processes different permutations of staff allocation. Even for a large number of bookings, the most efficient allocation of staff resources can be identified whilst maintaining service standards.
StaffPlan Roster’s highly flexible toolset helps managers effectively plan carer rosters, work patterns and visit cycles. The emphasis is on planning resource allocation in the most efficient and intuitive manner whilst aiding fast and effective reaction to changing circumstances (for example, carer sickness, special service user requirements, etc).

Wallcharts allow for easy visualisation and can be viewed from either a service user or care worker perspective. The wallcharts are interlinked and automatically synchronised with each other. Different views can be shown on screen simultaneously, so Care Managers have the complete picture.

Regular Bookings Information
Regular visits or Care Plans are set up on the service user’s wallchart with their regular carers. The Care Manager can drag and drop visits from one day to another without the need for repeating data input. Schedules can be changed either on a permanent or temporary basis and the wallcharts can be simply and easily updated. Any alterations to the schedule are checked by the system, ensuring that service user preferences are honoured, carers are not double booked, do not have too far to travel (requires additional routing software) and do not exceed their contract hours.
Key Features

**Diary Management**
The schedule is automatically booked forward into the service users’ and care workers’ diaries each week, taking into account service suspensions or care worker holidays. Care Managers can drag and drop visits between care workers or to different times, and StaffPlan Roster will immediately check each change. Even a whole run of bookings can be transferred between care workers in a single operation. Diaries are also used for one off bookings that can be painted directly onto the diary wallchart using the mouse, or typed into a booking grid.

**Runs**
Bookings can be linked in ‘Runs’ which allows them to be assigned to a different carer each week with the minimum effort.

**Text Messaging**
The system has an integrated text message broadcasting feature that enables efficient delivery of information to carers without tying up office staff. Messages can be sent to individuals, selected groups or even the entire workforce. The system can even allocate a bookings to a carer who texts back YES when asked if they can cover a shift plus any subsequent carer who texts in gets a reply thanking them for their efforts.

Financial Control Modules

**Charges and Pay Rates**
StaffPlan Roster gives you complete control over charges and pay rates. Numerous factors can be used in the tariff structure, including service user category; visit type; time of day/week; public holidays; length of booking; carer grade. All call charges and pay rates are automatically and accurately calculated as bookings are entered or updated. New costs and charges can be set up in advance and StaffPlan Roster will automatically apply them at the specified time.

**Invoices**
Once bookings for a period have been confirmed, invoices and billing reports can be produced automatically. The results can be viewed on screen, and any adjustments made, before printing. A complete history of all invoices is maintained and every visit cross-referenced to its invoice, establishing a robust audit trail for query management. Customised layouts can be created or adapted from our library of some 170 layouts to meet specific requirements.

**Payroll**
All gross payroll calculations are automatically performed, saving time and ensuring accuracy. Every visit is cross-referenced to a payslip number so queries can be quickly and easily dealt with.

**Expenses**
Travel or any other type of expense can be entered against the appropriate booking and automatically included in invoice and/or payroll runs. The system supports various mileage scheme rates. With the addition of supported routing software the system can even calculate care worker expenses for you, removing the tricky process of entering and validating mileage claims.
**Key Features**

**Integration to Central Accounting Systems**
Invoice, gross pay and expenses can be electronically transferred to existing payroll and accounting software, saving time and eliminating the potential for rekeying errors. StaffPlan Roster interfaces with most industry standard systems. Links can also be designed specifically for your existing central financial system.

**Notes and Journals**
The unique QuickNotes feature in StaffPlan Roster can replace the ubiquitous phone log; storing incoming messages against the relevant service user/carer and automatically bringing the message to the attention of the relevant coordinator.

The incoming message is logged in the ‘Journal’ – an area of the system that allows users to keep a full log of all communications with both service users and carers. Structured information such as complaints and compliments can be recorded as well as brief text notes. Journal entries can be easily searched and printed. Mailshots can be logged in the relevant journals when created using mailmerge capabilities.

The Notes system provides easy communication between users of StaffPlan Roster. It allows targeted announcements and message passing within the organisation and provides an audit trail of activities. An action [e.g. a telephone message] can be initiated by creating a note, the recipient of the note can carry out the activity and mark it as complete, or they can reply or forward the note. It is easy to see whether the request needs chasing up or if it has been actioned.

**Reporting and Management Information**
StaffPlan Roster has extensive built-in reporting capabilities. All reports can be viewed on screen, printed or exported to a variety of standard formats. Reports in StaffPlan Roster can accept user defined selection criteria, offering exceptional reporting flexibility and covering the vast majority of requirements. There is also a built-in Query Builder for ad-hoc investigations.

**Design Your Own Reports**
StaffPlan Roster uses the industry standard Microsoft SQL Server database and has ODBC connectivity which allows users to design their own reports using industry standard report writers, such as Crystal Reports. The system even comes with a built in banded report generator - ReportBuilder Enterprise which is very powerful yet easy to use.

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"Roster is the best thing since sliced bread; we used to use pens and pencils and it has been a massive improvement with the way we work."

-Muriel Auld
Housecall Nursing & Homecare Agency