



# Rostering Medics – from rollout to results

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People: at the  
heart of healthcare  
BIRMINGHAM 2016

# Introduction

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- Director Medical Workforce Solutions - Interim Medical HR Manager
- Rota Works (Zircadian) 2002
  - Central Manchester Foundation Trust
- e-job planning in four Trusts (100% return)
  - States of Jersey Hospital
  - Bolton Hospitals Foundation NHS Trust
  - Wirral University Hospitals NHS Trust
  - University Hospitals of South Manchester
- e-Leave / Employee Online
  - Bolton Hospitals Foundation NHS Trust
- e-Appraisal & e-360
  - States of Jersey Hospital
- Health Roster/ Employee Online
  - Lancashire Care Foundation NHS Trust



# Introduction

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- Turnaround
- Medical Productivity
- Reduction in Medical & Locum Pay Bill
  - Bolton £400k
  - Wirral £1m
  - South Manchester University Hospitals £800k
  - Lancashire Care CIPs £600k plus further £400k TBC



# Lancashire Care NHS Trust



- 1.4m population covering 1000 miles<sup>2</sup>
- Mental Health
  - Five Adult Inpatient units
    - Blackpool, Burnley, Blackburn, Ormskirk & Lancaster
  - Two CAMHS inpatient units
  - One secure Forensics unit
  - Community and Ward based MH teams – Consultant Led
- Other services
  - Dentistry
  - Sexual Health
  - Rheumatology



# Rota arrangements

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- **Mental Health Staffing**

- 100 Consultants
- 24 SAS & ST4-6
- 31 CT1-3 & TJDs
- 20 GPTS
- 16 FY2s
- 15 FY1

- **Rotas**

- 6 Junior – inpatient units – 2 at Blackpool – 1:9 FS
- 2 Middle Grade – East & North - 1:9 NROC
- 3 Consultant – East, North & Central & West - 1:16 to 1:25 NROC
- No middle grade in Central & West

- **Issues**

- Junior rota gaps – need 63 doctors – typically 55 or less, due to recruitment, Less Than Full Time, Restrictions, Maternity



# Rotas pre August 2015

North Blackpool Lancaster	Central Preston Chorley Ormskirk	East Blackburn Burnley
<b>Rota Co-Ordinator</b> Michael Thorne - 01253 306975	<b>Rota Co-Ordinator</b> Teresa Brown	<b>Rota Co-Ordinator</b> Christine Murton - 01282 657121
Weekly On Call Rota (Blackpool) <input type="checkbox"/> Weekly On Call Rota (Lancaster) <input type="checkbox"/>	Weekly On Call Rota Chorley & Ormskirk <input type="checkbox"/> Weekly On Call Rota Preston <input type="checkbox"/>	Weekly On Call Rota (Combined) <input type="checkbox"/>
<hr/> Consultant Rota (North) <input type="checkbox"/> Consultant Sick Rota (Blackpool) <input type="checkbox"/> Speciality/Staff Grade Rota <input type="checkbox"/> Junior Doctor Rota (Blackpool) <input type="checkbox"/> Junior Doctor Rota (Lancaster) <input type="checkbox"/> Senior Manager Rota <input type="checkbox"/>	<hr/> Consultant Rota <input type="checkbox"/> Speciality/Staff Grade Rota <input type="checkbox"/> Junior Dr Rota (Chorley/Ormskirk) <input type="checkbox"/> Junior Dr Rota (Preston) <input type="checkbox"/> Senior Manager Rota <input type="checkbox"/>	<hr/> Consultant Rota <input type="checkbox"/> Second Tier Rota <input type="checkbox"/> 1st Tier Rota (Blackburn) <input type="checkbox"/> 1st Tier Rota (Burnley) <input type="checkbox"/> Senior Manager Rota <input type="checkbox"/>
<small>* Select a Button on the right to Navigate to Desired Area.</small> Weekly Rota W/C 20 April 2015	Weekly Rota W/C 20 April 2015	Weekly Rota W/C 19 April 2015

- Dashboard
- Macro Links to individual rotas, or weekly rotas across each district
- Locum booking summary
- On intranet
- Rotas published 2-3 weeks before each changeover



# Rotas pre August 2015

Main Menu		1:10 Junior Doctor Rota (BGH)		
Date	Day	Long Days 9:30pm - 9am	2pm - 10pm	Nights 9pm - 9:30am
26/01/15	Mon		Coulton M (FY2)	Lachana A (FY2)
27/01/15	Tue		Wolton H (FY2)	Lachana A (FY2)
28/01/15	Wed		Sein M (TD)	Lachana A (FY2)
29/01/15	Thu		Coulton M (FY2)	Lachana A (FY2)
30/01/15	Fri	Hammond MD (GPST2)		Hussain Z (GPST2)
31/01/15	Sat	Hammond MD (GPST2)		Hussain Z (GPST2)
01/02/15	Sun	Hammond MD (GPST2)		Hussain Z (GPST2)
02/02/15	Mon		Coulton M (FY2)	Rashid R (TD)
03/02/15	Tue		Coulton M (FY2)	Rashid R (TD)
04/02/15	Wed		Wolton H (FY2)	Sein M (TD)
05/02/15	Thu		Lachana A (FY2)	Sein M (TD)
06/02/15	Fri	Wolton H (FY2)		Rashid R (TD)
07/02/15	Sat	Wolton H (FY2)		Rashid R (TD)
08/02/15	Sun	Wolton H (FY2)		Rashid R (TD)



# Rotas pre August 2015

Main Menu					Chorley & Ormskirk Weekly On Call Rotab				
(Monday) 20 April 2015					(Friday) 24 April 2015				
Area	On Call Times	Grade	Dr On Call	Pagers/Mobile	Area	Times	Grade	Dr On Call	Pagers/Mobile
Chorley & Ormskirk	5:00pm - 10:00pm	Junior Doctor	Dr Alam		Chorley & Ormskirk	5:00pm - 9:30pm	Junior Doctor	Dr Humphries	
Chorley & Ormskirk	9:00pm - 09:30am	Junior Doctor	Dr Kunhi		Chorley & Ormskirk	9:00pm - 09:30am	Junior Doctor	Dr Morris	
Chorley & Ormskirk	5:00pm - 09:00am	SpR	No SpR		Chorley & Ormskirk	9:00am - 09:00am	SpR	No SpR	
Chorley & Ormskirk	5:00pm - 09:00am	Consultant	Dr Rao		Chorley & Ormskirk	9:00am - 09:00am	Consultant	Dr Cumming	
SMOC	Smith Lisa		OATS (Central)	0	SMOC	Thomas Cole Ieuan		OATS (Central)	0
(Tuesday) 21 April 2015					(Saturday) 25 April 2015				
Area	Times	Grade	Dr On Call	Pagers/Mobile	Area	Times	Grade	Dr On Call	Pagers/Mobile
Chorley & Ormskirk	5:00pm - 10:00pm	Junior Doctor	Dr Jones		Chorley & Ormskirk	9:00am - 9:30pm	Junior Doctor	Dr Humphries	
Chorley & Ormskirk	9:00pm - 09:30am	Junior Doctor	Dr Kunhi		Chorley & Ormskirk	9:00pm - 09:30am	Junior Doctor	Dr Morris	
Chorley & Ormskirk	5:00pm - 09:00am	SpR	No SpR		Chorley & Ormskirk	09:00am - 09:00am	SpR	No SpR	
Chorley & Ormskirk	5:00pm - 09:00am	Consultant	Dr Khanna		Chorley & Ormskirk	09:00am - 09:00am	Consultant	Dr Aribisala	
SMOC	Brocklehurst Ian		OATS (Central)	0	SMOC	Cosgrove Janet		OATS (Central)	0
(Wednesday) 22 April 2015					(Sunday) 26 April 2015				
Area	Times	Grade	Dr On Call	Pagers/Mobile	Area	Times	Grade	Dr On Call	Pagers/Mobile
Chorley & Ormskirk	5:00pm - 10:00pm	Junior Doctor	Dr Farooq		Chorley & Ormskirk	09:00am - 9:30pm	Junior Doctor	Dr Humphries	
Chorley & Ormskirk	9:00pm - 09:30am	Junior Doctor	Dr Kunhi		Chorley & Ormskirk	9:00pm - 09:30am	Junior Doctor	Dr Morris	
Chorley & Ormskirk	5:00pm - 09:00am	SpR	No SpR		Chorley & Ormskirk	09:00am - 09:00am	SpR	No SpR	
Chorley & Ormskirk	5:00pm - 09:00am	Consultant	Dr Ezeoke		Chorley & Ormskirk	09:00am - 09:00am	Consultant	Dr Cumming	
SMOC	White Paul		OATS (Central)	0	SMOC	Taylor Lorna		OATS (Central)	0
(Thursday) 23 April 2015					When contacting the out of hours Consultant if you do not get a reply from the mobile number you have please could you try the land line. Many thanks Teresa.				
Area	Times	Grade	Dr On Call	Pagers/Mobile					
Chorley & Ormskirk	5:00pm - 10:00pm	Junior Doctor	Dr John						
Chorley & Ormskirk	9:00pm - 09:30am	Junior Doctor	Dr Kunhi						
Chorley & Ormskirk	5:00pm - 09:00am	SpR	No SpR						
Chorley & Ormskirk	5:00pm - 09:00am	Consultant	Dr Naguib						





# Rotas Redesign - pre implementation

## LANCASTER MEDICAL ROTA

Consultant North	OC
Middle Grade North	OC
Nights Lancaster 21:30 to 09:00	N
Long Day Lancaster 09:00 to 21:30	LD

Annual Leave	AL
Study Leave	SL
Bank Holiday	BH
Special Leave	SP
Sick	S

DISTRICT - Team - Location - Grade	Postholder	Rota	AUGUST																														
			S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	
LANC - CCTT - East Barns - CON		CON-NORTH	ND	ND	ND	ND	ND																										
LANC - CCTT - East Barns - CON		CON-NORTH			ND	ND	OC	ND	ND																								
LANC - CCTT - East Barns - CON		None			ND	ND	ND	ND	ND																								
LANC - CCTT - East Barns - CT3		LANC					ND																										
LANC - CCTT - East Barns - GPT		LANC																															
LANC - CCTT - East Barns - GPT		None			ND	ND	ND	ND	ND																								
LANC - CRHT - East Barns - CON		CON-NORTH			ND	ND	ND	ND	ND																								
LANC - CRHT - East Barns - CT2		LANC					ND	DO	N	N	N	DO	DO	ND	ND	ND																	
LANC - Comm OA - Altham Meadows - CON		CON-NORTH			ND	ND	ND	ND	ND																								
LANC - Comm OA - Altham Meadows - CT1		LANC					ND	ND	LD	LD	LD	DO	ND	ND	ND	ND																	

August 2015  
 New spreadsheet  
**Daytime** & Out of Hours  
 Rota loaded onto intranet every day

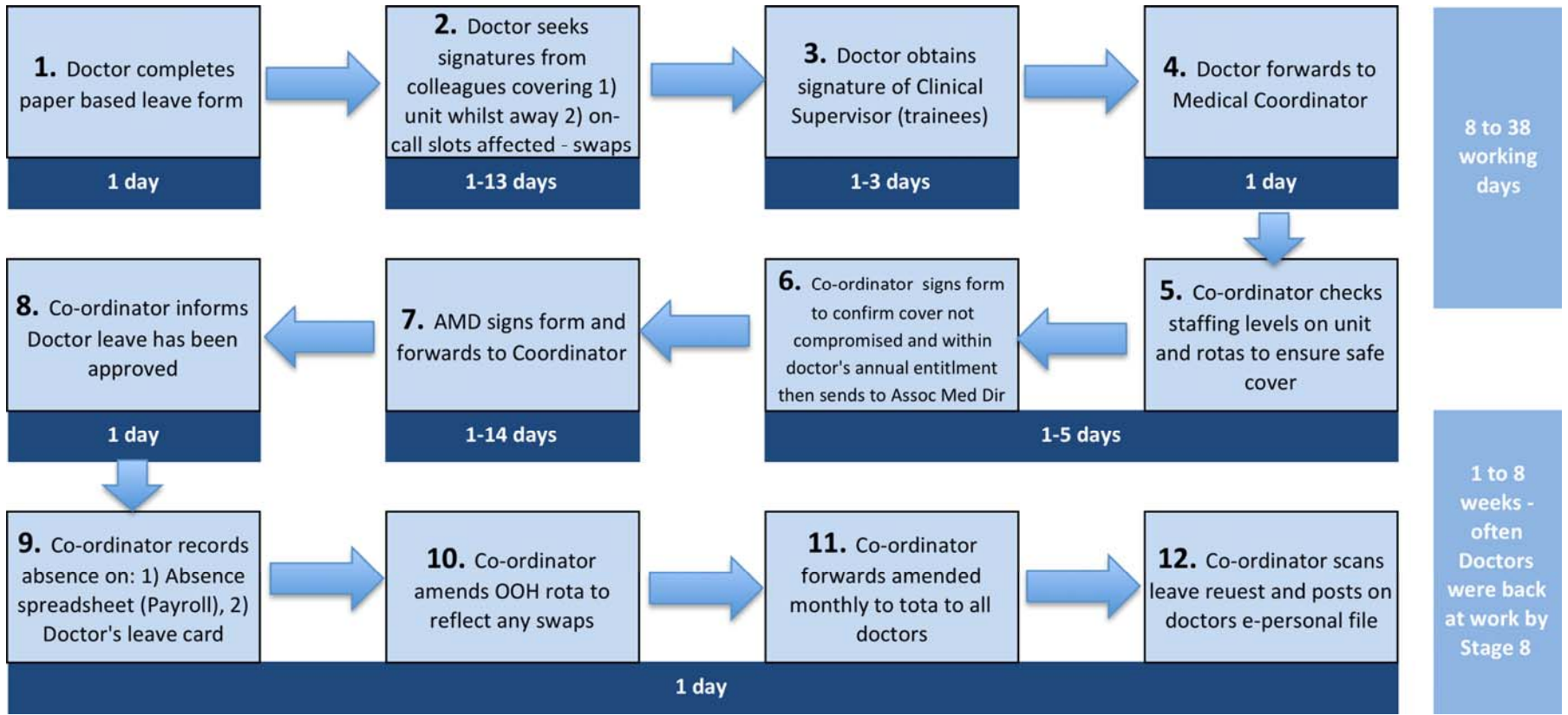
Change the mindset  
 Location & team based  
 Leave Recorded on xls once approved  
 Manual swaps managed by coordinators



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# Leave Management – August 2015



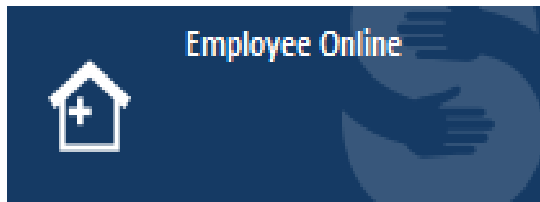
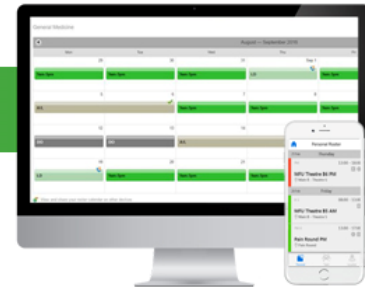
# The Solution

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## MedicOnDuty

Manage who is working, when and where, including locums



## MedicOnline

Leave and on call management designed for doctors



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# Health Roster – our approach

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- 👤 Doctors hold two postings
  - 1 in Clinical Network (daytime) AND 1 in Out of Hours Unit – all duties outside of M-F 09-17
- 👤 Multiple Units
  - by Geography – North, Central & West, East
  - By Network - Adult, Old Age, CAMHS & Forensics
  - By location
  - by patient group – Inpatient or Community
  - By team / ward
  - Two OOH units – Forensics & Adult/Old Age by rota

For example

EAST-ADULT-Burnley-Inpatient-Ward 20

OUT OF HOURS-Burnley Junior Rota



# Roll Out

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- 👤 4 months to build the back end, user set up, run tests, develop in-house manuals, train the doctors and leave approvers (Consultants)
- 👤 Prepopulate leave records (incomplete)
- 👤 Launched junior doctors at December 2015 changeover
- 👤 Consultants 1<sup>st</sup> Jan 2016 – new leave year from April



# Health Roster

View Rosters

Rosters  Any Unit

Name	February 2016		March 2016				
	Mon 29	Tue 01	Wed 02	Thu 03	Fri 04	Sat 05	Sun 06
Leyland-CAMHS-Shawbrook	Leyland-CAMHS-Shawbrook						
Cons Biradar, Rajeev (Cons)	D	D	D	D	D		
Cons Harrison, Lucy (Cons)	D	D		D			
Cons Mahadevan, Dushyanthan (Cons)	D	D	D		D		
MGD Paramel, Amith (ST4-6)	D	D	D	D	D		
CT 1-3 Issac, Elizabeth (CT1-3)	D	D	D	D	D		
	Evening:ORM 17:00 - 21:30 Out of Hours AI	Evening:ORM 17:00 - 21:30 Out of Hours AI					

Access only via network – Health Roster is hosted, not in the Cloud



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# Employee Online

HealthRoster Employee Online

Elizabeth Issac Change Password Logout

Rostering Skills, Training & HR Timesheets

View Roster: Child & Adolescent Mental Health Services

View Roster

Annual Leave

February — March 2016

Mon	Tue	Wed	Thu	Fri	Sat	Sun
22	23	24	25	26	27	28
D	D	D	D	D		
29	Mar 1	2	3	4	5	6
AL						
D	D	D	D	D		
Evening :ORM Out of Hours AMH & ACS 17:00 - 21:30	Evening :ORM Out of Hours AMH & ACS 17:00 - 21:30					

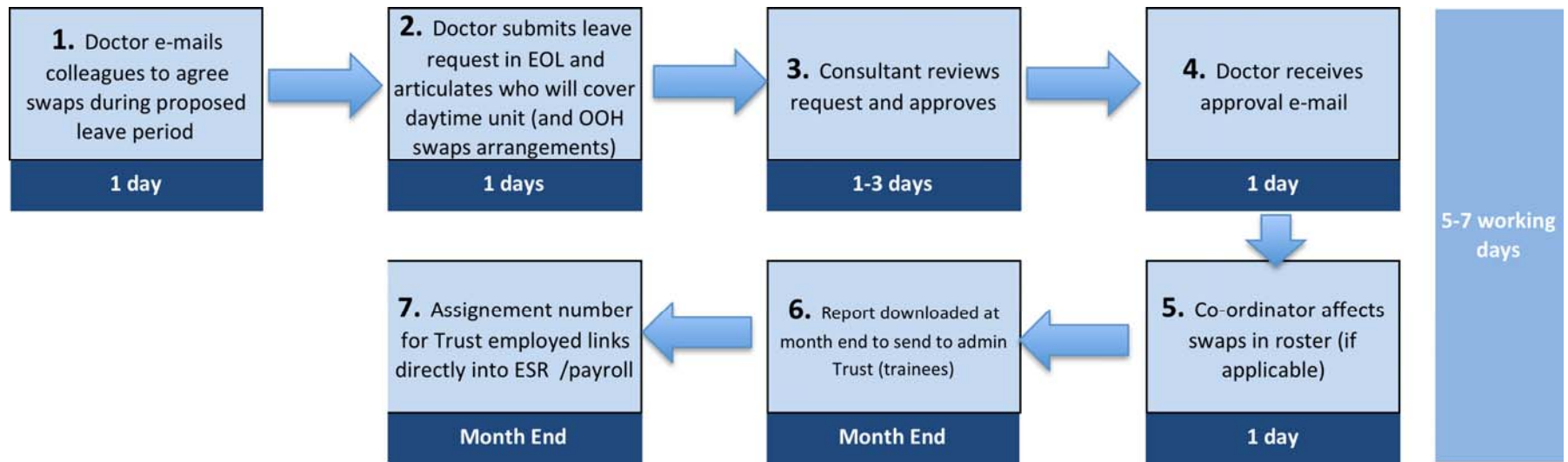
Access offsite, PC or smartphone / tablet



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# Leave Management – Dec 2015





# Post Roll Out

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- Three networks immediately engaged and fully implemented
- The coordinating team were skeptical at first but turned quickly. They love it.
- Positive user feedback
- Management of rota gaps, liaison with agencies improved
- One network continued to run paper-based approval, which was then entered by doctors in EoL??
- Initial disquiet about whether staffing levels would be affected??
- Full implementation by all networks by August 2106



# How to Succeed

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- Understand the business
- Preparation & Planning
- Project Plan
- Resources
  - Utilise Allocate Support & Technical Expertise
  - Use in-house nurse rostering team (if you have one)
  - Attend regional user group meetings
- Give yourself enough time



# How to Succeed

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 Develop in-house User Guides





 Training

- Location based training
- Junior Doctor Induction (15 minutes!)
- Junior Doctor Teaching sessions (post induction)
- Coordinators attend weekly teaching



# Quality & Cost Improvements

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-  Greater % of locum shifts covered by internal bank
  - split bank to agency - 20:80 to 60:40 within 3 months of implementation, and rising!
  - Estimated saving of £20k per annum – 5000 hours per annum
-  Rotas published early
-  Safer, better for patients, cheaper, leaner
-  e-Rota to implement 1:8 rotas across the Trust – removed all planned gaps – saving £350k – launched in Aug 2016



# Phase 2

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- 👤 Bank & Agency function – direct link to bank and medical agencies
- 👤 e-timesheets for extra duties
- 👤 Link to payroll – timely payment
- 👤 e-Mileage
- 👤 Cloud based Health Roster –access remotely
- 👤 e-JP procured – direct link to Health Roster
- 👤 E-Rota – new link in version 10.6.3 (Feb 2017)



# The End

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Any questions?

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