

Rostering Capability Framework - Learning Outcomes

The Rostering Capability Matrix

- [How and Why to Roster Effectively \(video\)](#)
- [The Rostering Process Flowchart explained \(video\)](#)
- [NSW Health Rostering Resource Manual¹](#)
- [MyHealth Learning](#)

Step	Online Learning	Tips for Roster Managers	Implementation Guide
All staff	Rostering Responsibilities for Staff		
Pre-requisite skills / knowledge	Foundation Rostering Skills and Knowledge <ul style="list-style-type: none"> • Overview of Rostering Capability Framework • Key Rostering Principles and Concepts • Overview of Awards • Myth Busting • Cost Effective Rostering 	Tips for Roster Managers <ul style="list-style-type: none"> • Explaining Rostering Decisions • Key Rostering Principles and Concepts • Cost Effective Rostering • Implement Continuous Improvement 	<ul style="list-style-type: none"> • Locating Rostering Resources
Roster Template Build + Development of Rostering Measures of Success	Create and Maintain a Roster Template <ul style="list-style-type: none"> • Review and Update the Demand Template • Establish Rostering Measures of Success 	Tips for Roster Managers <ul style="list-style-type: none"> • How to Check your Roster Demand Template • Review and Update the Roster Demand Template 	
Staffing Availability	Determine Staffing Availability <ul style="list-style-type: none"> • Manage Temporary Individual Roster Arrangements (TIRAs) • Gathering Resources to Plan Annual Leave • Annual Leave Planning • Manage Excessive Leave • Actioning Annual Leave Requests • Manage Allocated Days Off (ADOs) • Manage Sick Leave • Manage Maternity, Adoption and Parental Leave • Manage Long Service Leave • Manage Roster Requests • Vacancy Management 	Tips for Roster Managers <ul style="list-style-type: none"> • Manage Temporary Individual Roster Arrangements (TIRAs) • Planning Leave • Manage Allocated/Additional Days Off (ADOs) • Manage Maternity, Adoption and Parental Leave • Manage Roster Requests • Manage Vacancies 	<ul style="list-style-type: none"> • Manage Annual Leave • Manage Allocated Days Off (ADOs) • Manage Maternity, Adoption and Parental Leave • Manage Roster Requests and Shift Swaps • Manage Vacancies
Roster Creation	Create the Roster		
Approved for Publishing Roster	Check and Approve the Roster <ul style="list-style-type: none"> • Check a Roster Prior to Publishing • Approve and Publish a Roster 	Tips for Roster Managers <ul style="list-style-type: none"> • Approving a Partially Approved Roster (Roster Approvers) 	<ul style="list-style-type: none"> • Check and Publish a Roster
Maintenance	Maintain the Roster <ul style="list-style-type: none"> • Manage Shift Swaps • Action Unplanned Leave Requests • Maintain a Roster • Manage Overtime and Time in Lieu 	Tips for Roster Managers <ul style="list-style-type: none"> • Manage Shift Swaps • Maintain the Roster • Manage Overtime and Time in Lieu 	<ul style="list-style-type: none"> • Manage Roster Requests and Shift Swaps
Finalisation for Payroll	Finalise the Roster for Payroll <ul style="list-style-type: none"> • Finalise a Roster for Payroll 	Tips for Roster Managers <ul style="list-style-type: none"> • Finalise a Roster 	
Retrospective Adjustments	Retrospective Adjustments <ul style="list-style-type: none"> • Manage Retrospective Adjustments 	Tips for Roster Managers <ul style="list-style-type: none"> • Retrospective Adjustments 	

¹ This matrix aligns to the Rostering Process Flowchart, located in the NSW Health Rostering Resource Manual. The manual is available from the Rostering Portal, which can be accessed by selecting [here](#).

How to use the Rostering Capability Matrix

Please watch the [Introduction to the Rostering Capability Matrix](#) video to learn more about how to use the Rostering Capability Matrix to determine your own learning pathway.



The table above lists the steps you are required to complete to roster effectively and efficiently to deliver the service. We suggest you bookmark the matrix for easy access, as and when you need it! Even on your phone or mobile device!

Each column contains links to resources to support Roster Managers throughout the process. You may use these resources to develop your own rostering capability, or you can use them to support a colleague who is learning to roster.

Selecting links from the **Online Learning** column will take you to the learning outcomes for the relevant online learning module. If you or a colleague would like to develop capability in the learning outcomes listed, go to MyHealth Learning and search for the module by name, or simply search 'rcf' to view all available online learning modules for the Rostering Capability Framework.

Selecting links from the **Tips for Roster Managers** column will open a pdf document that lists eight of the key points you need to be aware of for the selected topic.

Selecting links from the **Implementation Guide** column will open a pdf document that lists the resources you may need to interact with for the selected topic. You can use this as a checklist and tick off as you access each one.

The **Locating Rostering Resources** guide, listed in the top row, provides details of the steps to locate each of the resources referred to throughout the online learning modules. They can be used to support you to access resources listed in the Implementation Guides.

Go to the [Rostering Capability Matrix](#)

Foundation Knowledge for all Staff

All staff within NSW Health have a responsibility to ensure rostering is efficient and effective.

Rostering Responsibilities for Staff

The module is aimed at all staff within NSW Health to provide the basis understanding of policies and procedures they are required to comply with to ensure rostering is efficient and effective.

Roster Managers are advised to arrange for all staff on their roster to complete this module.

By completing the requirements of this module, you should be able to:

- List the rostering related policies and procedures you need to comply with
- Outline your responsibilities for rostering
- Explain ways you may be able to influence your roster
- Located rostering related resources.

 Return to the [Rostering Capability Matrix](#)

 Go to [MyHealth Learning](#) and search '**rcf staff**'

Pre-requisite Skills / Knowledge

The Rostering Capability Framework Proof of Concept is a suite of module to develop staff who currently roster or are likely to roster in the future.

NSW Health Rostering Resource Manual

The NSW Health Rostering Resource Manual contains principles, Rostering Guidelines and tools to facilitate best practice rostering and reporting across NSW.

 Return to the [Rostering Capability Matrix](#)

Overview of Rostering Capability Framework

The module explains the Rostering Capability Framework and demonstrates how to navigate the modules.

By completing the requirements of this module, you should be able to:

- Explain the Rostering Capability Framework
- Navigate the Rostering Capability Framework modules for individualised learning.

 Return to the [Rostering Capability Matrix](#)

 Go to [MyHealth Learning](#) and search '**rcf overview**'

Key Rostering Principles and Concepts

This module outlines the Key Rostering Principles and Concepts and provides example scenarios of what may occur when principles are or are not applied.

By completing the requirements of this module, you should be able to:

- Explain the concept of rostering.
- List the rostering principles within NSW Health.
- Apply rostering principles when planning, creating, approving and monitoring rosters.
- Explain the different roles that exist within HealthRoster.

 Return to the [Rostering Capability Matrix](#)

 Go to [MyHealth Learning](#) and search '**rcf principles**'

Overview of Awards

This module details how to access awards to understand conditions of employment to support decision making for rosterers. Learners will be required to access relevant awards to respond to scenarios.

By completing the requirements of this module, you should be able to:

- Explain the importance of awards when rostering.
- Identify and locate the award that applies to each staff member within your team.
- Refer to awards to determine conditions of employment for specific individuals.
- Obtain additional assistance with awards where clarification is required.

 Return to the [Rostering Capability Matrix](#)

 Go to [MyHealth Learning](#) and search '**rcf awards**'

Myth Busting

This module presents a range of common statements staff may make relating to annual leave and ADOs and the learner is required to identify those that are fact and those that are myths.

By completing the requirements of this module, you should be able to:

- Identify common myths relating to ADOs and Annual Leave
- Clarify the correct interpretation of these myths.

 Return to the [Rostering Capability Matrix](#)

 Go to [MyHealth Learning](#) and search '**rcf myth**'

Cost Effective Rostering

This series of three modules outlines how rostering can be made more cost effective.

By completing the requirements of this module, you should be able to:

- List the benefits of cost effective rostering
- Estimate the staffing cost when a roster is worked
- Identify opportunities to roster for cost effective delivery of the service.

🔗 Return to the [Rostering Capability Matrix](#)

🔗 Go to [MyHealth Learning](#) and search '**rcf cost**'

Roster Template Build + Development of Rostering Measures of Success

Review and Update the Roster Demand Template

By completing the requirements of this module, you should be able to:

- Define the demand template
- Outline the benefits of demand using a demand template for rostering
- Explain how a demand template is developed
- List the factors that are considered in the demand template
- Outline the process to review and update the demand template.

🔗 Return to the [Rostering Capability Matrix](#)

🔗 Go to [MyHealth Learning](#) and search '**rcf template**'

Rostering Measures of Success

By completing the requirements of this module, you should be able to:

- Define the term measures of success as it relates to rostering in NSW Health
- Explain how measures of success are established
- Evaluate the quality of your roster throughout the end-to-end rostering process against agreed measures of success for your unit
- Implement actions to enhance roster quality to ensure measures of success are achieved.

🔗 Return to the [Rostering Capability Matrix](#)

🔗 Go to [MyHealth Learning](#) and search '**rcf measures**'

Staffing Availability

Manage Temporary Individual Roster Arrangements

This module outlines how to establish and manage Temporary Individual Roster Arrangements for staff in your team.

By completing the requirements of this module, you should be able to:

- Define flexible work practices
- Outline the benefits of flexible work practices
- Explain temporary individual roster arrangements (TIRA)
- Follow the process to establish a TIRA
- Assess a range of factors to determine if a TIRA should be approved
- Roster in accordance with approved TIRAs
- Review a TIRA prior to its expiry date.

🔗 Return to the [Rostering Capability Matrix](#)

🔗 Go to [MyHealth Learning](#) and search '**rcf tira**'

Gathering Resources to Plan Annual Leave

This module outlines the resources Roster Managers will utilise to create and maintain a roster to plan annual leave.

By completing the requirements of this module, you should be able to:

- Identify and locate resources you will require to support you to plan and manage annual leave.

🔗 Return to the [Rostering Capability Matrix](#)

🔗 Go to [MyHealth Learning](#) and search '**rcf gathering**'

Annual Leave Planning

This module outlines the process to plan annual leave for a unit.

By completing the requirements of this module, you should be able to:

- Communicate staff responsibilities for planning leave
- Plan the leave schedule.

🔗 Return to the [Rostering Capability Matrix](#)

🔗 Go to [MyHealth Learning](#) and search '**rcf planning**'

Managing Excessive Leave

This module outlines the process to manage excessive leave for a unit.

By completing the requirements of this module, you should be able to:

- Liaise with staff to manage excessive leave balances
- Maintain documentation regarding interactions with staff members.

🔗 Return to the [Rostering Capability Matrix](#)

🔗 Go to [MyHealth Learning](#) and search '**rcf excessive**'

Actioning Annual Leave Requests

This module outlines the process to action leave requests. Learners will have the opportunity to respond to common scenarios they are likely to face as a roster manager.

By completing the requirements of this module, you should be able to:

- Assess factors to make consistent decisions on leave requests
- Liaise with staff to achieve mutually agreeable outcomes regarding leave.

🔗 Return to the [Rostering Capability Matrix](#)

🔗 Go to [MyHealth Learning](#) and search '**rcf leave requests**'

Manage Allocated Days Off

This module outlines the process to plan allocated days off for your staff to prevent accrual beyond what is stipulated in the relevant Industrial Award.

By completing the requirements of this module, you should be able to:

- Define Allocated Days Off (ADOs)
- Discuss ADOs with staff in your team
- Roster ADOs in accordance with industrial award obligations
- Monitor ADOs to avoid excessive accumulation.

🔗 Return to the [Rostering Capability Matrix](#)

🔗 Go to [MyHealth Learning](#) and search '**rcf allocated**'

Manage Sick Leave

This module will outline how to promote an attendance culture whilst addressing staff illness and injury that prevents them from attending work.

By completing the requirements of this module, you should be able to:

- Promote an attendance culture for your team
- Identify potential issues and trends relating to sick leave for your staff
- Address identified issues and trends according to the relevant policy and/or local procedure
- Ensure the appropriate systems are updated when sick leave occurs
- Support staff when returning to work from sick leave.

 Return to the [Rostering Capability Matrix](#)

 Go to [MyHealth Learning](#) and search '**rcf sick**'

Manage Maternity, Adoption and Parental Leave

This module will outline how to manage maternity, adoption and parental leave for staff in your unit whilst complying with relevant Industrial Awards and the Leave Matters Policy Directive.

By completing the requirements of this module, you should be able to:

- Locate key documents relating to maternity, adoption and parental leave
- Respond to questions relating to maternity, adoption and parental leave
- Follow appropriate procedures to ensure maternity, adoption and/or parental leave is processed accurately.

 Return to the [Rostering Capability Matrix](#)

 Go to [MyHealth Learning](#) and search '**rcf maternity**'


Manage Long Service Leave

This module will outline how to manage long service for staff in your unit whilst complying with relevant Industrial Awards and the Leave Matters Policy Directive.

By completing the requirements of this module, you should be able to:

- Locate information regarding long service leave
- Outline the process to submit long service leave applications.

 Return to the [Rostering Capability Matrix](#)

 Go to [MyHealth Learning](#) and search '**rcf long service**'

Manage Roster Requests

This module will outline how to establish and implement a roster request process to allow staff within your unit to influence their roster prior to publication.

By completing the requirements of this module, you should be able to:

- Define roster requests
- Outline the roster request process
- Assess whether a roster request can be approved
- Advise staff of the outcomes of roster requests
- Follow correct process to document and process requests.

🔗 Return to the [Rostering Capability Matrix](#)

🔗 Go to [MyHealth Learning](#) and search '**rcf roster requests**'

Vacancy Management

This module will outline how to manage vacancies in your unit to ensure you deliver the service in an efficient manner.

By completing the requirements of this module, you should be able to:

- Explain how the unit's FTE, staffing profile and roster template relate to Vacancy Management
- Optimise staffing allocation of a unit
- Manage Vacancies to maintain delivery of the service.

🔗 Return to the [Rostering Capability Matrix](#)

🔗 Go to [MyHealth Learning](#) and search '**rcf vacancy**'

Roster Creation

Please refer to the HealthRoster intranet page for resources to develop capability in roster creation.

Approved for Publishing Roster

Check a Roster Prior to Publishing

This module details the checks to be completed prior to publishing a roster.

By completing the requirements of this module, you should be able to conduct checks to ensure the roster is accurate.

🔗 Return to the [Rostering Capability Matrix](#)

🔗 Go to [MyHealth Learning](#) and search '**rcf check**'

Approve and Publish a Roster

This module demonstrates how to partially and fully approve a roster in HealthRoster.

By completing the requirements of this module, you should be able to utilise the roster analyser to partially approve a roster and fully approve and publish the roster for staff to view on Employee Online.

🔗 Return to the [Rostering Capability Matrix](#)

🔗 Go to [MyHealth Learning](#) and search '*rcf approve*'

Maintenance

Manage Shift Swaps

This module outlines how to implement and manage a shift swap process for situations that were not known prior to the roster request cut off date.

By completing the requirements of this module, you should be able to:

- Define shift swaps
- Outline the process to request a shift swap
- Assess whether a shift swap can be approved
- Notify outcome of shift swap request
- Analyse frequency of shift swap requests
- Address issues related to shift swaps
- Implement strategies to minimise shift swap requests.

🔗 Return to the [Rostering Capability Matrix](#)

🔗 Go to [MyHealth Learning](#) and search '*rcf swaps*'

Actioning Unplanned Annual Leave Requests

This module explains how unplanned leave requests are actioned. Learners are presented with two scenarios to demonstrate how unplanned leave requests should be addressed.

By completing the requirements of this module, you should be able to:

- Action an unplanned annual leave request.
- Notify staff member of the outcome of request.
- Document the outcome of the request.

🔗 Return to the [Rostering Capability Matrix](#)

🔗 Go to [MyHealth Learning](#) and search '*rcf unplanned*'

Maintain a Roster

This module outlines how to maintain a roster to ensure it is accurate for payroll whilst minimising the time spend finalising the roster.

By completing the requirements of this module, you should be able to:

- List the reasons why a roster may need to be maintained
- Outline the benefits of establishing a process for maintaining a roster
- Explain the processes to identify and verify changes required to a published roster
- Explain the process of updating the roster to reflect what occurred
- Explain the benefits of educating and enforcing your staff's responsibilities.

 Return to the [Rostering Capability Matrix](#)

 Go to [MyHealth Learning](#) and search '**rcf maintain**'

Manage Overtime and Time in Lieu

This module outlines when overtime can be offered and how to interact with staff to negotiate how they will be compensated.

By completing the requirements of this module, you should be able to:

- Define overtime and time in lieu of overtime (TIL)
- Outline the process to manage overtime and time in lieu of overtime
- List the resources available to support management of overtime and time in lieu of overtime
- Explain the responsibilities of staff and Roster Managers when managing overtime and time in lieu of overtime.

 Return to the [Rostering Capability Matrix](#)

 Go to [MyHealth Learning](#) and search '**rcf overtime**'

Finalise for Payroll

Finalise a Roster for Payroll

This module outlines how to ensure the roster is accurate for payroll to minimise the need for retrospective adjustments.

By completing the requirements of this module, you should be able to:

- Outline the process to finalise a roster for payroll
- Follow correct procedures to finalise a roster for payroll

 Return to the [Rostering Capability Matrix](#)

 Go to [MyHealth Learning](#) and search '**rcf finalise**'

Retrospective Adjustments

Manage Retrospective Adjustments

This module outlines how to minimise avoidable retrospective adjustments whilst managing those that are unavoidable to reduce unnecessary processing time and potential charges to the cost centre.

By completing the requirements of this module, you should be able to:

- Explain the reasons retrospective adjustments occur
- List the potential impacts of retrospective adjustments
- Follow processes to avoid retrospective adjustments
- Process unavoidable retrospective adjustments.

🔗 Return to the [Rostering Capability Matrix](#)

🔗 Go to [MyHealth Learning](#) and search '*rcf retrospective*'