Investigating Net Hours

Staff are paid their basic salary from Employee Staff Records (ESR), regardless of the hours attached to the roster, staff are paid for their basic hours (unless overtime has been assigned).

There is therefore the potential for staff to overwork or underwork for the salary received. As a result, the 'Net Hours' column aids the Unit Managers as it acts as a calculator to keep the running total of hours *owed to the Trust* or *owed by the Trust*. It is important that whilst maintaining an accurate staff record of these hours, managers are expected to endeavour to keep net hours within the recommended number of hours i.e., no more than a shifts' worth owed or owing.

This guide offers some general guidance and tips to help enable you to investigate these hours. Please note, you should always pay attention to the Hours Left columns, but they will show most accurately if:

- You are viewing as a complete 4-week period, i.e., your view should show a solid purple bar (as in the example below)
- You are in a one-week view.
- 1. Navigate to the current roster and note the hours in the Net Hours Left column.
 - a. Utilise the *Person Search* function and type at least the first 3 letters of their name (either forename or surname), to focus on one person at a time and review more easily.

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2. Left click on the person's name and click the person's name again on the window that appears on the right-hand side of the screen.

HEALTH ROSTER	11										14 1	Person		
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HCA Test, Tester (Band 2	ו	Care I	B Care B				Care	B Care B						
(non)	,	ASC	ABC				ALC	ASC				Any Time	Any Time	Any Tim

- 3. From the Person Summary select 'Hours Accounts' from the list
- 4. At this point you can use the Effective Date column to locate where the hours started to build up, this is a good place to start investigating.
 - a. Take a screenshot and keep until the end of the process.
 Unfortunately, these records are not 100% and can disappear once you begin to make changes! But they will give a general indication of where to start investigating.

5. Once you've found the potential problem date, change to a 1-week view to spot where the differences are.



6. In this particular example, you can see that week 1 & 2, the staff member has been assigned the correct number of hours to balance their contracted hours:

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aBernol 🛩	21 May 2021		Care Bashty	Care Busity				_		

7. In weeks 3 & 4 you can see they are short by approx. a shift each week:

ZDemo1	Ŷ	test	Q 🖪			È.	e C	1 Week	~	$\langle \rangle$
	June 2021									
S zDemo1 🗸 🗸	Monday 14	Tuesday 15	Wednesday 16	Thursday 17	Friday 18	Saturday 19	Sunday 20	0/T Hrs	Net Hrs Laft	His Left
Care Buddy-A&C	Care Buddyx1	Care Baddys1	Care Buddys1		Care Buddyx1	Care Buddys1	Care Buildys1			
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• The far-right column is relative to the week or time frame you are currently looking at, the middle column is cumulative, so as you can see, after 2 weeks of being under rostered, their net hours show as 23hrs owing to the trust.

8. However, the next week they have been rostered an additional 2x shifts, which means their net hours are now below the threshold we would worry about (approx. a shifts' worth of hours either way):

ZDemo1	Ý	test	Q 🛃			ÈQ 🖬	e c	1 Week	×	< >
	June 2021			July 2021						
5 sDemo1	Monday 28	Tuesday 29	Wednesday 30	Thursday 01	Friday 02	Saturday 03	Sunday 04	0/T Hrs	Net Hrs Left	Hirs Left
Care Buddy-A&C	Care Buddys1					Care Buddyx1	Care Buddys1			
(Corport	28 June 2021	_		_	_				08:05	-15:00
HCA Test Tester (Berr		Para Budda	Case Budde	Care Builds	Care Builds				08.05	-15:00
HCA Test, Tester (Batc HCA)	2	E7.00 - 13.00	Care Buddy 87.08 - 11.58	ABC ABC	ABC Care Buddy				08.00	-15:90

9. Unfortunately, the week after that, they were then assigned "Time Owing" (T/O) and Overtime incorrectly:

zDemo1			✓ test	Q. 🔽					Week	~	< >
A zDemo1	~	July 2021 Monday 05	Tuesday 06	Wednesday 07	Thursday 08	Friday 09	Saturday 10	Sunday 11	0/T Hrs	Net Hrs	Hrs Left
Care Buddy-A&C	6	Care Buddyx1	Care Buddyx1	Care Buddyx1 07:00 - 19:30		Care Buddyx1	Care Buddyx1	Care Buddyx1			
zDemo1	~	28 June 2021							11:30	31:00	23:00
HCA Test, Tester HCA)	(Band 2		T/ 0		Care Buddy 07:00 - 19:30 A&C	0			11:30	31:00	23:00

• Note: Please do **not** assign overtime or Time Owing if the Net Hrs left column contains a positive figure (the staff member owes the Trust hours). These hours need to be addressed first before any T/O or OT can be assigned to the individual.

10. At this point you should follow along in the roster or continue looking in the Hours Account for spikes until all discrepancies have been addressed and net hours are balanced or correct depending on whether hours are legitimately owed to the trust or staff member. On rosters where staff work shifts that may not neatly fit within each week, net hours may not ever be completely balanced, but as long as they are not highlighted yellow or red within the middle/cumulative column, this is not necessarily something to worry about. As soon as they do highlight in yellow however, it is worth looking at as soon as possible, as catching net hours early is much easier than trying to investigate months and months in the past.

Further common examples:

1. In this example, an unavailability has been added to the Roster, cancelling out the shifts that were rostered for the week. However, the shifts rostered were over their contracted hours required for the week, and the unavailability entry has used these hours:

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		June 2021			July 2021						
6 zDemo1	~	Monday 28	Tuesday 29	Wednesday 30	Thursday 01	Friday 02	Saturday 03	Sunday 04	0/T Hrs	Net Hrs Left	Hrs Left
Care Buddy-A&C	7	Care Buddyx1	Care Buddyx1	Care Buddyx1	Care Buddyx1	Care Buddyx1	Care Buddyx1	Care Buddyx1			
zDemo1	~	28 June 2021								08:00	-15:00
HCA Test, Tester (HCA)	Band 2	A/L								08:00	-15:00
			Care Buddy 07:00 - 19:30 A&C	Care Buddy 07:00 - 19:30 A&C	Care Buddy A&C	A&C					

• Unavailabilities should only ever total contracted hrs for the week they are entered, so this should be edited and changed.

• The staff member has then decided they would prefer to work on Tuesday and Wednesday, so have reduced their leave to just the Thursday & weekend. When this is edited on the roster, the system does not automatically put shifts back in, so these will need to be manually dragged back down from vacant duties (or cleared and reauto rostered, if it is someone with a set work pattern for autorostering & they will complete their usual shift times/days):

zDemo1			~	test	Q					2 🖶 C 1V	Veek	~	<	>
		June 2021					July 2021							
6 zDemo1	~	Monday 28		Tuesday 29		Wednesday 30	Thursday 01	Friday 02	Saturday 03	Sunday 04	0/T Hrs	Net Hrs Left	Hrs Lef	it.
Care Buddy-A&C	7	Care Buddyx1		Care Buddyx1 07:00 - 19:30		Care Buddyx1 07:00 - 19:30	Care Buddyx1	Care Buddyx1	Care Buddyx1	Care Buddyx1				
zDemo1	~	28 June 2021										31:00	08:0	00
HCA Test, Tester (Band 2			Care Buddy 07:00 - 19:30	_	Care Buddy 07:00 - 19:30	A/L					31:00	08:0	00
				ABC	N	ABC	Care Buddy A&C	Asc						

2. In this example, a Public Holiday has not been input where it should be:

	August 2023				September 2023					
Unfilled Duties	> Monday 28	Tuesday 29	Wednesday 30	Thursday 31	Friday 01	Saturday 02	Sunday 03	0/T Hrs	Net Hrs Left	Hrs Left
eRostering	21 August 2023 : Fully Approv	ed							07:30	07:30
A&C Testing, Test (Ba 4 A&C)	nd Day	Day	Day 🗰 🕯	Day	Day				07:30	07:30

- This should be input, however if inputting retrospectively, there may not be sufficient entitlement hours remaining to add this in correctly. In this case, the hours would be legitimately owed to the trust.
- If it appears there are sufficient hours, ensure to cross reference the entitlement to check the hours have not been incorrectly carried forward to the next entitlement period. If so, they will either need to be reduced or removed, or if they have been used within the next period again this will have to remain as hours legitimately owed to the trust.

• Note: Public Holidays, if relevant i.e., if the service is closed during public holidays, should be input for the coming year before the entitlement begins. For example, leave entitlements run from April to the following March, therefore it is recommended that managers ensure all public holidays relevant to an individual are input near the end of the previous year, to ensure that the hours are set aside correctly, and not inadvertently overbooked elsewhere. You can easily input PHs in bulk when a roster (purple bar) is not loaded by clicking on the relevant day, holding Ctrl on your keyboard and selecting all team members as below:

	January 2024						
Unfilled Duties	Monday 01	Tuesday 02	Wednesday 03	Thursday 04	Friday 05	Saturday 06	Sunday 07
eRostering V							
A&C Tester, Test1 (Band 4 A&C)							
A&C Tester, Test2 (Band 3 A&C)							
A&C Tester, Test3 (Band 2 A&C)							

Or by using the multi-select option

(shows blue when active).

- Because there is no roster or shifts already loaded or assigned, the system will use their default hours to input the PHs. For example, if you have advised the roster team to set default hours for a staff member who does not work Mondays, even if you input a PH to that staff member, the entry will contain 0hrs because they do not usually work Mondays.
- 3. In this example, a shift was unable to be rostered as there were not sufficient shifts available within vacant duties:

	December 2023						
6 eRostering ~	Monday 04	Tuesday 05	Wednesday 06	Thursday 07	Friday 08	Saturday 09	Sunday 10
Shifts-A&C		Day					
1 Manager-RCH-A&C 🚺	DO	DO	DO	DO	DO	DO	DO
eRostering 🗸 🗸	13 November 2023						
A&C Tester, Test1 (Band 4 A&C)	Day III B	Day	Day	Day	Day		

• Provided that the staff member was confirmed to have worked the day in question (in this example, a Monday), the vacant shift on the Tuesday can be moved to the Monday via 'Move Demand' as it is a like for like cost shift. This can then be assigned, and the hours balanced, either by manually dragging down and time adjusting as necessary, or by clearing the cancelled (purple) shift and re-auto rostering.



- Note: Do **not** use move demand to move a weekday shift to a weekend as shifts carry different enhancements, moving these creates a discrepancy within the budget that the roster adheres to, which will be queried as it can indicate fraudulent activity.
- If you require shifts on days that are not in your usual template, you will need to request these as additional duties via the usual process (form available upon request).
- If you find you are needing to Move Demand frequently, please contact your roster leads to discuss a potential template change.
- 4. In this example, it is not immediately clear where the issue lies, as the week appears to be filled correctly with shifts and an unavailability:

	December 2023									
6 eRostering ~	Monday 04	Tuesday 05	Wednesday 06	Thursday 07	Friday 08	Saturday 09	Sunday 10	0/T Hrs I	Net Hrs H Left	Irs Left
Shifts-A&C	Day									
1 Manager-RCH-A&C 0	DO	DO	DO	DO	DO	DO	DO	1		
eRostering 🗸	13 November 2023								07:30	07:30
A&C Tester, Test1 (Band	A/L	Day	Day	Day	Day			-	07:30	07:30
	Day									
	101 B									

• In these cases, you can check the unavailability entry by double or right clicking and selecting "edit unavailability". Here you can see where the "work hours" are assigned and in this case, the hours have been incorrectly assigned to their Bank/Kernowflex posting:

Work Time Refresh										
Week Start 04/12/20	Week 04/12/2023 ~					Reset to default values				
Posting \uparrow	Mon 04/12	Tue 05/12	Wed 06/12	Thu 07/12	Fri 08/12	Sat 09/12	Sun 10/12	Total Hours		
Bank (Band 4 A&C)	07:30							07:30		
Substantive	00:00							00:00		

• Move the hours from this onto their substantive posting and this will be corrected:

Posting	\uparrow	Mon 04/12	Tue 05/12	Wed 06/12	Thu 07/12	Fri 08/12	Sat 09/12	Sun 10/12	Total Hours
Bank (B	and 4 A&C)								00:00
Subst	antive	07:30							07:30
-	December 2023								
6 eRostering V	Monday 04	Tuesday 05	Wednesday	r 06 Thu	rsday 07	Friday 08	Saturday 09	Sunday 10	O/T Hrs Net Hrs Hrs Left Left
Shifts-A&C	Day								
Shifts-A&C 1 1 Manager-RCH-A&C 0	Day DO	DO	DO	DO	DO		DO	DO	
Shifts-A&C 1 1 Manager-RCH-A&C 0 eRostering V	Day DO 13 November 2023	DO	DO	DO	DO		DO	DO	

Important notes:

- Monitor your team net hours often and try to catch any discrepancies when they occur.
- Encourage your team to monitor their own net hours via Loop (if they do not already have a copy, we also have guidance/FAQs for Loop that can be provided) and highlight any issues to their manager or team leader.
- Always look at the roster view from a Monday to a Sunday to show net hours most accurately.
- If after thorough investigation you find hours are legitimately owed by the staff member to the trust, this can be balanced by:
 - Working hours over their contract to reduce hours week by week.
 - Inputting additional leave to reduce owed hours.
 - Or paid back via discussion with Payroll.
- Conversely, if hours are owed to the staff member, these can be taken as TOIL at times convenient for both them and the service or paid via Payroll.
- If after thorough investigation a definitive answer cannot be reached but you believe there should be no hours owed by or owing to the staff member, this must be raised to Finance to arrange as an over or underpayment that cannot be recovered.
 - Provide confirmation via email to the rostering team once this has been arranged, confirming the hours have been written off as an accepted over or underspend, for HealthRoster to be updated as well.
- If you see an **X** in the Net Hours Left column, please contact the eRoster Team to initialise the hours.

Online URL: <u>https://elearning.cornwall.nhs.uk/site/kb/article.php?id=432</u>