

Employee On Line (EOL) Basic User Guide

E-Rostering Team Contact Details:

Central: ext (1815) 2266

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Logging in to the Employee on Line (EOL) System:

Double click on the internet explorer icon



On BCU's homepage click on the E-Rostering link under the short cut links to the left hand side of the screen.

On the E-Rostering page click on the Link entitled Access for staff – Employee On Line

Links

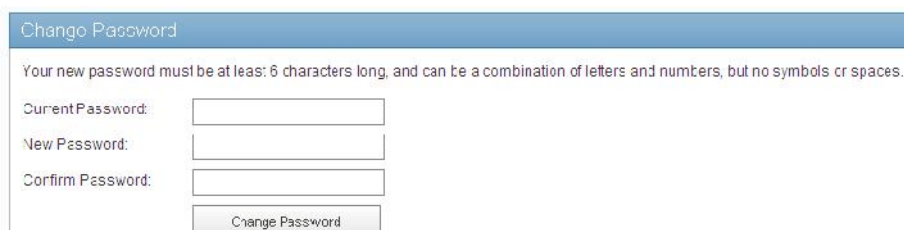
[NHS Access for staff - Employee On Line](#)

A new page will open as per below:

The image shows a screenshot of the HealthRoster Employee Online login page. At the top left, there is a logo with three people and the text 'HealthRoster Employee Online'. Below the logo, there is a 'Login' link. The main content area is titled 'Please Log in' and contains two input fields: 'User name:' and 'Password:'. Below the password field is a button labeled 'Login'. At the bottom of the form, there is version information: 'Version: 10.4.404.7' and 'Health Monitor Version: 10.4.401.19'.

Fill out your Username and Password, please note your password is case sensitive. If you do not know your username and / or password please contact a member of the E-Rostering team.

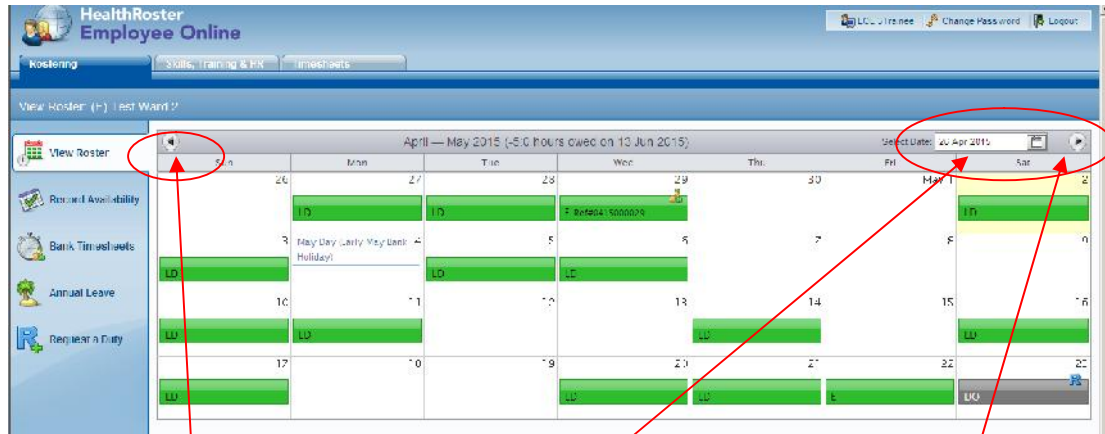
If this is your first time logging into the system you will be asked to change your password from the default password you are issued. Please follow the instructions in the screen to change your password:

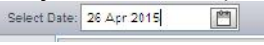


The image shows a screenshot of the 'Change Password' form. At the top, there is a blue header with the text 'Change Password'. Below the header, there is a message: 'Your new password must be at least 6 characters long, and can be a combination of letters and numbers, but no symbols or spaces.' Below this message are three input fields: 'Current Password:', 'New Password:', and 'Confirm Password:'. At the bottom of the form is a button labeled 'Change Password'.

Please note your password is case sensitive.

Viewing your roster:

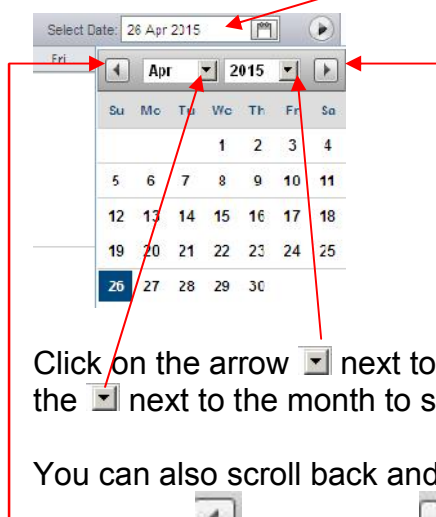
When you log into the system the first screen you will see will be the View Roster page. This page will provide you with details of shifts you are rostered to work and shifts previously worked. If you have a bank contract you will also see details of any booked bank shifts in this screen.







You are able to view your rosters (once they are fully approved) by clicking on the calendar icon  alternatively you can scroll back and forth between roster periods using the forwards  or backwards  buttons to the left and right of the date bar.

Please note details are only available to view in this screen if your rosters have been fully approved by your managers.

To use the calendar icon click into the Select date field this will open up the calendar for you

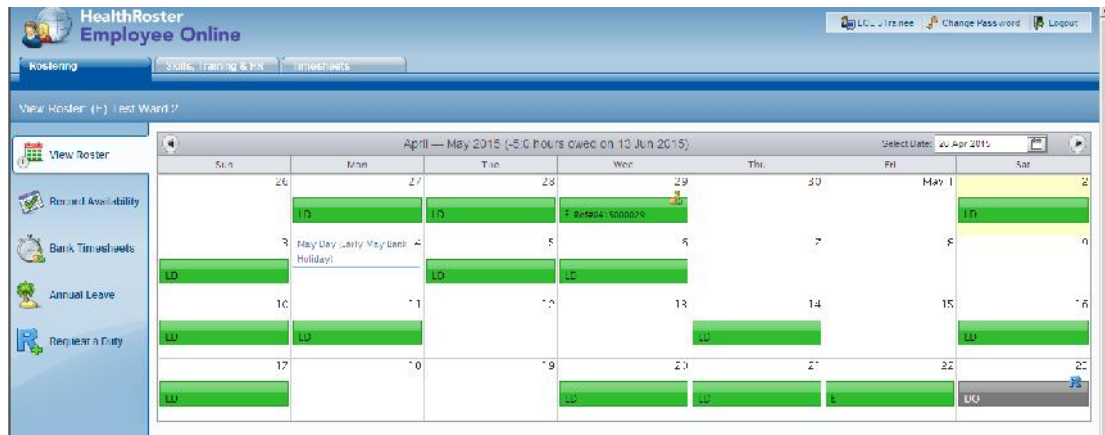


Click on the arrow  next to the year to select the year you wish to view and the  next to the month to select the month you wish to view

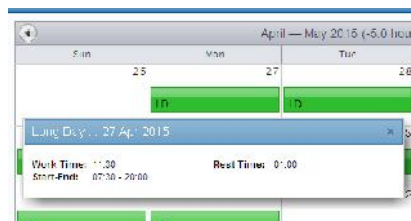
You can also scroll back and forth between months by clicking on the backwards  or forwards  buttons to the left and right of the date bar.


Viewing shift details:

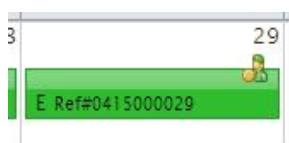
Once you have chosen the date you wish to view you will be able to see the shifts you are rostered in that period.



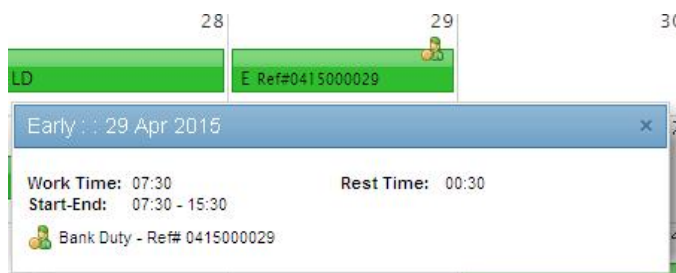
Clicking on any of the shifts will provide further information in regard to that shift, including the start and end times and any unpaid breaks.



If you have a bank contract you will also be able to view details of booked bank shifts. Bank shifts are indicated by the bank staff icon  and will have a booking Ref number displayed on them.



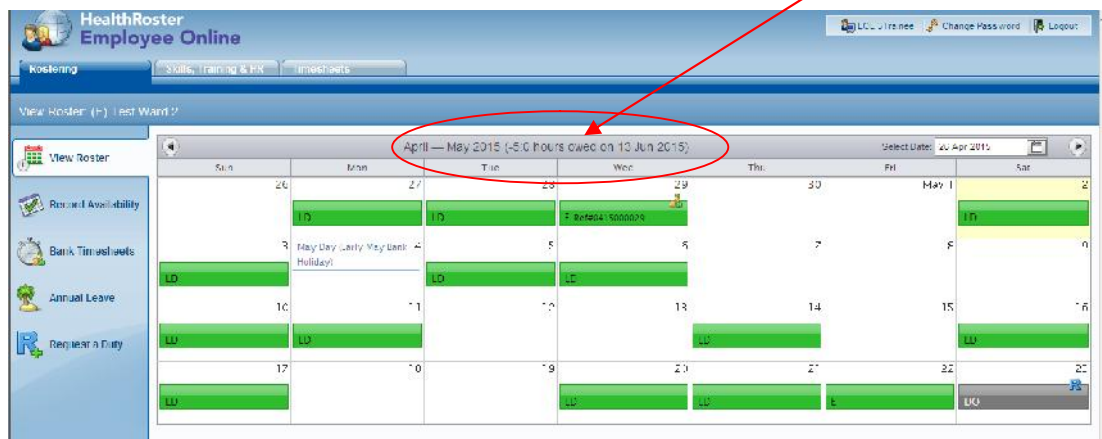
Clicking onto a bank shift will provide further details in regard to that shift, including the start and end times and any unpaid breaks.



Time owing:

You can view the balance of time owed to you or time that you owe to the Healthboard in the view roster screen.

Your time owing or owed balance will be displayed along the grey roster bar in ()'s and be given up to the stated date. Amending your view date (as above) will change the balance of hours owed / owing.



If the figures in ()'s state hours left, as per below example, this means that you have these number of hours / minutes left to work so therefore this is the balance of time that you owe to the Healthboard at the date shown.

March — April 2015 (5:30 hours left on 16 May 2015)			
Mon	Tue	Wed	Thu

If the figures in ()'s state hours owed, as per below example, this means that you have these number of hours / minutes owed to you so therefore this is the balance of time that you the Healthboard owes you at the date shown.

April — May 2015 (-5:0 hours owed on 13 Jun 2015)			
	Tue	Wed	Thu

If you feel your time owing / owed balance is incorrect please discuss this with your manager.

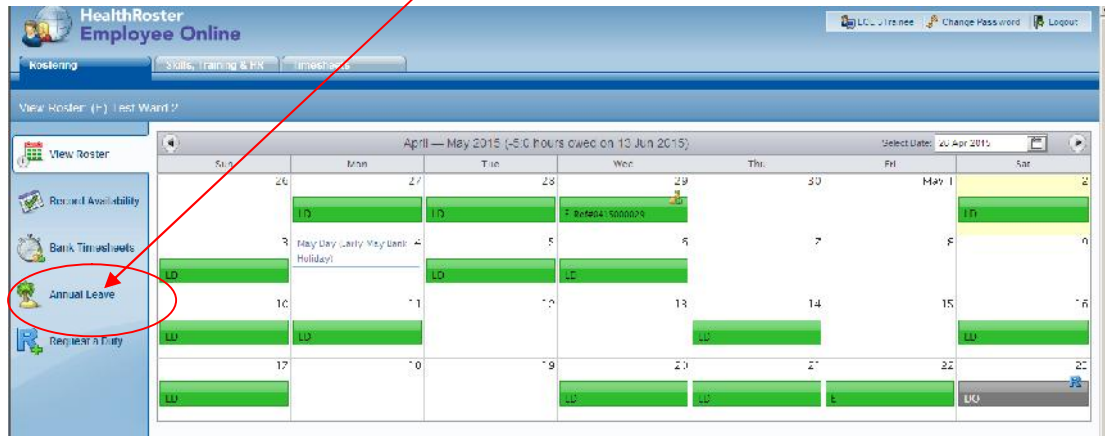
Annual leave:

To view details of annual leave held in the E-Rostering system for you including entitlements, planned, taken and booked annual leave click onto the

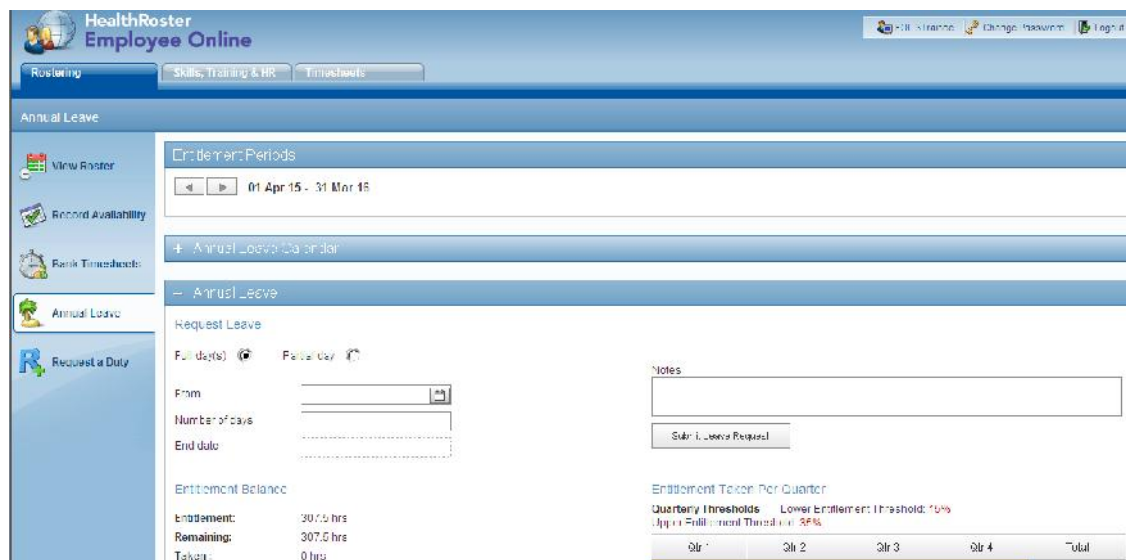
Annual Leave short cut



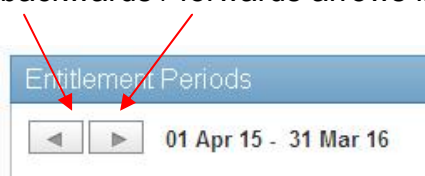
that can be found on the left hand side of the screen



When you go into the annual leave page the first screen you will see will provide you with details of your annual leave entitlement and annual leave taken / booked / planned.



You can change the annual leave period you are viewing by clicking on the backwards / forwards arrows in the Entitlement Periods section



Viewing Annual leave:

In the Annual Leave section you can request annual leave, view your entitlement balance, monitor your annual leave usage per quarter and see all episodes of annual leave for the leave year you are viewing.

The screenshot displays the 'Annual Leave' management interface. It includes a 'Request Leave' section with radio buttons for 'Full day(s)' (selected) and 'Part day', input fields for 'From', 'Number of days', and 'End Date' (Sun 10 Oct 2015), and a 'Notes' text area with a 'Submit Leave Request' button. Below this is the 'Entitlement Balance' section showing: Entitlement: 307.5 hrs, Remaining: 232.5 hrs, Taken: 0 hrs, Planned: 37.5 hrs, and Requested: 37.5 hrs. To the right is the 'Entitlement Taken Per Quarter' section with 'Quarterly Thresholds' (Lower: 15%, Upper: 35%) and a table showing usage for Qtr 1 (12%), Qtr 2 (12%), Qtr 3 (0%), Qtr 4 (0%), and a Total of 24%. At the bottom is an 'Episodes' table with columns for Status, Period, Duration, Times, Notes, and Delete.

Status	Period	Duration	Times	Notes	Delete
✓ Annual Leave	14-20 Jun 2015	37.5 hrs			
⚠ Annual Leave	16-22 Aug 2015	37.5 hrs			✗
✗ Annual Leave	20-26 Dec 2015	0 hrs			

Prior to requesting annual leave you should review your entitlement balance to establish what leave you have remaining.

Entitlement Balance

Entitlement: 307.5 hrs
Remaining: 232.5 hrs
Taken : 0 hrs
Planned : 37.5 hrs
Requested : 37.5 hrs

The Entitlement Balance section provides you with details on what your annual leave entitlement is for the leave year you are viewing (see above for details on how to amend view).

You will be able to see the entitlement you have remaining which is the difference between your Entitlement and any leave Taken / Planned or Requested.

The Taken section shows the number of hours of annual leave you have already taken during the viewed leave year.

The Planned section shows the number of hours of annual leave that has been authorised by your manager for you to take.

The Requested section shows the number of hours of annual leave that you have requested that has not as yet been authorised by your manager.

Viewing Annual leave continued:

You are able to view the % of leave that you have taken / planned or booked for each quarter of the leave year you are viewing.

Entitlement Taken Per Quarter

Quarterly Thresholds Lower Entitlement Threshold: 15%
Upper Entitlement Threshold: 30%

Qtr 1	Qtr 2	Qtr 3	Qtr 4	Total
12%	12%	0%	0%	24%

Please refer to BCU WP14 Leave Procedures policy for further details as to how leave should be taken during the year.

Any leave that you have already taken / planned or booked will be visible under the Episodes section.

Status	Period	Duration	Times	Notes	Delete
✔ Annual Leave	14-20 Jun 2015	37.5 hrs			
🔍 Annual Leave	18-22 Aug 2015	37.5 hrs			✖
✖ Annual Leave	20-26 Dec 2015	0 hrs			

This section provides details on the status of your annual leave, a green tick symbol ✔ indicates that the leave has been approved by your manager, a yellow question mark symbol 🔍 indicates the leave is awaiting approval from your manager and a red cross symbol ✖ indicates leave that has been rejected by your manager.

In the Episodes section you will also be able to see the period that the annual leave is covering and the number of hours allocated to this.

If taking a partial day annual leave the start and end times of the leave would be displayed.

If a note has been added to your leave by either yourself or your manager you would be able to see details of this in the notes section.

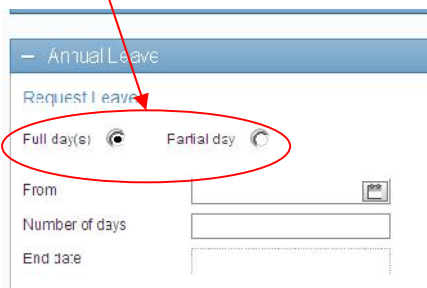
Requesting Annual leave:

To request annual leave you need to complete the details in the request leave section.



The screenshot shows the 'Request Leave' form. At the top, there are two radio buttons: 'Full day(s)' (which is selected) and 'Partial day'. Below these are three input fields: 'From', 'Number of days', and 'End date'. To the right of these fields is a 'Note' text area. At the bottom right, there is a button labeled 'Submit - Leave Requested'.

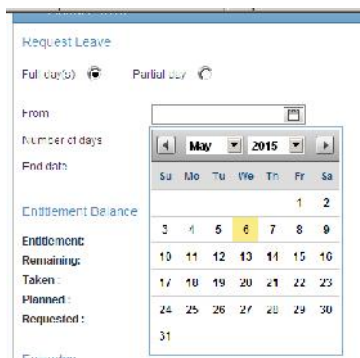
Firstly choose whether you would like to request your leave for a Full day(s) or a Partial day



This screenshot is identical to the one above, but a red circle highlights the two radio buttons for 'Full day(s)' and 'Partial day'. A red arrow points from the text above to the 'Full day(s)' radio button.

Partial days should only be requested if you are planning to work part of that day.

Once you have selected to book a Full day(s) or Partial day, click into the From section which will open a calendar to allow you to select the start date of the annual leave you wish to book.



The screenshot shows the 'Request Leave' form with a calendar open. The calendar is for May 2015. The 'From' field is highlighted, and the calendar shows the dates from 1 to 31. The 'Entitlement Balance' section is also visible, showing a balance of 12 days.

May 2015						
Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
						31

If required instructions showing how to use the calendar can be found on page 4 of this guide.

Requesting Annual leave continued:

Once you have entered the start date of your annual leave request enter the number of days you wish to request and then click into the End date section which will automatically populate with a date based on your entered start date and days requested.

Request Leave

Full day(s) Partial day

From 

Number of days


End date

Please note that within the E-Rostering system the working week commences on a Sunday so should you wish to take a full week off you should ensure that you select a Sunday start date and enter 7 days. Entering 7 days will not allocate more leave than your weekly contracted hours.

If you are requesting a Partial day leave you will need to complete the Start time of your leave and the number of hours / minutes required.

Request Leave

Full day(s) Partial day

From 

Partial Day: Start Time

Hrs/Min (HH:MM)

End Time

Time entered into the start time needs to be in a four digit format as above example and based on the 24 hour clock.

It is possible to add a note to your annual leave request if you wish to provide further information to your manager as per below example:

Notes

Once you have entered all the required details click on the Submit Leave Request button

Requesting Annual leave continued:

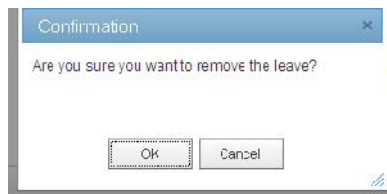
When your request has been submitted you will be able to see this under the Episodes section. Your Entitlement Balance and the % of Entitlement Taken per Quarter will have been adjusted to include this request.

Entitlement Balance		Entitlement Taken Per Quarter				
Entitlement:	307.5 hrs	Quarterly Thresholds: Lower Entitlement Threshold: 15%				
Remainder:	195 hrs	Upper Entitlement Threshold: 35%				
Taken:	0 hrs	Qt:1	Qt:2	Qt:3	Qt:4	Total
Planned:	37.5 hrs	12%	12%	12%	1%	37%
Requested:	75 hrs					

Episodes						
Status	Period	Duration	Time	Notes	Delete	
Annual Leave	14-20 Jun 2015	37.5 hrs				
Annual Leave	10-22 Aug 2015	37.5 hrs				
Annual Leave	11-17 Oct 2015	37.5 hrs		Would like to go away for Wedding Anniversary. If possible please?	<input checked="" type="checkbox"/>	
Annual Leave	20-26 Dec 2015	0 hrs				

Whilst your annual leave request is awaiting authorisation from your manager you do have the option to delete the request if you do not now wish to take this by clicking on the red cross under the delete column in the Episodes section.


The system will show the below confirmation message

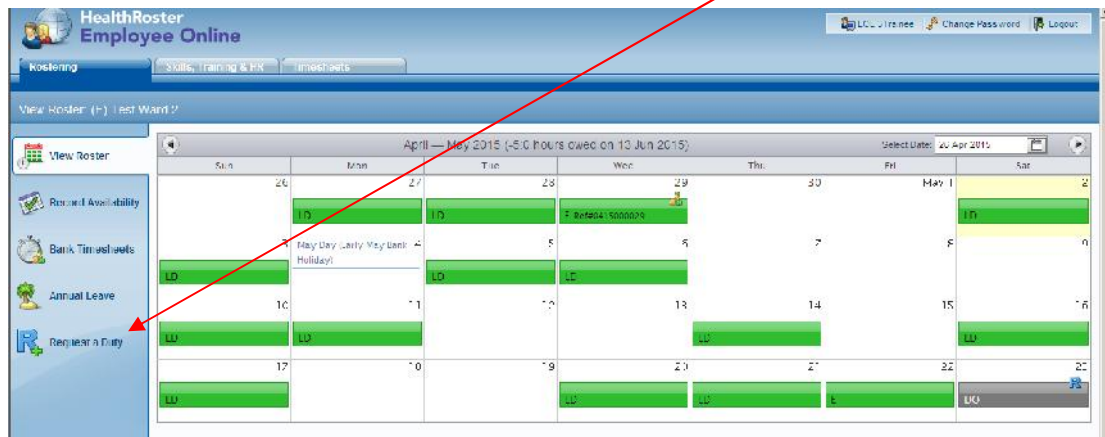


Click OK or Cancel as required

You do not have the option to delete any annual leave that has been approved or rejected by your manager. Should you wish to amend approved leave you will need to discuss this with your manager.

Request a duty:

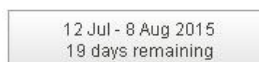
To request a duty click onto the Request a Duty short cut  that can be found on the left hand side of the screen



Any rosters that are available to submit requests on will be shown. The number of rosters available to request on will depend on the number of rosters your manager has opened to requests.



Details of the start and end date of the roster periods are shown along with the number of days remaining that requests can be submitted on that roster prior to it closing to requests.



To enter a request click on the roster period covering your request date. This will open up a diary view which enables you to add a request on the date required.

Request a duty continued:

The grey bar at the top of the diary view will show you details of the number of hours requested to work in that roster period and the number of requests made. For details regarding entitlement to requests please refer to WP28a Roster Policy.

Request a Duty for: (E) Test Ward 2										
19 Aug 2015 19 requests remaining		18 Aug 2015 47 hours remaining		16 Aug 2015 75 requests remaining		14 Aug 2015 133 hours remaining		12 Aug 2015 51 requests remaining		
Duty August 2015 (20150 hours, 0 requests)										
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Sat
12	13	14	15	16	17	18	19	20	21	22
23	24	25	26	27	28	29	30	31		
1	2	3	4	5	6	7	8			

To make a request click on the day you want to make the request on, this will automatically open up the request screen as per below.

Request for 27 Jul 2015

Request a Duty

If required add a note then click on the button to request a duty

REST:
no

RN:
C x 3 L x 3 N x 1
ID x 3

Notes:
Test

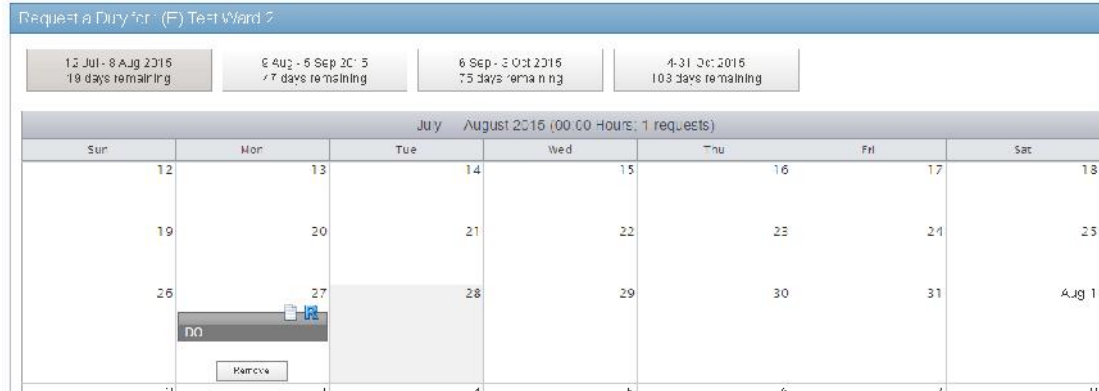
+ Request annual leave
+ Request study leave

The duties available to be requested on your roster will be displayed. If required add a note in the Notes section prior to selecting the duty you wish to request.

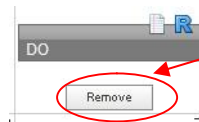
Duties available to be requested will be dependant upon the area in which you work.

Request a duty continued:

Once you have clicked on the duty you wish to request you will be returned to your diary view screen and be able to view the request on the roster.



If you have entered a request in error or no longer wish to make the request you can remove this by clicking on the remove button under the requested duty.



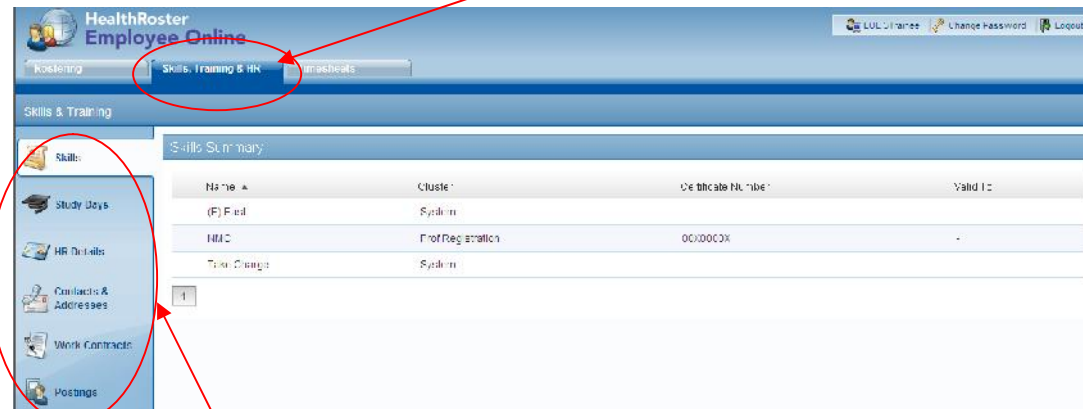
It is also possible to request annual leave from this screen. Click onto the date you wish your annual leave request to start from and complete the details in Request annual leave section of the screen that opens up.

Please refer to pages 10 – 12 of this guide for information on how to enter annual leave requests.

Skills, Training & HR Details:

Within Employee on Line you are able to view details held about yourself in the main roster system.

To do so click on the Skill, Training & HR tab at the top of the screen.



Each of the tabs on the left hand side of the screen contain different information so please click onto each tab. If any details are incorrect please inform your manager.

In the Skills section you are able to view any skills recorded for you including the date that these are valid to, examples of these maybe professional registration details and mandatory training records.

The Study Days tab will show details of any study attended.

The HR Details tab shows personal information including your staff number, name and date of birth. Employment information is also included in this tab.

The Contacts & Addresses tab shows details of your home address and contact numbers that are held in the system for you.

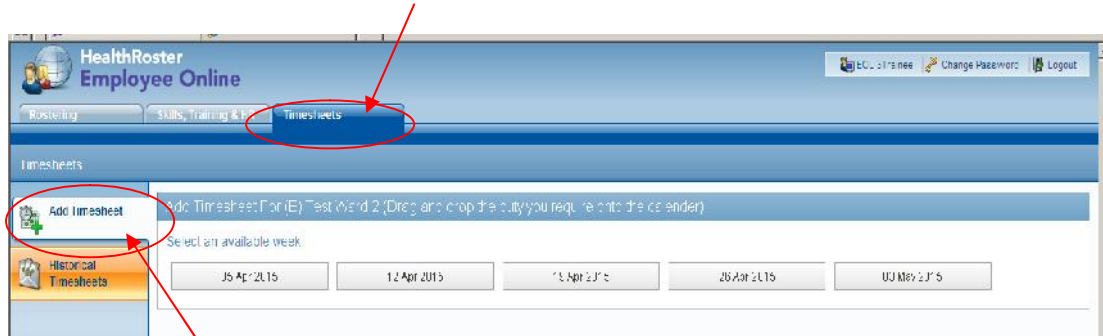
The Work Contracts tab shows your grade and the number of hours you are contracted to work in all posts held in the system. This includes bank post details.

The Postings tab shows all post details held for you within the system including start and end dates.

Viewing Timesheets:

Within Employee on Line you are able to view details in relation to the number of enhanced hours worked and absences taken during each calendar month.

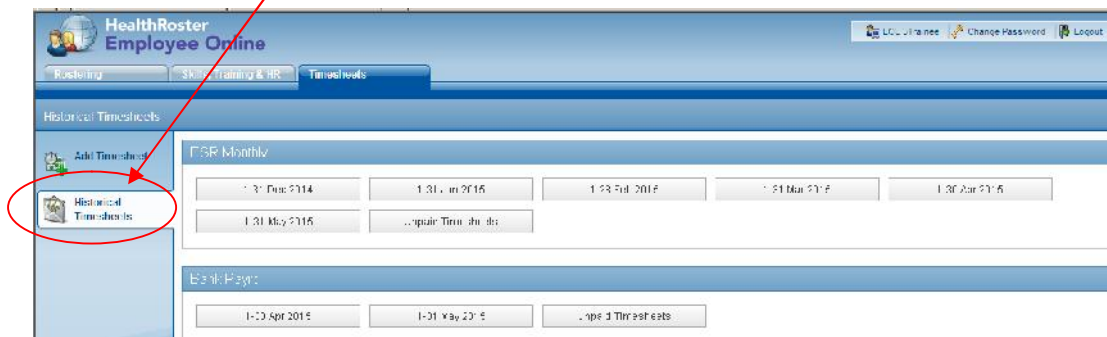
To do so click on the Timesheets tab at the top of the screen.



The Add Timesheet option can only be used if you have a posting that allows you to record your time worked on a daily basis, which is known as web based timesheets.

If you use web based timesheets to record your daily working hours please refer to the Employee On Line Web based timesheets user guide.

To view details of enhancements and absences recorded on your roster click onto the Historical Timesheets tab on the left hand side of the screen.



Click onto the month that you wish to view details for which will then open up a summary showing all enhanceable hours and absence recorded for you.


Summary for: 01 Jan 2015- 31 Jan 2015

Element Type	Hours
▶ Overtime OT 1-8	07:30
▶ Saturday (Protected) 1-8	39:30
▶ Sunday (Protected) 1-8	12:15
▶ Unsocial (Protected) 1-8	04:30

Absence Summary: 01 Jan 2015- 31 Jan 2015

There is no information to display for this period

Viewing Timesheets continued:

To view details of the dates that the hours worked relate to click on the arrow symbol  to the left of the enhanceable hour rate you wish to view

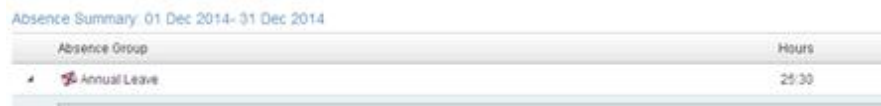



Summary for: 01 Jan 2015- 31 Jan 2015	
Element Type	Hours
 Overtime OT 1-8	07:30
 Saturday (Protected) 1-8	39:30


This will then provide further information including the shift date, start & end time and hours worked.

Date	Shift	Start	End	Hours
03 Jan 2015	Late	12:30	20:30	07:30
10 Jan 2015	Long Day	07:30	20:30	12:15
17 Jan 2015	Early	07:30	15:30	07:30
24 Jan 2015	Long Day	07:30	20:30	12:15

If any absence has been recorded for you, you can view details of this in the Absence Group section



Absence Summary: 01 Dec 2014- 31 Dec 2014	
Absence Group	Hours
 Annual Leave	25:30

Again clicking on the arrow symbol  to the left of the absence will provide further details in regard to dates and hours of absence.

Date	Absence	Hours
01 Dec 2014	Annual Leave	12:00
02 Dec 2014	Annual Leave	12:00
03 Dec 2014	Annual Leave	01:30

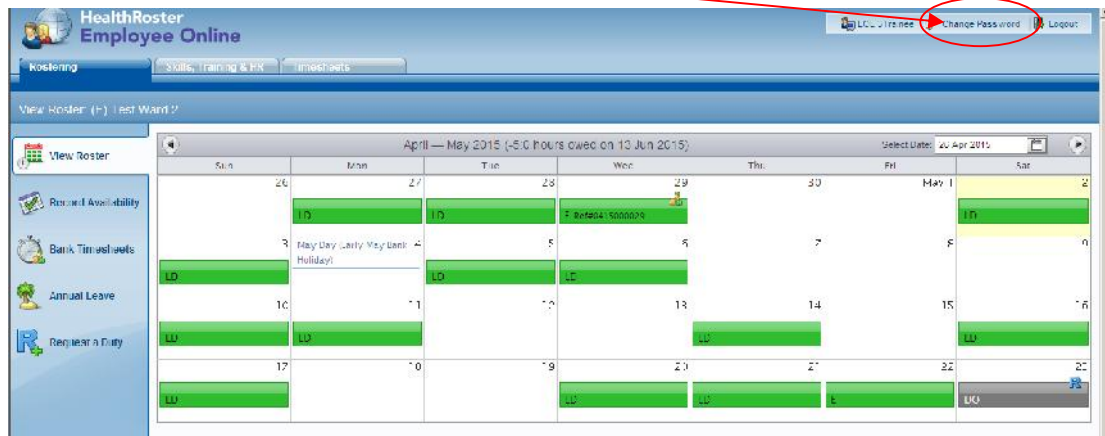
If there are any discrepancies with hours worked or recorded absences please speak to your manager.

It is also possible to view details of bank shifts worked, please refer to the Employee On Line bank staff user guide for information on this.

Change Password:

To change your password in the system click on the Change Password

icon in the top right hand corner of the screen



This will open up the below screen:

The screenshot shows the 'Change Password' form. It has a title bar 'Change Password:'. Below the title bar, there is a note: 'Your new password must be at least 4 characters long, and can be a combination of letters and numbers, but no symbols or spaces.' There are three input fields: 'Current Password:', 'New Password:', and 'Confirm Password:'. Below the input fields is a 'Change Password' button.

Fill out as required. In the Current Password section you should enter the password that you used to log into the system. Please note your password is case sensitive.

If any information held in Employee on Line is incorrect please discuss this with your manager.

If required the E-Rostering team can be contacted on the details below:

E-Rostering Team Contact Details:

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Email – BCU.HealthRosterCentral@wales.nhs.uk

East: ext (1814) 6644 or (1814) 5250

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