



# Job Planning Levels of Attainment

**Level 4 Organisational eJob Planning:** there is board-level accountability for monitoring eJob Planning across all workforce groups, ensuring audit and review. Individual and team objectives, departmental budgets and the trust's objectives are aligned, so it can respond dynamically to services' changing needs.

**Level 3 Team eJob Planning:** teams establish team eJob Planning meetings that align team objectives to individual eJob Plans and service needs, as defined through team capacity and demand analysis. Planned and delivered activity is reconciled at least quarterly using data from the trust's eRostering system, with objectives annualised if this meets service needs. The trust ensures eJob Planning is consistent between teams.

**Level 2 Advanced individual eJob Planning:** the trust allocates time and resources to eJob Planning. The trust uses the full functionality of eJob Planning software to include details of the agreed average output of planned activity. It maintains a fair and transparent culture around eJob Planning

**Level 1 Basic individual eJob Planning:** the trust has procured eJob Planning software and trained its staff to use it. Trust-wide policies detail the eJob Planning process and its governance. At least 90% of employees have an active e-job plan.

**Level 0 No eJob Planning:** eJob Planning software may be being procured or in place, but fewer than 90% of employees are fully accounted for on the system. Job plans may be in place (e.g. paper-based or Microsoft Excel) but are not recorded on dedicated eJob Planning software.



# eRostering Levels of Attainment

**Level 4 Organisational eRostering:** there is board-level accountability for monitoring eRostering across all workforce groups, ensuring audit and review. Team objectives, departmental budgets and the trust's objectives are aligned, so it can respond dynamically to services' changing needs.

**Level 3 Capacity and demand:** teams analyse capacity and demand, using evidence-based tools where available. Team 'capacity and demand' meetings ensure rosters reflect service needs and team objectives. Software is used to report productivity and deployment metrics.

**Level 2 Timetabling:** the software is used to capture shift preferences and staff's personal working patterns via a remotely accessible application. The software can automatically generate rosters, with final roster publication at least six weeks before the roster start date. Unfilled shifts are identified through regular roster reviews. The software reports key performance indicators for use at all organisation levels

**Level 1 Visibility of the individual on the eRoster:** the trust has procured eRostering software, ensuring paperless payment mechanisms, and trained its staff in its use. All contracted hours are recorded on the system, ensuring safe working hours and appropriate skill-mix. Trust-wide policies detail the eRostering process, ensuring consistent roster rules are applied. At least 90% of employees are registered on an eRoster.

**Level 0 No attainment:** eRostering software may be being procured or in place, but fewer than 90% of employees are fully accounted for on the system. eRosters may be in place (e.g. paper-based or Microsoft Excel) but are not recorded on dedicated eRostering software.