DirectProjectSolutions.com

EMS TRAINING FOR SUPERVISORS

INCLUDES EMSREPLACE AND EMSVARIATION

The EMS Data Capture System captures information from rosters, variation sheets and other sources to provide supervisors and managers with useful budget and expenditure reports

EMSReplaceRequests.xls and *EMSVariation.xls* help feed data into EMS

EMSReplaceRequests.xls submits staff replacement data to your Staff Replacement Officer

EMSVariation.xls submits roster variations to your Cluster Manager

Contents

1 Introduction

1.1 EMS

EMS is a database that captures information from rosters, variation sheets and other sources to provide accommodation based supervisors and managers with useful budget and expenditure reports. *EMS* is currently in place in seven regions.

1.2 EMSReplaceRequests

EMSReplaceRequests is one component of *EMS*. **Currently, it is used in North and West Region ONLY**. This tool is in a simple spreadsheet layout and in short, you use this spreadsheet to notify your Staff Replacement Officer (SRO) of all shifts that:

1. Have been filled 'at the house';

2. Need to be filled by SRO; and that

3. Are unstaffed yet do not need to be filled.

To do this you do not need to use the phone or the email. Rather, press the *EMSReplaceRequests* link on the North and West E-Kit, fill out the spreadsheet that pops up, and then press the *Send to SRO* button.

The data will then be posted via the DHS Network to your Staff Replacement Officer, who will note your data, and fill the shift if it is not already filled.

More detailed instructions appear further on in this document.

1.3 EMSVariation

EMSVariation is one component of EMS. Variation Sheets record any amendments to a core roster in an accommodation unit.

EMSVariation is an automated shift calculation program that assists supervisors to record Variation Sheets in a consistent and accurate way.

EMSVariation also provides supervisors and managers with the costs of each individual variation to the roster and a range of 'total variation reports'.

A feature of *EMSVariation* is that it records house issues affecting expenditure. These issues appear on management reports and can be taken into account by supervisors and managers in respect of making decisions.

Costing tools within *EMSVariation* are current against the *HSUA Department of Human Services Disability Services Agreement 2004* and common practices in DHS regions.
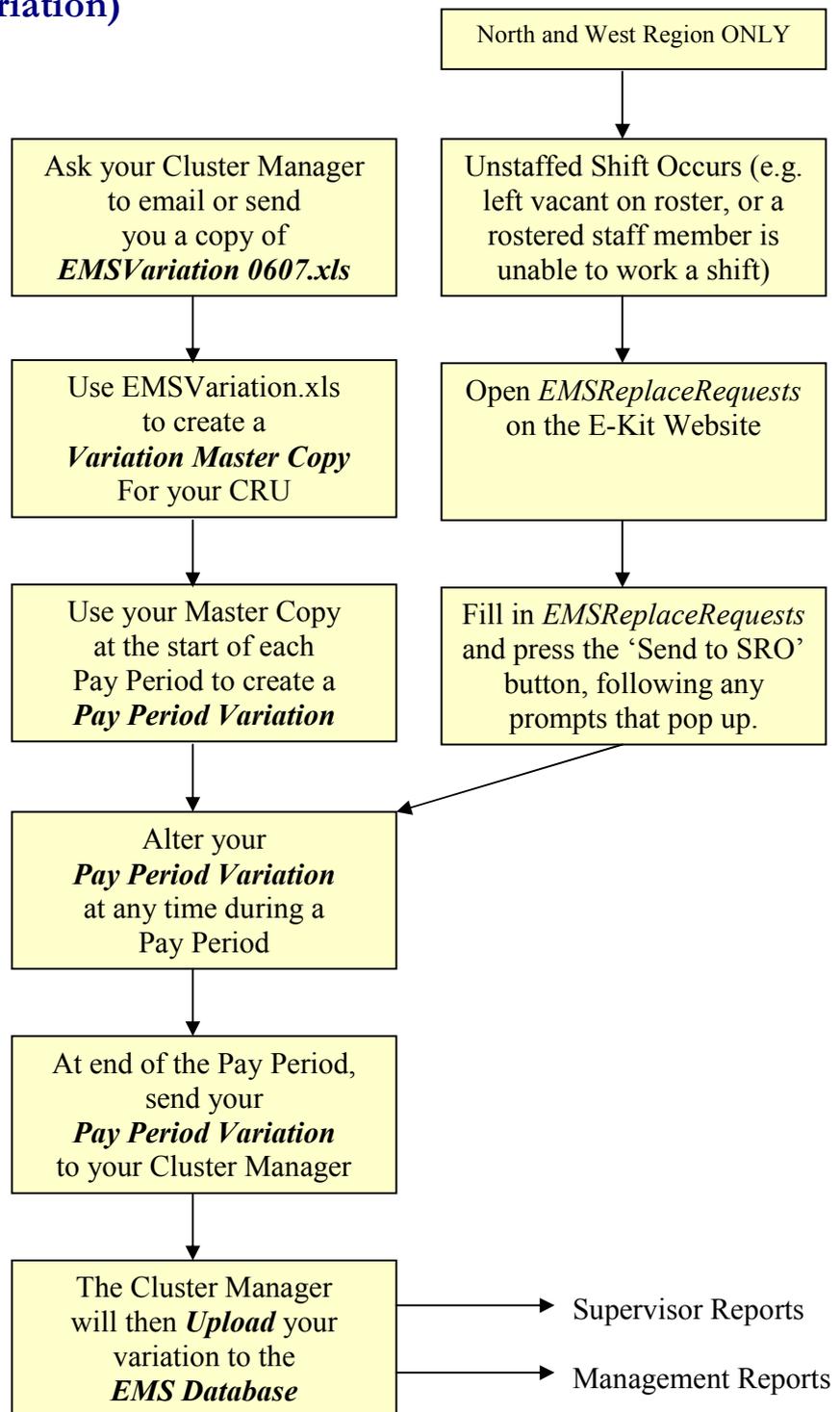
1.4 About this User's Manual

EMSReplaceRequests[1] and *EMSVariation* are programmed in excel. This manual takes the user through typical excel tasks – e.g. creating, opening, saving and closing folders and excel files – step-by-step. The authors strongly recommend that these *file management* skills are vital whether or not one uses EMS, and that users practice these skills often and well.

N.b. When trying out this software, each time you are asked to "Enable" or Disable" macros, you should choose to "**Enable**" Macros.

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[1] Currently, *EMSReplaceRequests* is used in North and West Region ONLY.

1.5 Shift Replacement Process (Involves both EMSReplace and EMSVariation)

```
                                        ┌─────────────────────────┐
                                        │ North and West Region    │
                                        │        ONLY              │
                                        └─────────────────────────┘
                                                    │
                                                    ▼
┌─────────────────────────┐         ┌─────────────────────────┐
│ Ask your Cluster Manager │         │ Unstaffed Shift Occurs   │
│ to email or send         │         │ (e.g. left vacant on     │
│ you a copy of            │         │ roster, or a rostered    │
│ EMSVariation 0607.xls    │         │ staff member is unable   │
│                          │         │ to work a shift)         │
└─────────────────────────┘         └─────────────────────────┘
             │                                      │
             ▼                                      ▼
┌─────────────────────────┐         ┌─────────────────────────┐
│ Use EMSVariation.xls     │         │ Open EMSReplaceRequests  │
│ to create a              │         │ on the E-Kit Website     │
│ Variation Master Copy    │         │                          │
│ For your CRU             │         │                          │
└─────────────────────────┘         └─────────────────────────┘
             │                                      │
             ▼                                      ▼
┌─────────────────────────┐         ┌─────────────────────────┐
│ Use your Master Copy     │         │ Fill in EMSReplaceRequests│
│ at the start of each     │         │ and press the 'Send to SRO'│
│ Pay Period to create a   │         │ button, following any    │
│ Pay Period Variation     │         │ prompts that pop up.     │
└─────────────────────────┘         └─────────────────────────┘
             │                                      │
             ▼                                      │
┌─────────────────────────┐◄───────────────────────┘
│ Alter your               │
│ Pay Period Variation     │
│ at any time during a     │
│ Pay Period               │
└─────────────────────────┘
             │
             ▼
┌─────────────────────────┐
│ At end of the Pay Period,│
│ send your                │
│ Pay Period Variation     │
│ to your Cluster Manager  │
└─────────────────────────┘
             │
             ▼
┌─────────────────────────┐
│ The Cluster Manager      │──────►  Supervisor Reports
│ will then Upload your    │
│ variation to the         │──────►  Management Reports
│ EMS Database             │
└─────────────────────────┘
```

2 How to Use EMSReplaceRequests[2]

You need to notify SRO of all shifts that:

1. Have been filled 'at the house' (see first row in example below);

2. Need to be filled by SRO (see second row in example below); and that

3. Are unstaffed yet do not need to be filled (see third row in example below)

EMSReplace 2.3 (Shift Requests) North, Central and West Region

Based on previous systems developed by North and West Staff Replacement Teams. Redeveloped 2005 by www.DirectProjectSolutions.com.

| Home | Change Region | Send to SRO | Sort | | | | | | | | | | | |

If **Send to SRO** button fails due to bad network connection, please email completed form to your Regional Staff Replacement Officer — North, Central and West

Booking Date	Requested By	Shift Date	Shift 1 Start	Shift 1 End	Shift 2 Start	Shift 2 End	SO Y/N	Reason for Variation	Comments (e.g. Staff Name)	CRU Name	Relief Name	Accept Date	OT Y/N	Ag Y/N
23 Nov 05	Michael Stone	24 Nov 05	4:00 PM	10:00 PM	7:00 AM	9:00 AM	Y	Leave: Sick	John Doe	C2771 Harrison	Peter Pepper	23 Nov 05	N	N
23 Nov 05	Michael Stone	25 Nov 05	7:00 AM	10:30 AM			N	Vacant on Roster	Need SRO to fill this one...	C2771 Harrison				
23 Nov 05	Michael Stone	26 Nov 05	9:00 PM	7:00 AM			N	Leave: Without Pay	Mary Doe	C2771 Harrison	Relief Not Required	23 Nov 05	N	N

To do this you do not need to use the phone or the email, or even have a copy of the above spreadsheet on your PC. Rather, just press the *EMSReplaceRequests* link on the North and West E-Kit, and then follow the steps outlined below. The following screen pops up first:

EMSReplace 2.3 (Shift Requests)

| Home | Change Region | Send to SRO | Sort |

If **Send to SRO** button fails due to bad network connection, please email completed form to yo

| Booking Date | Request By |

Welcome to EMSReplace

Disability Accommodation Services

Welcome to EMSReplace

EMSReplace is an e-system platform for staff replacement at Community Residential Units.

○ I would like information on the operation of EMSReplace

Press this button… ⟹ ○ I already know how to operate the system

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The following screen then pops up:
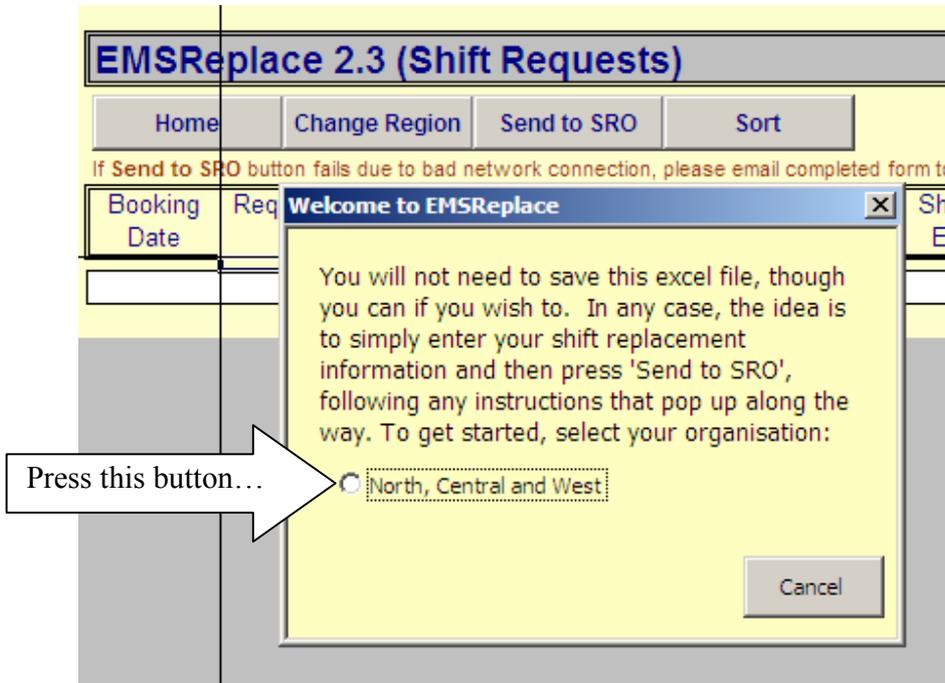
Enter shifts as shown below:

Note that dates need to be entered in the format d/mmm/yy and that shift times need to be entered in 24-hour time using a colon (e.g. enter 15:00 for 3pm).

Also note that when you click in the columns marked 'SO Y/N', 'Reason for Variation' and 'CRU name', a little arrow pops up to the right of the cell as follows:

Whenever such an arrow appears, click on it and select an option as shown below:

Once you have entered your shifts, press the 'Send to SRO' button as shown below:

If you have any mistakes, you will be prompted as shown on the page following (in this example, I forgot to type in the evening finish time of the sleepover shift):

The bright red areas will disappear as you type data into cells. Once you have removed all red cells, again press the 'Send to SRO' button.

You will get the following message (or a message that advises you that your network I down, and that you should 'try again later' or email your spreadsheet to SRO as you wish):

EMSReplace 2.3 (Shift Requests) North, Central and West Region

| Home | Change Region | Send to SRO | Sort |

If **Send to SRO** button fails due to bad network connection, please email completed form to your Regional Staff Replacement Officer

Microsoft Excel

Your request was successfully sent. Once your shifts are filled by SRO, details will be logged in the file 'f:\Western DAS Bulletin\EMSReplaceBookings North, Central and West.xls'. N.b. If ANY of the shifts are due to commence within the next 3 hours, please ring SRO now to warn them.

OK

Please note the very important message that pops up as shown above:

> *"Your request was successfully sent. Once your shifts are filled by SRO, details will be logged in the file 'f:\Western DAS Bulletin\EMSReplaceBookings North, Central and West.xls'. N.b. If ANY of the shifts are due to commence within the next 3 hours, please ring SRO now to warn them."*

The shift replacement data will then be posted via the DHS Network to your Staff Replacement Officer, who will note your data, and fill the shift if it is not already filled.

3 How to Create a Variation Master Copy

House Supervisors can use *EMSVariation.xls* to create CRU specific *Variation Master Copy*. Instructions for Supervisors follow.

The software you will be using is saved in *Excel*. If *Excel* is not open on your screen, then open *Excel* using the *Start* button as shown…
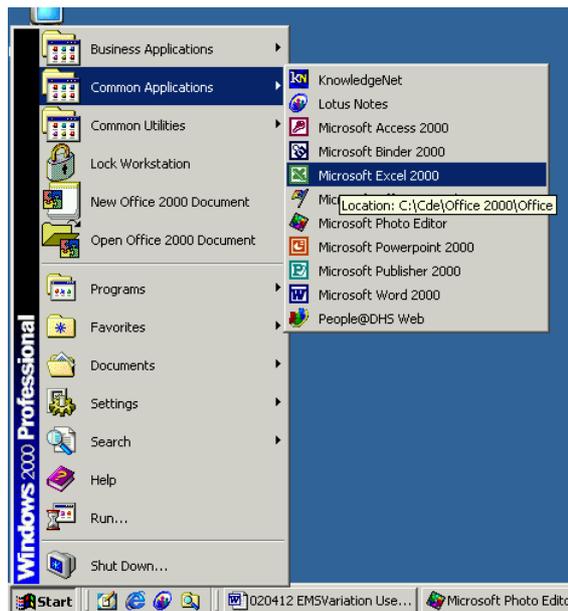
Obtain an EMSVariation Disk from your Cluster Manager. Insert the disk into your PC and then press **File / Open…**
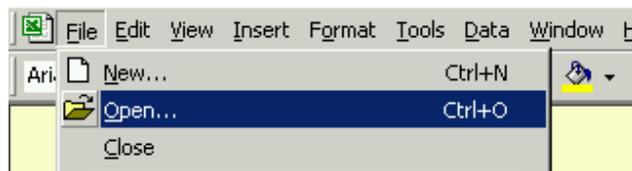
Click on the arrow to the right of the **Save in** box near the top of the window and then click on the words **3½ Floppy (A:)** as shown below.

11

A file called EMSVariation.xls appears as follows…
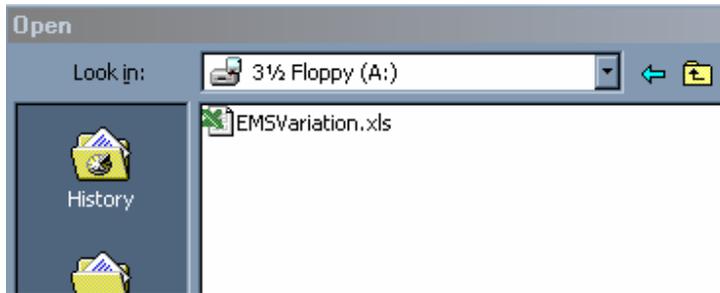
Click on this file and then press the *Open* button near the bottom right hand corner. A screen similar to the following appears …

You will be asked what region you are in (e.g. Northern DAS) and what financial year you are in (e.g. 2006/07). Answer these questions by clicking as indicated on the screen …

press **File / Save As…**
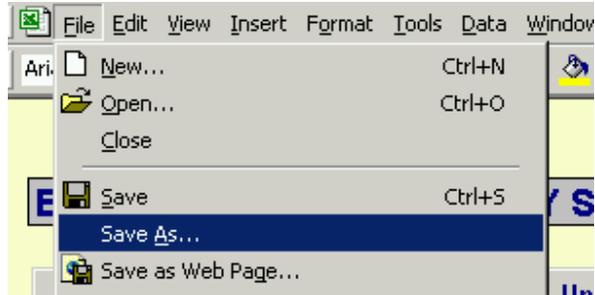
A window like the following window appears…
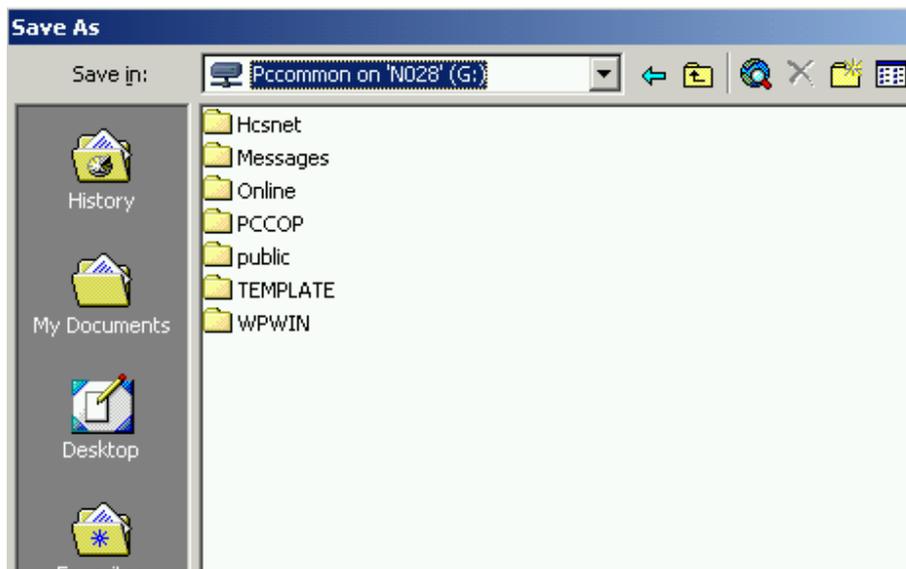
The **Save in** box is located near the top of this window. Click on the arrow to the right of the **Save in** box and then click on the words CDE5 (C:) and then on the word **DATA** as shown in the following two diagrams…
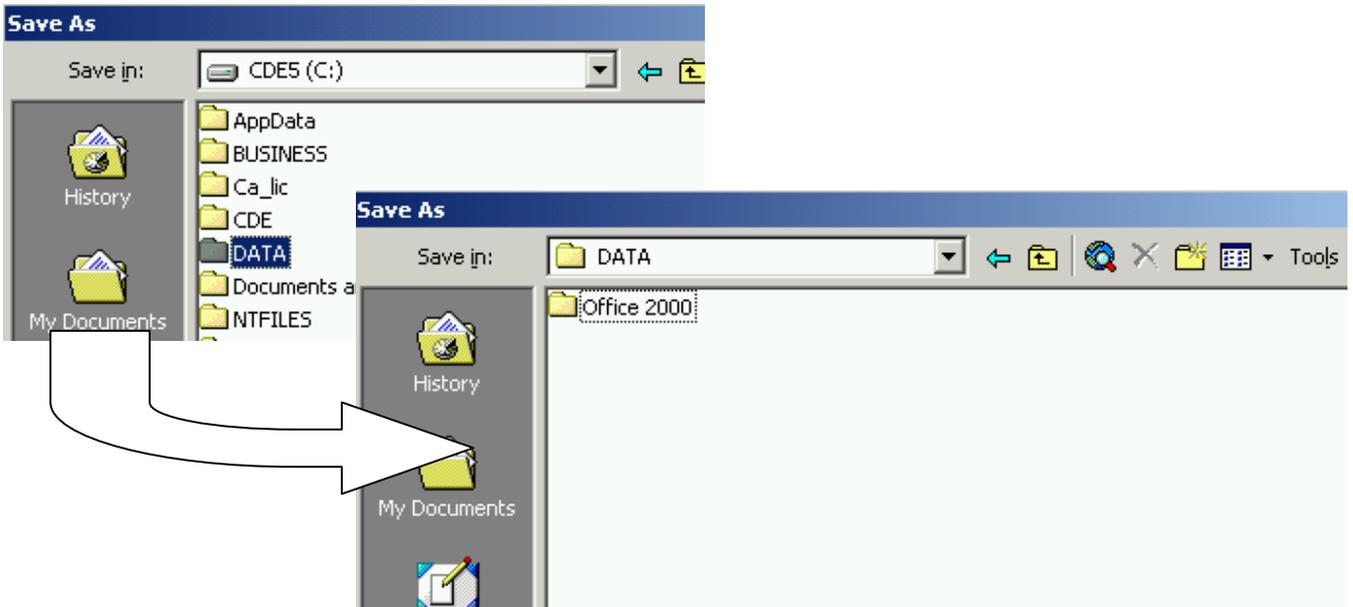
Look in the window, and if you cannot find a yellow folder in the window called 'Variation Sheets', as is the case above, then press the Create New Folder icon in the window and type the words '*Variation Sheets*' in the **Name** box that appears…
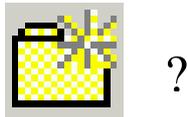
Ensure that the words '*Variation Sheets*' now appears in the **Save in** box as shown below[3]…

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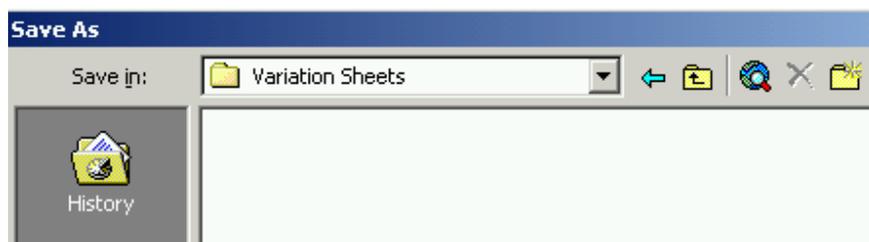
[3] To find 'Variation Sheets' you may have to press the arrow to the right of the Save in box

Next, type the name of your template using your CRU address in the **File name** box the following way (this example is for a CRU in Example St)…
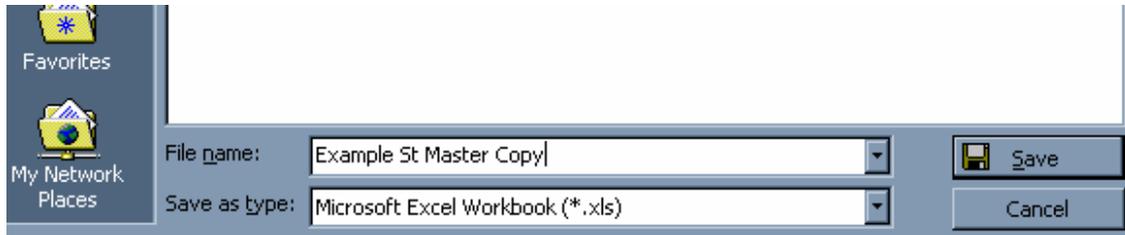
You have now created a template containing no data. You must now fill out this template with data relating to your CRU, and then save the template one final time …

Fill out all the vacant boxes in the Staff Lists Sheet that is displayed on the screen using the Standard 2 Week Roster for your house (leave the Pay Period box blank).

Note: Instructions on how to fill out each box appear in a yellow help-box when you click into a box on the Staff Lists Sheet.

The top portion of a completed Staff Lists Sheet is shown here (n.b. Vacant shifts have no PIN, so we recommend you use 111)

The bottom portion of a completed Staff Lists Sheet is shown below. Note there is now room to place the names of your preferred casual and part time relief staff. Also, there is room to place the names of rostered staff who are on leave for all or most of a given pay period to save you entering their shifts one by one later.

Select **File Save** shown below.

Finally, select **File Close**. You have now created a Variation Master Copy for your CRU, and can use this template to create Variation Sheets throughout the year.

4 How to Create a Variation Sheet

House Supervisors can use a blank *Variation Master Copy* to create a *Variation Sheet* for a given pay period.

In the following example, the template created in chapter 3 will be used, and a *Variation Sheet* for Pay Period 13 will be created.

Your template is saved in *Excel*. If *Excel* is not open on your screen, then open *Excel* using the *Start* button as shown…
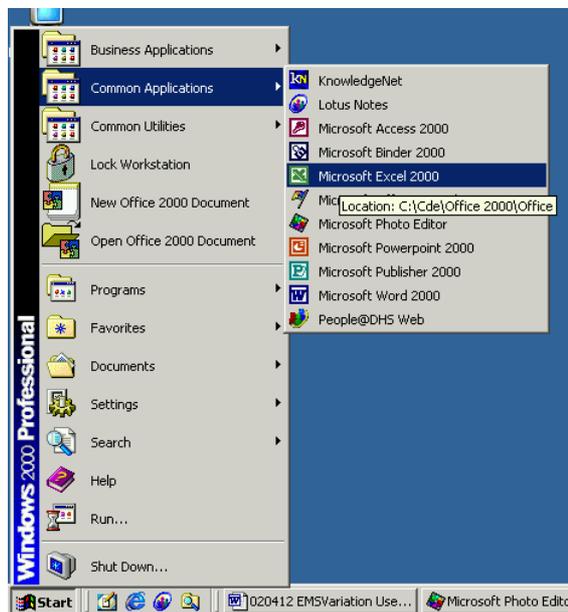
Select **File / <u>O</u>pen**
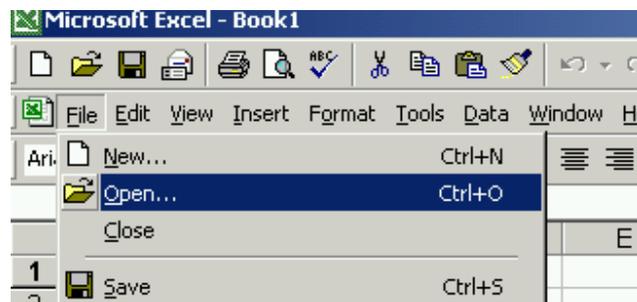
Locate the folder *c:\data* using the arrow to the right of the **Look in** box as shown…
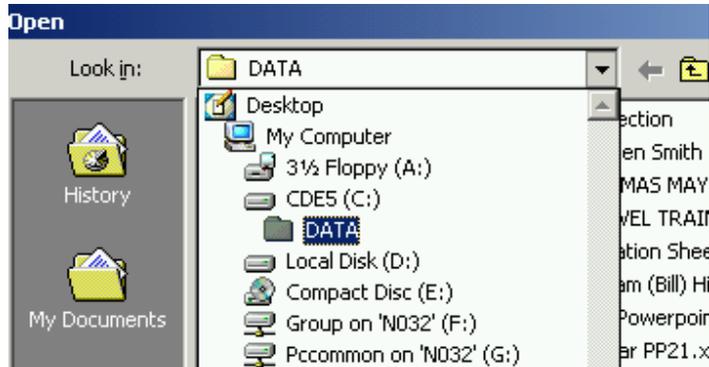
Click on the word 'DATA', and then click on the words 'Variation Sheets', and then press the *Open* button. When the name of your template appears in the window, click on it and then press the *Open* button to open your template. The following screen appears…

Place the number of the current Pay Period in the box at the top right hand corner of the screen.

If the current 2-week roster in your CRU is different than the CRU's Core Roster, make the necessary alterations to all staff details in this screen.

If you anticipate that your expenditure will be affected by certain issues in the coming Pay Period, type details of those issues into the *Issues Affecting Variations* box (see above picture).

	100% Penalties or Overtime Loading	0 Hrs
	150% Penalties	0 Hrs
	Any Major Issues in Pay Period 14?	
	No issues recorded	
	Relief Staff Used in Pay Period 14	
Reason	**First Name then Surname**	**Class**	**Condition**

Press the *Variation Sheet* button to produce a blank Variation Sheet like the following:

EMSVariation 7.4 (Variations)   **Northern DAS 2005/06**

Copyright www.DirectProjectSolutions.com

| Home | New Row | New Staff | Staff Lists |

Pay Period	Pay Period Start	Pay Period End	Cost Centre	Short Address	Supervisor This Pay Period
14	25 Dec 05	7 Jan 06	Z9999	Example	Sue Supervisor

A

To remove all details from a row (e.g. a row that is not calculating properly), clear the "Date" field and then press the "New Row" button.

Date	Comments	Staff Details	Start	Finish	Employment Conditions
		Rostered Staff			Reason for Variation
		Relief Staff			Relief Condition
Please Enter Date		Please leave these three cells BLANK =>			

Then save the file using the following steps: First, press **File Save As** …

| File | Edit | View | Insert | Format | Tools | Data | Window |

New…	Ctrl+N
Open…	Ctrl+O
Close	
Save	Ctrl+S
Save As…	
Save as Web Page…	
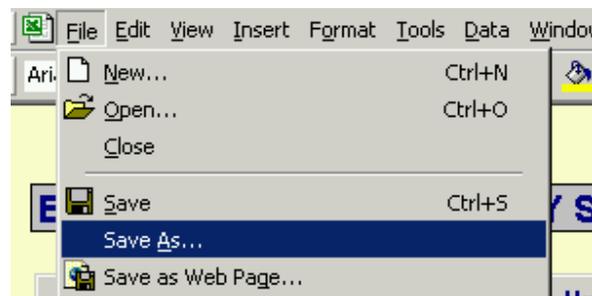
Ensure that the words '*Variation Sheets*' now appears in the **Save in** box as shown below[4]…
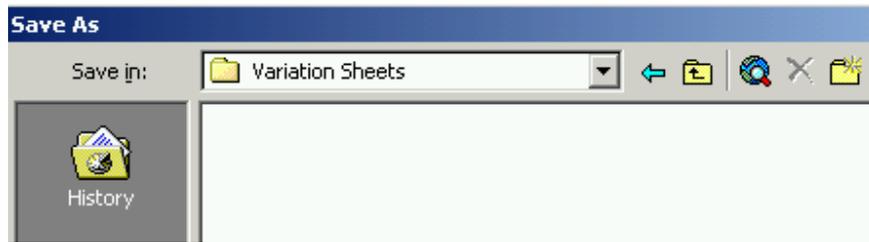
In the **File name** box, type the current year, pay period and CRU address (this example is for a CRU in Example St)…
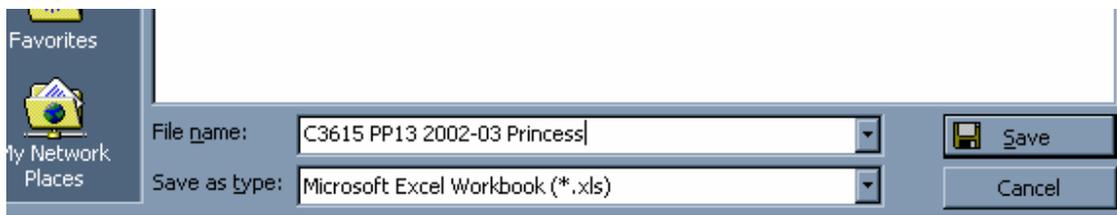
Press the **Save** button and then press **File Close** …
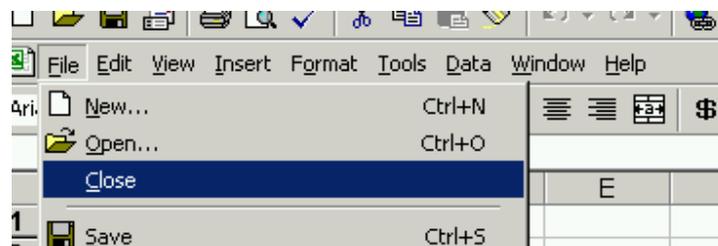
You have now created a blank Variation Sheet for Pay Period 13 for your CRU. This Variation Sheet can be used as often as required during Pay Period 1.

At the end of the Pay Period, the Variation Sheet will be forwarded to the Program / Cluster Manager (see Chapter 5).

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[4] To find 'Variation Sheets' you may have to press the arrow to the right of the Save in box

5 How to Fill In a Variation Sheet

5.1 Preamble

Each time throughout the current Pay Period that variations to the roster occur (e.g. due to sick leave, client illness etc) open the current Variation Sheet – in this example, *C3615 PP13 2002-03 Princess.xls* – and then record the variation[5] using the following guide.

Read and follow the yellow help box that appears each time you select a **white box** within the Variation Sheet

Type NMB in these two boxes if the shifts have no meal breaks

Use 24 Hour time to type shifts into these fields, eg. For 10:00 PM type 22:00

Type S/O in these two boxes if the shifts are sleepover shifts

Type 150 in this box if the Relief Staff is claiming Pub Hol 150% Penalties

Type MA in this box if the Relief Staff is claiming Overtime Meal Allowance

A 'filled out' Variation Sheet appears as an attachment to this User's Manual. This example is a valuable resource in respect of deciding how to fill out a given variation.

5.2 The Steps to Take…

Your template is saved in *Excel*. Open excel using the *Start* button as shown in the previous chapter.

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[5] If you need a new blank row press *New Row,* and if you need to sort your variations in date order press *Sort Rows*.

Select **File / <u>O</u>pen**
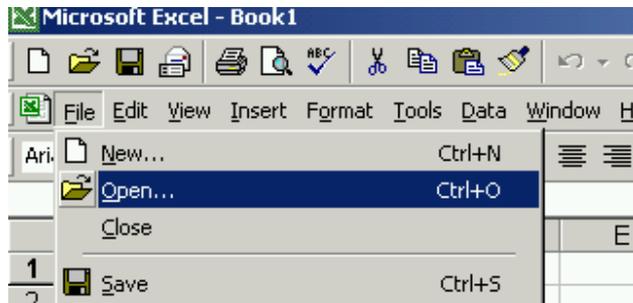
Locate the folder *c:\data* using the arrow to the right of the **Look <u>in</u>** box as shown…
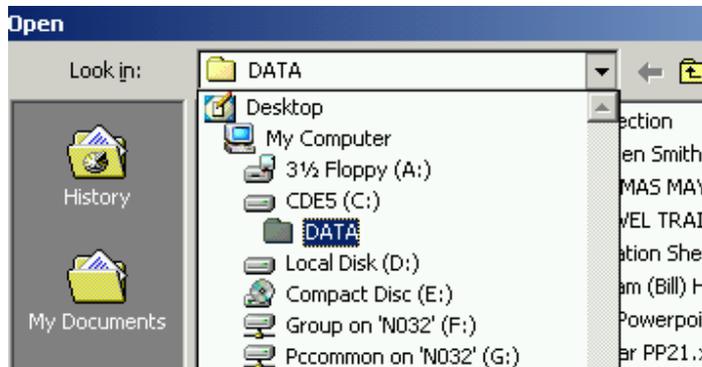
Click on the word 'DATA', and then click on the words 'Variation Sheets', and then press the *Open* button. Click on the file that contains the number of the current Pay Period, and then press the *Open* button to open your current Variation Sheet. The following screen should appear (if it doesn't, press the *Variation Sheet* button):

Fill in the variation in the first blank row (Click new Row button if required).

Then close the file using **File <u>C</u>lose** (If you are asked if you want to *Save* the file, then respond "yes")

5.3 Glossary: the 'Types of Reason' Field

Vacant on Roster / Vacant: Day Program Close / Vacant: Client Special / Vacant: DCS Client Special

Use one of these options when when filling (or not filling) a vacant shift. N.b. always include vacant shifts even when they are unfilled, as they will produce a "Saving on Backfill" in management reports.

Unrostered: Day Program Close / Unrostered: Client Need / Unrostered: Client Special / Unrostered: DCS Client Special / Unrostered: Other

Use when extra hours are needed for unrostered shifts (remember, Vacant on Roster shifts are **not** Unrostered shifts: Vacant shifts are noted on the first screen and are covered by the instruction immediately above.

Leave: Rec / Leave: Sick / Leave: Sick (No Cert) / Leave: Sub / Leave: Without Pay / Leave: WorkCover / Leave: Other

Use when a rostered staff takes Unplanned Leave (i.e. leave not covered in the Staff on Leave box in the first screen).

Double-Up Relief

Use when filling one rostered shift with two or more staff – in such a case use 'Double-Up Relief' for the second, third staff etc. N.b**. Do not retype the rostered shift in each of these 'extra' variation lines.**

Time in Lieu

Use when a rostered staff takes time in lieu in cases where this TIL is also noted on timesheets.

DWG OHS Additional Hrs / IR Additional Hrs / DWG OHS Reassigned / IR Reassigned

Use this when the staff member attends an OH&S or IR meeting either as 'additional hours' or 'during rostered hours', the latter being the 'Reassigned' case.

Additional Hrs Traineeship / Rostered Hrs Traineeship

(Important: do not put non-traineeship training under these categories)

Use when a rostered staff participates in a Certificate 4 Traineeship activity as 'additional hours' or 'instead of / during' a rostered shift. Please note: you will be prompted to enter the training shift and training date if you select the latter option.

This is not costed to the current CRU, it is costed to the Staff Traineeship Cost Centre after EMS exports the data to a separate piece of software called *TrainTrack*. Hence, a $0 costing will occur regardless of the shift.

Additional Hrs Training / Rostered Hrs Training

(Important: do not put Certificate 4 traineeship training under these categories)

Use when a rostered staff participates in a training activity as 'additional hours' or 'instead of / during' a rostered shift. Please note: you will be prompted to enter the training shift and training date if you select the latter option.

This is not costed to the current CRU, it is costed to the Staff Traineeship Cost Centre after EMS exports the data to a separate piece of software called *TrainTrack*. Hence, a $0 costing will occur regardless of the shift.

Reassigned (this CRU) / Reassigned (other CRU)

Use when a rostered staff is removed from one shift and is asked to fill a second shift in either the same CRU ('this CRU'), or another CRU ('other CRU'). Do not use if the rostered staff happens to be swapping shifts with the staff occupying that second shift

Shift Swap

Use when a rostered staff is swapping shifts with a second staff member, where Staff A does Staff B's shift AND Staff B does Staff A's shift. If this two-way-swap is not occurring, then use **Reassigned (this CRU)**, not **Shift Swap**.

50% Higher Duties / 100% Higher Duties

If a person is granted Higher Duties, then type his or her name in as a Relief Staff. There is no need to include a Rostered Staff Name.

150% P/Hol Pens

If a person is elects to receive 150% penalties and it happens to be a public holiday, then type his or her name in as a Relief Staff. There is no need to include a Rostered Staff Name.

5.4 Glossary: the 'Condition' Field

Ordinary

Use when the relief staff is on ordinary hours (as is the case during a swap shift)

Extra (P/T)

Use when a part time staff takes on extra hours, but has not yet reached 76 hours in the current pay period.

Extra (Agency)

Use if the staff member is an *Agency Staff*.

Recalled on S/O

Use when a staff member is recalled for duty during the sleepover part of a sleepover shift, and is 'into overtime'.

Casual

Use when the relief staff is a casual staff member

Overtime

Use when the relief staff is 'into overtime', but is not on a sleepover as discussed above.

From Other CRU

Use when the relief staff has been reassigned from another CRU, and is hence been paid for by that other CRU.

5.5 Data Fix Messages

If you forget to enter important data, or add too much data, or try to type impossible data (e.g. casual staff on overtime) *EMSVariation* will notify you by colouring errors with a **RED** shade and providing helpful advice.

6 Uploading Variation Sheets to EMS

At the end of the pay period, email that pay period's *Variation Sheet* to your Cluster Manager, who will check it against timesheets and upload it to the EMS Databases.

To Upload the Variation Sheet, the Cluster Manager will press the *Upload* button on the Staff Lists Sheet…

The EMS Databases will then provide supervisors and managers with a range of additional management reports, and will also export a number of fields into other databases and web applications to reduce duplication and workload.

7 Variation Sheet Example (a Resource)

Press this button

FMSVersion 6.6 for TT (Staff Lists)				Northern CRS 2003/04	

Copyright www.DirectProjectSolutions.com

Variation Sheet   **Upload**

C

Cost Centre	**Z9999**		Pay Period	**26**
Short Address	**Example**		Pay Period Start Date	**13 Jun 04**

Tip: Give vacant shifts a "DDSO-1Q" classification

Supervisor Roster for Pay Period 26 (Fortnight Hrs Only)			
First Name then Surname	**Class**	**Hours**	**PIN**
Sue Supervisor	DDSO-3	76:00	00000123

Pay Period 26 Performance	
Variation to Pen/Loadings (Average)	9%
Overtime	0 Hrs
Sick Leave	0 Hrs
WorkCover	0 Hrs
Saved on Backfill ($)	$30
Saved on Backfill (Hrs)	0.5 Hrs
Variation to Posted Roster Cost (Fortnight)	$1,228
Variation to Posted Roster Hours (Fortnight)	30 Hrs
Posted Roster + Variation Hours (Fortnight)	282 Hrs

Staff Roster for Pay Period 26 (Include Vacant Shifts)			
First Name then Surname	**Class**	**Hours**	**PIN**
Fred Fulltimer	DDSO-1Q	76:00	00000456
Peter Parttimer	DDSO-1	50:00	00000789
Vacant	DDSO-1Q	50:00	00000111
Total		252:00	

Pen/Loadings Breakdown in Pay Period 26	
0% Penalties	7 Hrs
15% Penalties	-1Hr
17.5% Leave Loading	10.5 Hrs
18% Commuted Allowance	0 Hrs
25% Casual Loading	12.5 Hrs
50% Penalties	7.5 Hrs
56%	26.5 Hrs
100% Penalties or Overtime Loading	6 Hrs
150% Penalties	0 Hrs

Recoups for Pay Period 26 ($)	

Issues Affecting Variations in Pay Period 26	

Planned Leave in Pay Period 26			
First Name then Surname	**Class**	**Hours**	**PIN**
Total		0:00	

Relief Staff Used in Pay Period 26		
First Name then Surname	**Class**	**Condition**

Relief Staff Used in Pay Period 26		
First Name then Surname	**Class**	**Condition**
Cassie Casual	DDSO-1Q	Casual
Amy Agency	DDSO-1Q	Agency

EMSVariation 7.0					Northern DAS 2004/05
					Copyright www.DirectProjectSolutions.com

Home	New Row	New Staff	Duty Roster	Staff Lists

Pay Period	Pay Period Start	Pay Period End	Cost Centre	Short Address	Supervisor This Pay Period
14	26 Dec 04	8 Jan 05	Z9999	Example	Sue Supervisor

A

To remove all details from a row (e.g. a row that is not calculating properly), clear the "Date" field and then press the "New Row" button.

Date	Comments	Staff Details	Start	Finish			Employment Conditions
Sunday		Rostered Staff	4:00 PM	10:00 PM	SO		Reason for Variation
		VACANT (P)	7:00 AM	9:00 AM	NMB		Vacant on Roster
26 Dec 04		Relief Staff	4:00 PM	10:00 PM	SO		Relief Condition
		AMY AGENCY (A)	7:00 AM	8:00 AM	MB		Extra (Agency)
$112		Please leave these three cells BLANK =>					DDSO-1Q 8; DDSO-1Q 6.5
Monday		Rostered Staff					Reason for Variation
							Unrostered: Client Need
27 Dec 04		Relief Staff	10:00 AM	3:00 PM			Relief Condition
		CASSIE CASUAL (C)					Casual
$153		Please leave these three cells BLANK =>					DDSO-1Q 5
Monday		Rostered Staff					Reason for Variation
							150% P/Hol Pens
27 Dec 04		Relief Staff	9:00 AM	5:00 PM		150	Relief Condition
		PETER PARTTIMER (P)					Ordinary
$176		Please leave these three cells BLANK =>					DDSO-1 7.5
Tuesday		Rostered Staff	9:00 AM	9:00 PM			Reason for Variation
		FRED FULLTIMER (F)					Leave: Rec
28 Dec 04		Relief Staff	9:00 AM	2:00 PM			Relief Condition
		AMY AGENCY (A)					Extra (Agency)
$237		Please leave these three cells BLANK =>					DDSO-1Q 10.5; DDSO-1Q 5
Wednesday		Rostered Staff					Reason for Variation
							Double-Up Relief
29 Dec 04		Relief Staff	2:00 PM	9:00 PM			Relief Condition
		PETER PARTTIMER (P)					Extra (P/T)
$102		Please leave these three cells BLANK =>					DDSO-1 6.5
Thursday		Rostered Staff					Reason for Variation
							Additional Hrs Traineeship
30 Dec 04		Relief Staff	9:00 AM	5:00 PM			Relief Condition
		PETER PARTTIMER (P)					Extra (P/T)
$0		Tracking Training: pls confirm training shift times and date =>	9:00 AM	5:00 PM	30 Dec 04		DDSO-1 7.5
Friday		Rostered Staff	4:00 PM	10:00 PM	SO		Reason for Variation
		FRED FULLTIMER (F)	7:00 AM	9:00 AM			Rostered Hrs Training
31 Dec 04		Relief Staff	4:00 PM	10:00 PM	SO		Relief Condition
		CASSIE CASUAL (C)	7:00 AM	9:00 AM			Casual
$0		Tracking Training: pls confirm training shift times and date =>	9:00 AM	5:00 PM	20 Jul 04		DDSO-1Q 7.5; DDSO-1Q 7.5
Saturday		Rostered Staff	9:00 AM	5:00 PM			Reason for Variation
		FRED FULLTIMER (F)					Reassigned (this CRU)
1 Jan 05		Relief Staff	9:00 AM	5:00 PM			Relief Condition
		AMY AGENCY (A)					Extra (Agency)
$176		Please leave these three cells BLANK =>					DDSO-1Q 7.5; DDSO-1Q 7.5
Sunday		Rostered Staff	9:00 AM	5:00 PM			Reason for Variation
		FRED FULLTIMER (F)					Reassigned (other CRU)
2 Jan 05		Relief Staff	9:00 AM	5:00 PM			Relief Condition
		AMY AGENCY (A)					Extra (Agency)
$410		Please leave these three cells BLANK =>					DDSO-1Q 7.5; DDSO-1Q 7.5
Monday	See Jan 4	SUE SUPERVISOR (F)	9:00 AM	5:00 PM			Reason for Variation
							Shift Swap
3 Jan 05		Relief Staff	9:00 AM	6:00 PM			Relief Condition
		PETER PARTTIMER (P)					Ordinary
$40		Please leave these three cells BLANK =>					DDSO-3 7.5; DDSO-1 8.5
Tuesday	See Jan 3	Rostered Staff	3:00 PM	10:00 PM	SO		Reason for Variation
		PETER PARTTIMER (P)	7:00 AM	9:00 AM			Shift Swap
4 Jan 05		Relief Staff	4:00 PM	10:00 PM	SO		Relief Condition
		SUE SUPERVISOR (F)	7:00 AM	9:00 AM			Ordinary
$30		Please leave these three cells BLANK =>					DDSO-1 8.5; DDSO-3 7.5
Wednesday		Rostered Staff					Reason for Variation
							50% Higher Duties
5 Jan 05		Relief Staff	10:00 AM	5:00 PM			Relief Condition
		PETER PARTTIMER (P)					Ordinary
$19		Please leave these three cells BLANK =>					DDSO-1 6.5

8 Overview of EMS for Cluster Managers

8.1 Introduction

This 'Overview of EMS for Cluster Managers' is designed to be inserted in Cluster Manager Manuals at North West, and was requested by Claus Zadolinnyj.

EMS is a database that captures data from tools such as "RosterCoster.xls" and "EMSVariation 0607.xls", both of which can be found at f:\RosterCoster. User Manuals for these two tools can also be found at f:\RosterCoster.

EMS then processes this data to provide CRS/DAS supervisors and managers with a wide range of useful workflow and budget reports. It also exports a lot of this data to other applications such as TrainTrack and, in a trial sense at present, SAP.

EMS Tools are maintained by Damien Ryan. Key regional contacts are: Zena Mayberry (North and West), Monica White (Outer East), Michelle Lawther (Inner East), John Gray (Southern), Mick Dowd (Grampians), Peter Senini (Loddon-Mallee), Glenys McNeil (Hume), Rae Cloak / Glenda Clarke (Gippsland) and David Ridley (Barwon).

8.2 Core Rosters and EMS

Both historical and current Core Rosters are maintained in the folder f:\EMS Rosters using the following filename style guide:

- "Core C3172 Holmes PP01.xls"

- "Core C3172 Holmes PP21.xls"

- "Core C3173 Tyler PP01.xls"

- Etc…

8.3 Posted Rosters and EMS

Typically, the Cluster Manager is responsible for preparing Posted Rosters (for posting out to CRUs) every 2 or 4 weeks.

Due to varying definitions across regions as to what is included in and excluded from a Posted Roster, EMSVariation now avoids, where possible, the term 'Posted Roster'.

Instead, the first screen in EMSVariation is called "Ongoing / Contract / Vacant" and seeks to capture only those major changes to a Core Roster that:

- Are in the roster as full roster lines before the pay period starts; and

- Are contracted out or left vacant for part-timers to pick up.

In the case of vacant roster lines, the word "vacant" is typed in instead of a rostered staff's name, and the staff members picking up each shift in the roster line are not recorded until the second screen, which seeks to capture 'during the fortnight' or 'shift-by-shift filled' variations.

8.4 Variations and EMS

The Cluster Manager is responsible for uploading a variation sheet for each CRU each fortnight. The process is:

- Ask the House Supervisor to submit an EMSVariation Sheet with each set of timesheets

- Check this Variation Sheet against the timesheets

- Press the UPLOAD button on the variation sheet

8.5 EMS Reports

The Cluster Manager is responsible for using EMS Reports to assist in the management of workflow and budgets.

To obtain access to the EMS Reports, the Cluster Manager needs to have an EMS Icon on his/her Desktop. The process for this obtaining and EMS Icon is:

- Open Windows Explorer

- Open the folder f:\RosterCoster\Tools

- Right Click / Copy the blue EMS Icon

- Go to the Desktop (there is a small icon near your START button that should take you there)

- Right Click / Paste the blue icon called "EMS" onto the Desktop

Then, whenever you need an EMS Report, double-click the blue EMS Icon.

8.6 EMS Training

8.7 Preamble

For information relating to EMS Training, contact Damien.Ryan@dhs.vic.gov.au. Please note that training in industrial relations and regional rostering practices is outside the scope of EMS Training. These areas are being dealt with via a focus group being convened by Sabine Benthien, Budget and Resources Branch.

8.7.1 RosterCoster and EMSVariation Training

Course Aim: to ensure best possible 'roster variation data in', upon which 'data out' via EMS Reports is fully dependent.

Target Audience: House Supervisors.

Course Duration: 3 Hrs (a one hour information session is also available to Office Based Managers).

Comments: This course steers clear of time-consuming discussions relating to regional rostering practices and issues, but makes references to practice issues where necessary to demonstrate best ways of entering shifts into EMS. This course has been run previously in a number of regions, with advice and support from Natasha Williams, DLDU and Kylie Hughes, Eastern Metropolitan Region.

8.7.2 EMS Reports Training

Course Aim: to demonstrate how information within EMS Reports can be converted into change management strategies, which are then followed through to cause real change in better allocating limited resources to client need.

Target Audience: Office Based Managers.

Course Duration: 3 Hrs (a one hour information session is also available to Corporate Managers and Finance Teams).

Comments: A key focus of this course is to better involve House Supervisors in budget management, on the premise that the majority of expenditure and client outcomes – i.e. the majority of roster variations – occur at house level. This course has been run previously in a number of regions, with advice and support from Michael Mefflin and Michael Stone, North West Region.