How to Create, Customise and Assign Shifts in the Draft Rota

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How to Create, Customise and Assign Shifts in the Draft Rota

This guide explains how to create a shift in the Draft Rota, update its settings and assign it to a staff member. You'll learn how to select a shift template, set an allocation for a service user and assign a staff member to cover the shift.

Takes 5 minutes

For: Managers

Updated: 6th Nov 2026

Introduction

The Draft Rota allows you to create and manage staff shifts before they are published. You can choose shift times, update shift details and assign staff members to help ensure your rota reflects the care and staffing arrangements you need.

In this guide, we'll show you how to add a shift, customise its settings, allocate it to a service user and assign a staff member to cover it.

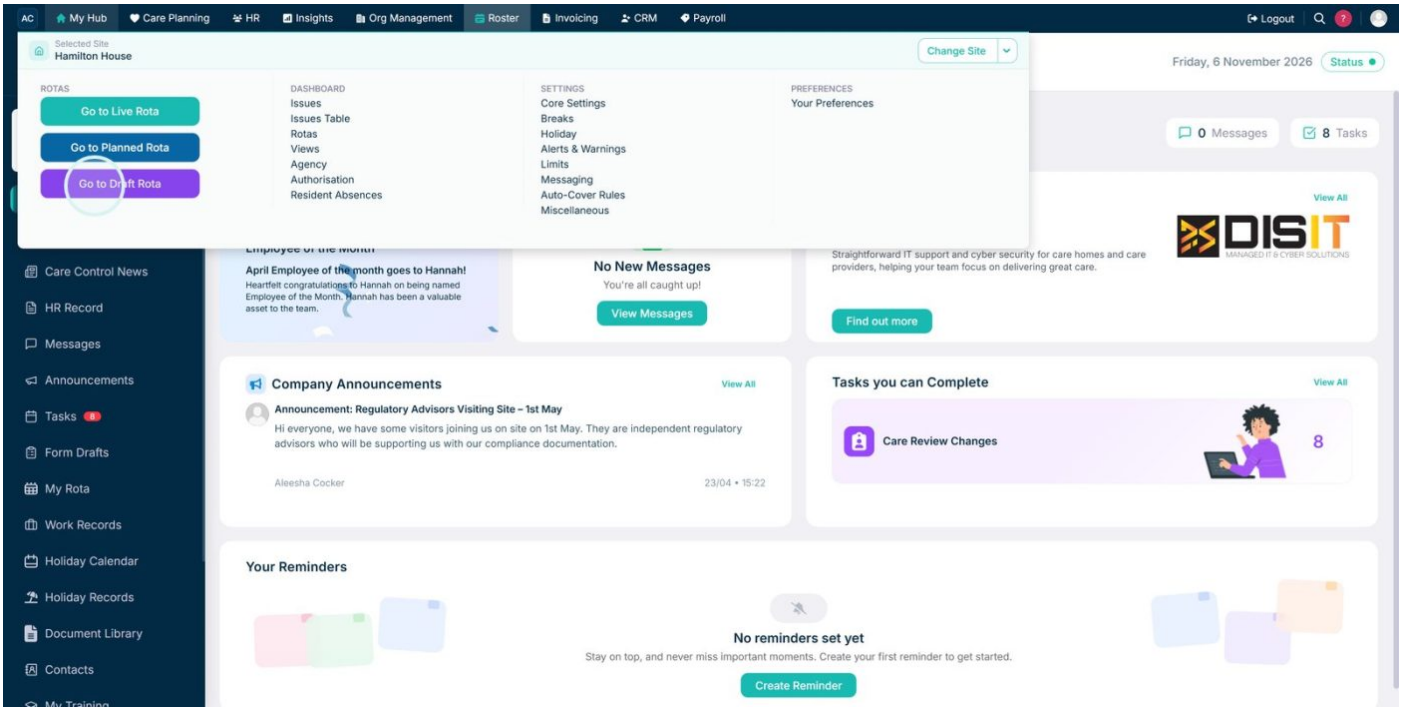
In this guide, you'll learn how to:

- Open the Draft Rota and add a new shift.

- Select a shift template and update the shift details.
- Set an allocation for a service user.
- Assign a staff member to the shift.

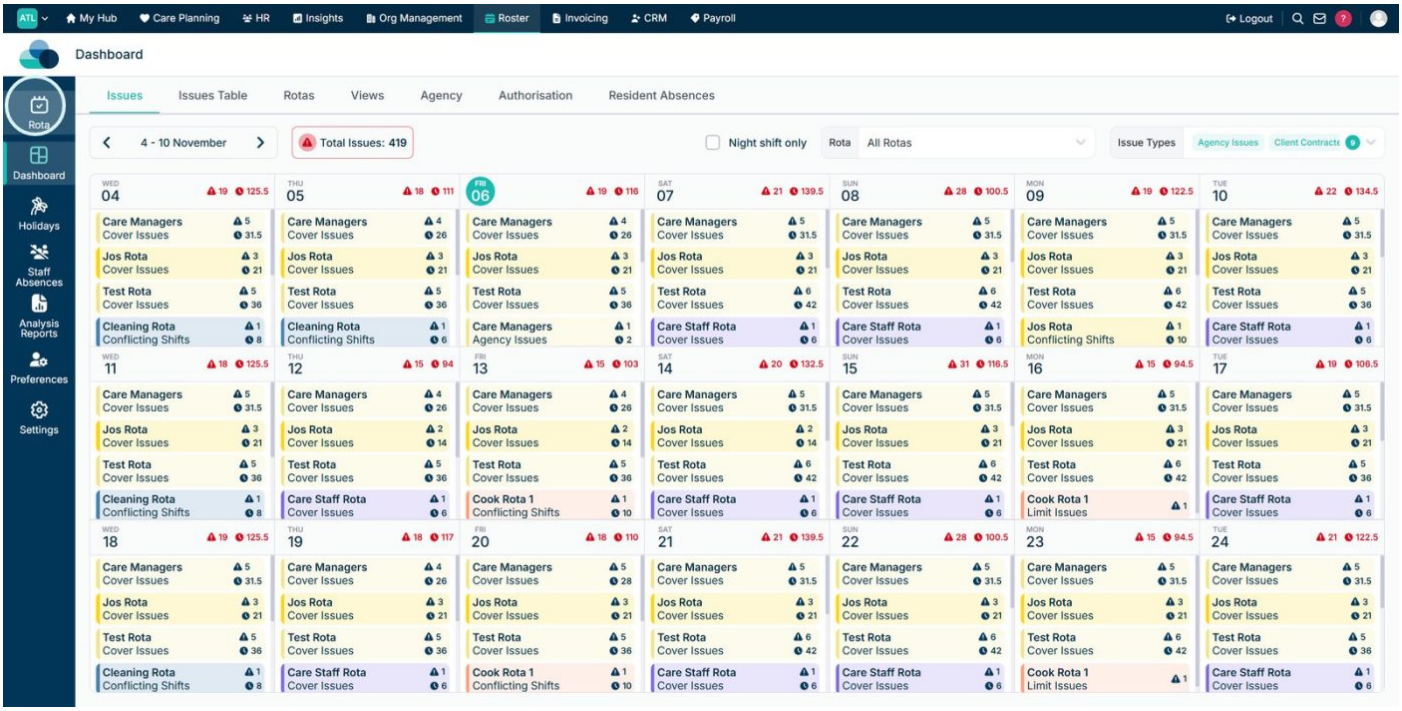
Open the Draft Rota

Start by opening the **Draft Rota** to view upcoming staff shifts and make changes to your schedule.



Open the Rota Section

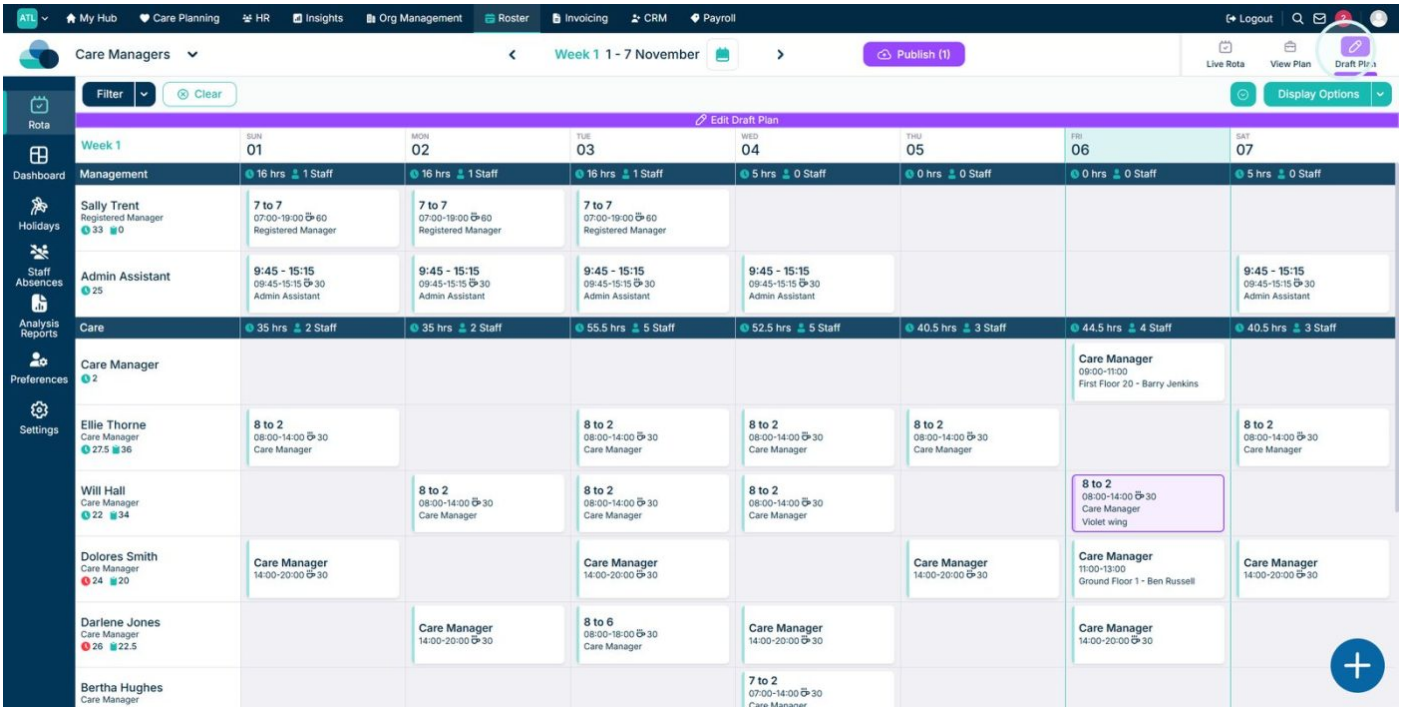
Select **Rota** to view the staff schedule and access the available shift management options.



Switch to the Draft Plan

Select the **Draft Plan** to make changes to your rota before it is published.

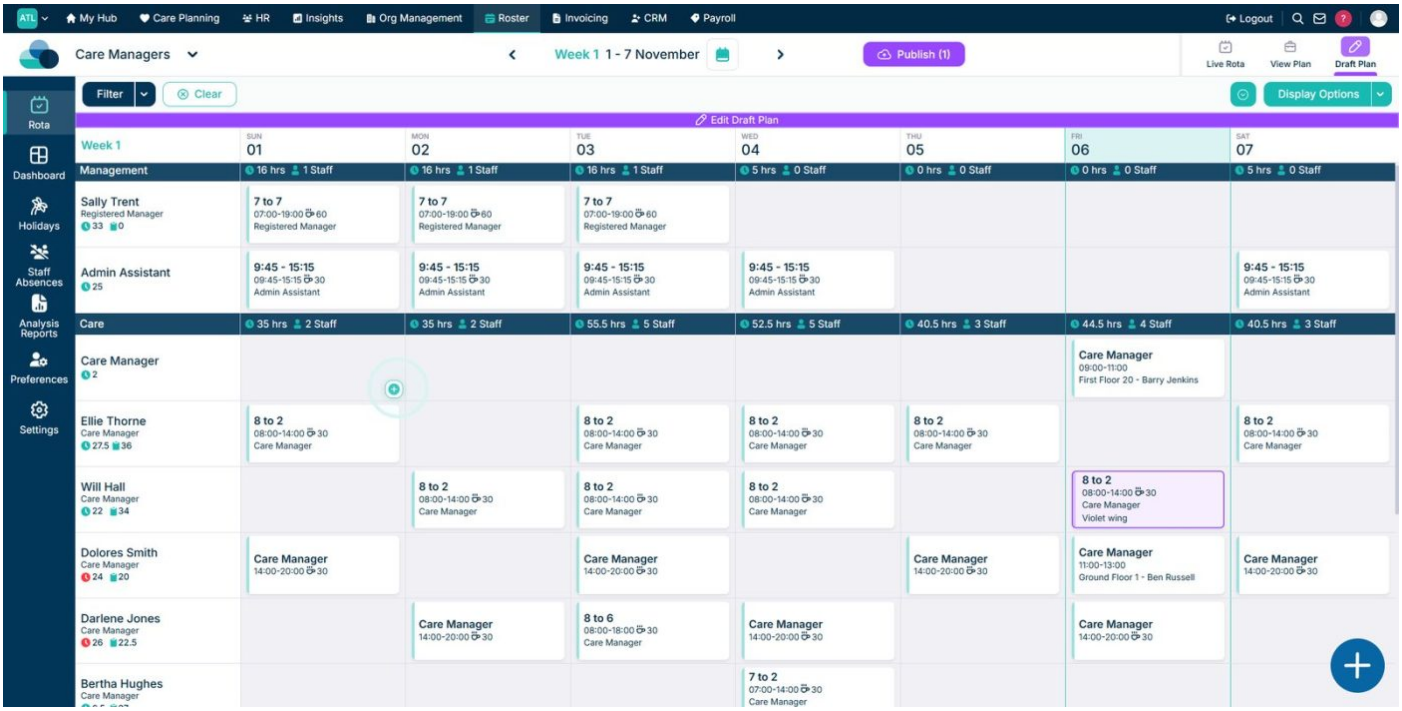
This is where you can add shifts and update your planned staff schedule.



Select a Shift

Find the day and position where you want to add a shift.

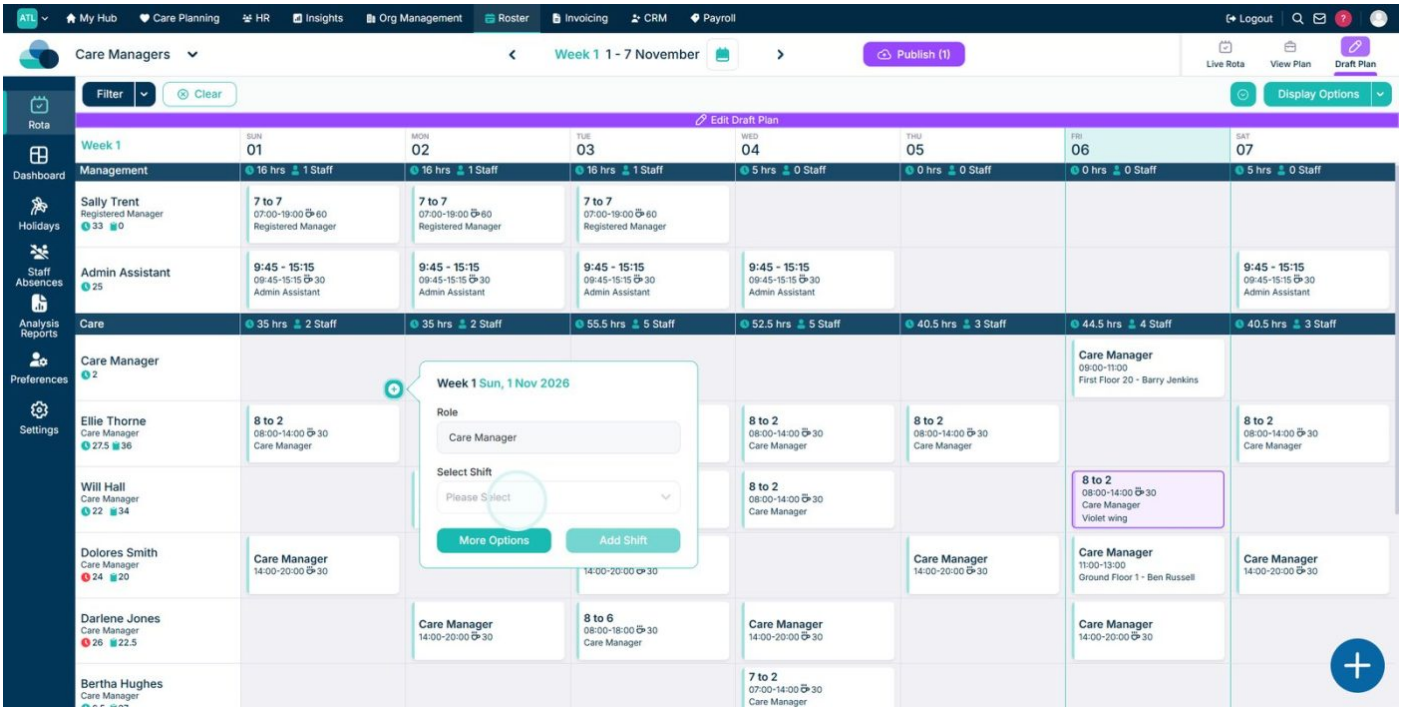
Click the relevant **shift** area to open the options for adding a shift to your rota.



Open Select Shift

Click the **Select Shift** dropdown to view the available shift times.

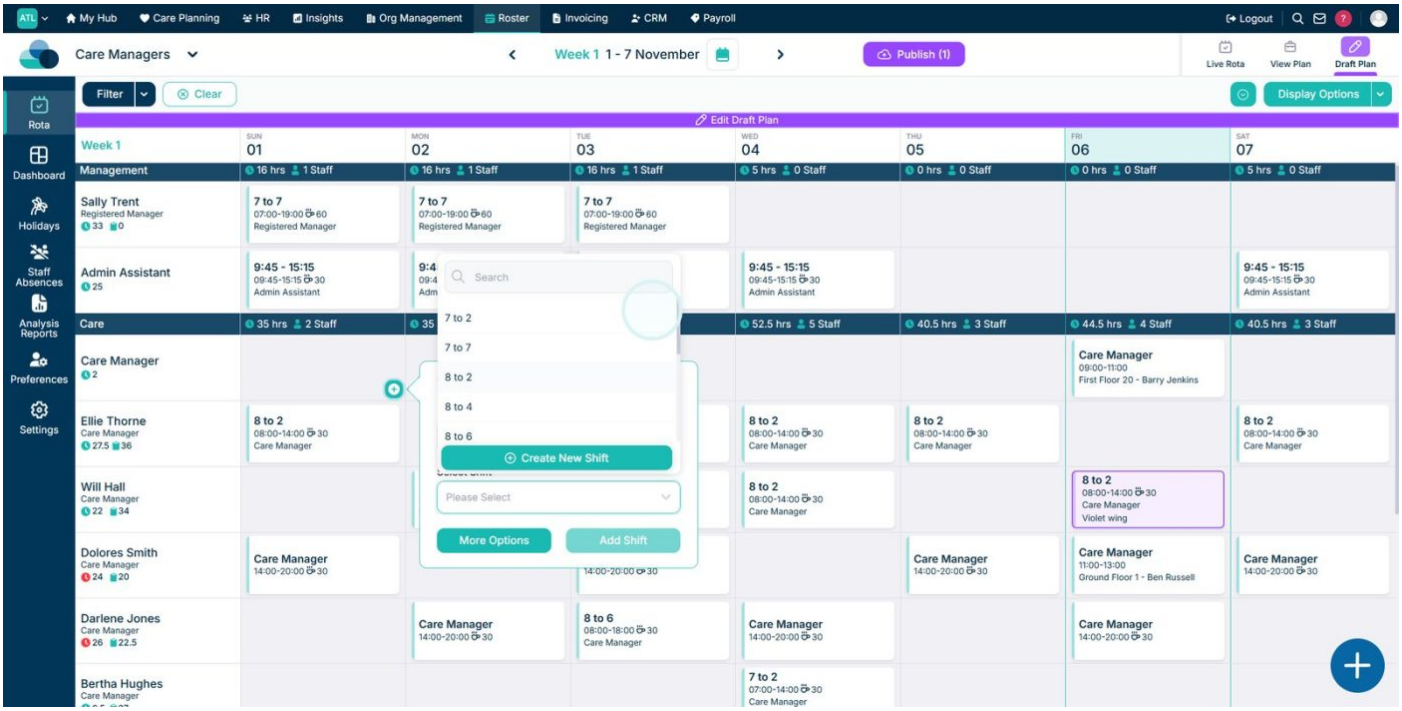
You can choose the shift pattern that matches the hours you need to schedule.



Choose a Shift Time

From the available options, select the shift time you want to use.

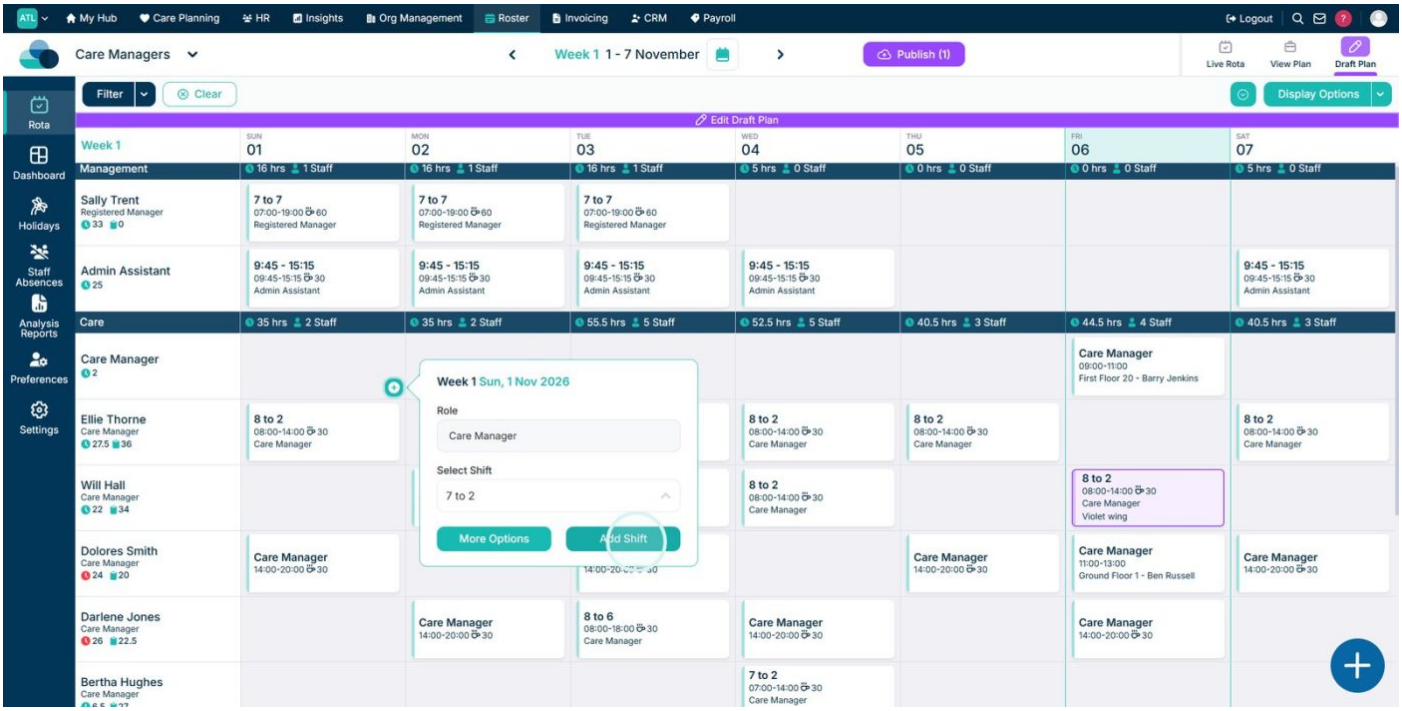
In this example, select **7 to 2** to use this shift pattern.



Add the Shift

Once you have selected the required shift time, click **Add Shift**.

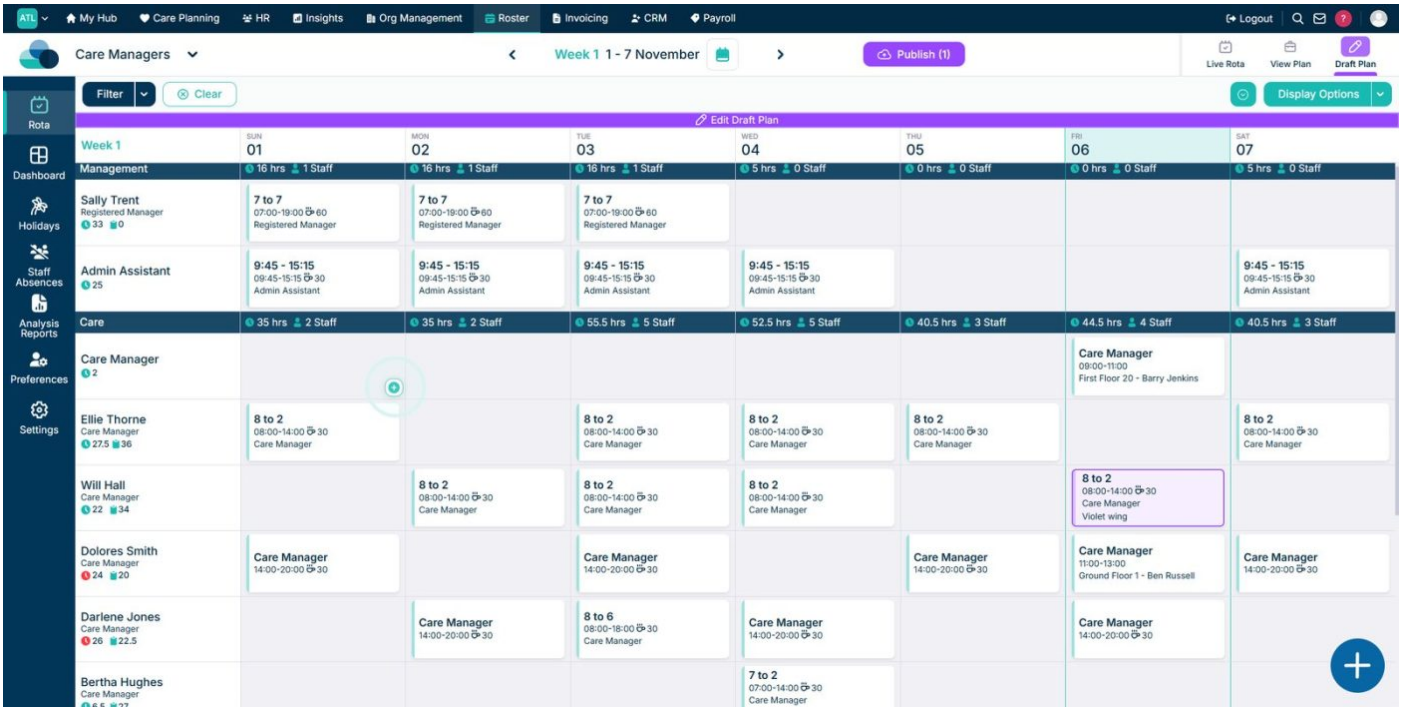
This adds the shift to your Draft Rota, ready for any further changes or staff assignments.



Open the Shift Details

Find the shift you have added to the Draft Rota.

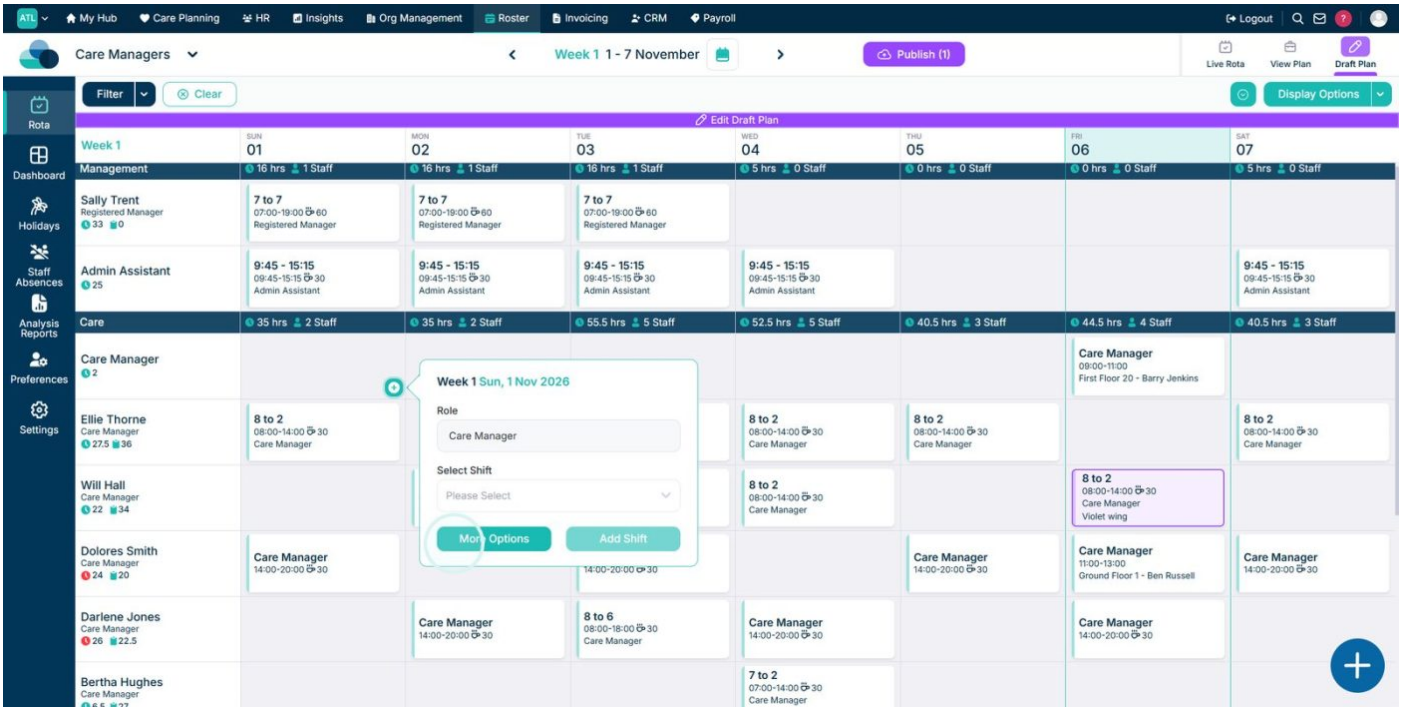
Click the **shift entry** to open its details and review or update the shift settings.



Open More Options

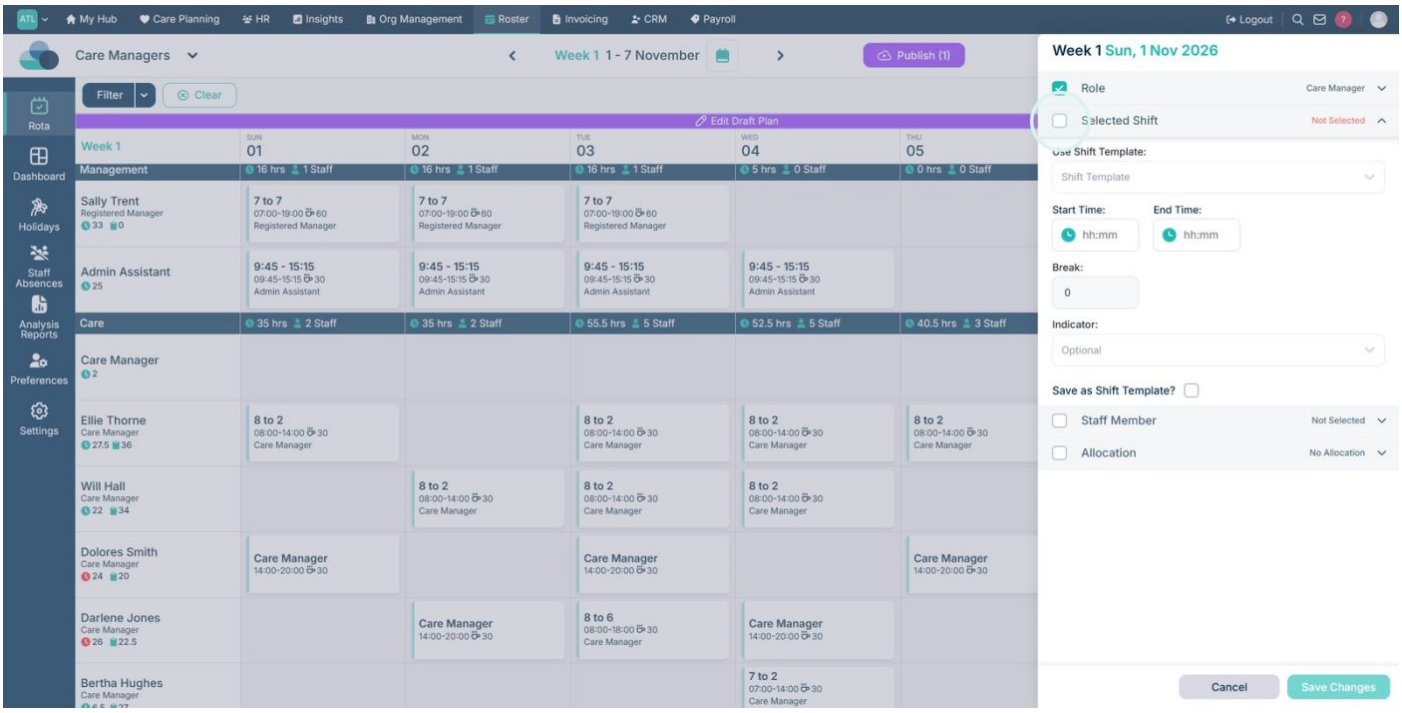
Select **More Options** to access additional settings for the selected shift.

These options allow you to update the shift details and its allocation.



Choose Selected Shift

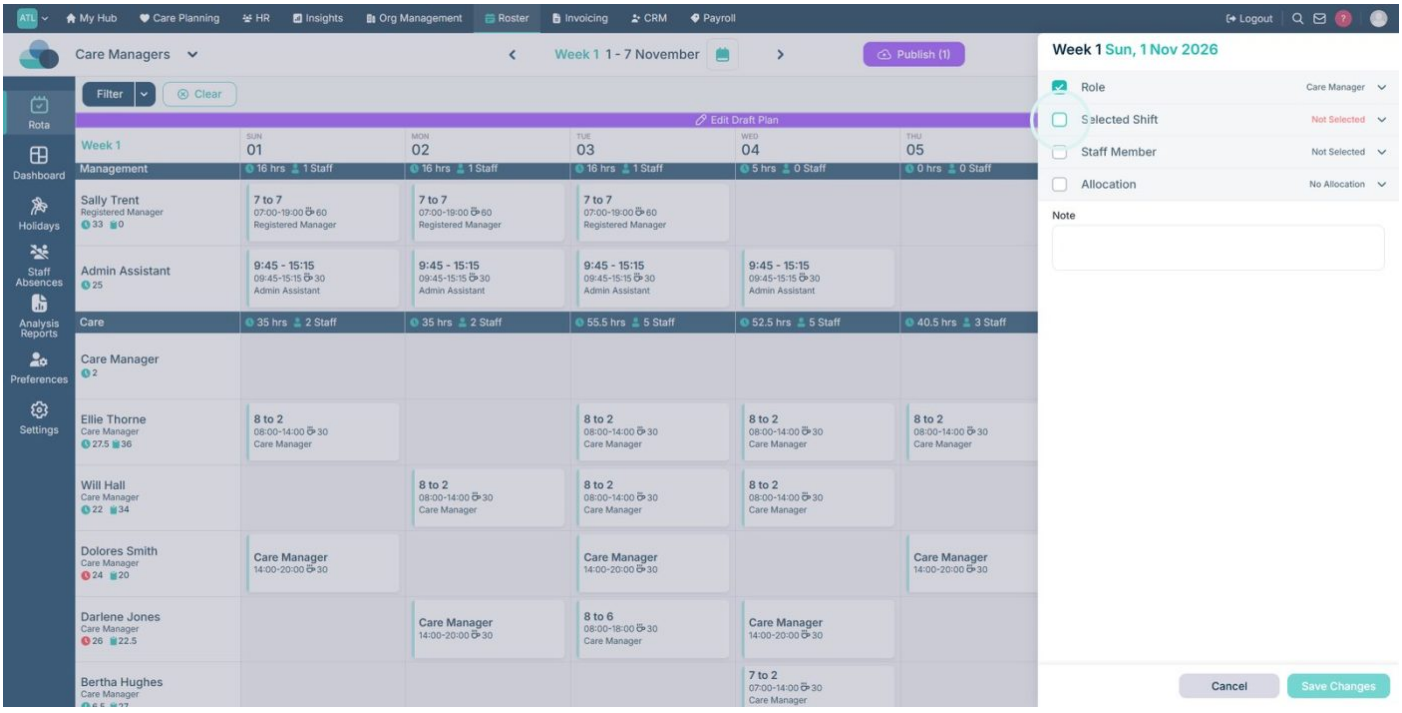
Find the **Selected Shift** option and tick the checkbox to select the shift you want to update.



Confirm the Shift Selection

Make sure **Selected Shift** is ticked so that your changes apply to the intended shift.

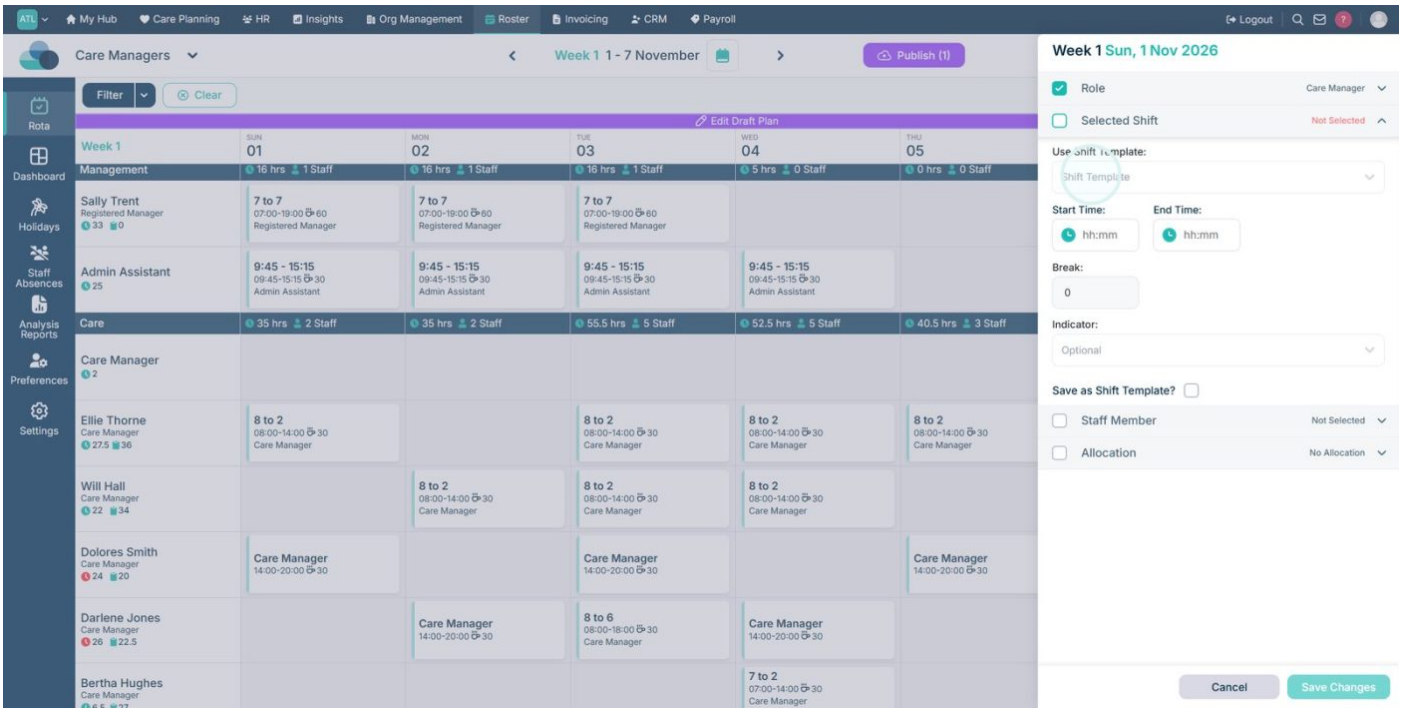
You can now continue updating its settings.



Open the Shift Template

Select the **Shift Template** dropdown to view the available shift patterns.

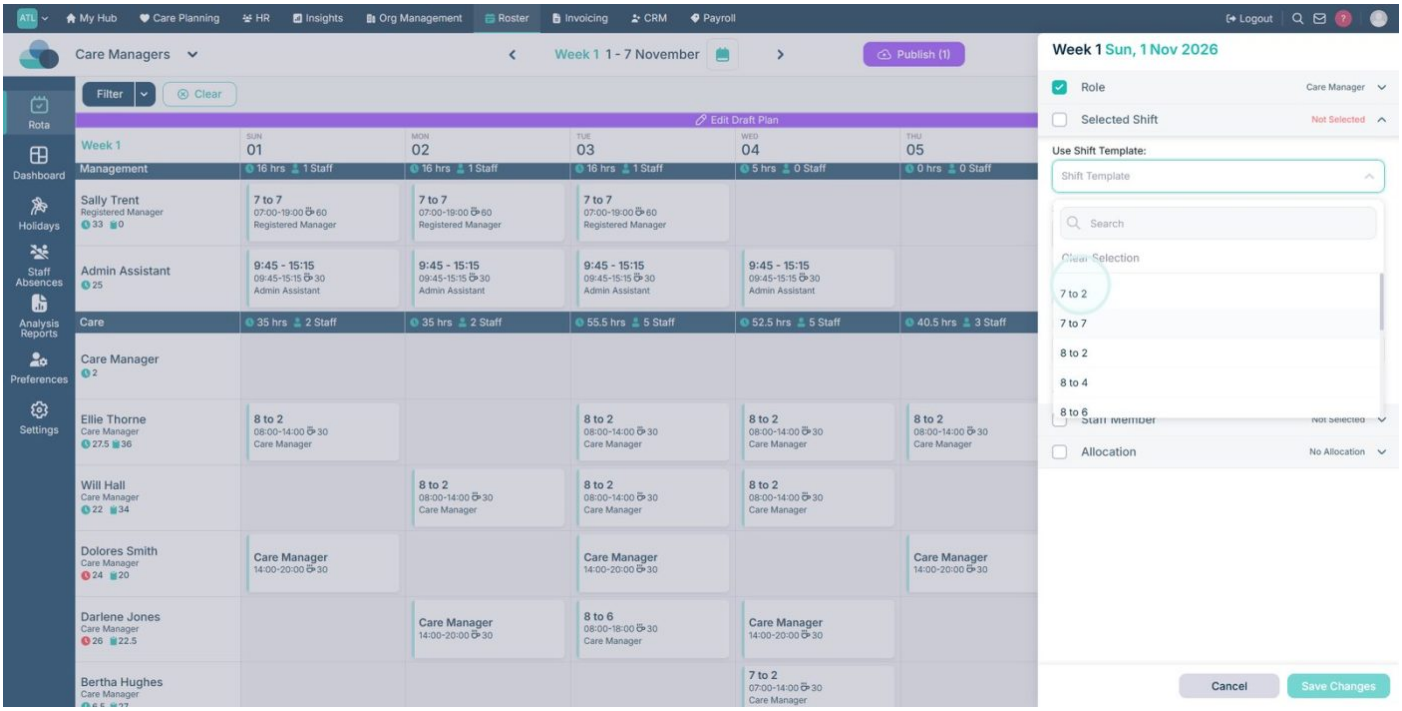
Shift templates allow you to choose a predefined set of working hours for the selected shift.



Select a Shift Template

Choose the shift template you want to apply.

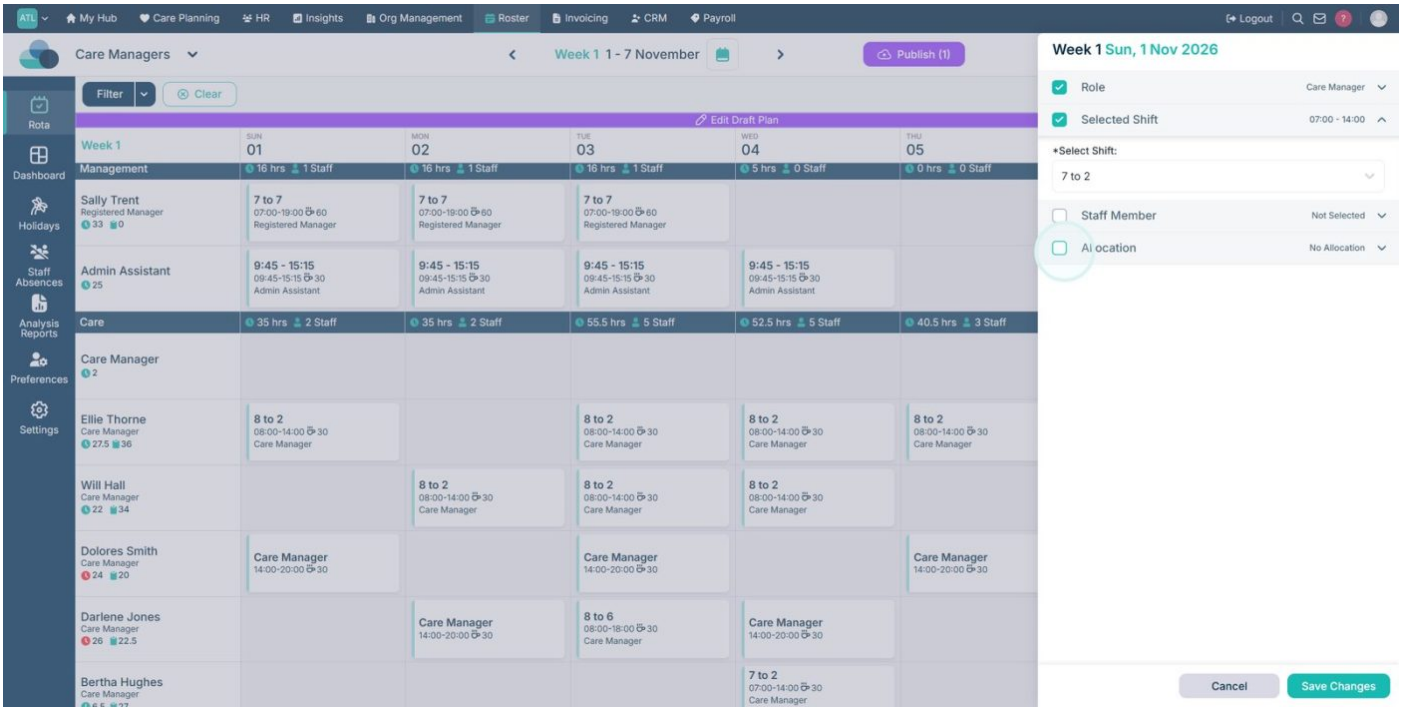
In this example, select **7 to 2** to use that predefined shift pattern.



Enable Allocation

Find the **Allocation** option and enable it to specify where the shift should be allocated.

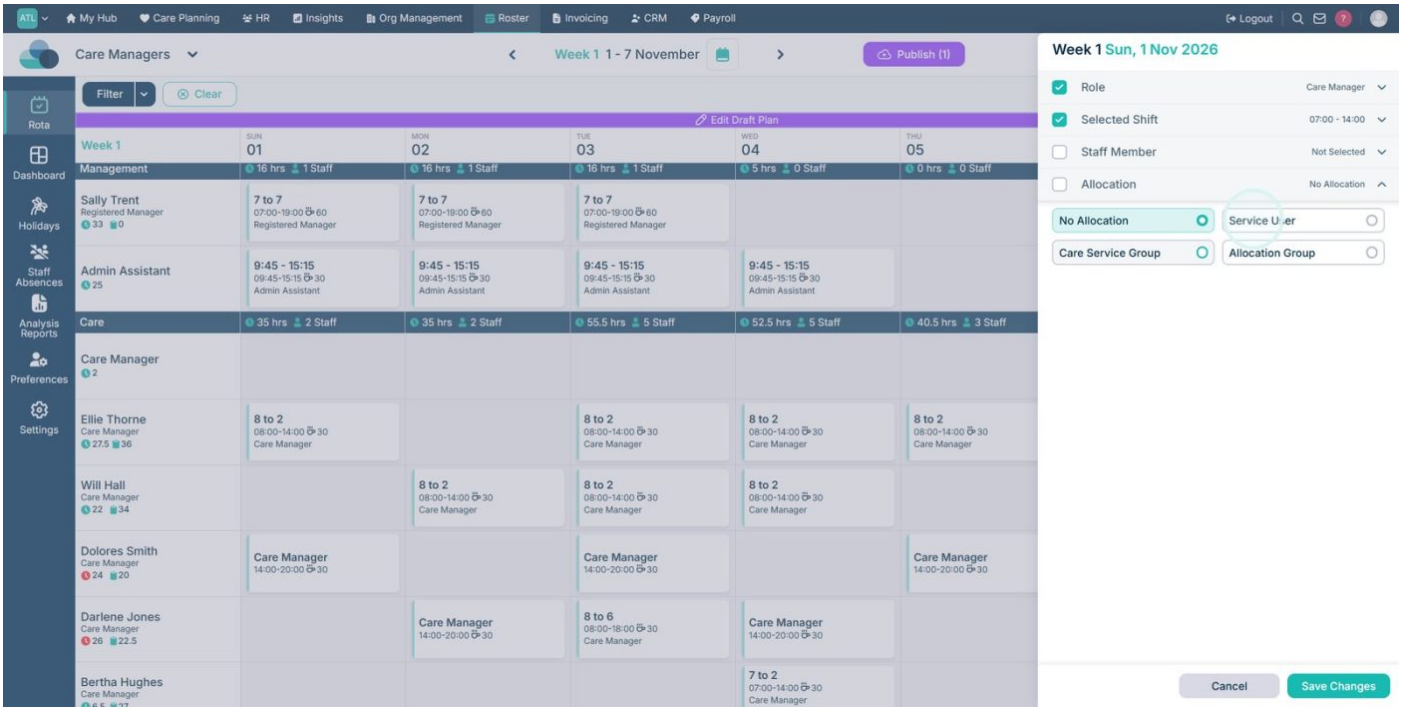
This allows you to link the shift to the relevant service user or area.



Select Service User

From the available allocation options, select **Service User**.

This allows you to choose the service user associated with the shift.

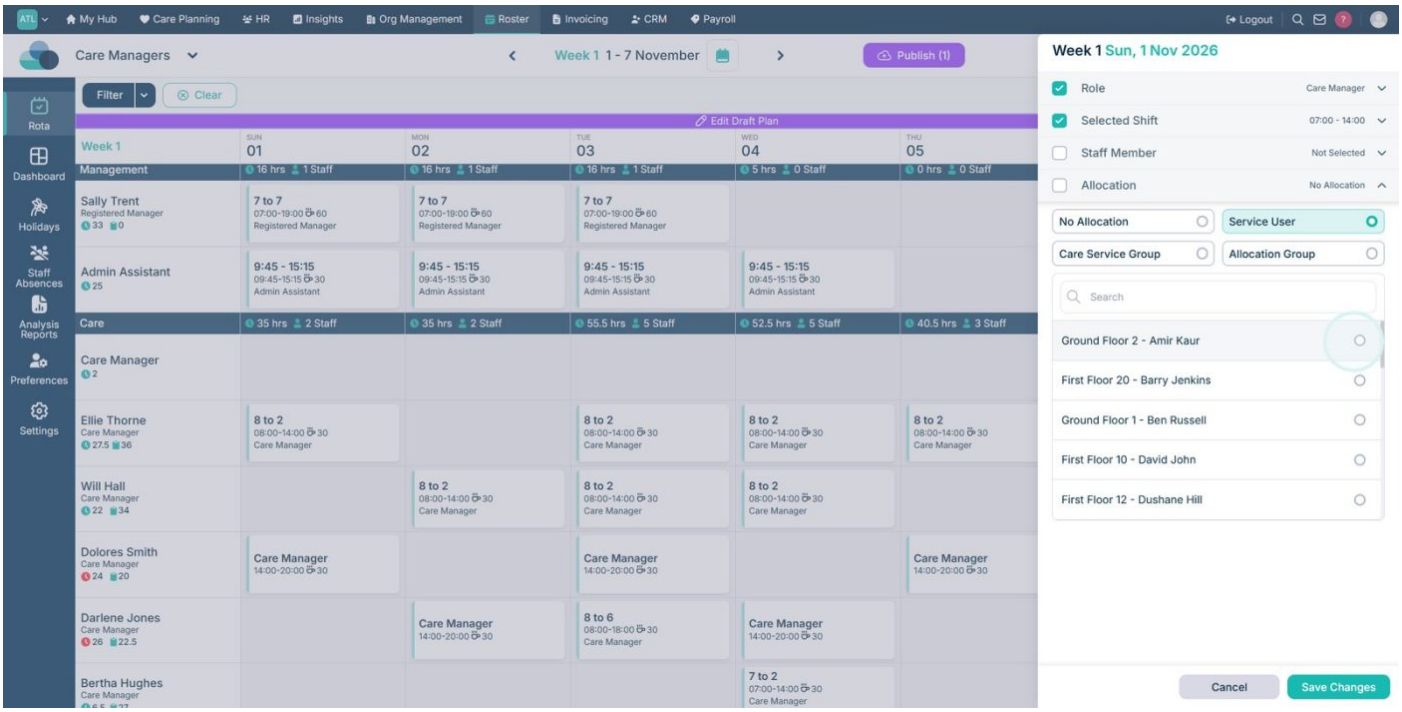


Choose the Service User

Select the service user or location you want to associate with the shift.

In this example, select **Ground Floor 2 - Amir Kaur**.

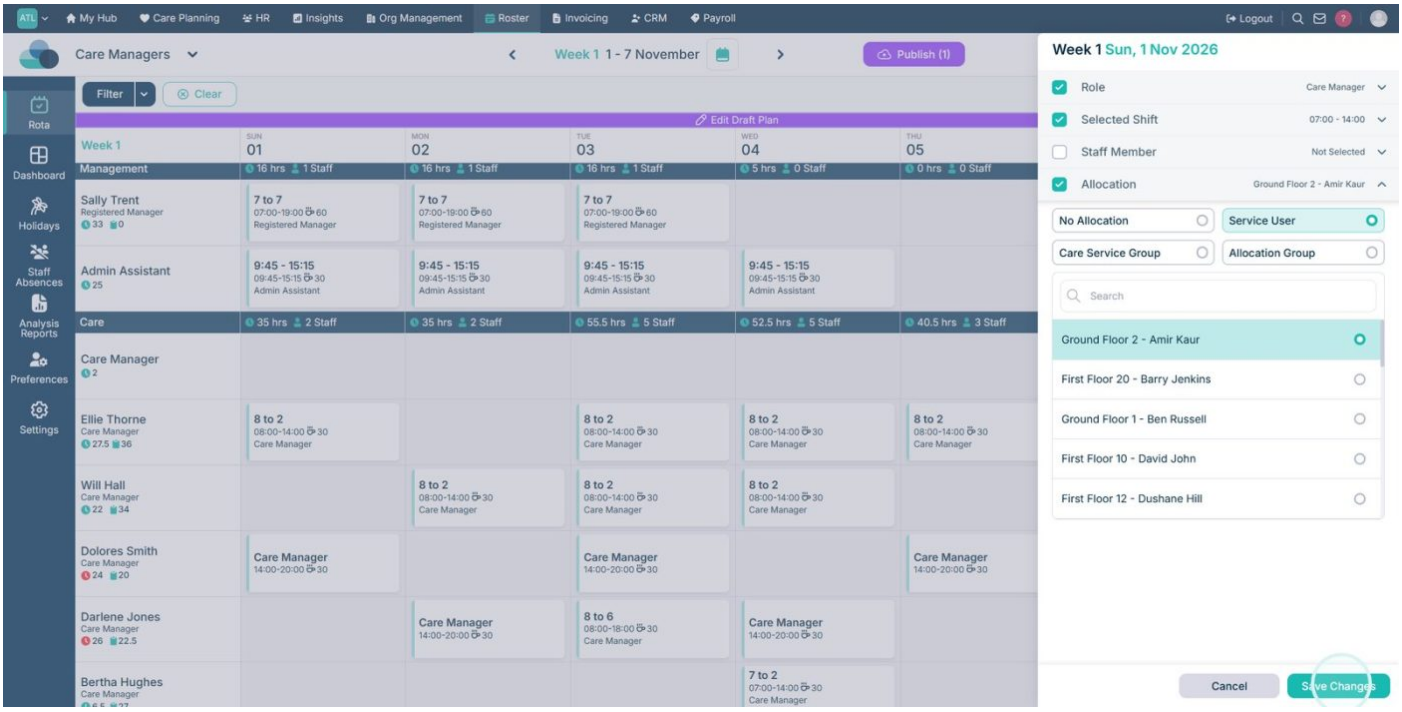
Check that you have selected the correct allocation before saving your changes.



Save Your Changes

Once you have selected the shift template and allocation, click **Save Changes**.

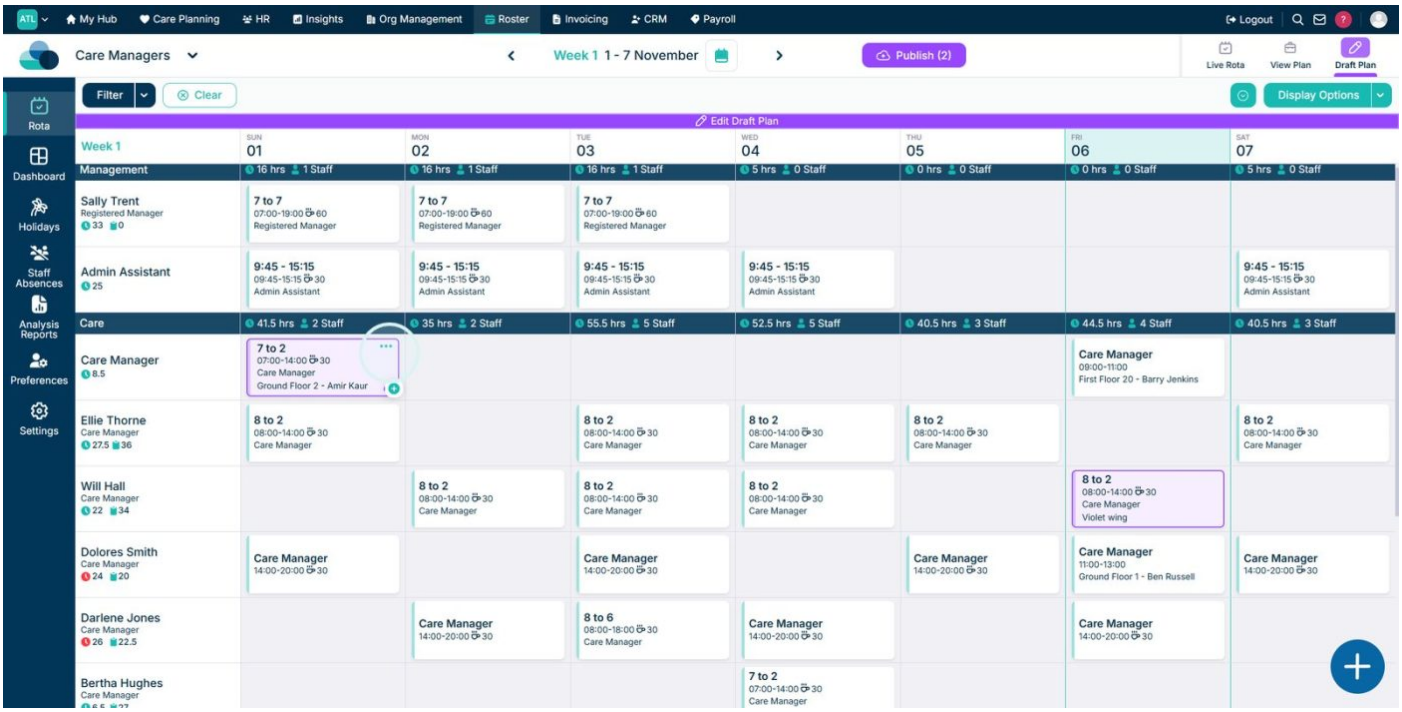
This saves the updated details for your selected shift.



Open the Scheduled Shift

Return to the Draft Rota and find the shift you want to assign to a staff member.

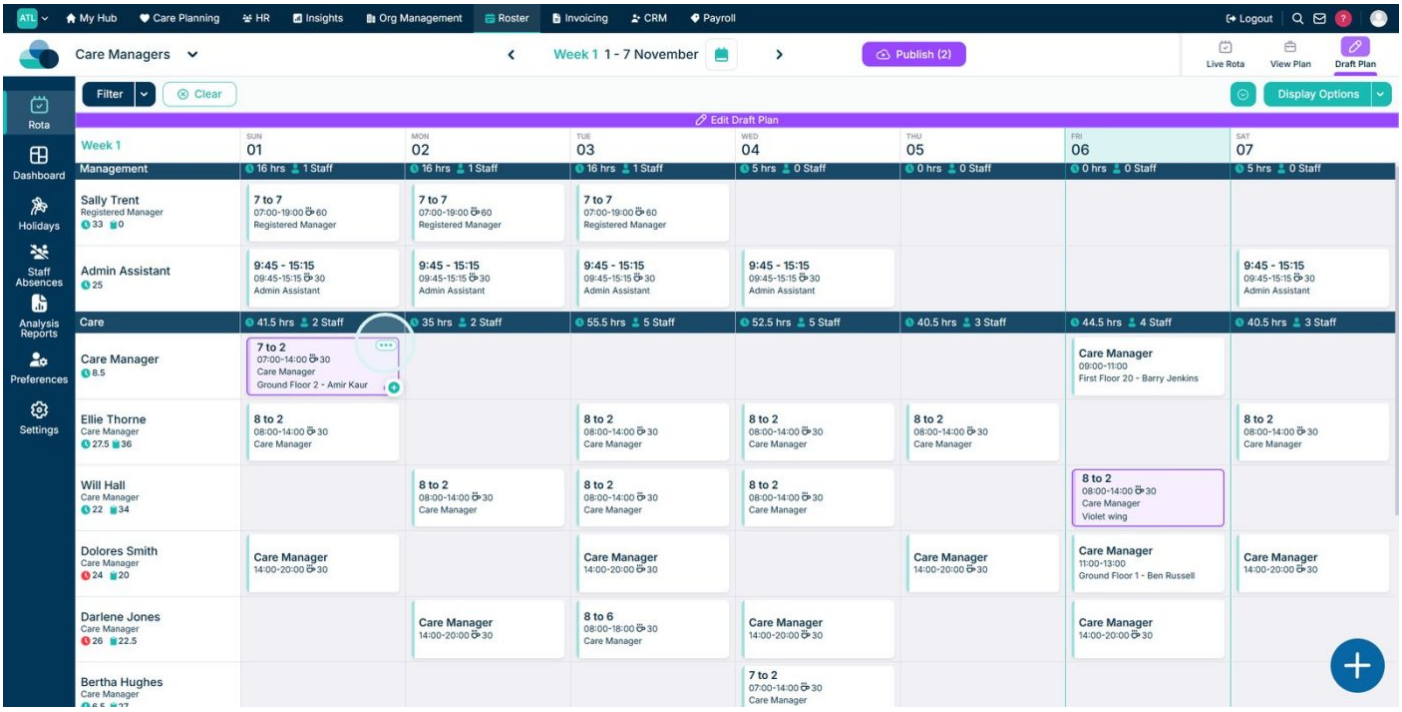
Click the **scheduled shift** to view its assignment options.



Select the Shift to Assign

Select the **shift** you want to assign to a staff member.

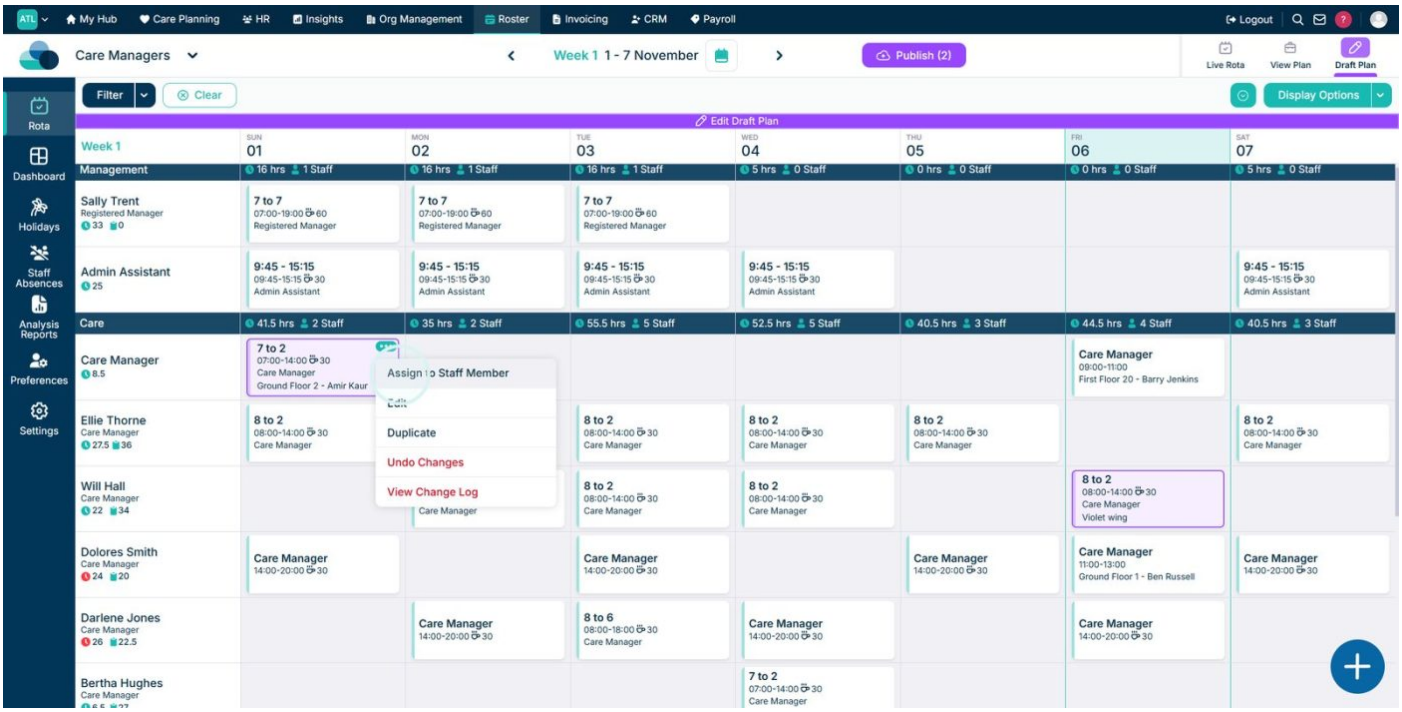
This opens the available options for managing the selected shift.



Choose Assign to Staff Member

From the available options, select **Assign to Staff Member**.

This allows you to choose who will cover the selected shift.



Select a Staff Member

Choose the staff member you want to assign to the shift.

In this example, select **J Doe**.

Check that you have selected the correct staff member before confirming the assignment.

[J Doe highlighted in the staff member selection list]

Assign the Shift

Once you have selected the correct staff member, click **Assign**.

This assigns the selected shift to that staff member in your Draft Rota.

[Assign button highlighted to confirm the staff member's shift assignment]

Review the Staff Assignment

Review the updated Draft Rota to check that the shift has been assigned to the correct staff member.

You have now created a shift, updated its settings and assigned it to a staff member.

[Draft Rota displayed after assigning the shift to a staff member]

Top tip

Before assigning a shift to a staff member, check that the correct Shift Template and Allocation have been selected. This helps ensure the shift has the right working hours and is linked to the intended service user or area.

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