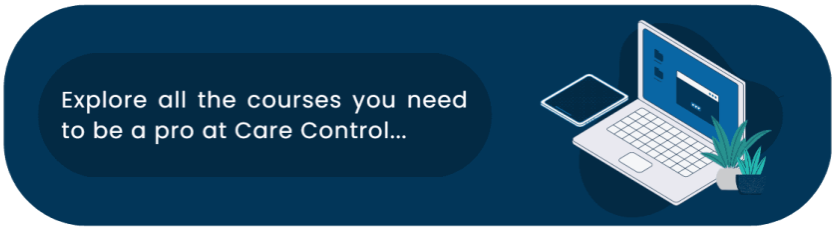
Assigning Allocation to the Rota

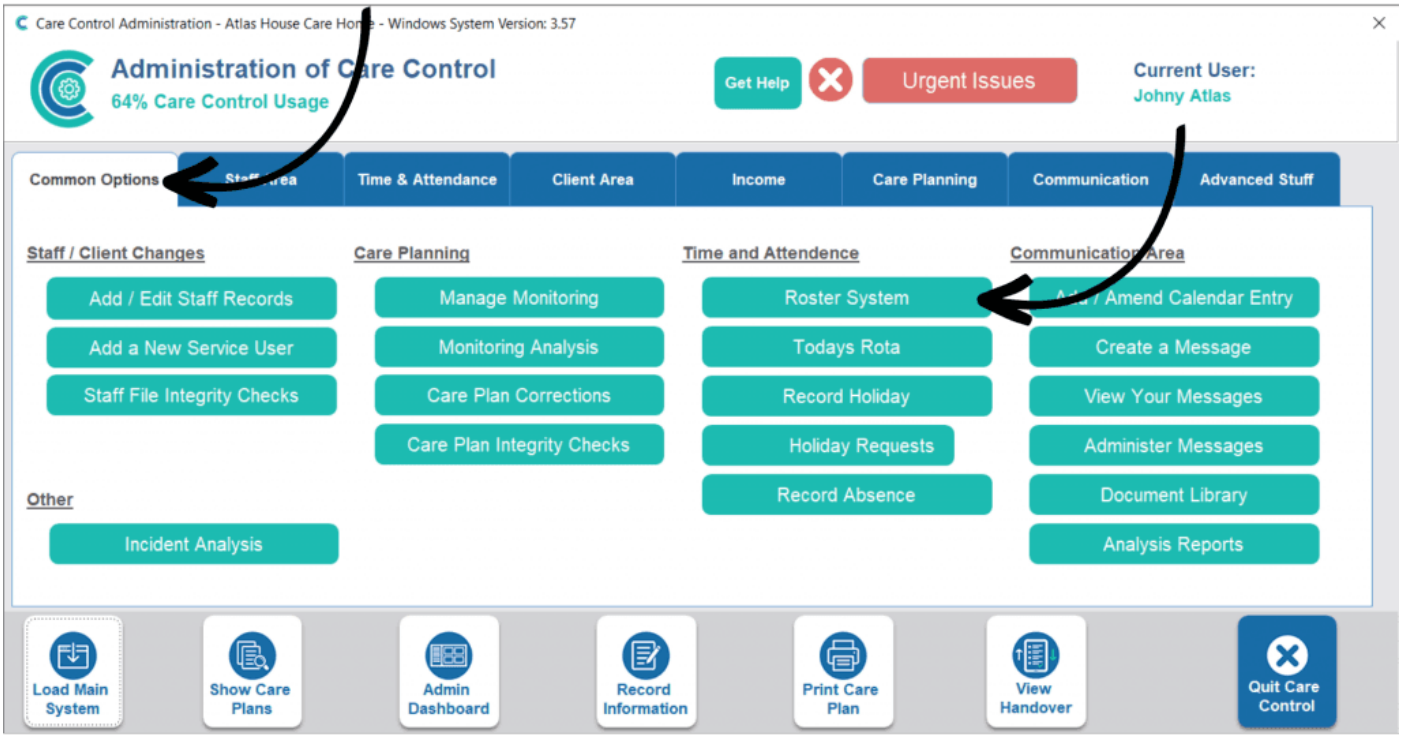
Administration Windows · https://cclearninghub.co.uk/docs/assigning-allocation-to-the-rota/



Assigning Allocations on the Rota

This guide will cover how to assign allocation groups to shifts on the rota. Two methods will be covered, both completed within Care Control Windows.

Embedded media:
https://player.vimeo.com/video/815283853?color&autopause=0&loop=0&muted=0&title=1&portrait=1&byline=1&h=aebb

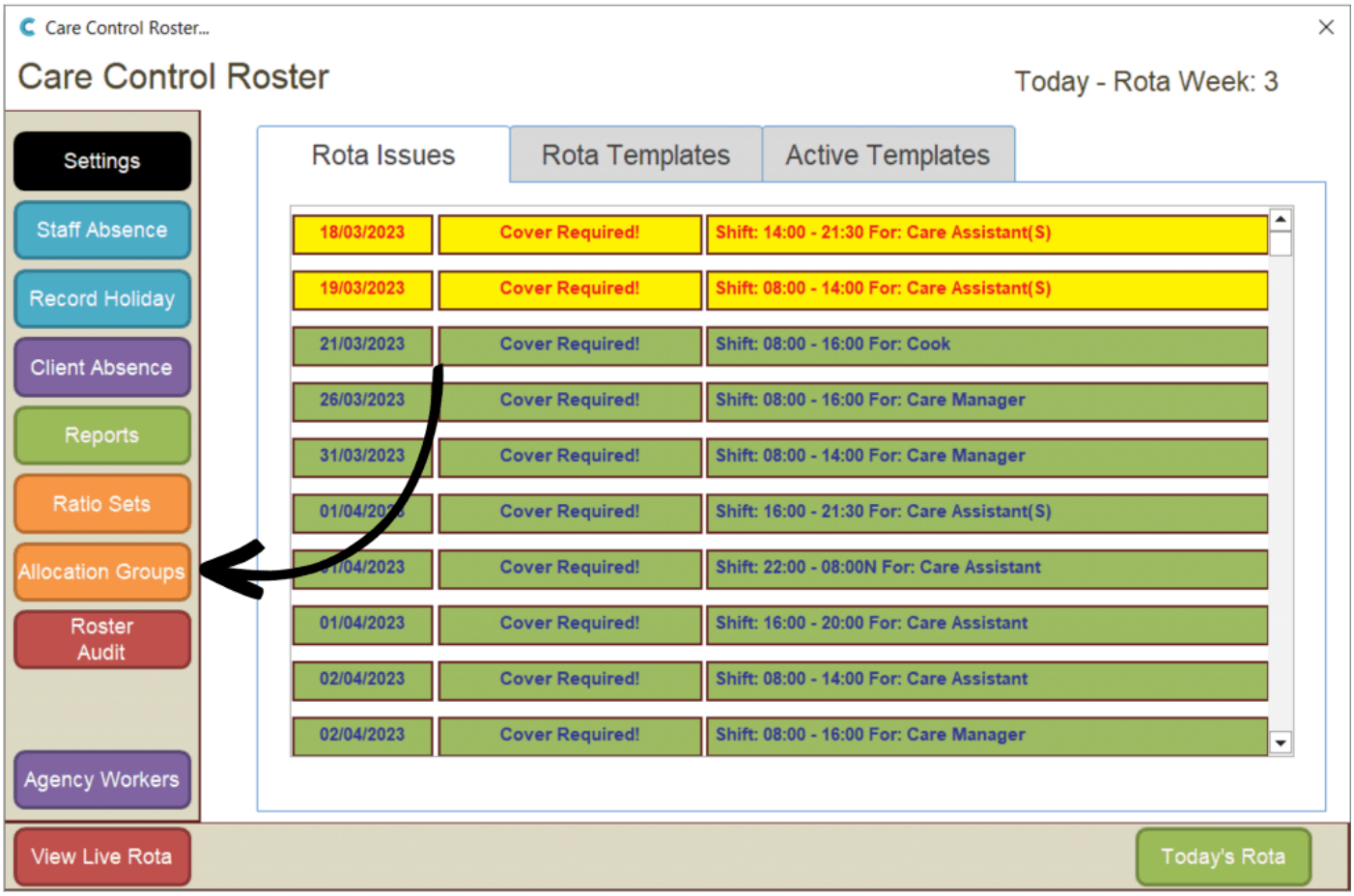


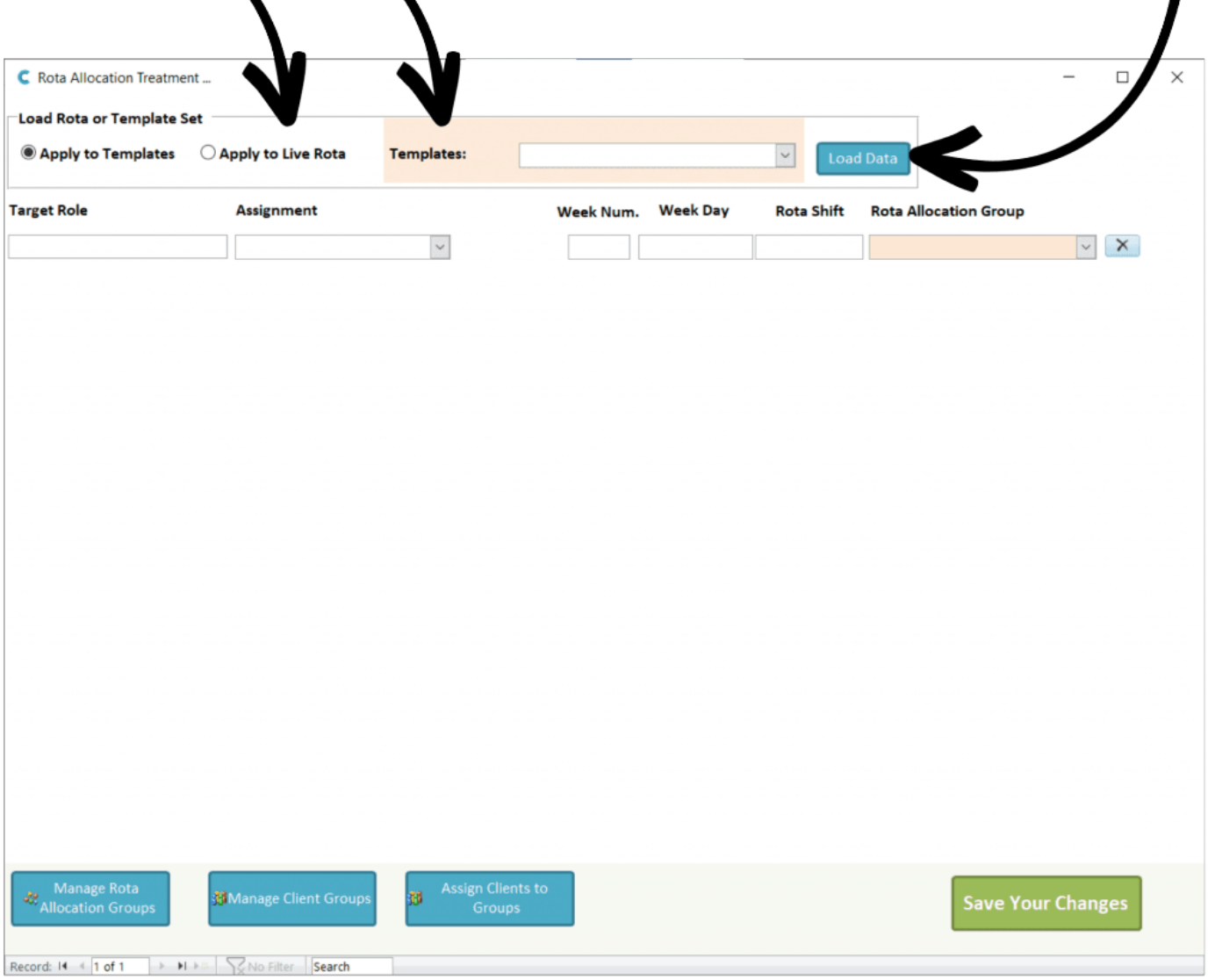
1

In the **Administration of Care Control Windows**, navigate to the **Roster System**, which can be found under the **Common Options** and **Time & Attendance** tabs.

2

We will first bulk assign allocations via the **Allocation Groups** button on the left-hand side of the window.


Care Control Roster...
Care Control Roster
Today - Rota Week: 3
Settings
Staff Absence
Record Holiday
Client Absence
Reports
Ratio Sets
Allocation Groups
Roster Audit
Agency Workers
Rota Issues
Rota Templates
Active Templates
18/03/2023 Cover Required! Shift: 14:00 - 21:30 For: Care Assistant(S)
19/03/2023 Cover Required! Shift: 08:00 - 14:00 For: Care Assistant(S)
21/03/2023 Cover Required! Shift: 08:00 - 16:00 For: Cook
26/03/2023 Cover Required! Shift: 08:00 - 16:00 For: Care Manager
31/03/2023 Cover Required! Shift: 08:00 - 14:00 For: Care Manager
01/04/2023 Cover Required! Shift: 16:00 - 21:30 For: Care Assistant(S)
01/04/2023 Cover Required! Shift: 22:00 - 08:00N For: Care Assistant
01/04/2023 Cover Required! Shift: 16:00 - 20:00 For: Care Assistant
02/04/2023 Cover Required! Shift: 08:00 - 14:00 For: Care Assistant
02/04/2023 Cover Required! Shift: 08:00 - 16:00 For: Care Manager
View Live Rota
Today's Rota



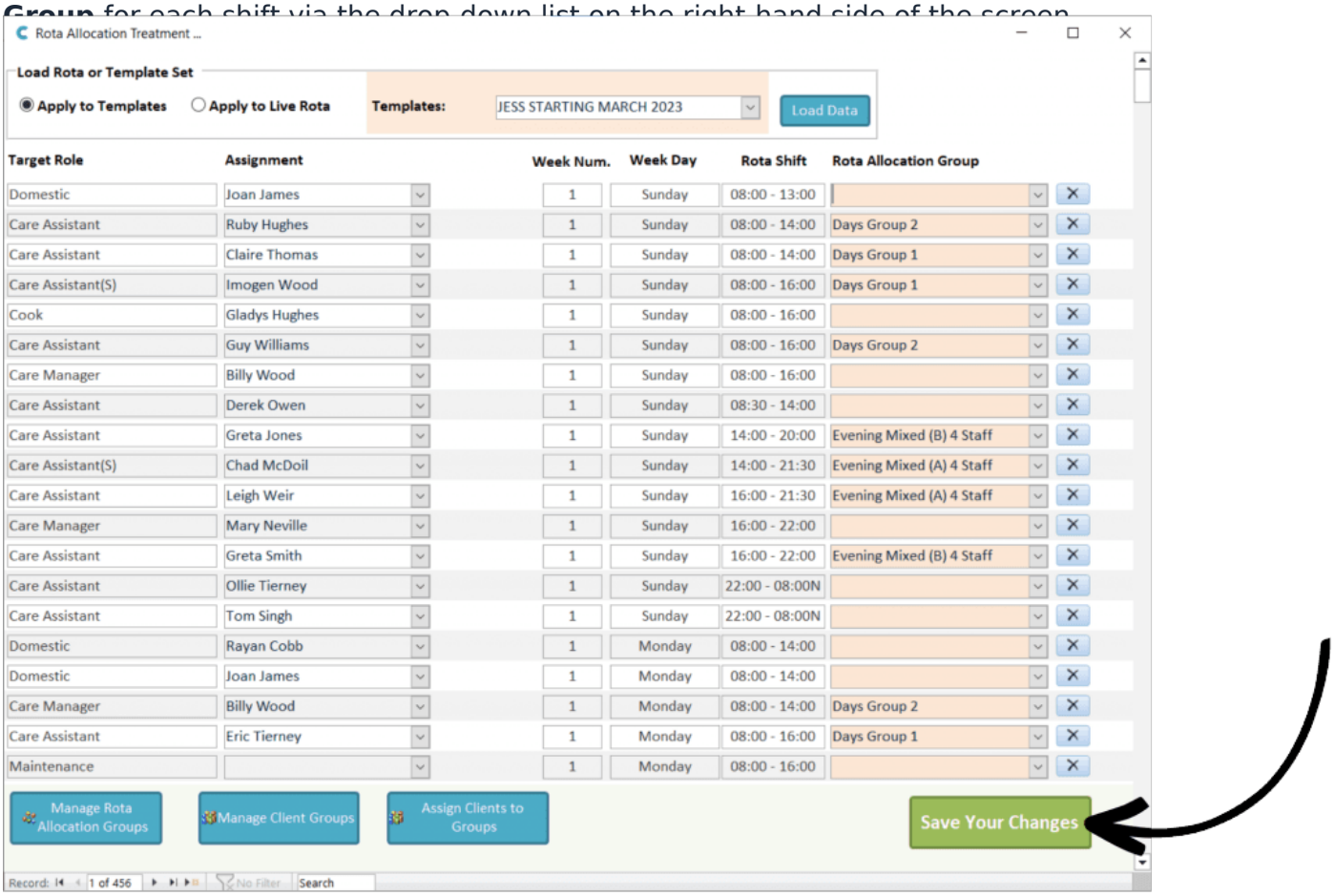
3

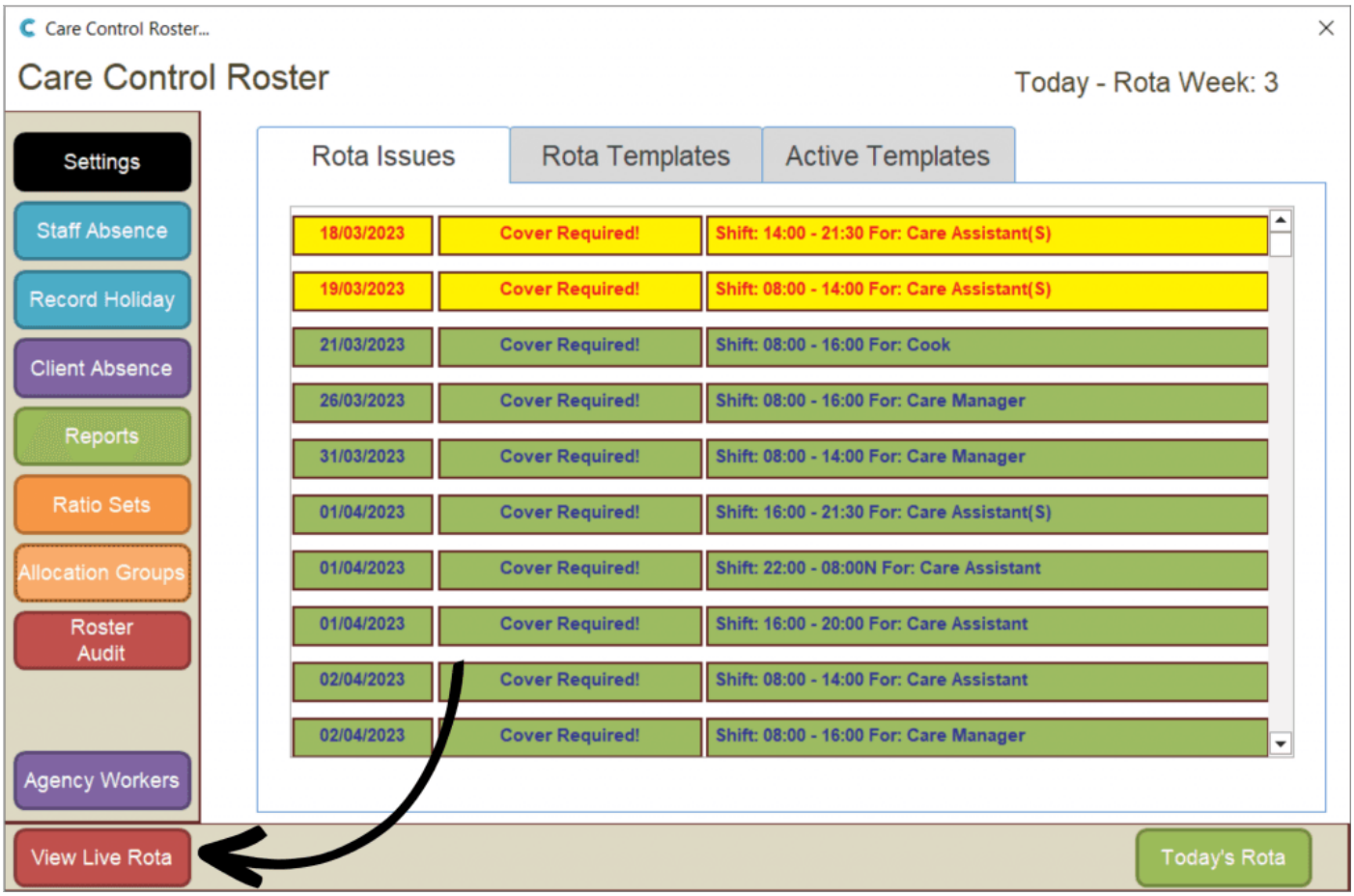
A new window will open. Here you can set the parameters for assigning allocation groups. First, choose whether to assign to the **Template or Live rota** and select the template from the drop-down list.

Press **Load Data**.

4

The page should populate with the shifts from the template. You can select the **Rota Allocation Group** for each shift via the drop down list on the right hand side of the screen.



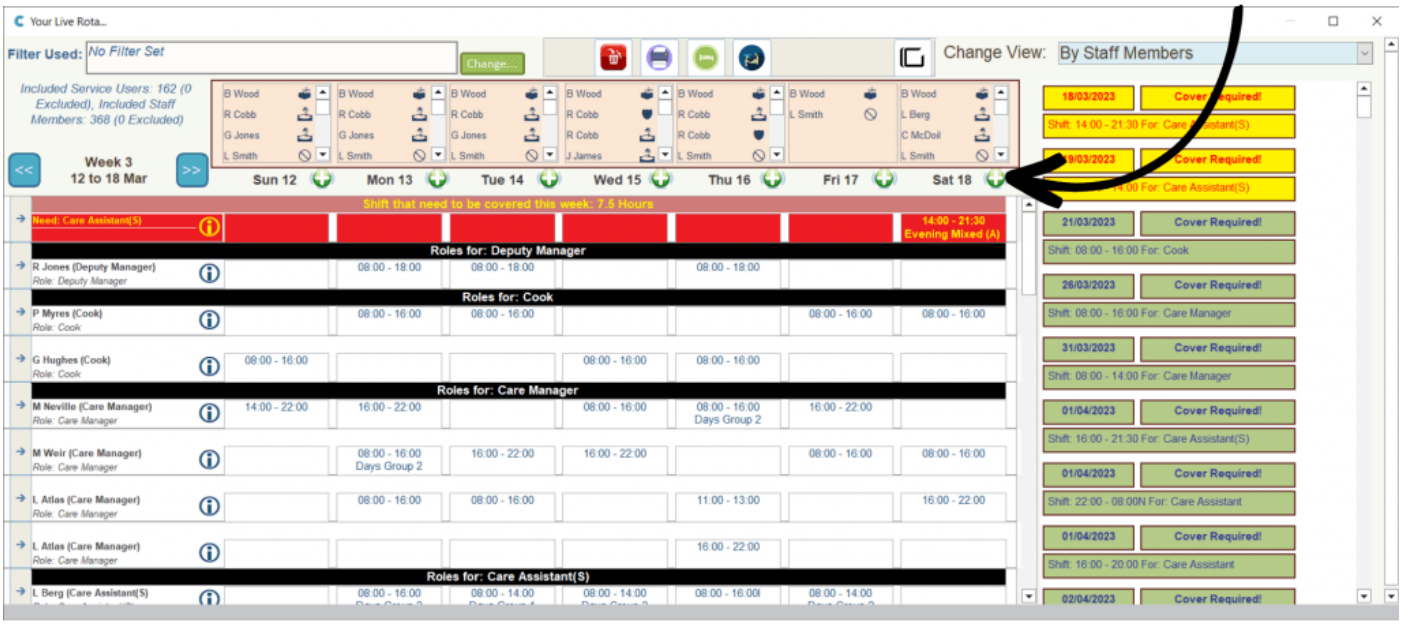


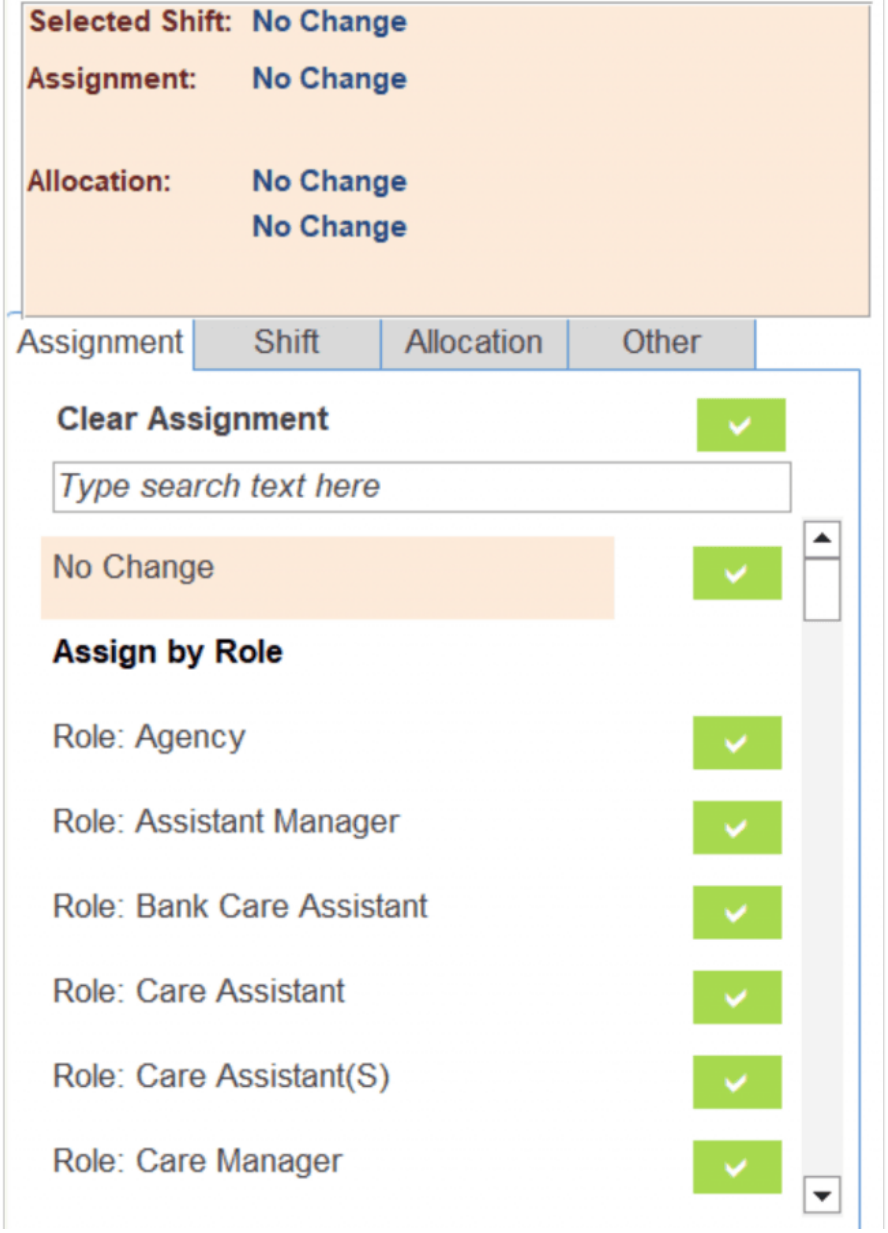
5

You can also assign allocations directly from the live rota. From the **Roster System**, select **View Live Rota**.

6

You can add the allocation to an existing shift or to a new one. In this example, we will allocate a new shift. Press the **Green Plus** (+) symbol on the day you wish to add a shift.


Your Live Rota...
Filter Used: No Filter Set
Change...
Change View: By Staff Members
Included Service Users: 162 (0 Excluded), Included Staff Members: 368 (0 Excluded)
Week 3
12 to 18 Mar
Sun 12
Mon 13
Tue 14
Wed 15
Thu 16
Fri 17
Sat 18
Shift that need to be covered this week: 7.5 Hours
Need: Care Assistant(S)
14:00 - 21:30
Evening Mixed (A)
Roles for: Deputy Manager
R Jones (Deputy Manager)
Role: Deputy Manager
Roles for: Cook
P Myres (Cook)
Role: Cook
G Hughes (Cook)
Role: Cook
Roles for: Care Manager
M Neville (Care Manager)
Role: Care Manager
M Weir (Care Manager)
Role: Care Manager
L Atlas (Care Manager)
Role: Care Manager
L Atlas (Care Manager)
Role: Care Manager
Roles for: Care Assistant(S)
L Berg (Care Assistant(S))
18/03/2023
Cover Required!
21/03/2023
Cover Required!
Shift: 08:00 - 16:00 For: Cook
26/03/2023
Cover Required!
Shift: 08:00 - 16:00 For: Care Manager
31/03/2023
Cover Required!
Shift: 08:00 - 14:00 For: Care Manager
01/04/2023
Cover Required!
Shift: 16:00 - 21:30 For: Care Assistant(S)
01/04/2023
Cover Required!
Shift: 22:00 - 08:00N For: Care Assistant
01/04/2023
Cover Required!
Shift: 16:00 - 20:00 For: Care Assistant
02/04/2023
Cover Required!

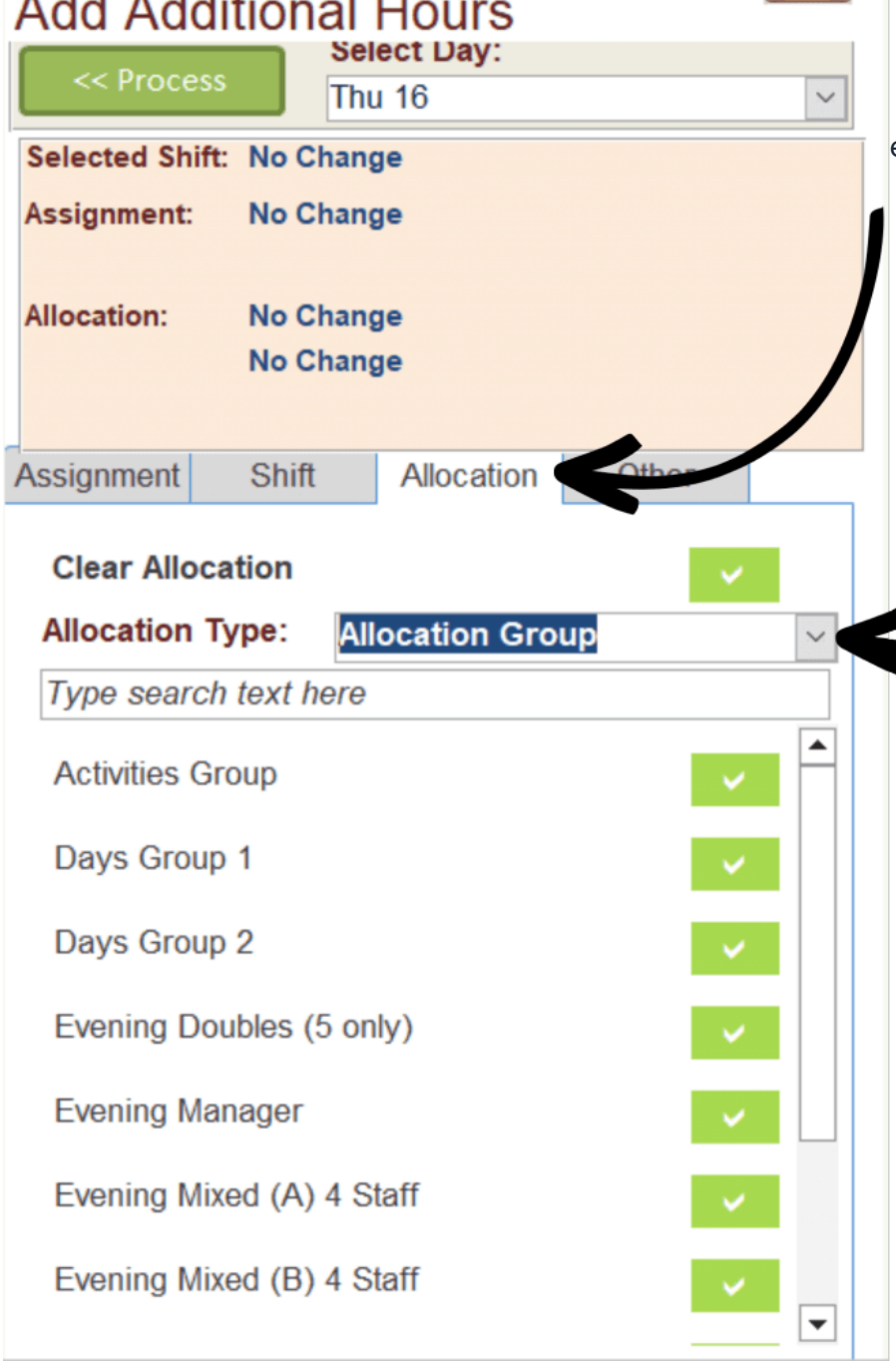


7

The smart board should open on the right side of the rota. Here, select the shift assignment (by role or staff member). Next, under the shift tab, enter the times for the shift.

8

Under the allocation tab, set the **Allocation Type** to **Allocation Group** and select the group via the green tick.



ess at the top of the smart board to