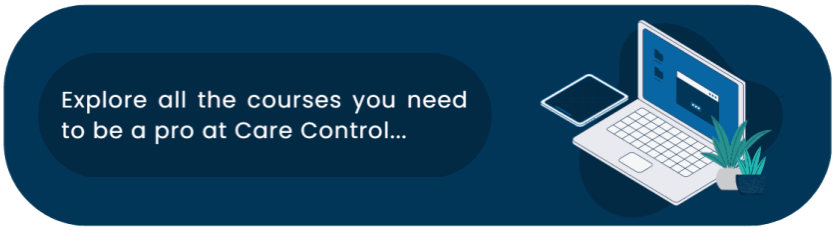
How to Build a Rota Template

HR Windows · https://cclearninghub.co.uk/docs/build-a-rota-template/



How to Build a Rota Template

This guide introduces the Care Control roster system on Care Control Windows. It covers how to create a new rota template, populate it with shifts and assign those shifts to staff members.

Embedded media:
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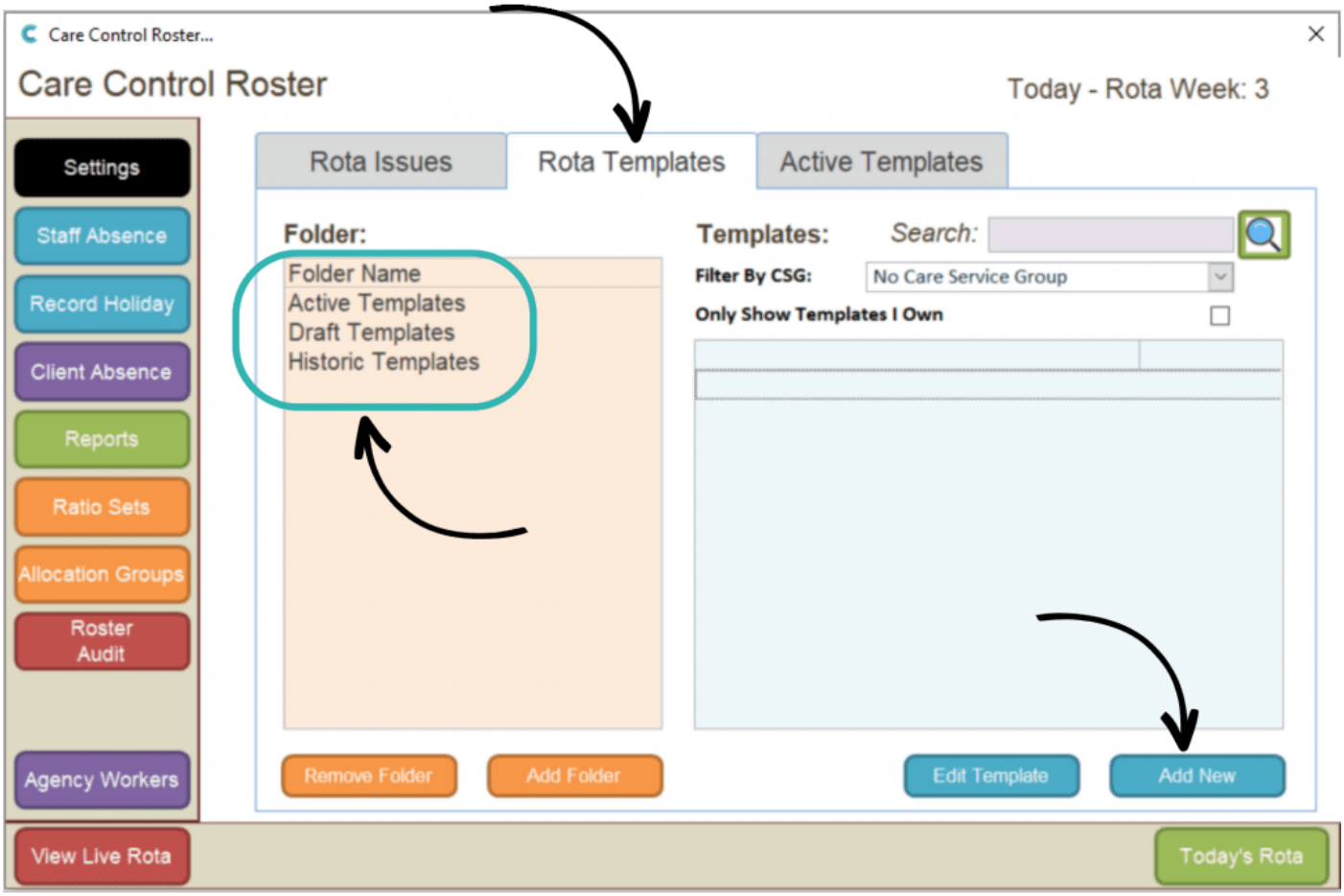


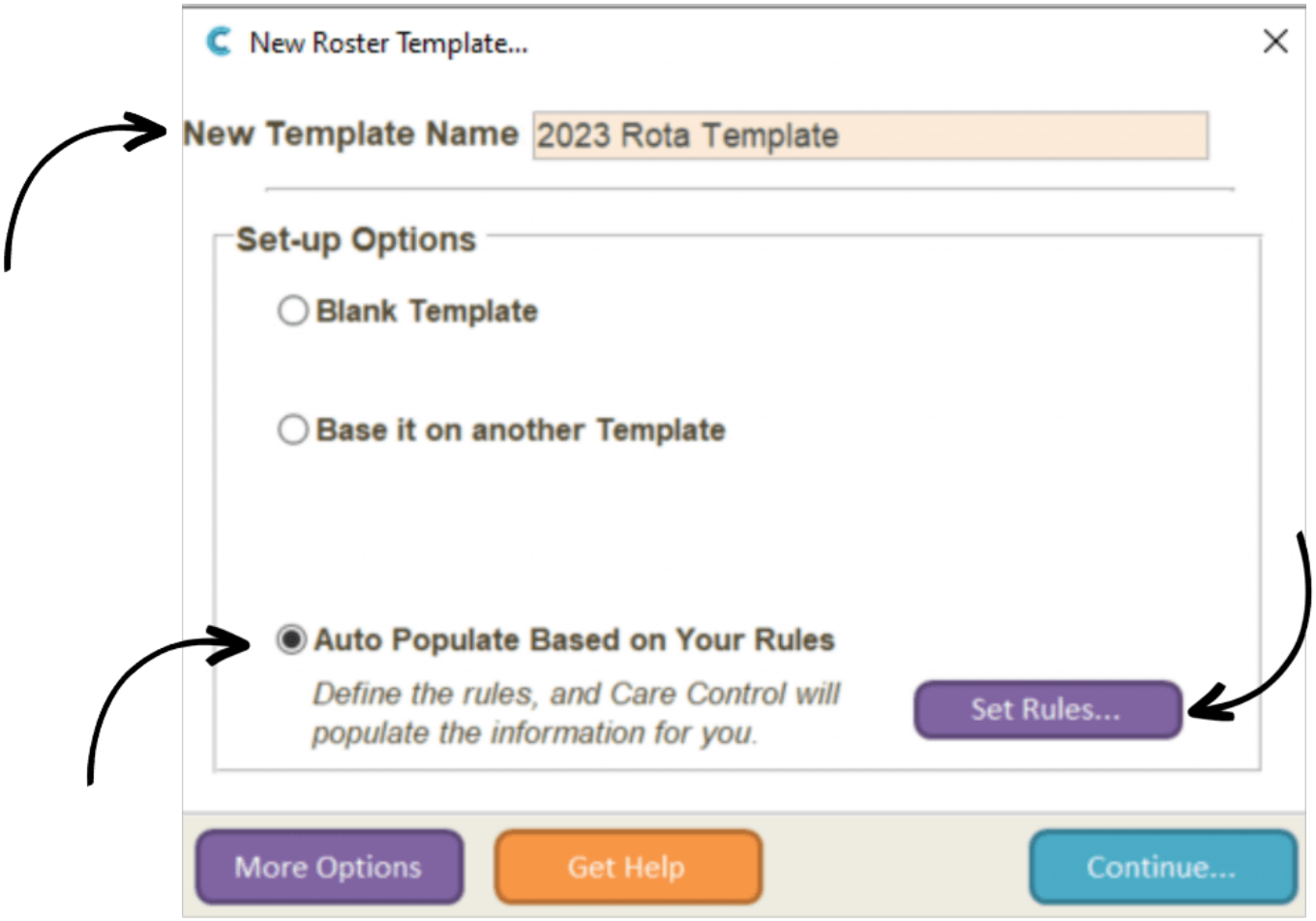
1

In the **Administration of Care Control** Windows, navigate to the **Roster System** which can be found in the **Common Option**s and **Time and Attendance** tabs.

2

*I*n the **Roster System**, select **Rota Templates** from the 3 tabs at the top of the window. Here you will be able to see **Active**, **Draft** and **Historic Templates**. You can also **Edit** and **Add New** templates using the corresponding buttons. In this guide we will **Add New**.


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
View Live Rota
Rota Issues
Rota Templates
Active Templates
Folder:
Folder Name
Active Templates
Draft Templates
Historic Templates
Templates:
Search:
Filter By CSG:
No Care Service Group
Only Show Templates I Own
Remove Folder
Add Folder
Edit Template
Add New
Today's Rota



3

Selecting **Add New** will open a new window with a blank form. Here you can set a **New Template Name**. You can also select a template set-up option:

- **Blank Template** – a clean slate, no data loaded
- **Base it on another Template** – you can choose to base it on an existing template
- **Auto-populate based on your rules** – you define the rules, and Care Control will populate the information for you

In this example, we will use **Auto Populate**. To create rules for the template, select **Auto Populate** and press **Set Rules**.

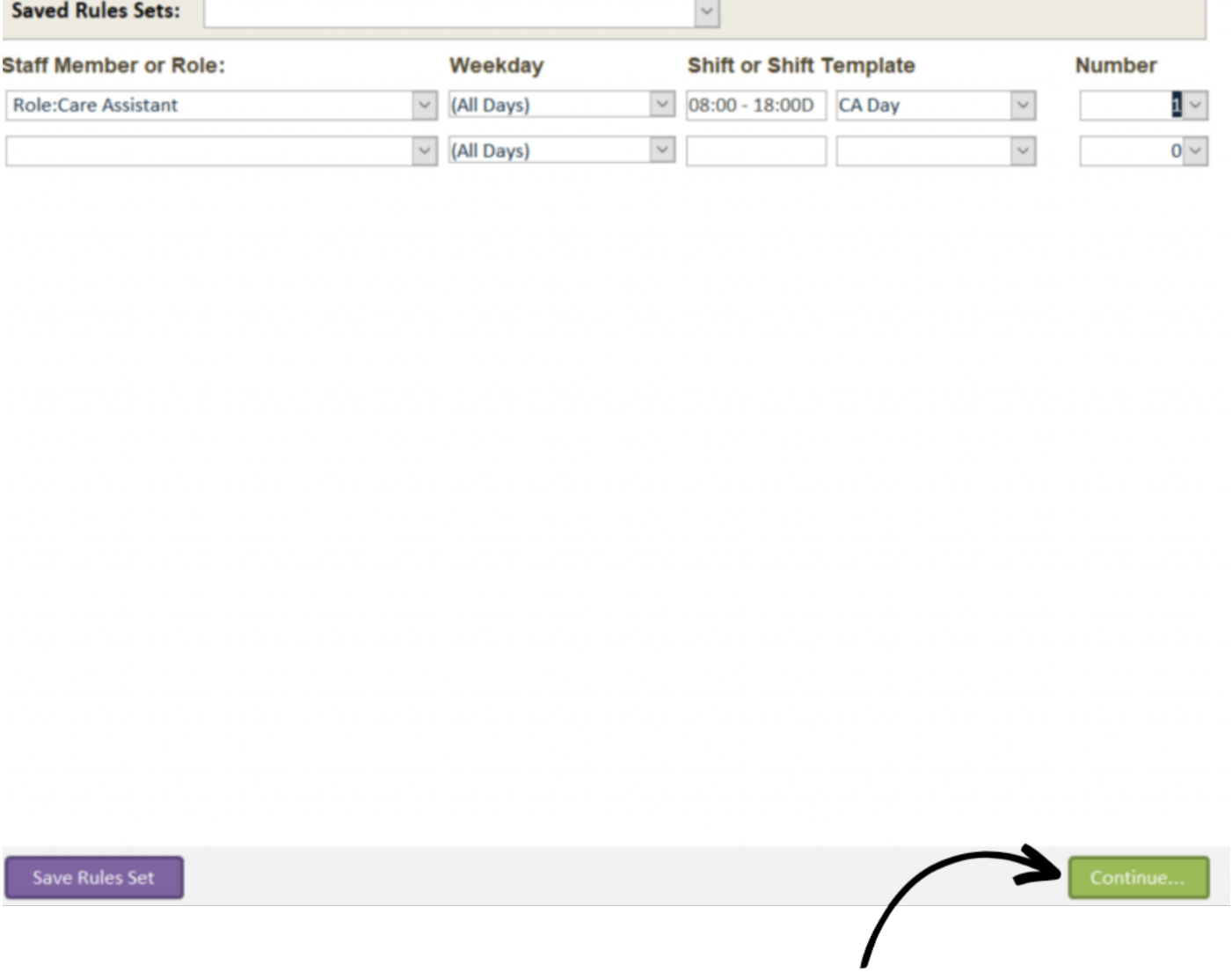
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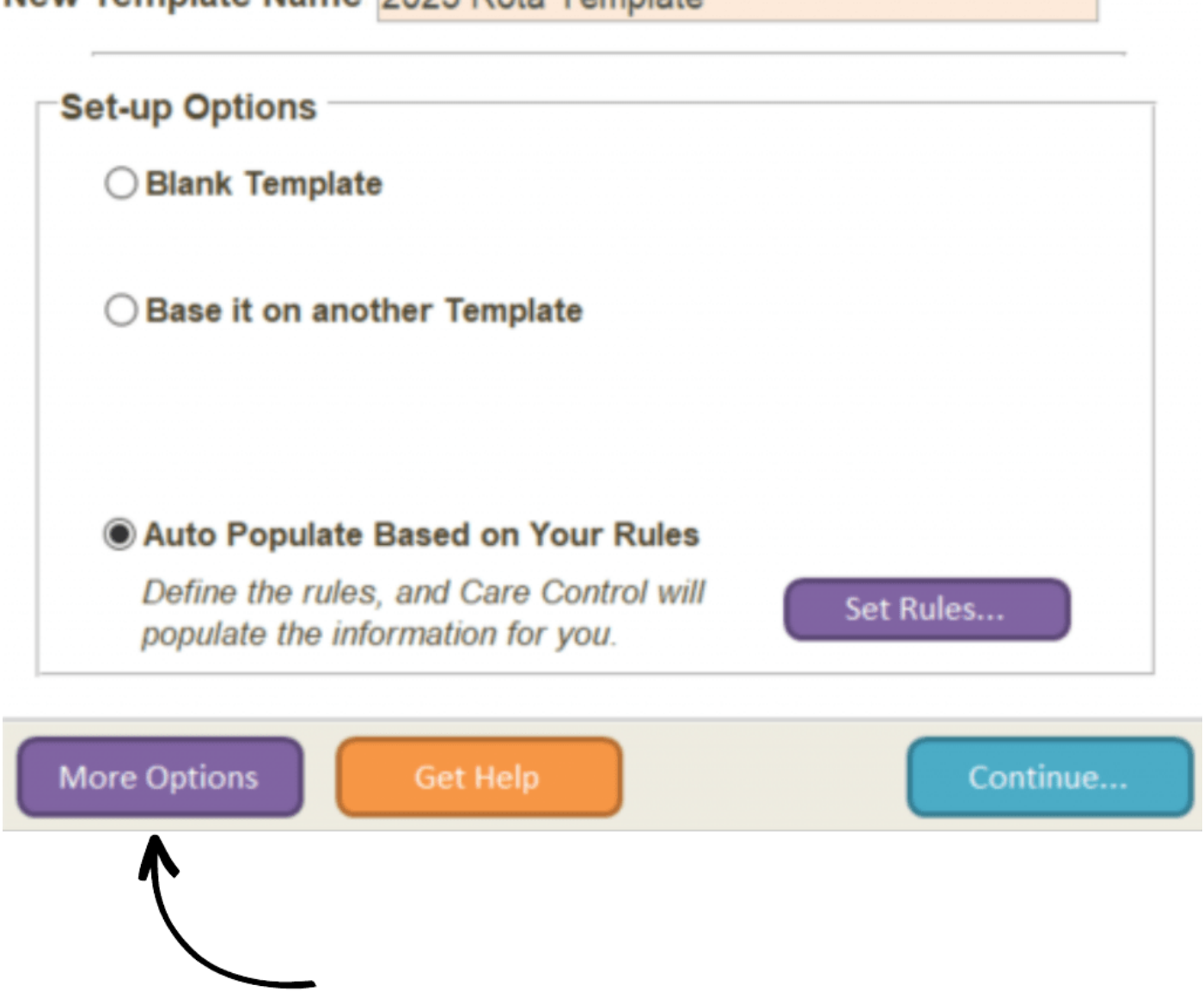
Pressing **Set Rules** will open a new window with a blank form. Here you can create rules which Care Control will use to populate a template. The form is split into 4 columns:

- **Staff Member or Role** – select a staff member or role for this rule
- **Weekday** – select the day(s) on which the staff member or role will work
- **Shift or Shift Template** – either manually enter a shift time or select a **Shift Template,** for information on creating Shift Templates, please see the relevant guide.
- **Number** – select a number, and the shift rules will display on the rota in this order.

In this example, we will set up a singular shift pattern – a **Care Assistant** role for all weekdays, working 08:00-18:00. This will show 1st on the rota.

Select **Continue**.


Saved Rules Sets:
Staff Member or Role:
Weekday
Shift or Shift Template
Number
Role:Care Assistant
(All Days)
08:00 - 18:00D
CA Day
1
(All Days)
0
Save Rules Set
Continue...



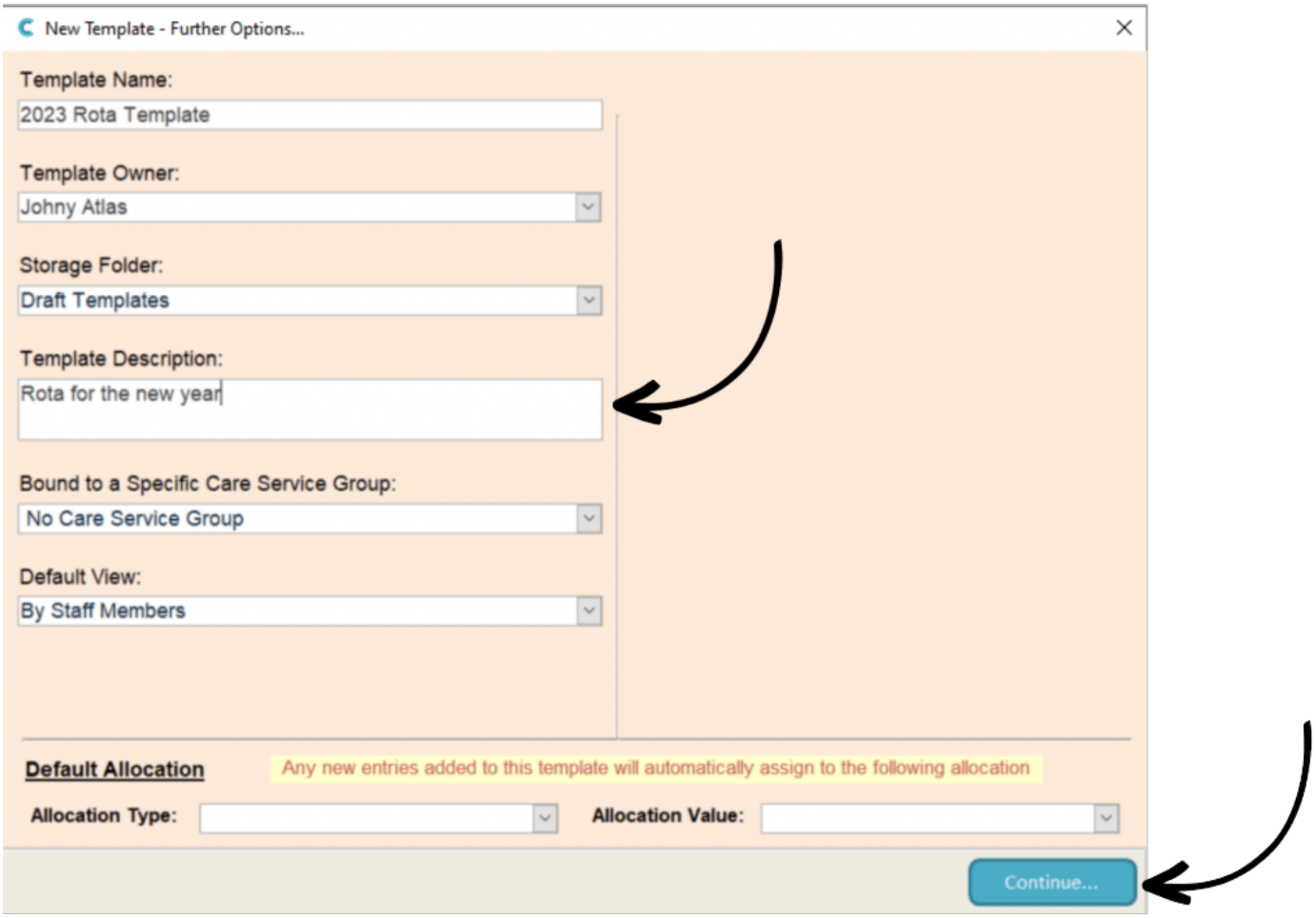
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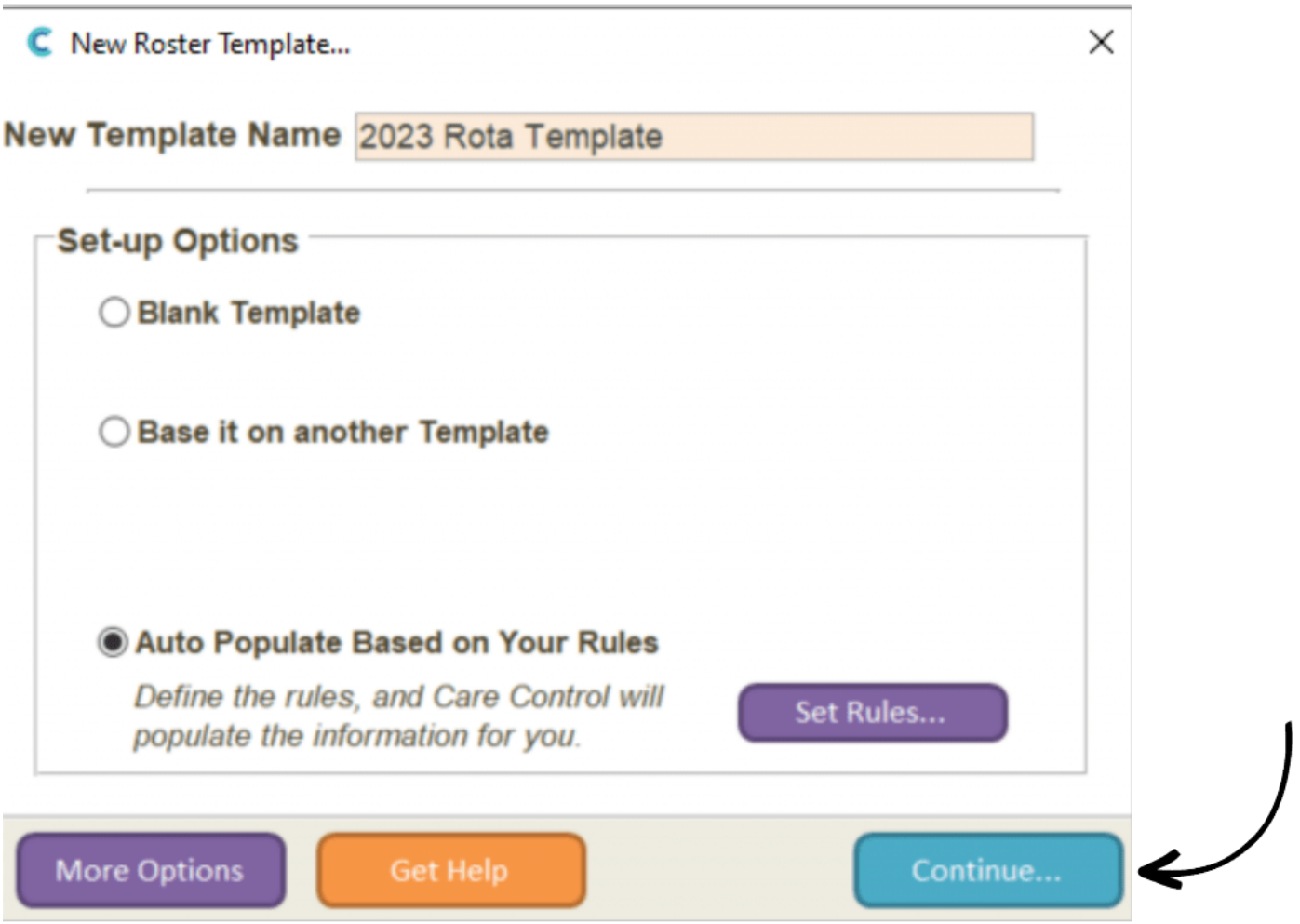
Finally, we can enter further information about the template by selecting **More Options**.

6

Selecting **More Options** will open a new window. Here the template information is displayed along with some further options.

For now, simply add a **Template Description** and select **Continue**.


New Template - Further Options...
Template Name:
2023 Rota Template
Template Owner:
Johny Atlas
Storage Folder:
Draft Templates
Template Description:
Rota for the new year
Bound to a Specific Care Service Group:
No Care Service Group
Default View:
By Staff Members
Default Allocation
Any new entries added to this template will automatically assign to the following allocation
Allocation Type:
Allocation Value:
Continue...

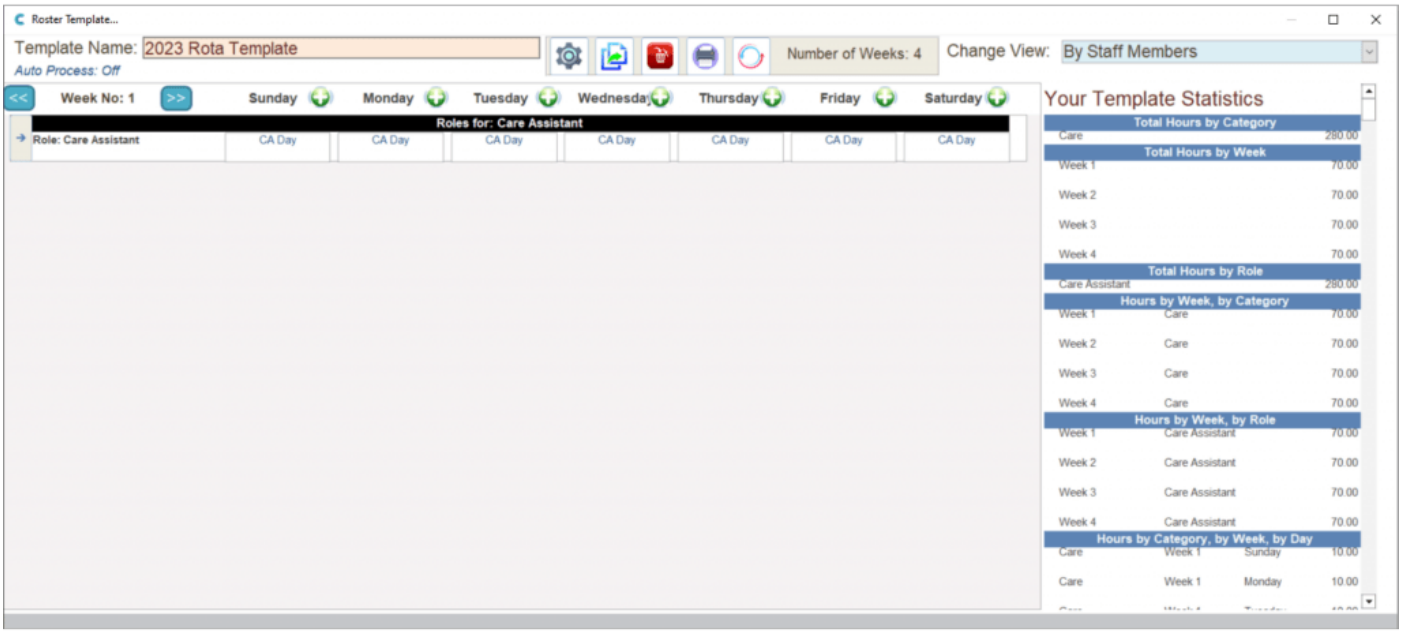


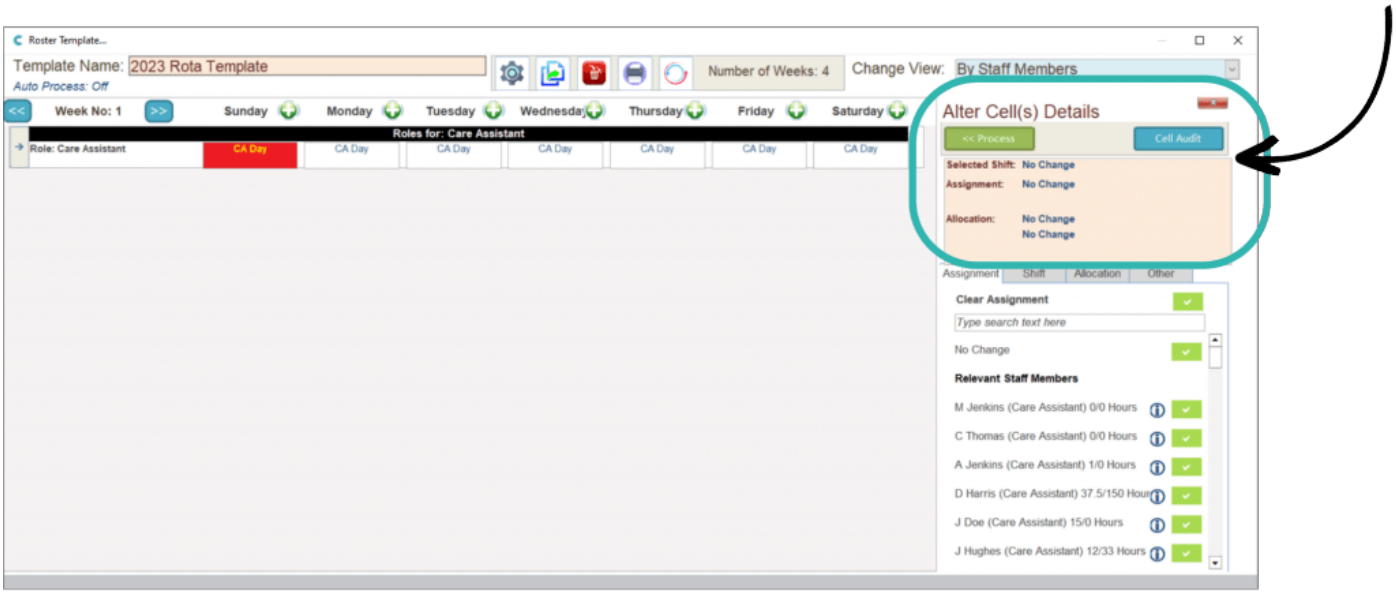
7

Now we have created the groundworks for a basic template. **Select Continue** to populate the template.

8

Your new template should open. It can also be found in **Draft Templates** from the **Roster System** window. We can now assign our shift pattern to staff members.


Roster Template...
Template Name: 2023 Rota Template
Auto Process: Off
Number of Weeks: 4
Change View: By Staff Members
Week No: 1
Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Roles for: Care Assistant
Role: Care Assistant
CA Day
Your Template Statistics
Total Hours by Category
Care 280.00
Total Hours by Week
Week 1 70.00
Week 2 70.00
Week 3 70.00
Week 4 70.00
Total Hours by Role
Care Assistant 280.00
Hours by Week, by Category
Hours by Week, by Role
Hours by Category, by Week, by Day
Care Week 1 Sunday 10.00
Care Week 1 Monday 10.00

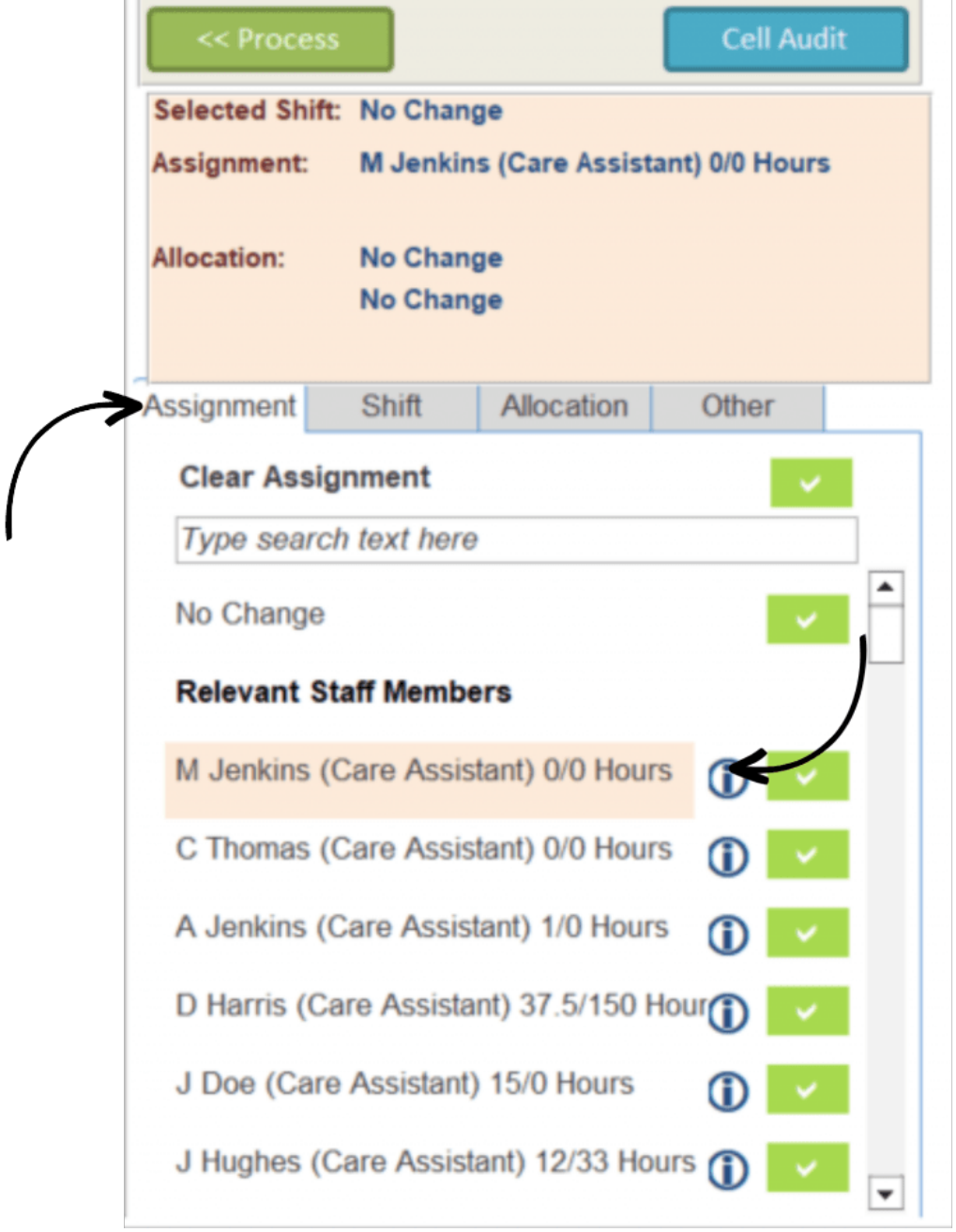


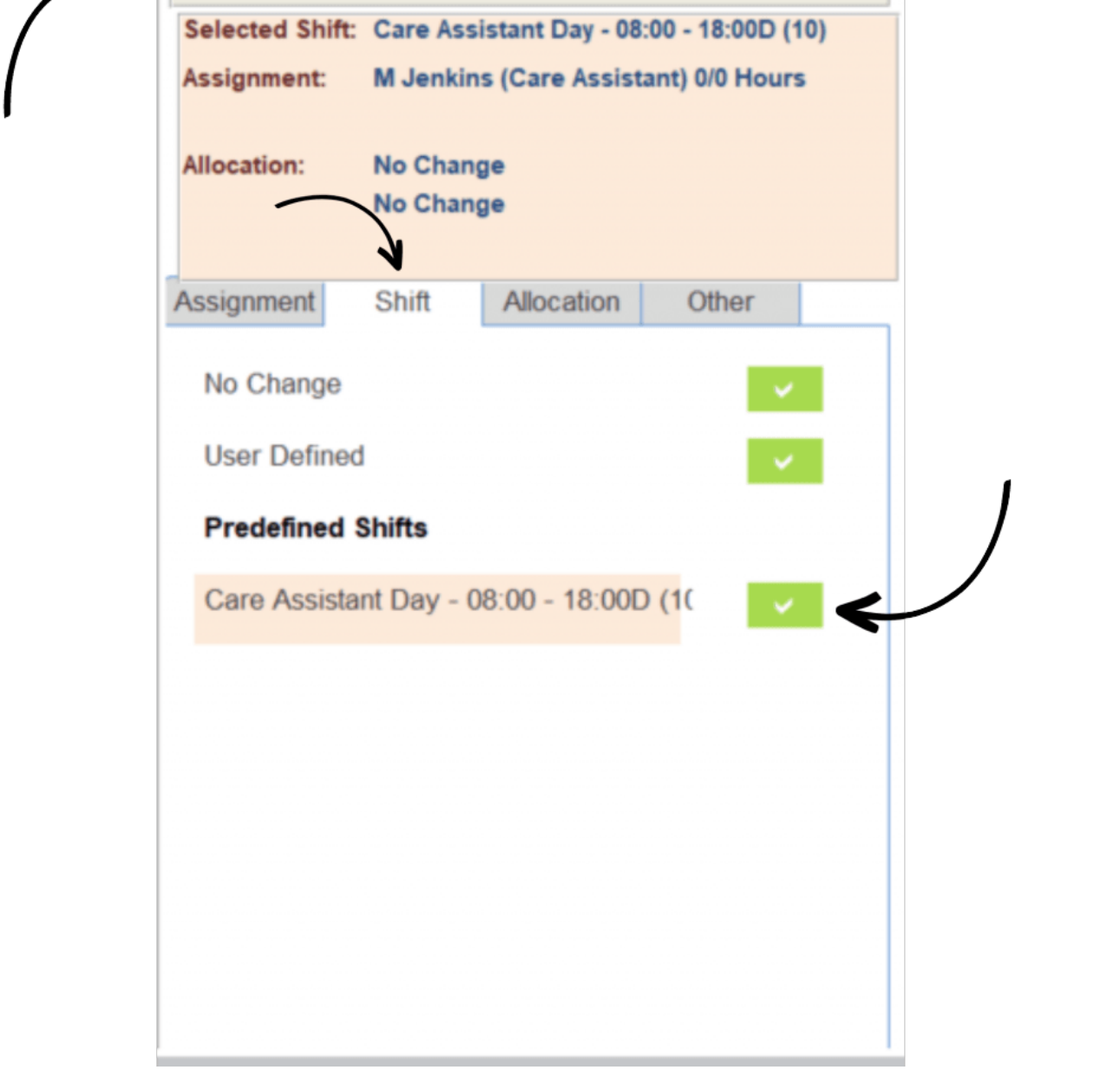
9

Select the shift you wish to assign – it will be highlighted in red, and some new options will appear on the right-hand side of the screen.

10

Under the **Assignment** tab you will be able to see a list of the **Relevant Staff Members**. Select the staff member by clicking the **green tick** on the right side of the staff member's name.


<< Process
Cell Audit
Selected Shift: No Change
Assignment: M Jenkins (Care Assistant) 0/0 Hours
Allocation: No Change
No Change
Assignment
Shift
Allocation
Other
Clear Assignment
Type search text here
No Change
Relevant Staff Members
M Jenkins (Care Assistant) 0/0 Hours
C Thomas (Care Assistant) 0/0 Hours
A Jenkins (Care Assistant) 1/0 Hours
D Harris (Care Assistant) 37.5/150 Hour
J Doe (Care Assistant) 15/0 Hours
J Hughes (Care Assistant) 12/33 Hours

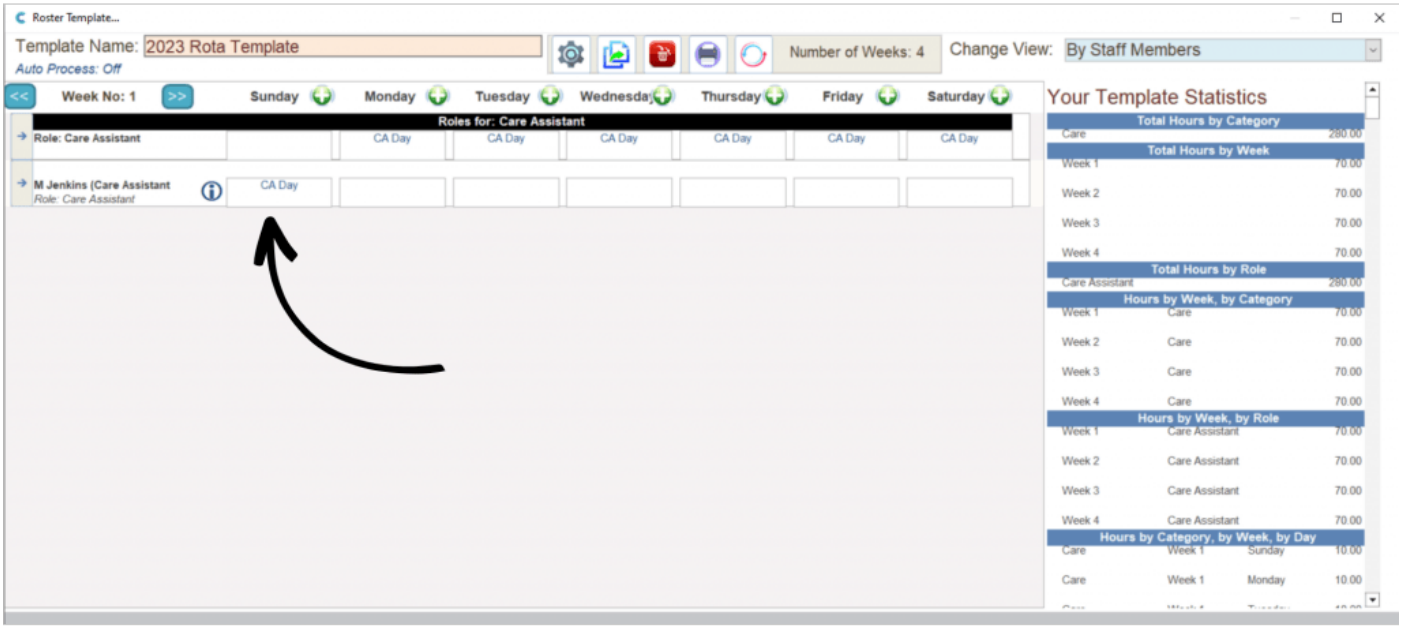


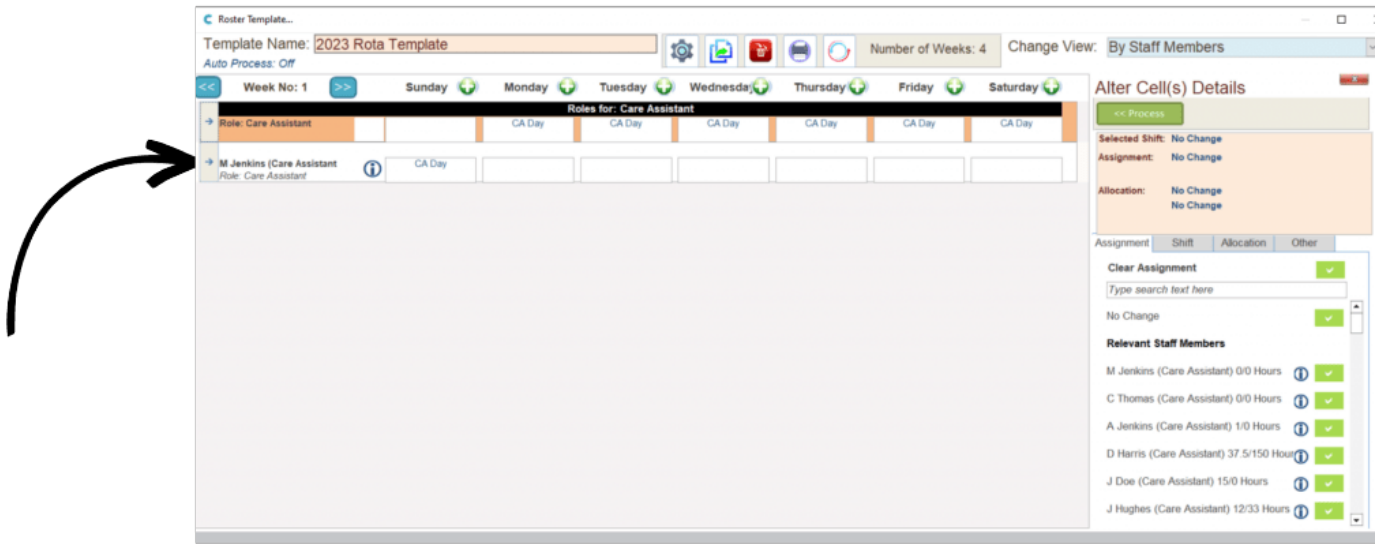
11

Next, navigate to the **Shift** tab. Select the shift time you wish to assign by clicking the **green tick** on the right side of the shift. Finally, press the **Process** button. This will load the information selected onto the shift.

12

As you can see, the shift is now assigned to a staff member.


Roster Template...
Template Name: 2023 Rota Template
Auto Process: Off
Number of Weeks: 4
Change View: By Staff Members
Week No: 1
Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Roles for: Care Assistant
Role: Care Assistant
CA Day
M Jenkins (Care Assistant
Role: Care Assistant
Your Template Statistics
Total Hours by Category
Care 280.00
Total Hours by Week
Week 1 70.00
Week 2 70.00
Week 3 70.00
Week 4 70.00
Total Hours by Role
Care Assistant 280.00
Hours by Week, by Category
Hours by Week, by Role
Hours by Category, by Week, by Day
Care Week 1 Sunday 10.00
Care Week 1 Monday 10.00



13

You can also assign a whole row of shifts at once by pressing the **arrow** on the left-hand side. This will highlight the row. Follow the same steps to assign a staff member and shift time.