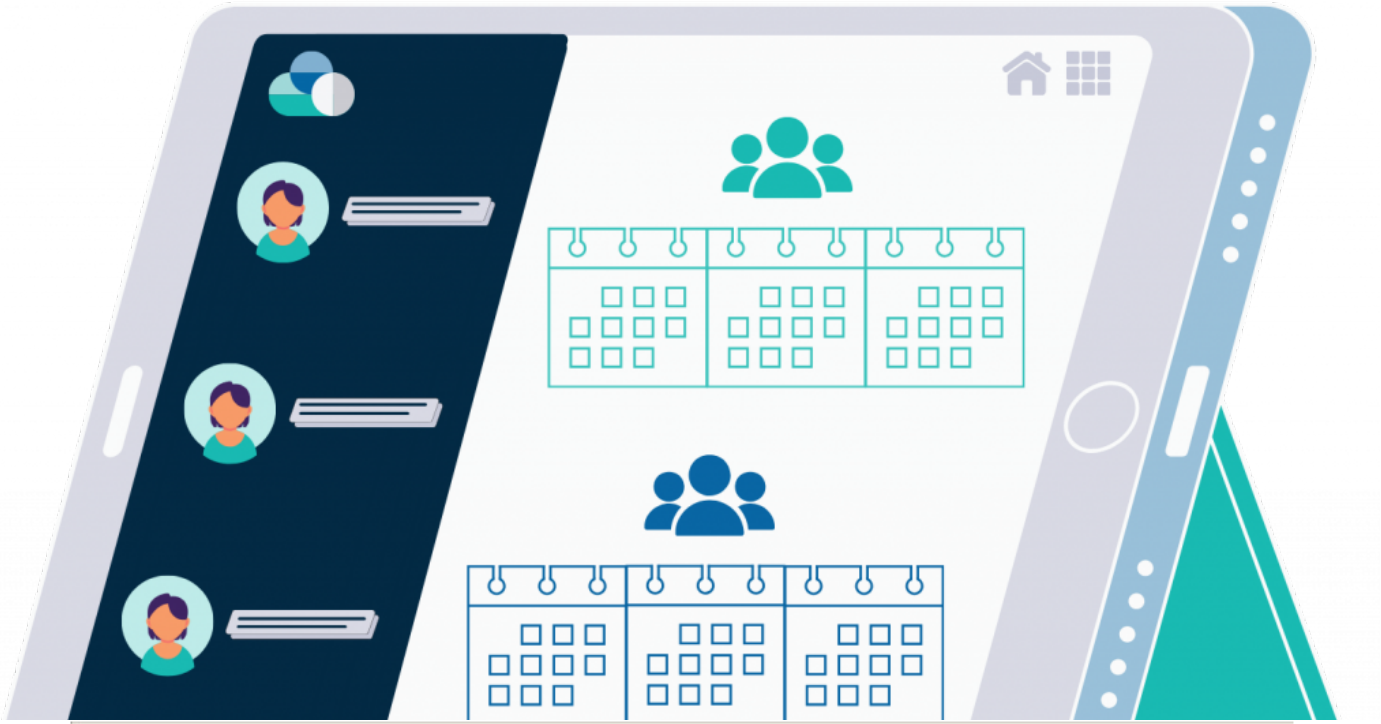
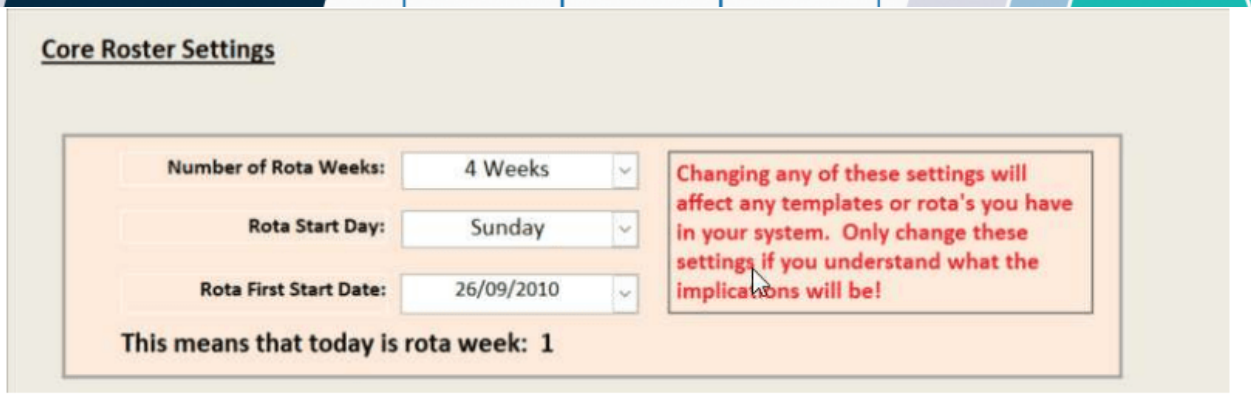
FAQ – Roster Core Settings

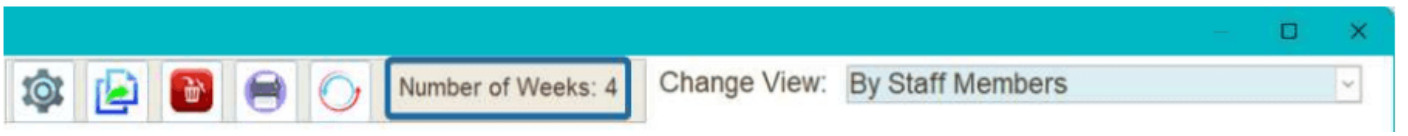
FAQ's · https://cclearninghub.co.uk/docs/faq-roster-core-settings/

FAQ - Roster Core Settings

This guide will cover some of the Core Settings in the Roster System.







1

Number of Rota Weeks:

When creating a new Rota template the number of weeks chosen for this setting will applied. You will be able to see the number in the top right of the template.

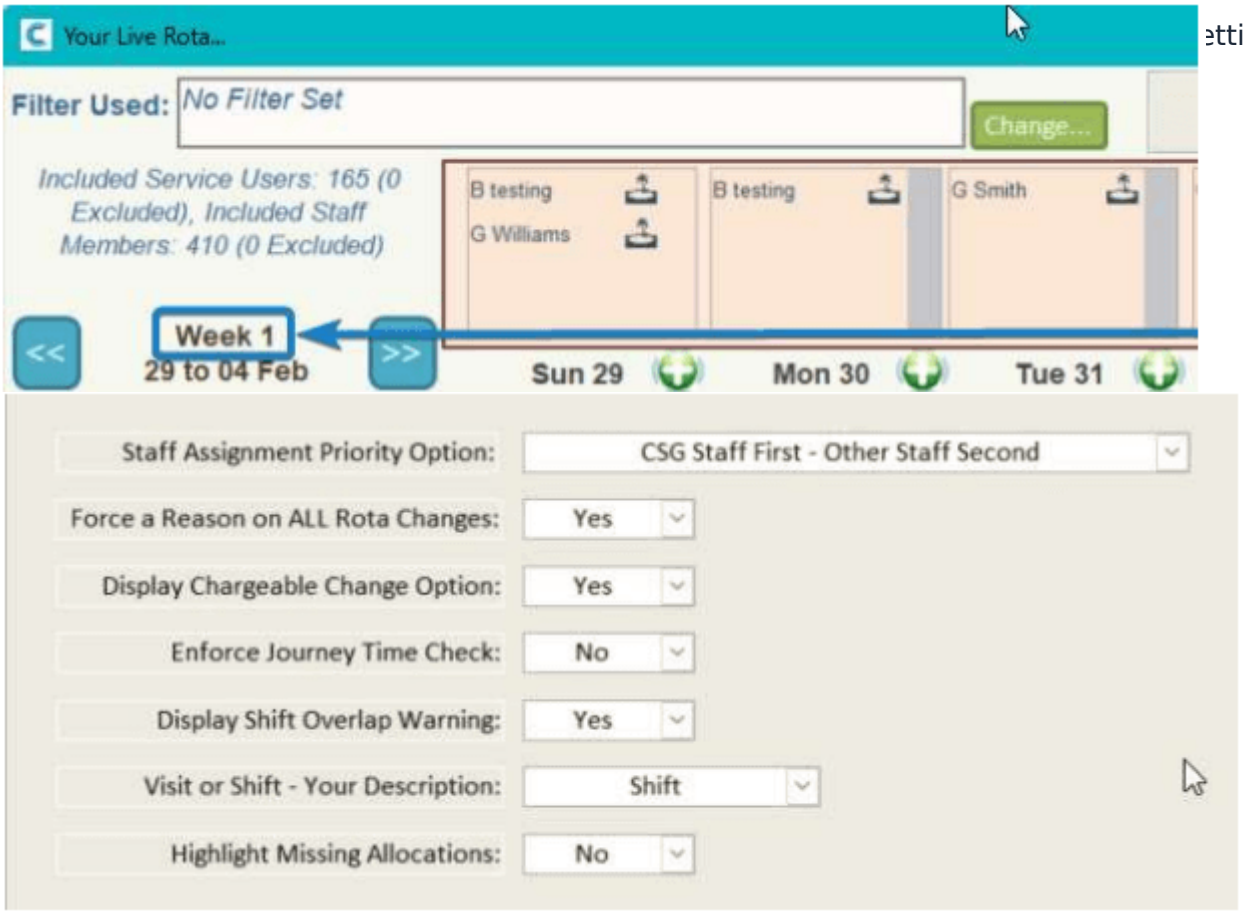
Rota Start Day:

When creating a new Rota template the first day of the week should be the day which corresponds to what was selected in the settings.

2

The date for this setting is irrelevant, it's the 'This means that today is Rota week: 1' which you will want to focus on.

After processing a template you will want to go into the Live Rota and ensure that the week number for todays date corresponds with what's in the setting. If the Week number is not

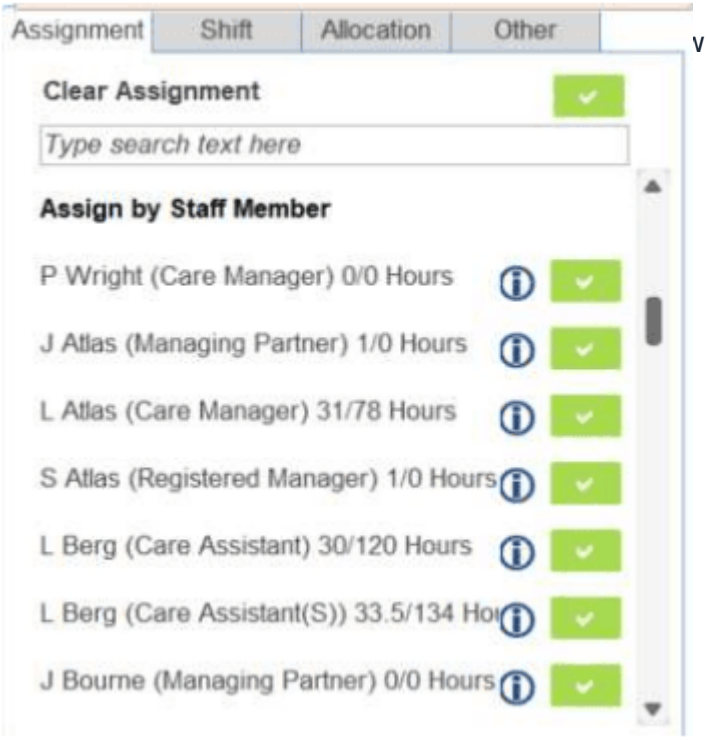


3

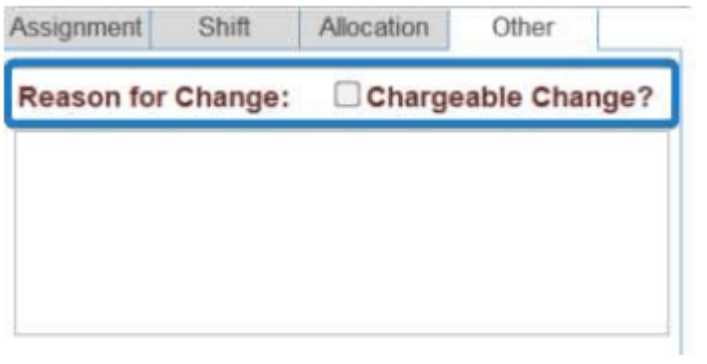
Staff Assignment Priority Options: These are the options available: All Staff – Most Suitable Available First, CSG Staff First – Other Staff Second and Team Members First – Other Staff Second. Changing this setting will determine the order in which the staff are displayed when assigning a shift on a Rota.

Force a Reason on ALL Rota changes:
If set to Yes – when making a change on the live Rota it should ask you to put a description in of why you are making that change

4



which the staff are displayed when assigning a



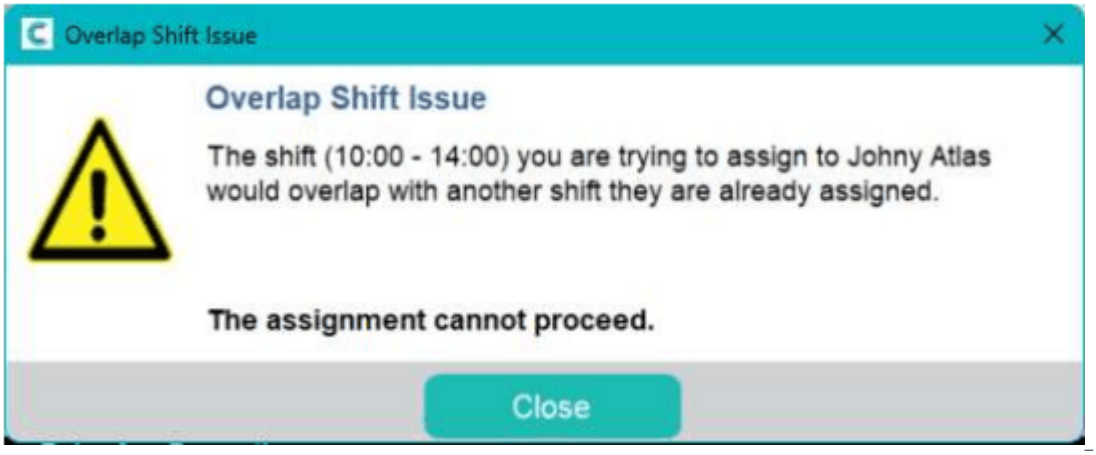
5

Display Chargeable Change Option:

If set to Yes – the option to check Chargeable Change will be displayed.



ney time is not sufficient.



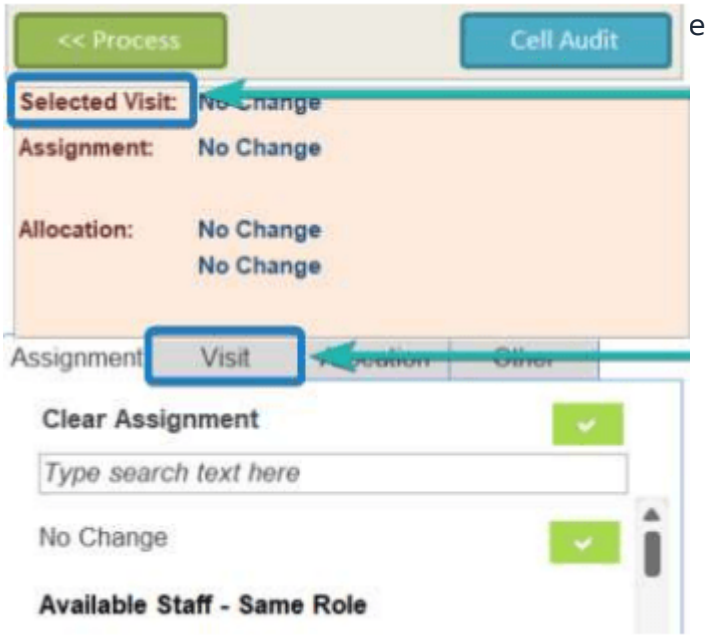
7

Change the Display Shift Overlap Warning option:

If set to Yes – when a shift overlaps into another shift a warning will be displayed. If set to No – the overlap will be ignored and process as per normal.

8

Visit Or Shift – Your Description: The selected option will determine what is displayed to describe the staffs working hours. When going into the Live Rota and adding on a new visit/shift



ent and at the top where it says ‘Selected’ will



9

Highlight Missing Allocations:

If set to Yes – Any shifts that have not been allocated should be highlighted on the live Rota.

10

Support Multi-Active Templates:

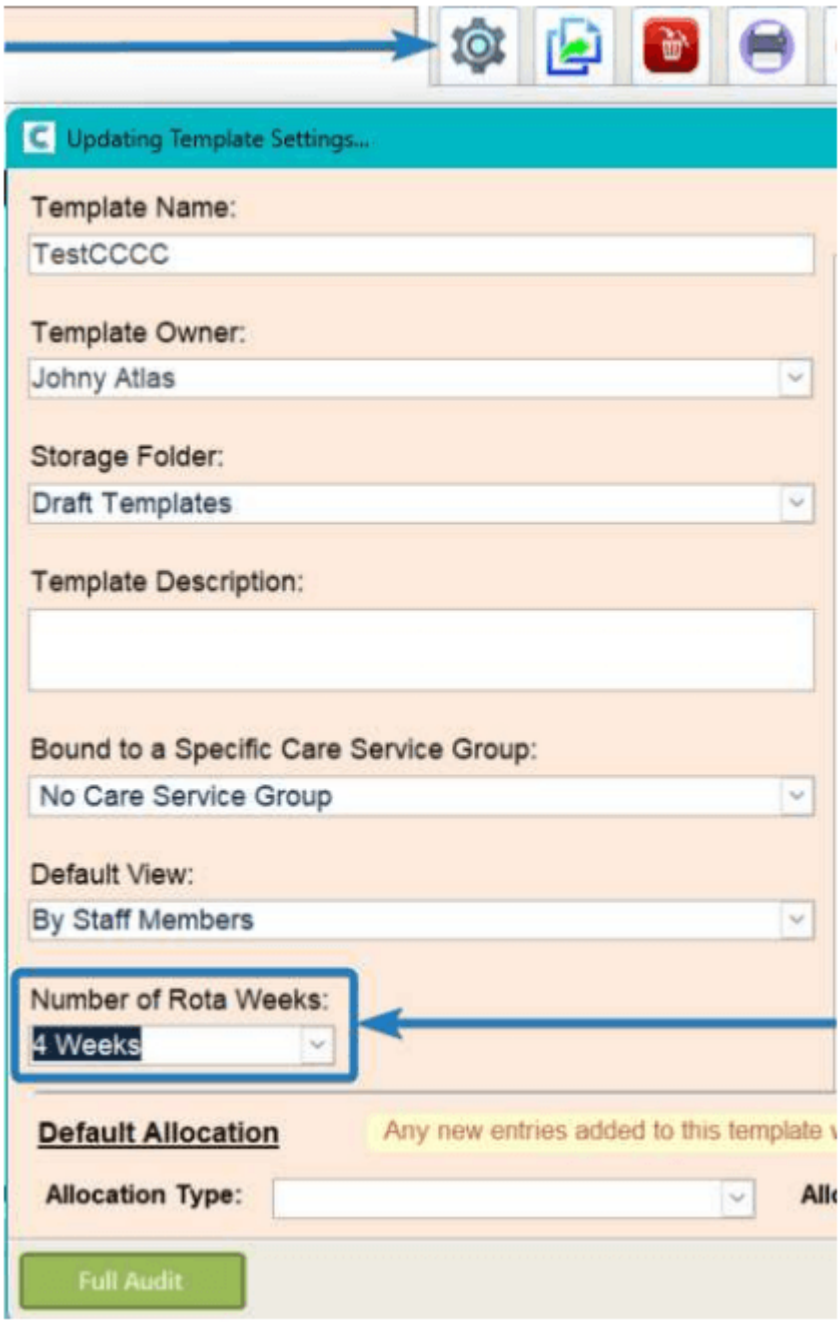
If set to Yes – you will be able to process more than one template and have them both active on the Live Rota.

Variable Weeks for Templates: If set to Yes – if you have more than one template but don’t want them all to have the same number of weeks, this setting allows for each template to have a different number of weeks.

In order to change the number of weeks for a specific template go into the template > cog icon > a drop down will be available at the bottom ‘Number of Rota Weeks’ > change the number from the selection > Update Changes.

Please note that when this setting is set to Yes you will not be able to see the Rota week numbers displayed in the Live Rota.

Processing Frequency: The number of days selected for this setting will affect how often the template continues to auto process after the amount of weeks which have already been processed.
(e.g. if you select Every Day, the template will move on a day every day which actually passes).
Maximum Future Target:The number of days selected will affect how far in advance you will be able to process the templates for.


Updating Template Settings...
Template Name:
TestCCCC
Template Owner:
Johny Atlas
Storage Folder:
Draft Templates
Template Description:
Bound to a Specific Care Service Group:
No Care Service Group
Default View:
By Staff Members
Number of Rota Weeks:
4 Weeks
Default Allocation
Any new entries added to this template
Allocation Type:
Full Audit


Updated Visit: 08:00 - 20:00 (12 Hours)
Treatment of any Residual Hours?:
Lose Residual Hours
Mark as "No Allocation" Required
Mark as "Not Required"
Journey Plan >>
Staff Absence
Client Absence
Smart Board >>
Reason for Change:
Chargeable Change?

11

Show Journey Planner: If set to Yes – when selecting a shift on the Live Rota the option to select Journey Planner from the Quick Adjustment board will be available.

Default Journey Start: The option selected will be applied to the Journey plan start location.

Default Journey End: The option selected will be applied to the Journey plan end location.

Round First Mile:If the first mile is a value such as 0.8 then it will be rounded up to 1.

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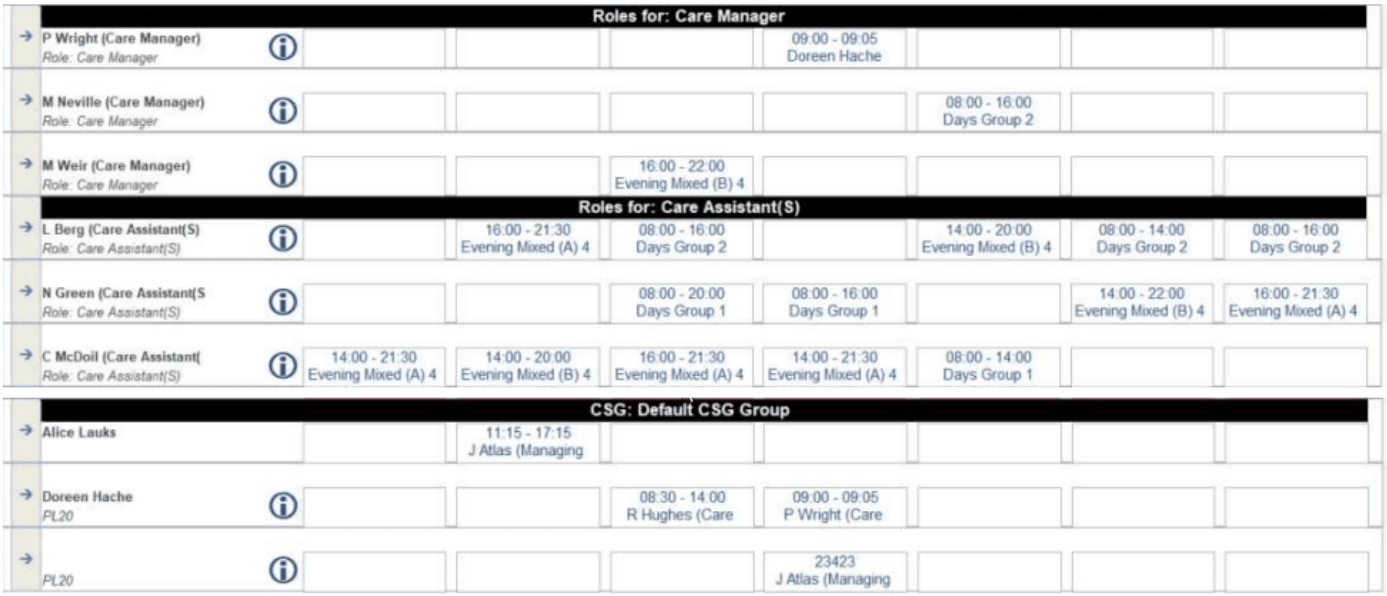
Group By Target Role



13

Group By Staff – Staff View Grouping Option:When the view for the Live Rota is set to By Staff Members the Group By Target Role setting will take affect, when set to By Service User, the Group by Staff setting will take affect.

14

Select a shift which needs to be covered.



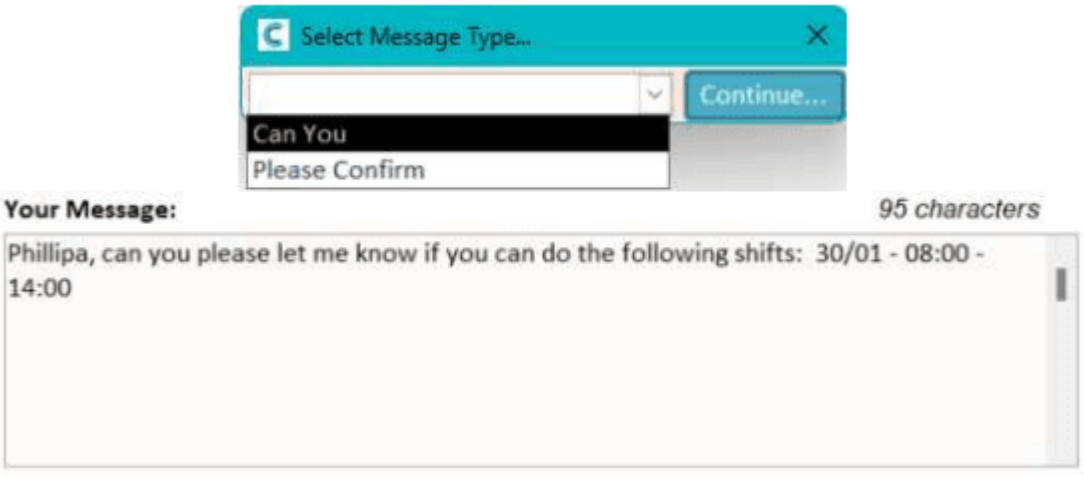


15

On the Alter Existing Hours board to the right select the ‘i’ icon next to a staff member > Message About Shift

16

Here you can select the message type > the message template will then be applied where the staff name and shifts appear.



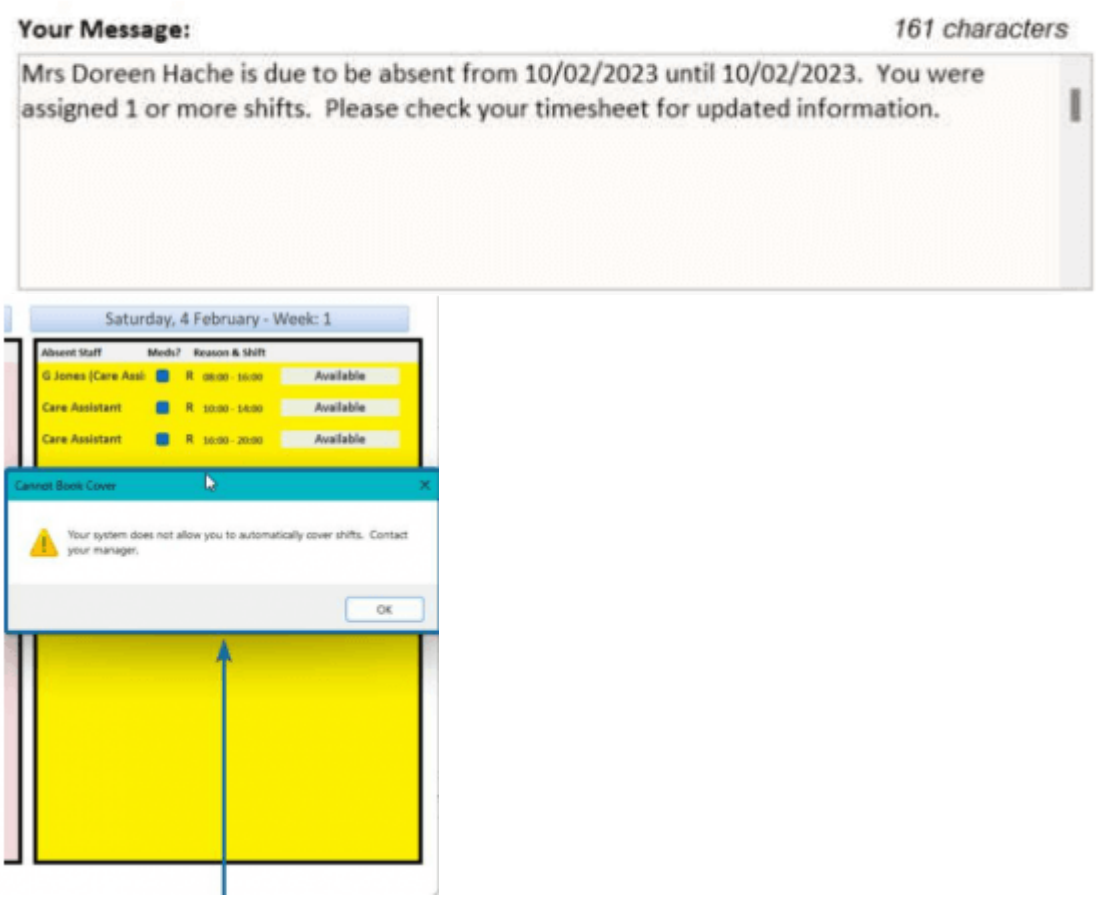


17

Select Client Absence > Fill out the details > Check Send message to affected staff

18

The option to send a message will only appear if staff are affected by the client absence. The message template will then be applied where the client name and start and end date appears.



19

Allow Auto Cover of Shifts:

If set to Yes – when a staff member selects a shift to cover they will automatically be accepted.

If set to No – when a staff member selects a shift to cover a warning message will be displayed explaining that shifts cannot be automatically covered, contact your manager.

Maximum Data View:

The number of days chosen will determine how far in advance staff can view the Live Rota.

Hide Staff Names on CC Pocket:

If set to Yes – staff names will not be displayed when viewing the Staff Rota in Pocket.