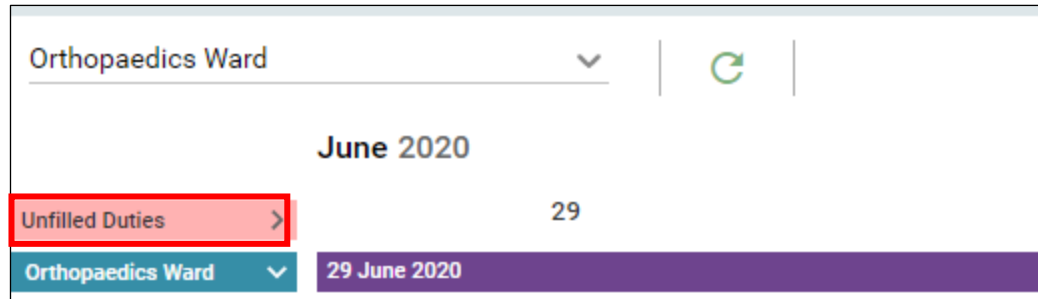


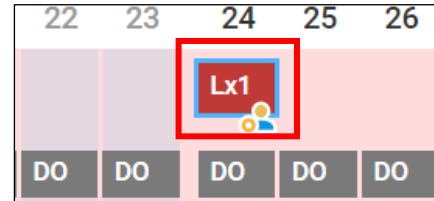
# HealthRoster – Assign Temp Staff

How to video: <https://vimeo.com/460677199/18a70ea01d>

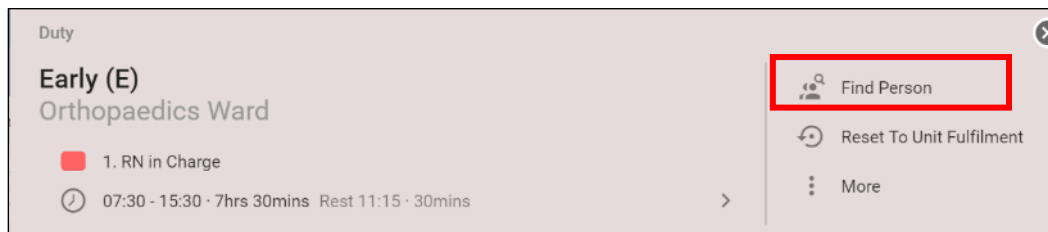
1  
Navigate to the roster and select **Unfilled Duties** to view the unfilled duties that have been sent to Bank or Agency.



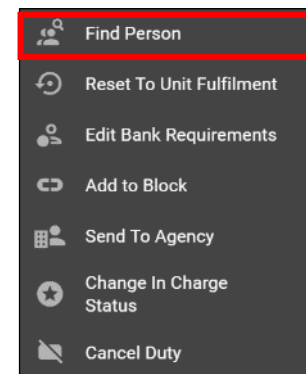
2  
Select the **duty** to be filled.



3  
Double click/tap the duty to open the duty panel. Select **Find Person**.



4  
Alternatively, right click on the duty and select **Find Person**.

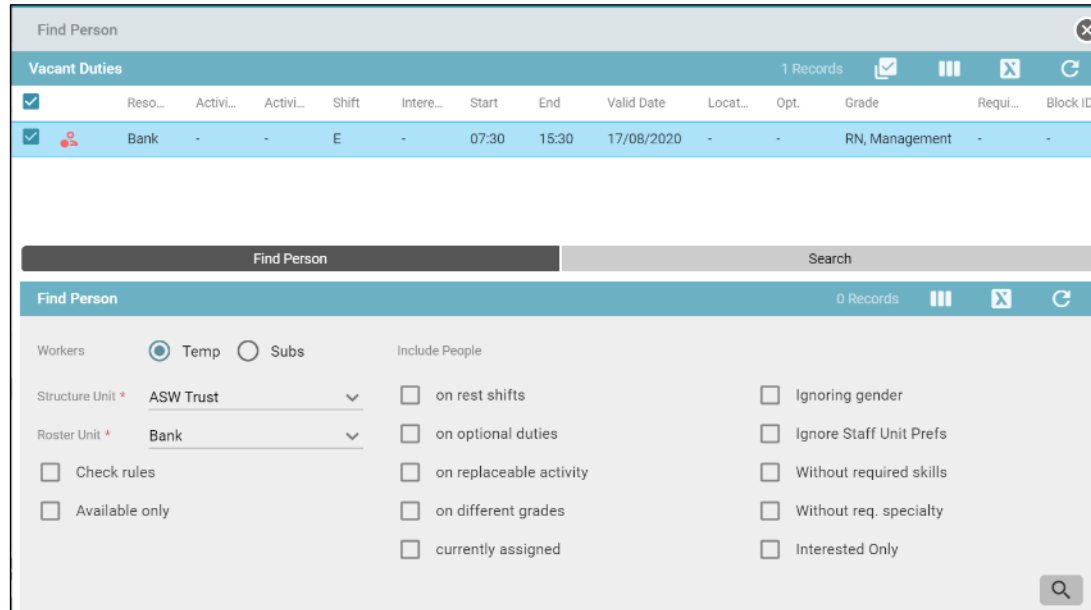


# HealthRoster – Assign Temp Staff

5

The **Find Person** panel will open, and two modes of searching is available.

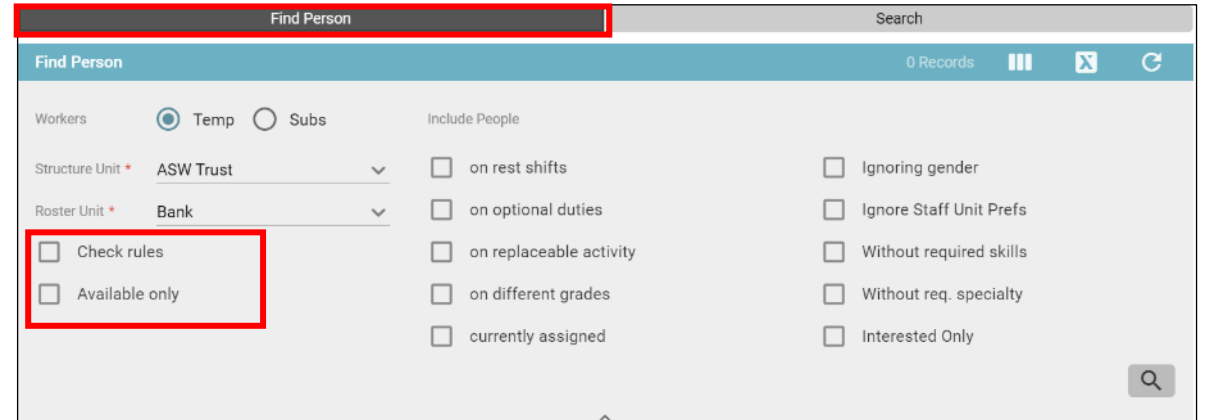
- 1) Find person, to run a search for find a matching person
- 2) Search, to assign someone you already know you want to assign the duty to



6

The **Find Person** function as highlighted below can be used to do a general search for staff that meet the criteria for the shift.

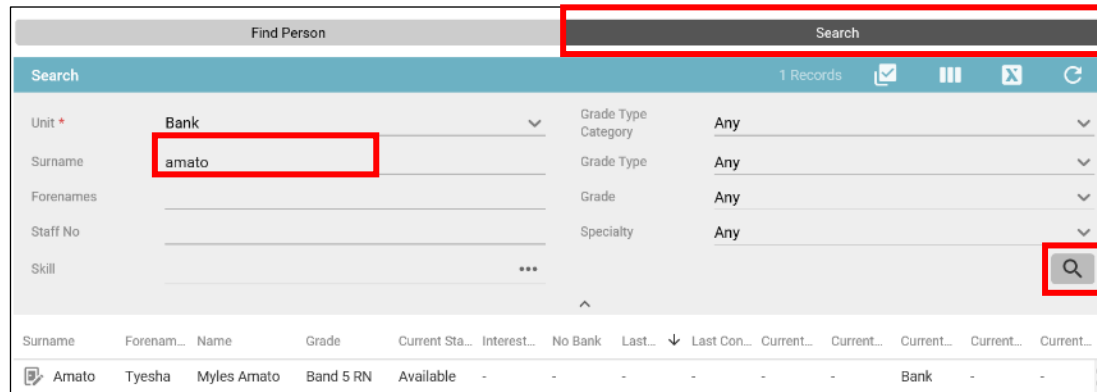
- Use the **Available Only** tick-box so that only those staff who are free to cover the shift will be returned.
- Using the **Check Rules** tick-box will also ensure that only those staff who are compliant will be returned.



# HealthRoster – Assign Temp Staff

7

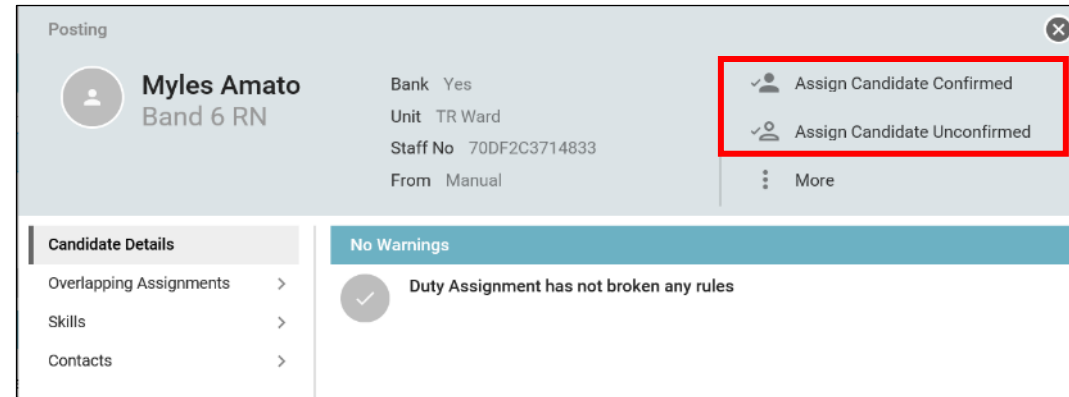
If you know who you want to assign the duty to, select the **Search** panel and enter the specific **Person Search Criteria** and select the **Find** icon



8

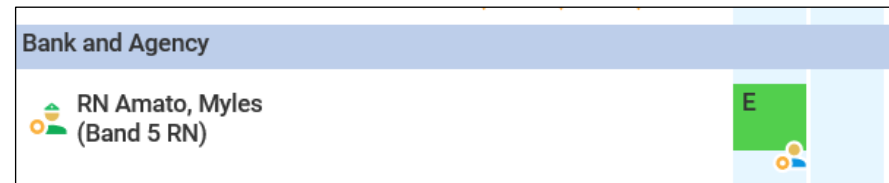
Select the person record and in the person panel, there will be the option to Assign Candidate.

- Assign Candidate Confirmed will directly book the staff member onto the shift.
- Assign Candidate Unconfirmed will provisionally book them into the shift, subject to a further confirmation action.



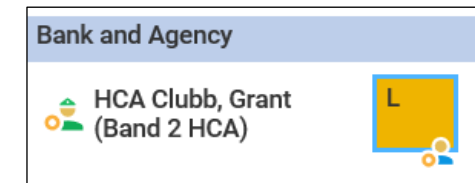
9

Selecting Assign Candidate Confirmed will allocate the duty as a green duty under **Bank and Agency** on the roster.



10

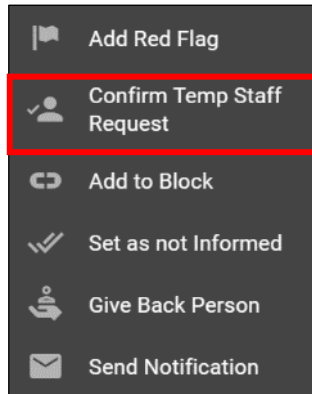
Selecting Assign Candidate Unconfirmed will allocate the duty as a yellow duty under **Bank and Agency** on the roster.



# HealthRoster – Assign Temp Staff

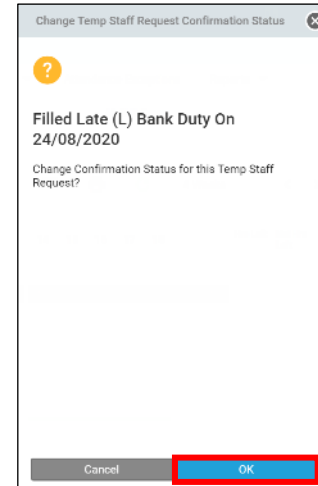
11

To confirm an unconfirmed duty, right click and select **Confirm Temp Staff Request**.



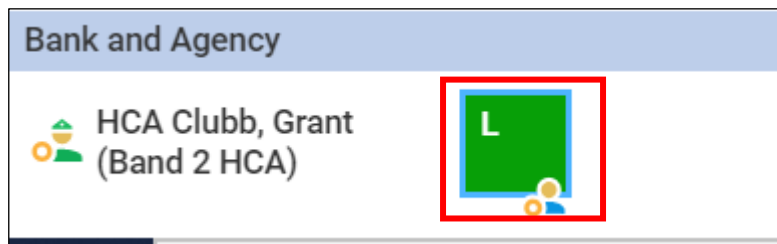
12

The below message will appear. Select **OK**.



13

The shift now appears on the roster as confirmed



# HealthRoster – Assign Temp Staff

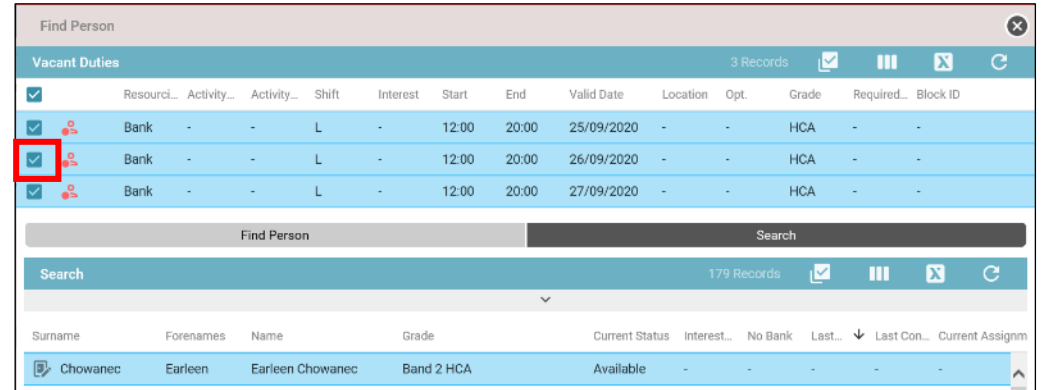
14

Multiple duties can be selected and assigned at the same time by pressing & holding the **CTRL** key and choosing your duty selection



15

In instances where multiple duties have been selected, the same employee can be assigned to the entire selection by using the tick-boxes next to the listed duties, and following the previous steps



16

The selected person will appear as assigned to the selected shifts on the roster under the Bank and Agency team

