

Assigning Duties to external staff

All shifts that have been worked in your Dept / Ward will need recording on Healthroster for audit purposes

- 1) Find the shift in the vacant duties you want to assign, right click on the shift to amend the times first to reflect the working hours

The screenshot shows the Healthroster interface. On the left, a grid displays shifts for Monday 08, Tuesday 09, and Wednesday 10. A context menu is open over a shift on Tuesday 09, listing options such as 'Delete Duty', 'Send Notification', 'Change Team', 'Adjust Times', 'View Notes', 'Add Notes', 'Move Demand', 'Change Cost Centre', and 'Change Location'. On the right, the 'Adjust Times' dialog box is open, showing details for a 'Vacant Late (L) Duty On 09/03/2021'. The dialog includes fields for 'Planned Start' (15:30), 'Planned End' (21:00), 'Rest Time' (00:30), and 'Planned Work Time' (05:00). There are also dropdown menus for 'Duty Change Reason' and 'Duty Note'. At the bottom of the dialog are 'Cancel' and 'OK' buttons.

- 2) You then need to right click on the shift again and choose option 'Find Person'.

This screenshot shows the Healthroster interface for Wednesday 10 and Thursday 11. A context menu is open over a shift on Wednesday 10, listing options such as 'Send To Bank', 'Find Person', 'Change In Charge Status', 'Cancel Duty', 'Split Demand', 'Copy Demand', 'Cancel Demand', 'Create Additional Duty', and 'Add Red Flag'.

- 3) In the pop-up box, you will then need to select the 'search' tab, choose the substantive unit from the drop down box, type in the employee's surname and click find.

The screenshot shows a 'Find Person' window with two tabs: 'Vacant Duties' and 'Search'. The 'Vacant Duties' tab is active, displaying a table with columns: Resourcing Org Unit, Activity, Shift, Interest, Start, End, Valid Date, Location, Opt., Grade, Required, and Block ID. Two records are shown for 'Mitchinson Ward' with a shift of 'E' and grade of 'RN'. Below the table is a search form with fields for Unit (set to 'Mitchinson Ward'), Surname, Forenames, Staff No, and Skill. There are also dropdown menus for Grade Type Category, Grade Type, Grade, and Specialty, all set to 'Any'. A search button is located at the bottom right of the search form.

- 4) Once found, click on the name and click 'assign candidate' at the top right hand corner of the box. This will then assign the shift to the employee you have chosen and will appear at the bottom of the roster under 'external staff'.

The screenshot shows a 'Posting' window for 'Dorothy Stephens RN Band 6'. The window displays her profile information: Bank No, Unit Mitchinson Ward, Staff No TEMP_BLOGGSDOT, and From Unknown. A dropdown menu is open, showing options: 'Assign Candidate' (highlighted with an orange box), 'Assign and Close', and 'More'. Below the profile information is a 'Candidate Details' section with links for Overlapping Assignments, Skills, Contacts, Availability, and Unit Preferences. To the right, a 'No Warnings' section shows a green checkmark and the message 'Duty Assignment has not broken any rules'.

- 5) If the staff member will be remaining with you for any length of time, you should now be able to find them in 'external staff' and drag and drop shifts to them like you would with your other substantive staff members. It is better to do this in a 2 week view as otherwise they will disappear weekly from the roster.