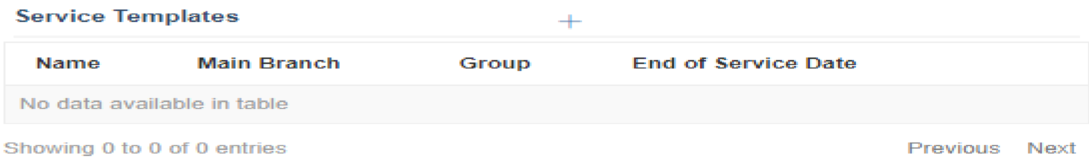
SD – Brevity Service Engagement Coordinator - Rostering

Content

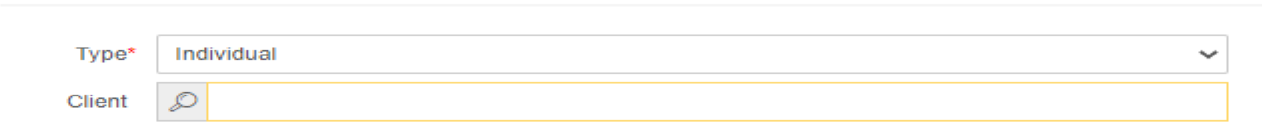
Creating a New Clients Shift

To create a new client shift through the **Service Template** icon located on the clients panel within the schedule board follow the steps below:

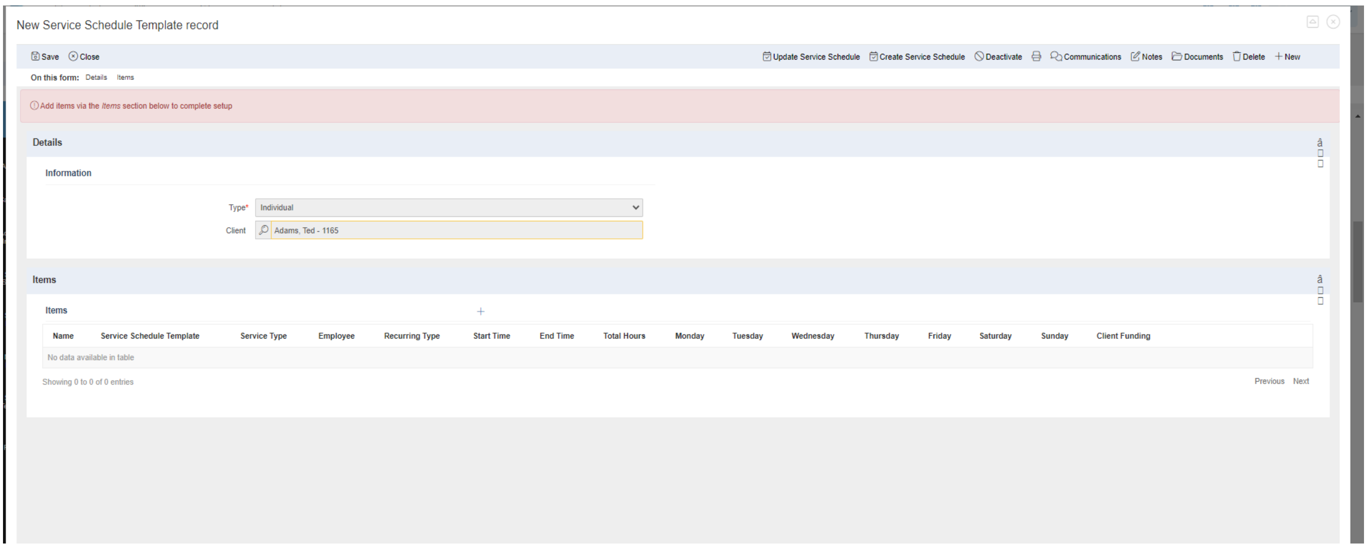
1. Click on the **+** New button to create a new Service Template



2. From the Type field either accept the default of Individual or click in the field and select Group from the drop-down list.



3. Click **Save**
4. Click on the **+** New button to create



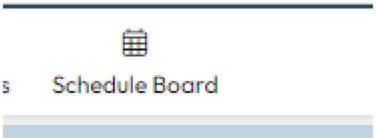
5. Fill out all the information for the new Service Schedule

6. Click on the **Save** button

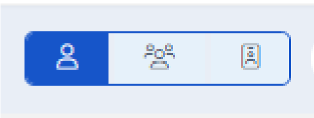
Creating a new shift for an existing client

To create a new shift for an existing client, follow the steps below:

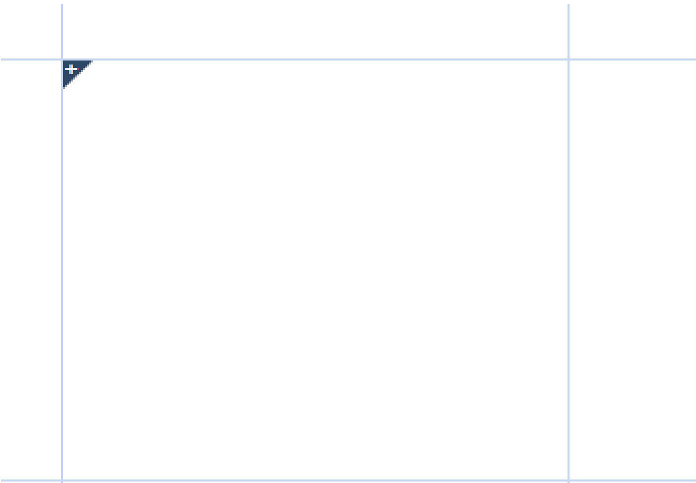
1. Click on the **Schedule Board** icon



2. Select the **Person** icon in the left top corner to show the all clients

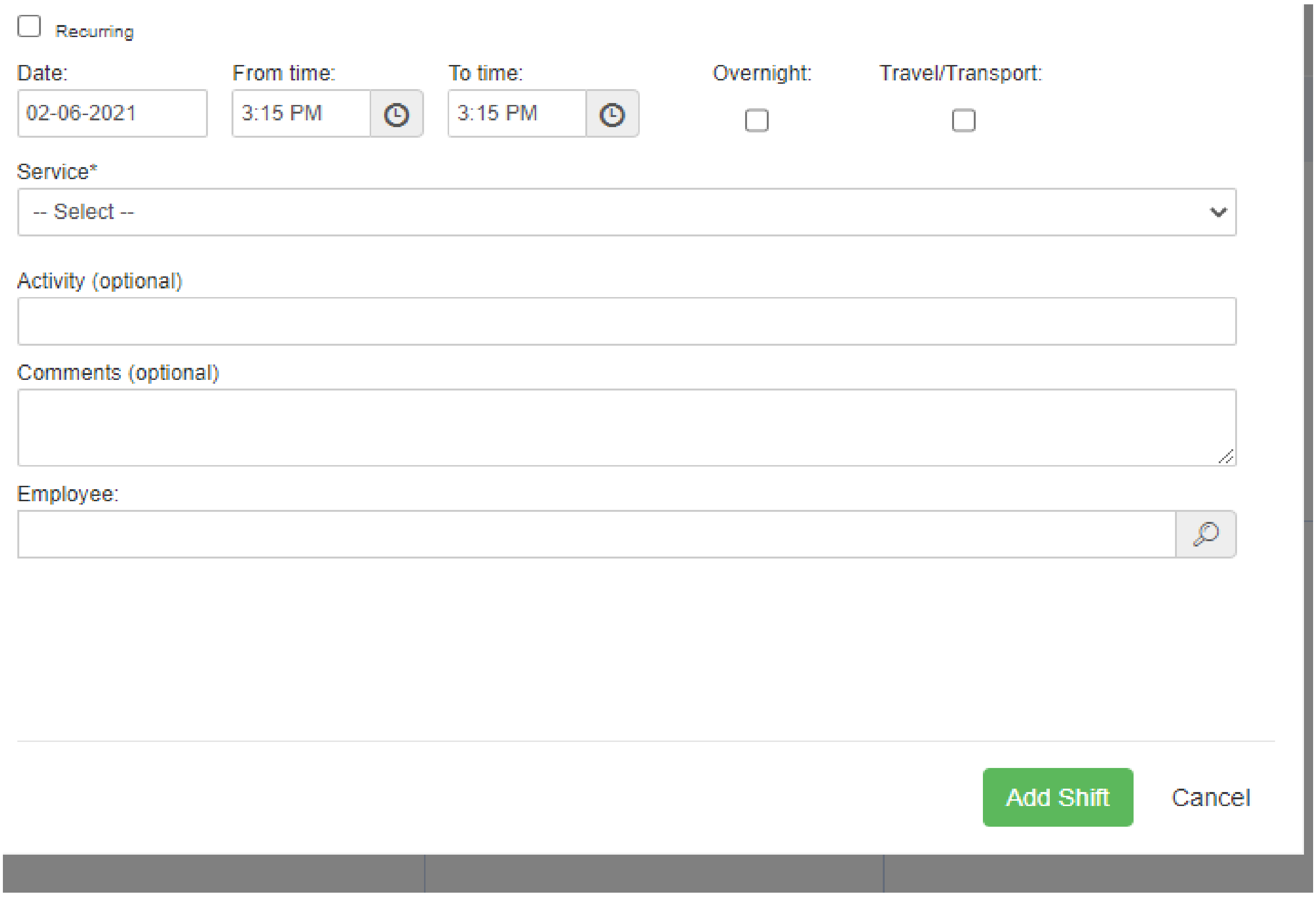


3. Select the date on the calendar that the shift is required, in the top corner of the date box click on the **+** button



4. Within the date field complete the date that the shift is to occur

5. Within the from time field complete the time the shift is to commence
6. Within the to time field complete when the shift is to be completed
7. Within the Service field select what service is required from the drop-down list
8. Within the Activity field complete what activity is required
9. Within the comments field, type in any comments if required
10. Within the employee field select employee to attend the shift from the drop-down list
11. Click on the **Add Shift** button

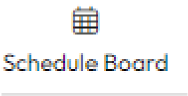


Editing Clients Shifts

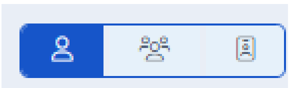
Following the steps below you will be able to edit the clients shift including reassigning the shift to another Life Skills Officer (LSO), cancel the shift, change the shift start and/or end time, change the day of shift and complete the selected shift.

To find and edit a shift, follow the steps below:

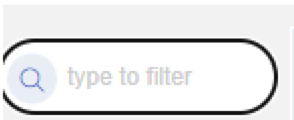
1. Select the **Schedule Board** Icon



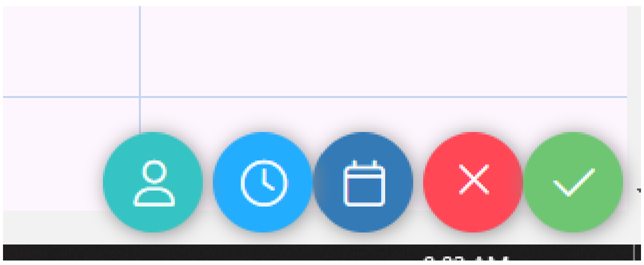
2. Select the **Person** icon in the left top corner to show the all clients



3. Scroll down the side panel to find the client or use the search bar and type in the client's name



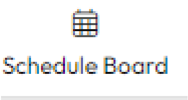
4. Click on the shift you want to edit, the below icons will appear in the bottom right side of the screen



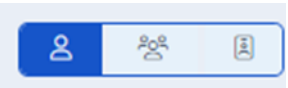
Bulk Cancel

Bulk cancel is a feature where you can cancel several shifts at once. To do this, follow the steps below:

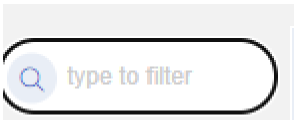
1. Select the **Schedule Board** Icon



2. Select the **Person** icon in the left top corner to show the all clients



3. Scroll down the side panel to find the client or use the search bar and type in the client's name



4. Select the calendar icon under the client's name, this will bring up all the shifts scheduled for the client

id	Name	Type	Employees	Status	Weekday	Start Day	Time From	Time To	Total Hours	Group	Created By
1743	Bannister, Paul - 0249 - SUPPORT - Financial intermediary monthly processing - 2021-06	Individual		Completed	Tue	01-06-2021	00:00 AM	00:00 AM	0.00		
5347	Bannister, Paul - 0249 - Access Community, Social And Rec Activities - Standard - TTP - Fri, 4-Jun-2021	Individual	Molnar, Peter	Scheduled	Fri	04-06-2021	10:00 AM	14:15 PM	4.25		Matthews, Wendy
8974	Bannister, Paul - 0249 - Access Community, Social And Rec Activities - Standard - TTP - Sat, 5-Jun-2021	Individual	Bullard, Sharon	Scheduled	Sat	05-06-2021	09:30 AM	11:30 AM	2.00		Matthews, Wendy
5348	Bannister, Paul - 0249 - Access Community, Social And Rec Activities - Standard - TTP - Fri, 11-Jun-2021	Individual	Molnar, Peter	Scheduled	Fri	11-06-2021	10:00 AM	14:15 PM	4.25		Matthews, Wendy
8975	Bannister, Paul - 0249 - Access Community, Social And Rec Activities - Standard - TTP - Sat, 12-Jun-2021	Individual	Bullard, Sharon	Scheduled	Sat	12-06-2021	09:30 AM	11:30 AM	2.00		Matthews, Wendy
5349	Bannister, Paul - 0249 - Access Community, Social And Rec Activities - Standard - TTP - Fri, 18-Jun-2021	Individual	Molnar, Peter	Scheduled	Fri	18-06-2021	10:00 AM	14:15 PM	4.25		Matthews, Wendy
8976	Bannister, Paul - 0249 - Access Community, Social And Rec Activities - Standard - TTP - Sat, 19-Jun-2021	Individual	Bullard, Sharon	Scheduled	Sat	19-06-2021	09:30 AM	11:30 AM	2.00		Matthews, Wendy
5350	Bannister, Paul - 0249 - Access Community, Social And Rec Activities - Standard - TTP - Fri, 25-Jun-2021	Individual	Molnar, Peter	Scheduled	Fri	25-06-2021	10:00 AM	14:15 PM	4.25		Matthews, Wendy
8977	Bannister, Paul - 0249 - Access Community, Social And Rec Activities - Standard - TTP - Sat, 26-Jun-2021	Individual	Bullard, Sharon	Scheduled	Sat	26-06-2021	09:30 AM	11:30 AM	2.00		Matthews, Wendy
5351	Bannister, Paul - 0249 - Access Community, Social And Rec Activities - Standard - TTP - Fri, 2-Jul-2021	Individual	Molnar, Peter	Scheduled	Fri	02-07-2021	10:00 AM	14:15 PM	4.25		Matthews, Wendy
8978	Bannister, Paul - 0249 - Access Community, Social And Rec Activities - Standard - TTP - Sat, 3-Jul-2021	Individual	Bullard, Sharon	Scheduled	Sat	03-07-2021	09:30 AM	11:30 AM	2.00		Matthews, Wendy
5352	Bannister, Paul - 0249 - Access Community, Social And Rec Activities - Standard - TTP - Fri, 9-Jul-2021	Individual	Molnar, Peter	Scheduled	Fri	09-07-2021	10:00 AM	14:15 PM	4.25		Matthews, Wendy
8979	Bannister, Paul - 0249 - Access Community, Social And Rec Activities - Standard - TTP - Sat, 10-Jul-2021	Individual	Bullard, Sharon	Scheduled	Sat	10-07-2021	09:30 AM	11:30 AM	2.00		Matthews, Wendy
5353	Bannister, Paul - 0249 - Access Community, Social And Rec Activities - Standard - TTP - Fri, 16-Jul-2021	Individual	Molnar, Peter	Scheduled	Fri	16-07-2021	10:00 AM	14:15 PM	4.25		Matthews, Wendy
8980	Bannister, Paul - 0249 - Access Community, Social And Rec Activities - Standard - TTP - Sat, 17-Jul-2021	Individual	Bullard, Sharon	Scheduled	Sat	17-07-2021	09:30 AM	11:30 AM	2.00		Matthews, Wendy
5354	Bannister, Paul - 0249 - Access Community, Social And Rec Activities - Standard - TTP - Fri, 23-Jul-2021	Individual	Molnar, Peter	Scheduled	Fri	23-07-2021	10:00 AM	14:15 PM	4.25		Matthews, Wendy
8981	Bannister, Paul - 0249 - Access Community, Social And Rec Activities - Standard - TTP - Sat, 24-Jul-2021	Individual	Bullard, Sharon	Scheduled	Sat	24-07-2021	09:30 AM	11:30 AM	2.00		Matthews, Wendy
10129	Bannister, Paul - 0249 - SUPPORT - Financial intermediary monthly processing - 2021-07	Individual		Completed	Fri	30-07-2021	00:00 AM	00:00 AM	0.00		Barnes, David
5355	Bannister, Paul - 0249 - Access Community, Social And Rec Activities - Standard - TTP - Fri, 30-Jul-2021	Individual	Molnar, Peter	Scheduled	Fri	30-07-2021	10:00 AM	14:15 PM	4.25		Matthews, Wendy
8982	Bannister, Paul - 0249 - Access Community, Social And Rec Activities - Standard - TTP - Sat, 31-Jul-2021	Individual	Bullard, Sharon	Scheduled	Sat	31-07-2021	09:30 AM	11:30 AM	2.00		Matthews, Wendy

5. Click on the shifts you want to cancel and click **Bulk cancel** it will have a confirmation pop up.
6. Click **Ok** to confirm

Available Shifts

This page will let you check shifts that do not have an employee assigned to that service schedule. You can cancel, change time and assign an employee on that shift. Move the mouse on the Employees from the Main Menu and then click on **Available Shifts** from the sub menu to go to this page.

Availability Search

This section allows you to search for employees that are available for a specific date by setting conditions. To go to this page, click **Employees** then click **Availability** search. You can search for the available employee by using the search field and setting the conditions for the employee. Click **Search** to search for an employee that has those conditions. Once the condition is met, it will list all the available employee.

It will display all the list of employees from the table.

1. The top tab indicates the time for the day.
2. The left side list all the employees that matches the search fields.
3. The blue bar indicates that the employee has a shift from the time period.

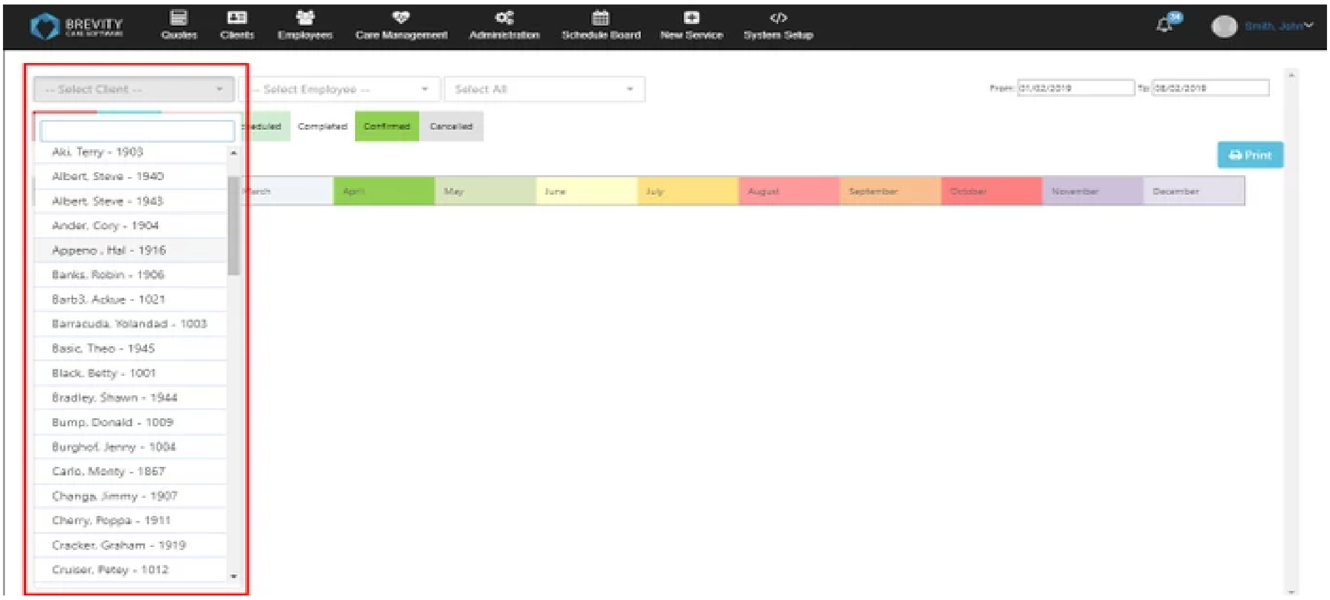
If you move the mouse over the blue bar, it will show the details of the shift. The detail will show the name of the client, service type of the schedule and the date of the service schedule.

Employee Service Calendar

This section allows you to view the services of the client for a specific date(s) and print the schedule. To go to this page, click on **Employees** then click on **Service Calendar**. You can use several options/fields to display the client's service calendar.

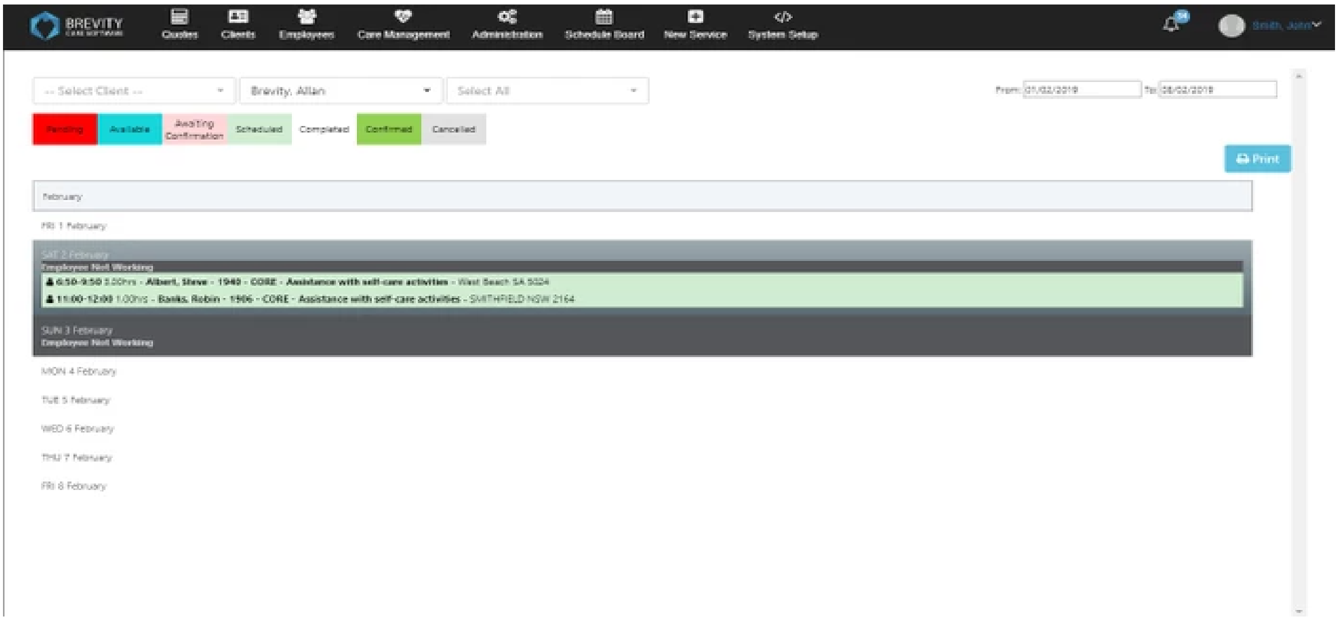
The calendar will display the list of schedules for the client. You will notice that each service schedule has a different colour background. The background colour indicates the status of the service schedule. The status colour coding that can be found under the drop-down shows what is the status of the service schedule.

You can display the service schedule of the client using the client drop down. Select a client from the drop down then specify the date so the table could show the service schedule for the specified dates.



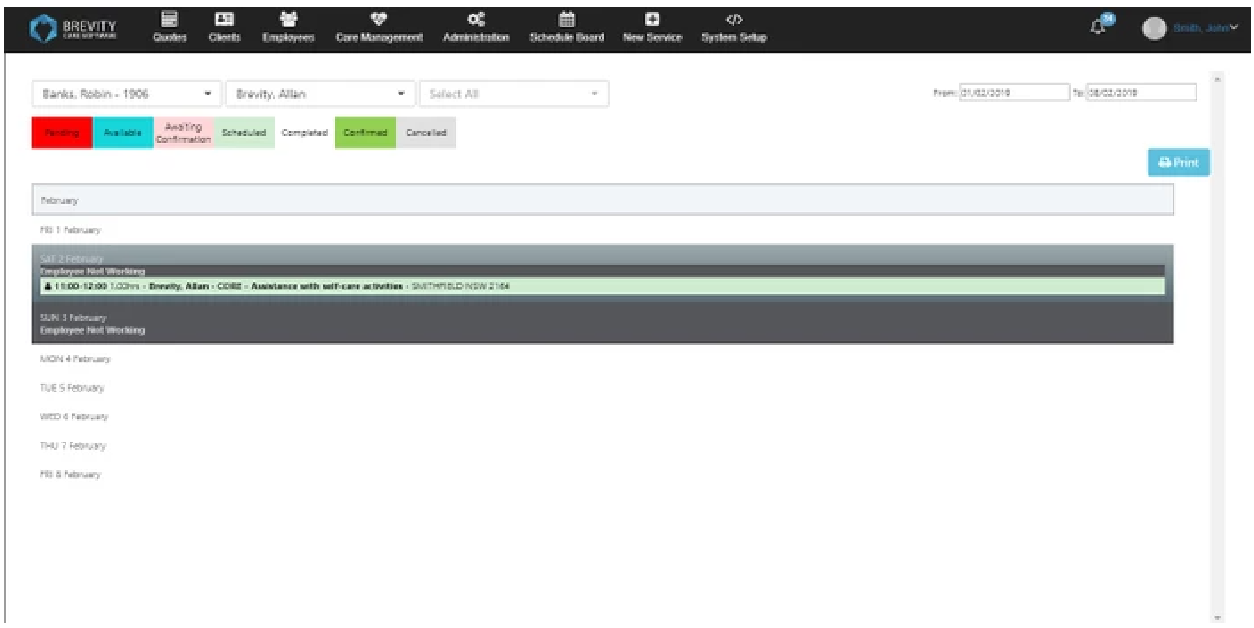
After Selecting the client from the client drop down, the table will automatically show all the service schedule for the client. If you want to display a specific status, select a status from the status drop down.

You can use the employee's drop down to display the service schedule that has been assigned to the employee. Select an employee from the employee drop down then select the date range so that the table could show the service schedule for the employee on the specified dates.



You can show a specific status by selecting a status from the status drop down. The table will show all the service schedule with the specified status

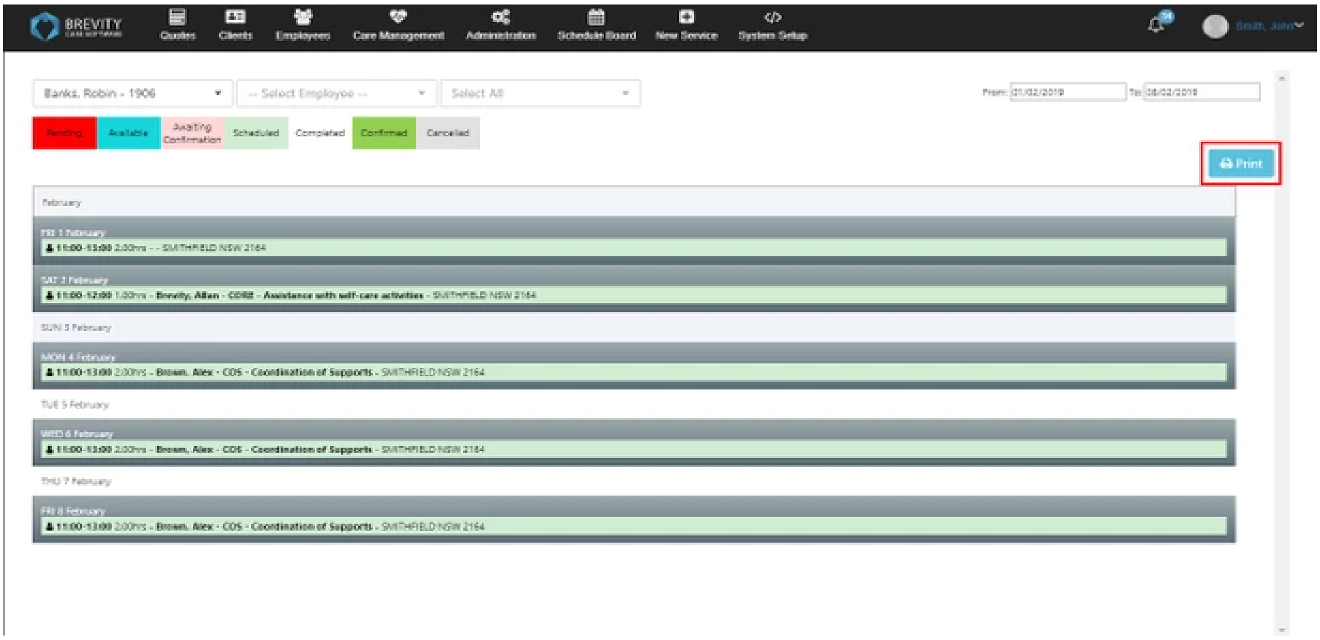
You can use both Client and Employees drop down to show the shifts for a specified client and an employee assigned to the client's service schedule. Select a client and employee from the client drop down / employee drop down, then specify the dates you want to show on the table.



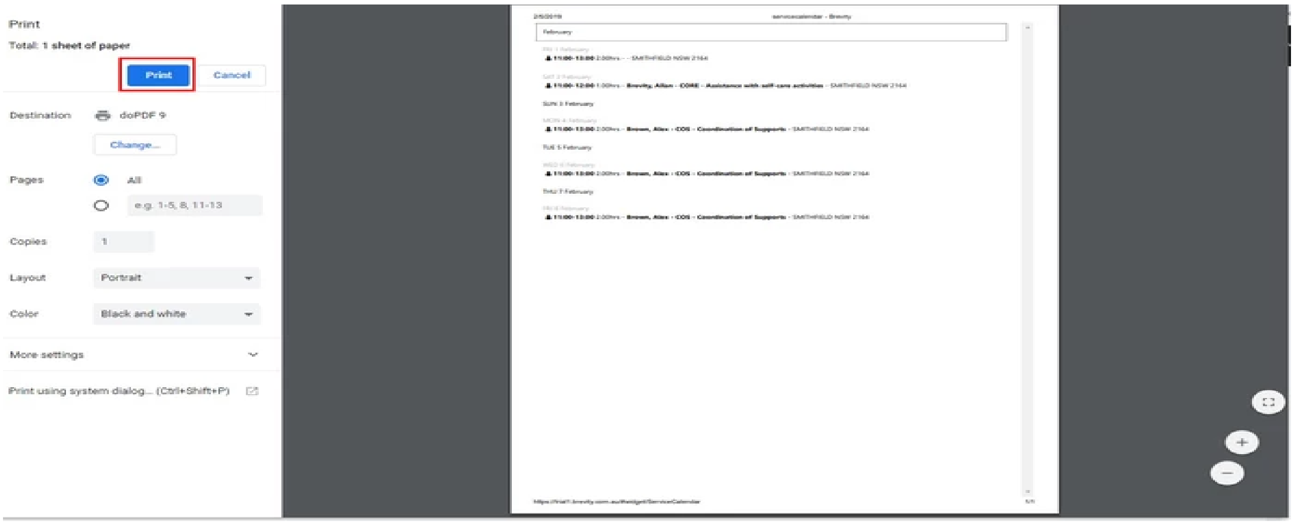
You can also select a status by using the status drop down. If you select a status, all service schedule with that status will be shown on the table.

Printing the Calendar

After showing the service schedule on the table, you can print the service schedule by clicking on the **Print** button.

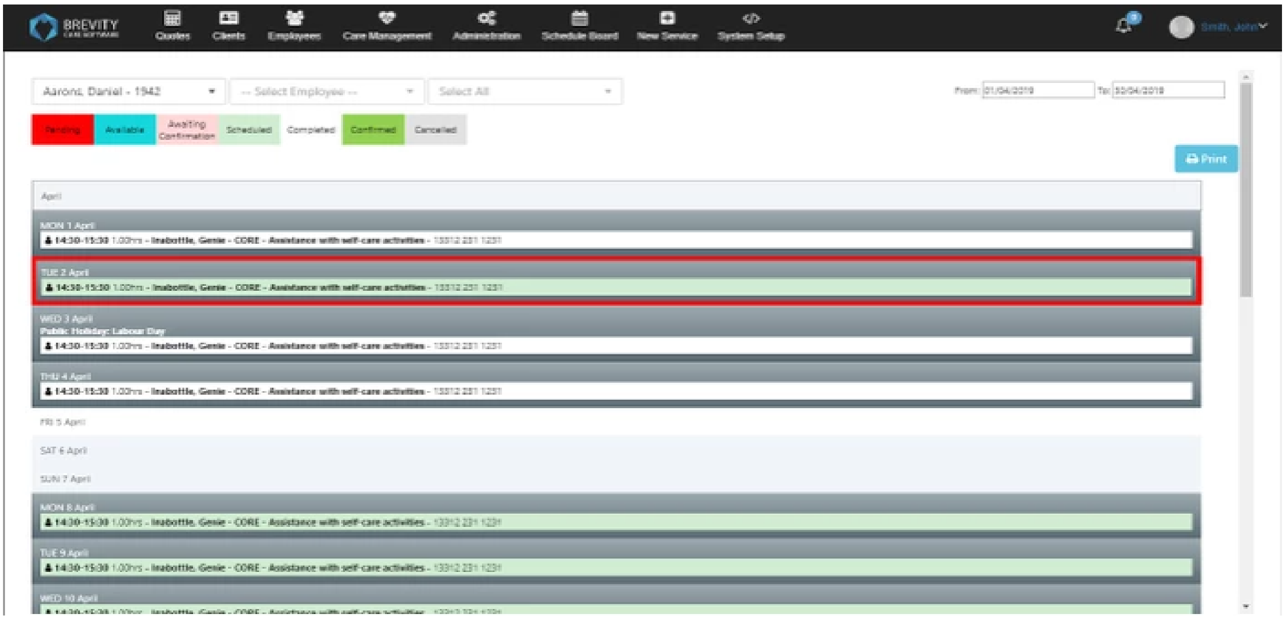


It will show the print dialog box. You can change the settings for the printer on this page and once you are done, click on the print button to start printing the service calendar.

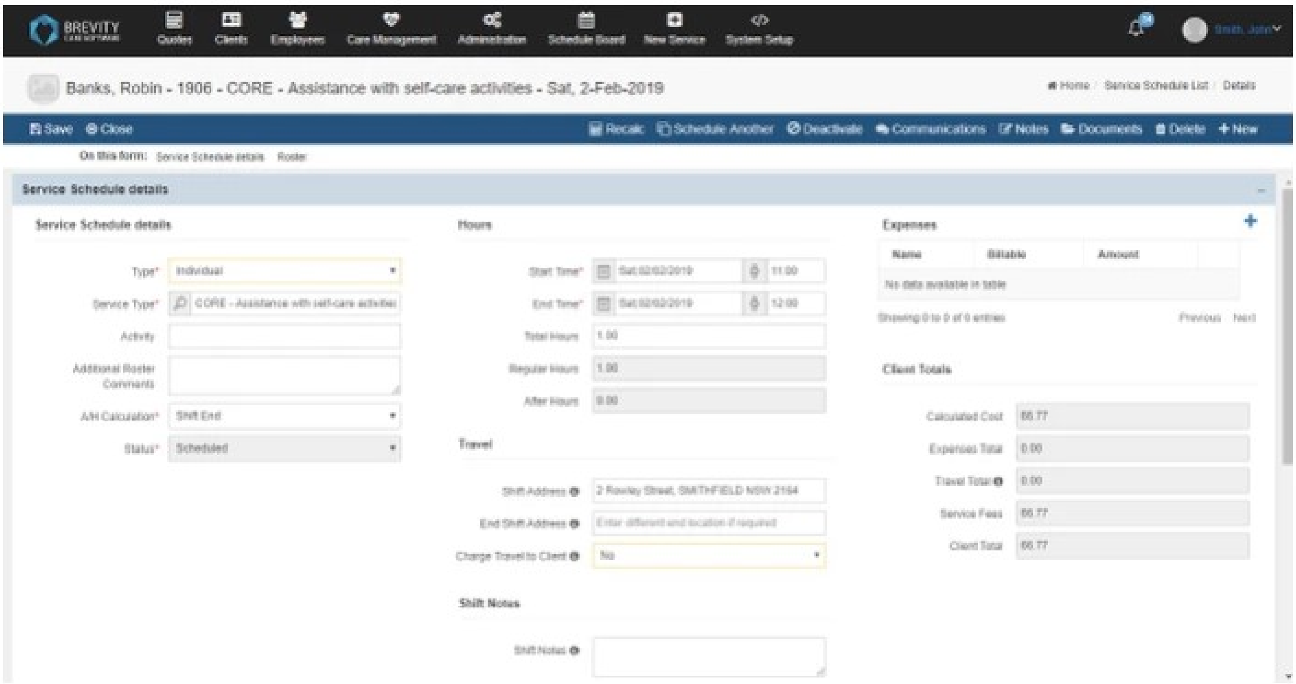


Checking the Service Schedule Record

Double click on the **Service Schedule** to see the service schedule details.



It will open another page and it will display the service schedule details.



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Approved Timesheets

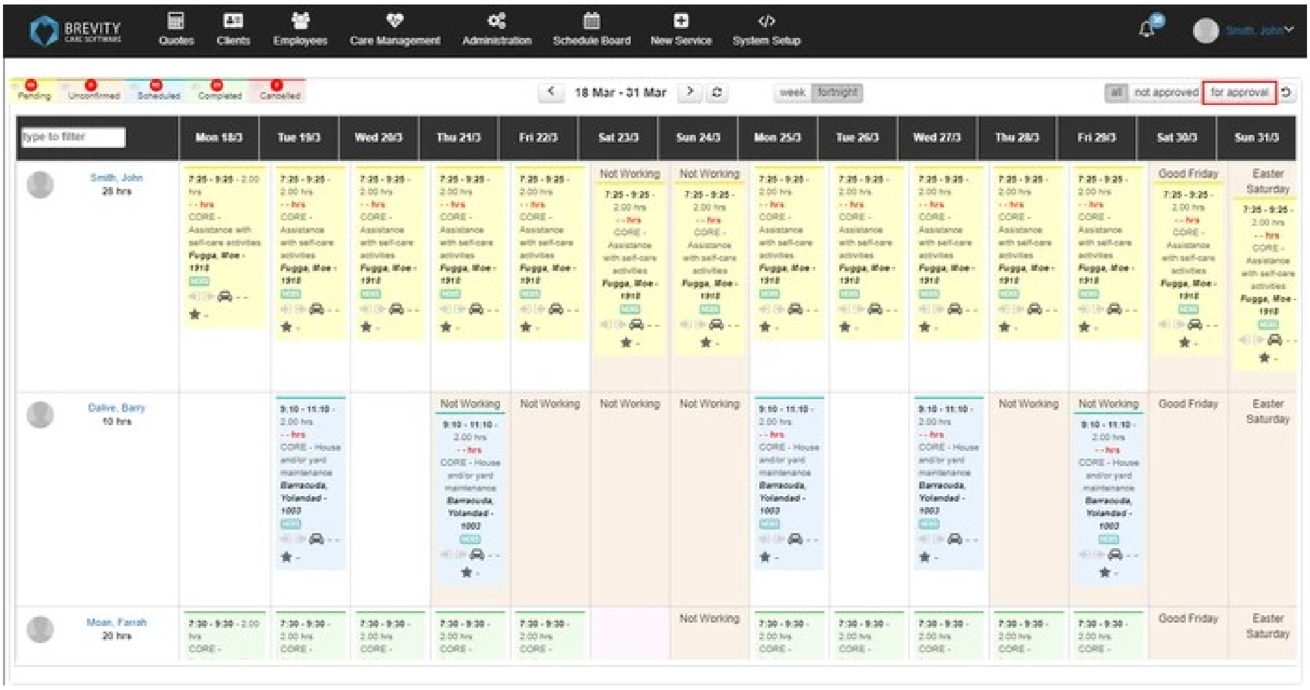
This page shows all the approved and not approved timesheet of the employees and their status. You can also see the details of the completed shifts that are recorded by the employees using the Brevity Mobile App. You can also approve the employees shift on this page. Approving the time sheet of the employee is required before you create the invoice for NDIS and Plan Managed clients. To navigate this page, click on **Employees** then click on the **Approved Timesheet**

Changing the Employee Timesheet View

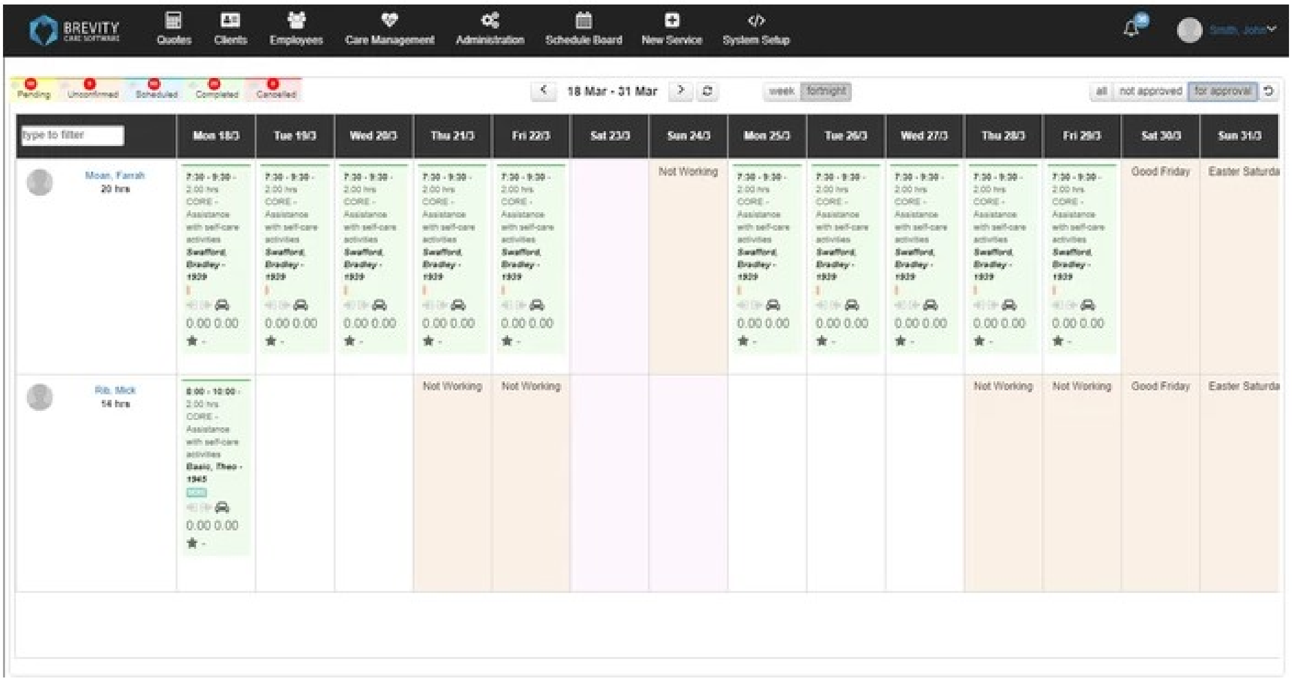
You can change the employee's timesheet view to show the shifts that are not yet approved and timesheet that needs approval. You can use this feature to show the employees timesheet that needs an approval to complete the shift. By default, all shifts are shown on the employee's timesheet view.

Showing Shifts for Approval

You can show the timesheets that needs approval by clicking on the **For Approval** button.

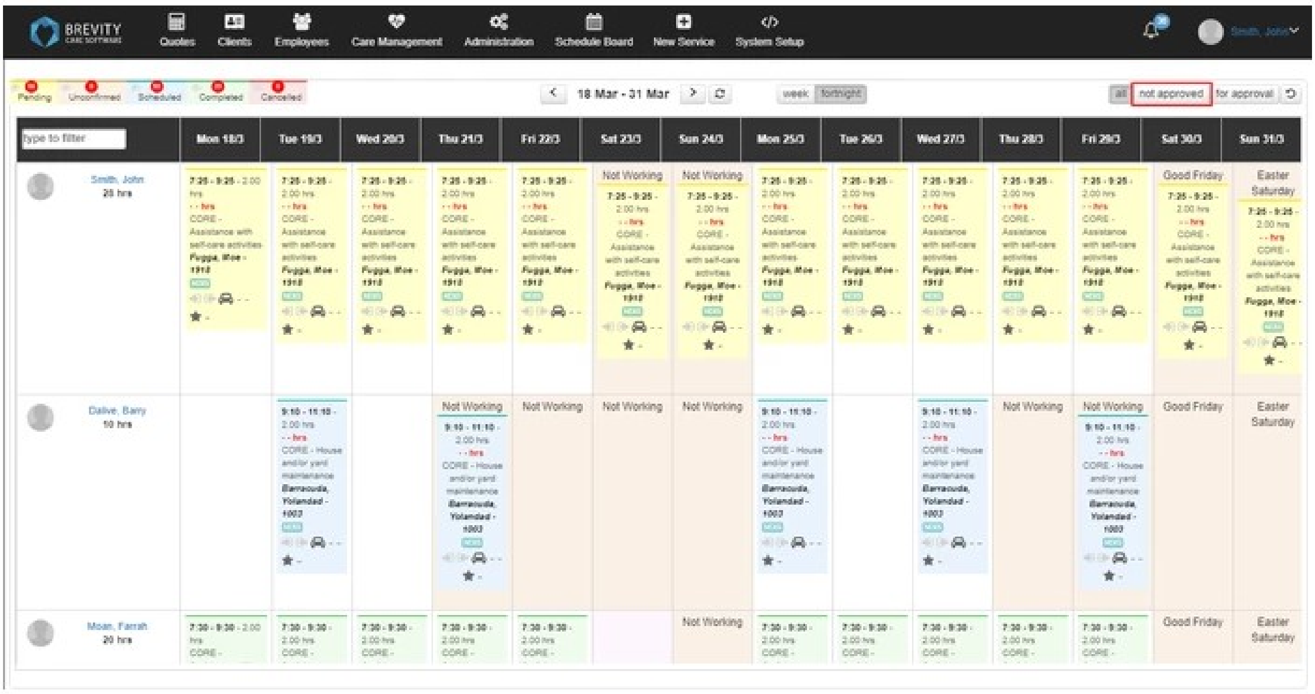


The calendar will only show the shifts that needs approval. This view can be useful if you want to only show the shifts that needs approval to complete the shifts.

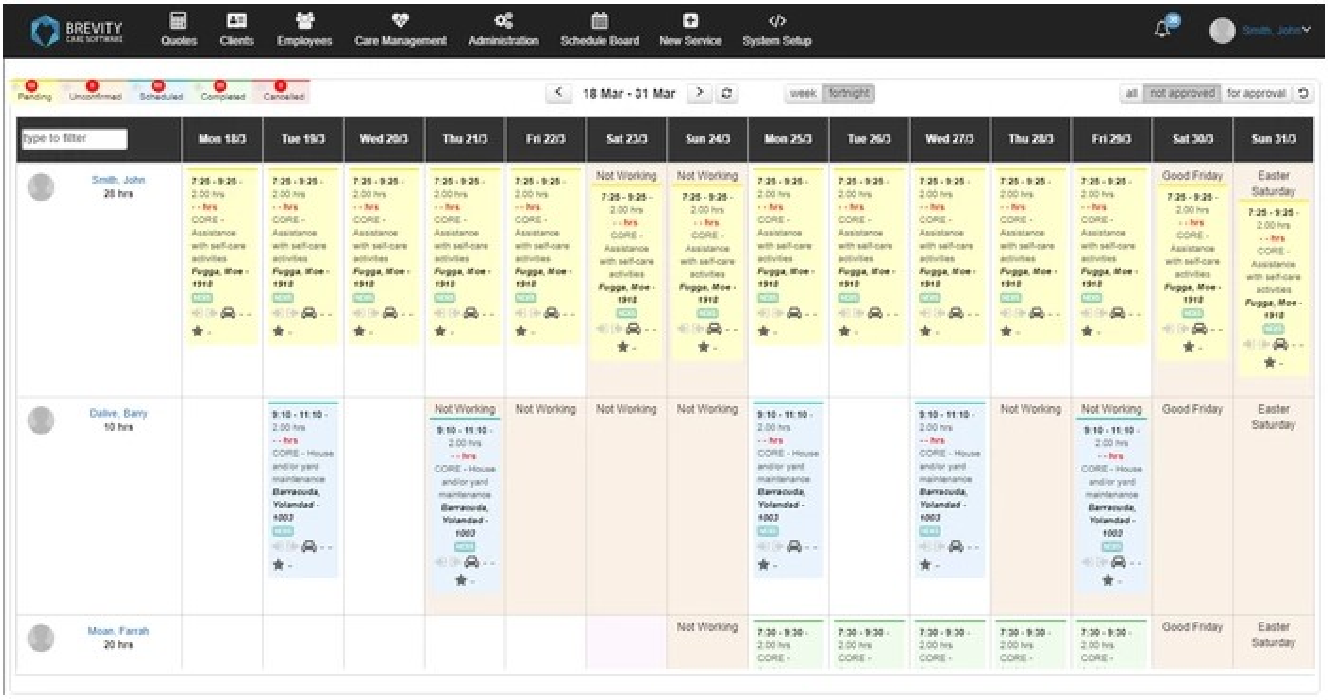


Showing Shifts not Approved

You can show the employee's timesheet that are not yet approved by clicking on the **Not Approved** Button. Showing the not approved shifts will let you review the shifts of the employee that are not yet approved and hides all the approved timesheet of the employees.

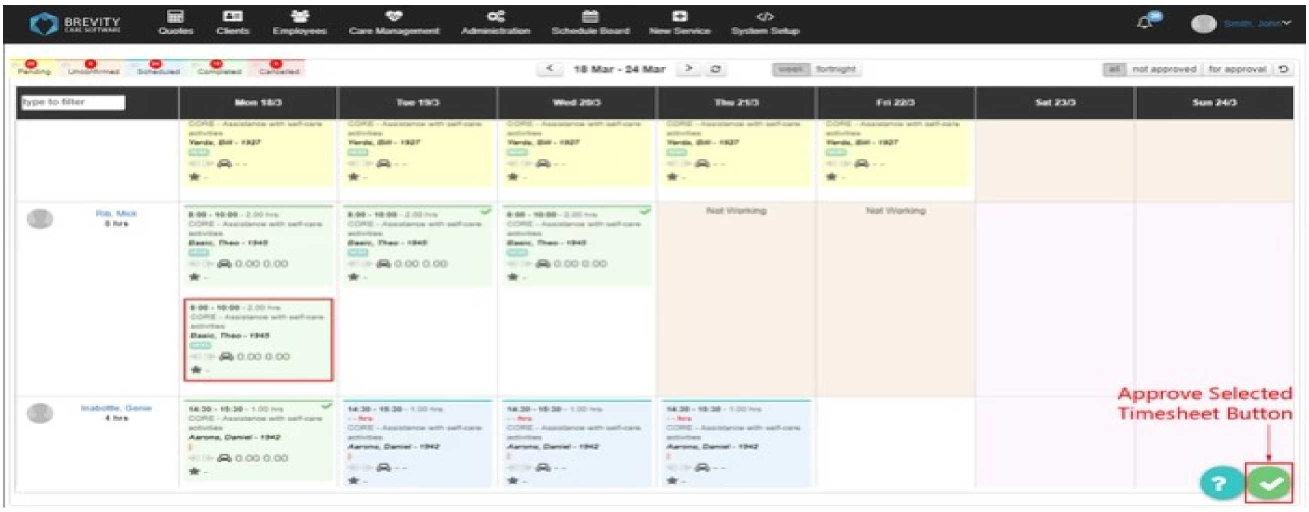


The calendar will show the employee's timesheet that are not yet approved.

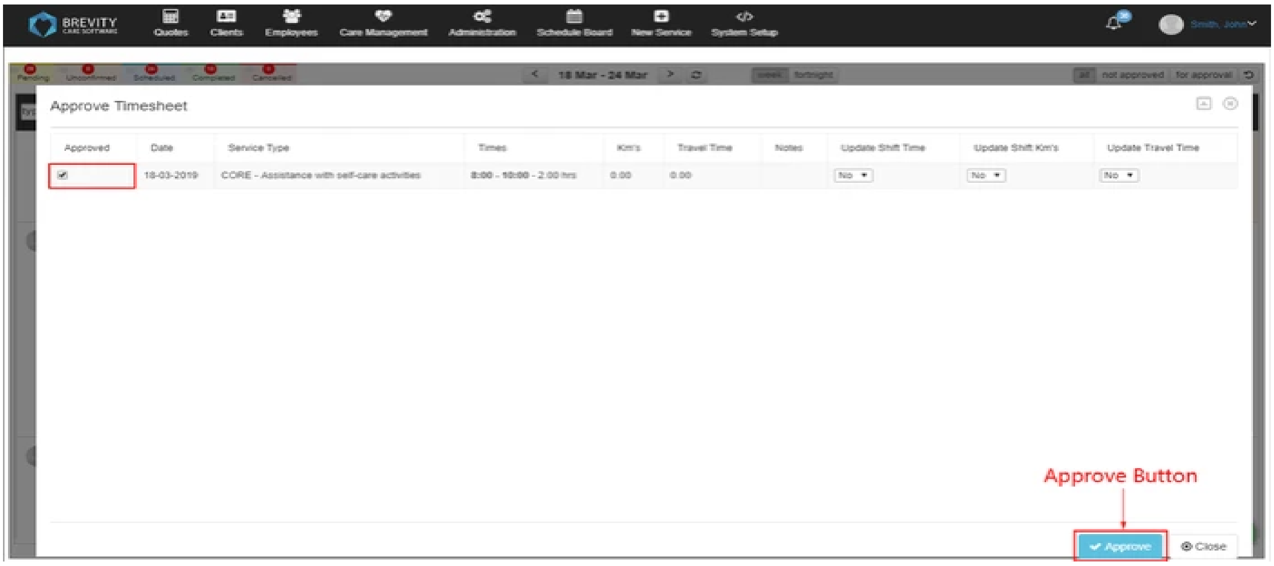


Approving the Employees Timesheets

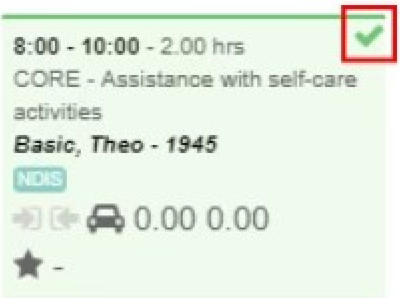
When the employees finish a shift using the Brevity Mobile App, you need to approve the timesheet of the employee to complete the shift. You cannot create an invoice for the completed shift of the client if the employee's timesheet is not approved. You can approve the timesheet of the employee by clicking on the shift of the employee you want to approve and then clicking on the **Approve Selected Timesheet** button.



A new window will appear after clicking on the **Approved Selected Timesheet** button. It will display all the timesheet of the employees that you can approve. You can also update the shift time, shift Km's and travel time from this page. Click on the **Checkbox** from the approved column and then click on the **Approve** button to approve the timesheet of the employee.

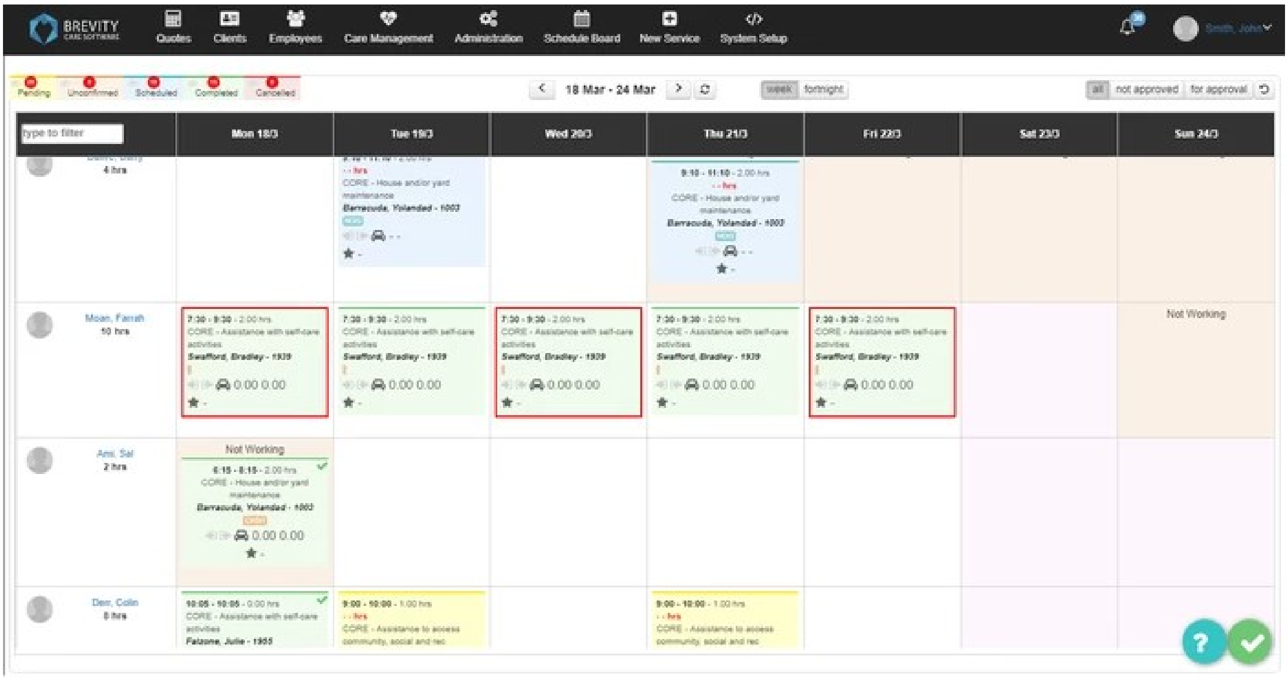


Once the Timesheet has been approved, you will see a check mark on the upper right side of the shift. This indicates that the shift has been approved.

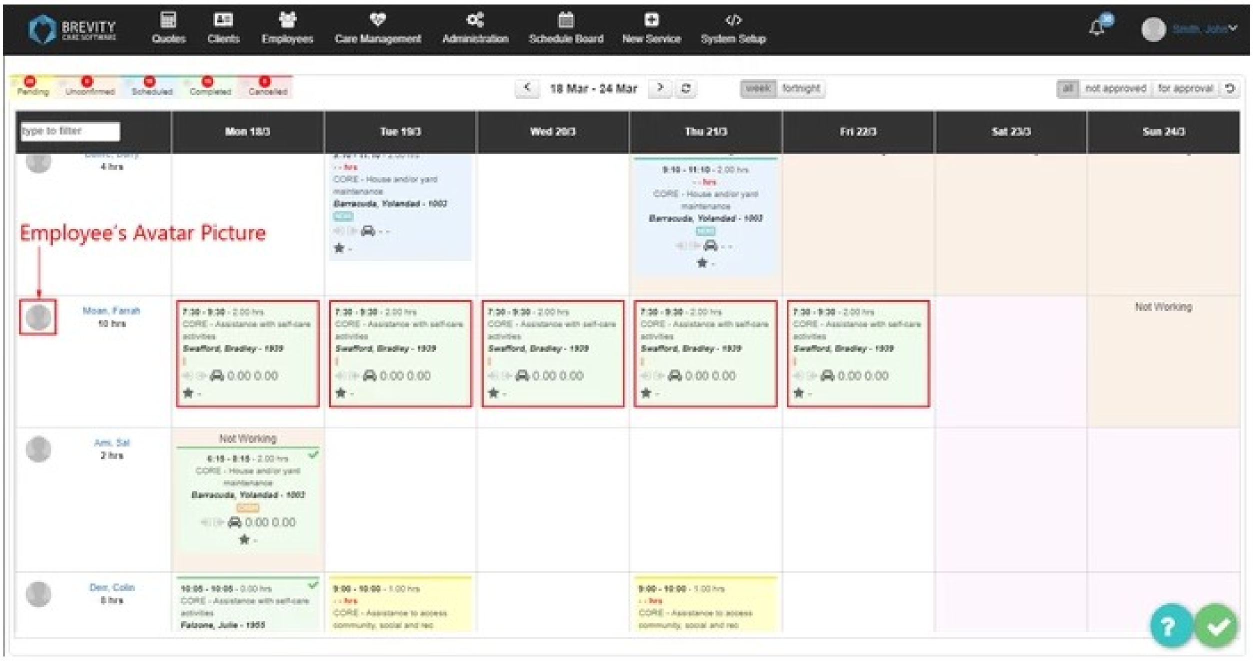


Approving Multiple Employee Timesheets

You can approve multiple timesheets for the employee. There are two ways to select the timesheets of the employee. The first way is by manually clicking on the shifts of the employee that you want to approve. The shift you selected will have a red box on the shift box to indicate that the shift has been selected.



The second way to select the shift is by clicking on the employee's **Avatar Picture**. it will select all the shifts for the current view.



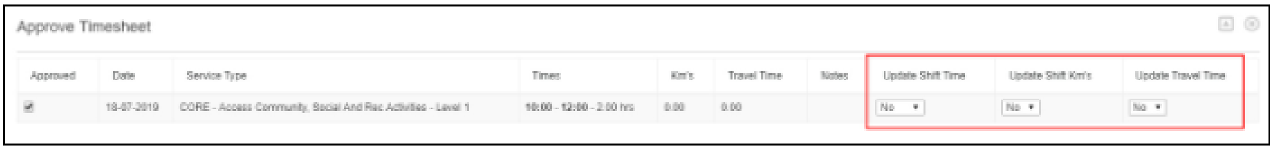
Selecting the shifts in Weekly View

Once you selected the shifts, click on the **Approve Selected Timesheet** button to approve the shifts.

You can select the timesheets that you want to approve by clicking on the check box under the Approved column. Once you selected the timesheets, click on the **Approve** button to select the timesheets.

Updating the Shift Time and Travel on Timesheets

When approving the Employee's Timesheet, you can update the shift time, shift km's and travel time. You can click on the dropdown for each column to show the option in updating the time and travel.



Update Shift Time: You can use this column to update the shift time of the employee

a. Yes - If you selected yes, the login hours of the employee will be selected and will be used to pay the employee

b. No - Selecting this option will use the time of the shift.

c. Reset - Selecting this option will use the shift time and it will remove the login time of the employee.

Update Shift Km's: If the employee has a shift Km's, you can use this column to add kms for the shift of the employee.

a. Yes - Selecting the Yes option will add the KM to the shift of the employee.

b. No - This will disregard the shift KM of the employee.

Update Travel Time: You can update the employee's shift's travel time. It is the same with Shift Km's but this option is for the shift's travel time.

a. Yes - Selecting this option will update the shift's travel time.

b. No - This will regard the travel time of the employee.

Checking the Approved Shifts

You can check the approved shift details on this page. The approved shifts are highlighted in green and it includes the shift details created by the employee using the Brevity Mobile App.

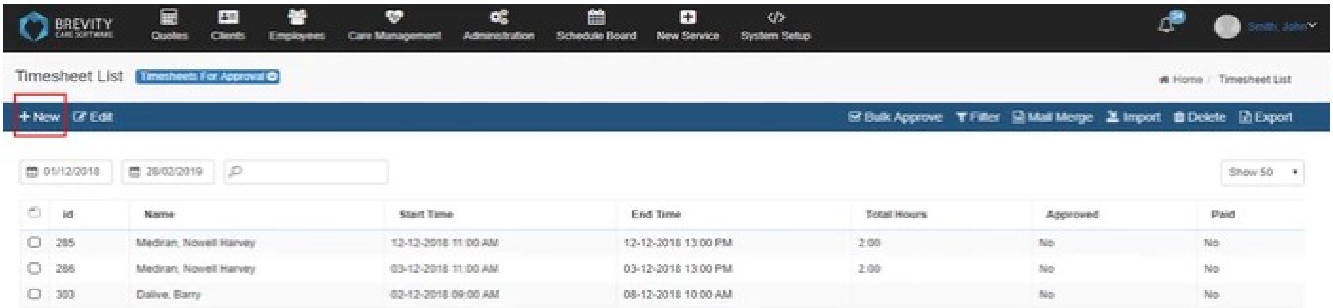
Timesheets

This page shows all kind of timesheet for the employees. You can search for specific date by using date box or specific employee by using the search box. You can narrow the search by using both date and search box. Click **Employees** then click **Timesheet** to navigate this page.

Creating a New Timesheet

To create a new timesheet, follow the steps below:

1. Click the **+**New button



2. Fill up the information and click **Save** once done.