

## Workforce screen

The screenshot displays the 'Manage workforce' interface. At the top, a teal navigation bar contains the 'Here' logo and menu items: Assignments, Workforce, Schedule, Invoicing & payment, Account, and Help. A red 'Logout' button is in the top right. Below the navigation bar, the text 'EHS Brighton & Hove' is visible. The main heading is 'Manage workforce' with an information icon. To the right are three buttons: 'Export (CSV)', 'Manage assignments', and 'View schedule'. Below this are tabs for 'GP', 'NURSE', 'PHARMACIST', 'PRACTICE ADMIN', and 'HCA'. A filter bar shows 'Enabled (2)' and 'Not enabled (1)'. A search box contains 'Quick filter..'. A list item for 'Tom Brown' is shown with a 'More ->' link and a 'DISABLE' button.

### Description

This document relates to the Workforce management screen.

<https://ias.hereweare.org.uk/assignments/employees>

The Workforce screen is where the service Administrator can enable/disable and manage the attributes of their workforce.

Staff members of all types can request to join your service from within their account and, when they do, the service Administrator will receive an email notification and can **enable** the staff member into their workforce from this screen.

Once enabled, before they can be assigned to shifts in your Rota, the Workforce staff fulfil certain criteria. There are also many types of compliance checks that can be done here and saved with annotations and initials.

### Workforce management items

#### Shifts wanted per months

This relates to the Assignment logic but does not prevent a staff member being assigned

#### More...>

This is a link that opens a more details layer in front of the screen

#### Signed agreement docs

#### Associated modules

This relates to assignment logic, determining at what hosts a staff member will show as available to

#### Notes

This is simply a general info field for Admin notes

**Things that need to be fulfilled before a member of staff is ready to be assigned to shifts in your rota.**

- They must have connected with the Hub service from within their staff account
- The Hub Admin must have enabled them within their Workforce screen
- Their required documents (those with an asterisk) must be uploaded, unless "ignore missing documents" is ticked.

**To be assigned to a specific shift in your rota staff also need some aspects of their account Profile to be setup**

- **Availability**  
They must be available for that time (either via their schedule or marked as always available for that day of week + time of day as a shift pattern for that Hub)
- **Visibility to locations**  
They must have set themselves as willing to work for the location of a shift (the host)

**The things that do not need to be fulfilled before a member of staff can be assigned to shifts in your rota but are part of a best practice approach to Workforce management and may be audited in future.**

- Identity checked (right to work)
- Documents cross checked
- Service induction
- References
- Has completed joining form
- Ignore missing documents
- Professional registration checked
- Site induction
- Initial contact made

## Q&A

**I want to assign a staff member to a shift in my rota but they are not appearing either as an Orange suggestion or in the drop down list**

**There could be one of three reasons for this**

1. The staff user profile is not properly checked and compliance not fulfilled – the staff user is not ready to be assigned
2. The staff user is ready to be assigned but has no availability for that date
3. The staff user is ready to be assigned and has availability for that date but has not specified that they will work at that location from within their account

**What can I do ?**

1. You can use the **ASK** feature to request a staff member self-assign to the shift. All staff members that are compliant will appear in the ASK feature drop down, regardless of their availability. Only staff who are already assigned elsewhere will not appear in the ASK list.
2. You can request that the staff member create some more availability and connect themselves to that host site / module so that you can assign them to the shift.