**Rota related issues**

**1. Descriptions**

**Assignments selection**

There are drop down menus which allow you to assign users by selecting (and saving).

Auto-selected users are marked in <span style="color:orange">ORANGE</span>. Once the assignment has been saved the entry will display <span style="color:green">GREEN</span>.

If the hub has cancelled the assignment or the employee has declined, the entry will be crossed out and marked ~~RED~~, this employee can be re-assigned but they won't be chosen automatically for any shift at the same time.

Shift **ON HOLD** means employees can't self assign themselves nor will the system preselect employees for those shifts, but employees can still be **ASKED** to work those shifts and become assigned that way.

**Self assignment & ASK feature**

If you have "Allow self assignment" enabled in your account profile, employees may self assign themselves to unfilled shifts up to 3 weeks in the future. These shifts will appear in their Schedule and regular email notifications will go out to any relevant employees reminding them of self assignment and showing their eligible shifts.

You can also choose to ASK a particular user to work a shift. This will notify the user of this request via email. The user can then assign themselves via a link in that email.

**Notifications and other rules**

When you **SAVE** rows or screens, newly selected employees will be assigned and any assignments that were unselected will be cancelled, **employees are sent notifications at this stage**.

They may decline the offer up to 2 calendar days before an assignment. If they do so, you will be contacted by email and this will show in the Assignments screen.

As HUB user you are able to cancel the shifts from your Schedule view or by assigning another employee for that shift. The employee will be notified if their assignment is cancelled.

If no GP is assigned, Practice admins and HCAs won't be automatically selected, nor will be able to self-assign. You can still manually assign these user types however.

If a employee has declined or been cancelled a shift at a particular date/time, they won't be auto-selected for shifts at the same time but should still appear in the list of potential staff unless they have also removed their availability for that shift.

Practitioners will also receive an email when one of their uploaded documents is approaching it's expiry date. If their document expires, it will still be available to download.

## 2. Q&A

When you do an ask request from the assignments screen do you need to save the row or whole screen?
You don't need to save the row or the screen. System will send it when you submit the ask modal and save

When you do move away and return, is the ask request gone
No, all request history is stored in the ASKED button that shows
you can make more ask requests - its first come first served. We will develop a new feature to retain asks.

When you reset green assignments back to none and then save the month view screen for the module.
Setting a Green to none is effectively the same as cancelling an assignment. It will send cancelled notifications to anyone who was Assigned.
On reload of screen, it should still suggest alternatives to fill that shift (if there are any available). This can include the person who was cancelled.

When you set Orange assignments to none then come back to the assignments screen
This can re-suggest the same person that was previously suggested – this makes logical sense. The none status is not a way to ignore a suggestion but to save the assignments screen without committing someone to a shift.

What is the status on Hold ?
We have created a new pseudo status that allows you to simply suspend a shift in the rota. This is like a half way stage to removing the shift but can be applied to each individual staff type for a shift. Setting to Hold means you don't have to deal with the shift and the system will not auto suggest for the shift.

What if I set a green assigned shift to Hold ?
This will effectively cancel the assignment and send the notificatrion out

Assigning a practitioner to a shift at same date/time but in an alt location?
This is only possible if the practitioner is not already working a shift (assigned elsewhere) for the same day/time

If a practitioner cancels and assignment can a hub admin re-assig them to the same shift
This cannot be done. Once someone is declines or cancels a shift they cannot be re-requested or assigned for the same shift.

Why cant I ask a Practice admin to self assign to a shift when they are not working elsewhere?
This could be because the system logic will not allow – there are a few possible reasons:
1. The staff member is already working a shift (assigned elsewhere) for the same day/time

Combining GPs and practice admins within a shift – assignment logic
When a GP is **NOT** assigned to a shift:
  • Practice admin staff cannot self-assign to the shift
  • The Assignment screen will not offer a Practice admin as an orange auto match
  • Hub admin can still manually pick a PA or HCA if they want to override and assign