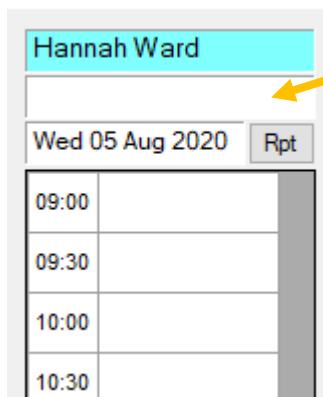


The i-Clarity staff rota links to the appointment diary, staff members who have a clinic added to the diary will automatically have an entry created in the rota, unless it was done in advance of the clinic creation.

Preparing to use the Staff Rota

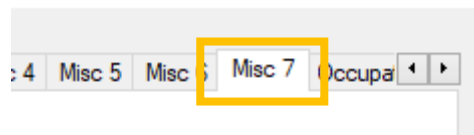
Rota display in Diary

Underneath the name of the user running the clinic is space for a summary of the staff rota to be displayed.



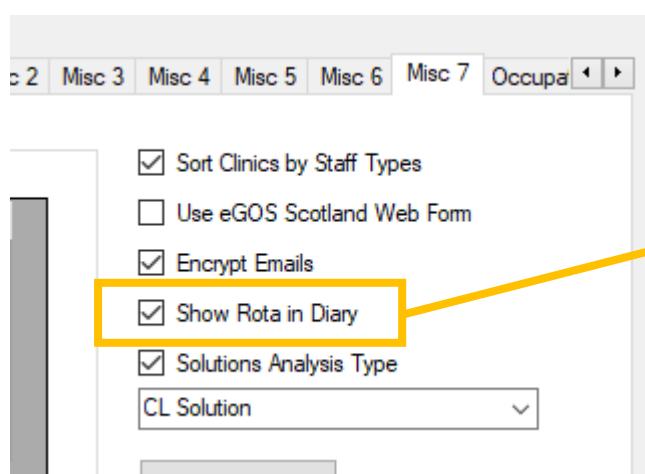
A screenshot of the staff rota display for Hannah Ward. The name 'Hannah Ward' is in a light blue box. Below it is a date selector 'Wed 05 Aug 2020' and a 'Rpt' button. A table shows time slots: 09:00, 09:30, 10:00, and 10:30. A yellow arrow points from the text below to the name box.

If you would like the usernames of the other staff in on this day to be displayed, then open the maintenance module of i-Clarity. Navigate to the Misc 7 tab.



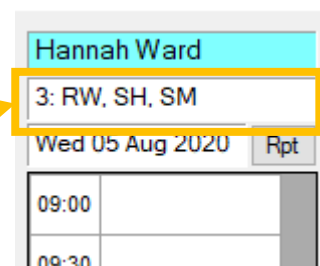
A screenshot of the maintenance module tabs. The tabs are labeled 'Misc 4', 'Misc 5', 'Misc 6', 'Misc 7', and 'Occupa'. The 'Misc 7' tab is highlighted with a yellow box.

On this tab there is a tick box labelled 'Show Rota in Diary'.



A screenshot of the maintenance module settings for Misc 7. The 'Show Rota in Diary' checkbox is checked and highlighted with a yellow box. Other settings include 'Sort Clinics by Staff Types' (checked), 'Use eGOS Scotland Web Form' (unchecked), 'Encrypt Emails' (checked), 'Solutions Analysis Type' (checked), and a dropdown menu for 'CL Solution'.

Ticking this box will show the usernames of the staff marked as present in the Rota.



A screenshot of the staff rota display for Hannah Ward, showing the staff names '3: RW, SH, SM' in a yellow box. The date is 'Wed 05 Aug 2020' and the time slots are '09:00' and '09:30'.

Further to this, there is an option on the Misc 6 tab called 'Show all staff initials'.

Filter Patient Address on ...
 Show All Staff Initials

If this box is unticked, then only the usernames of the staff present that do not have a clinic in the diary that day will be displayed.

Neither CG nor HW are displayed

If this box is ticked, then the usernames of all the staff present will be displayed except for the users running the individual clinic.

HW is displayed under the clinic for the user CG and CG is displayed under the clinic for HW

Colour Coding Staff Types

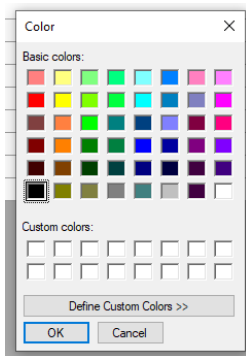
To help you differentiate between different staff types when adding staff members to the rota it is advised that you colour code your staff types in maintenance.

In the maintenance module navigate to the staff types tab.

Staff Type	Notes	Colour
▶ Optometrist		Blue
DO		
Receptionist		
CL Optician		
Manager		
Opt Assistant		
Pre-Reg		
Audiologist		
Clinical Assistant		

	Staff Type	Notes	Colour
▶	Optometrist		
	DO		
	Receptionist		
	CL Optician		
	Manager		
	Opt Assistant		
	Pre-Reg		
	Audiologist		
	Clinical Assistant		

Double click in the colour field against the staff type.



This will open a colour panel.

Select a colour for this staff type by clicking on it and then click ok.

Repeat this for all staff types.

	Staff Type	Notes	Colour
▶	Optometrist		Blue
	DO		Green
	Receptionist		Yellow
	CL Optician		Orange
	Manager		Magenta
	Opt Assistant		Purple
	Pre-Reg		Dark Green
	Audiologist		Cyan
	Clinical Assistant		Grey

The names of staff members will be colour coded according to their staff type in the rota.

Staff Member Hours

When you add a staff member to the rota their start time, lunch time, lunch length, and finish time will be automatically populated (however it can be amended in the rota if required). If you would like to amend the default times that are entered automatically, open the maintenance module of i-Clarity and navigate to the users tab.

	Full Name	Mobile	Staff Type	Default Appointment Type	Start Time	Lunch Time	Lunch Duration	Finish Time
	Charlie Gibson		Optometrist	(See rep)	09:00:00		60	13:00:00

The times can be amended by editing the fields in the grid.

Staff Members Mobile number

SMS messages can be sent to staff members from the Rota, to use this function ensure the mobile number of the staff member is entered against their name in the users tab of maintenance.

Setting up Staff Members Annual Leave allowance.

Within the rota is the ability to monitor how much annual leave a staff member has taken.

On the user tab in maintenance, scroll along until the Leave Start and Leave Days fields are visible.

	Forename	Surname	VA Template	NVA Template	Leave Start	Leave Days
	Charlie	Gibson			01 Jan	20

Enter the start date/reset date of the annual leave.

Enter the amount of annual leave days the user is allowed.

Setting up your Rota

After clicking on the rota icon, the rota for today will be displayed.

The screenshot shows the 'Staff Rota' application interface. At the top, there is a date selector set to 'Wednesday 05 Aug 2020' and a 'Monthly View' button. The branch is set to 'Radyr Eyecare'. Below this is a table with the following data:

Staff Member	Status	Notes	Start	Lunch	Mins	Finish
Hannah Ward	Present		09:00	13:00	60	17:30
Charlie Gibson	Present		09:00		60	13:00
Rob Ward	Present		09:00	13:00	60	17:00
Simon Harwood	Present		09:00	13:00	60	17:30
Simon Moores	Present		09:00	13:00	60	17:30

Below the table, there are several controls: a 'Staff Member' dropdown set to 'Ashleigh Edwards', a 'Status' dropdown set to 'Present', a 'Notes' text area, and various buttons like 'Send SMS to this Staff Member', 'Check Leave', 'Show Filters', 'Add Block', 'Import Standard Rota', 'Export Standard Rota', 'Days Worked Report', 'Export Enhanced Rota', 'Duplicate to', 'Multiple Duplicate', 'Block Duplicate', and 'Close'. Date pickers for 'From' and 'To' are also present, both set to '05 August 2020'.

The date will be displayed at the top.

This close-up shows the date selector 'Wednesday 05 Aug 2020' with left and right navigation arrows. The date text and the calendar icon are highlighted with a yellow box.

You can scroll through each day by click on the arrows to the right and left of the date.

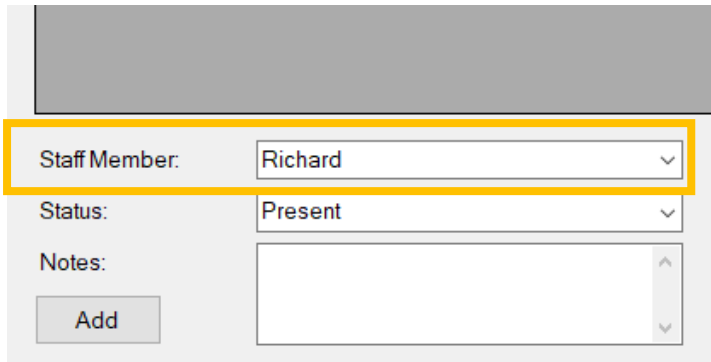
This close-up highlights the left and right navigation arrows with yellow boxes, showing how to scroll through the days.

Or you can navigate straight to a day by clicking on the calendar arrow and clicking on the date you require.

This close-up highlights the calendar icon with a yellow box, showing how to click on it to navigate to a specific date.

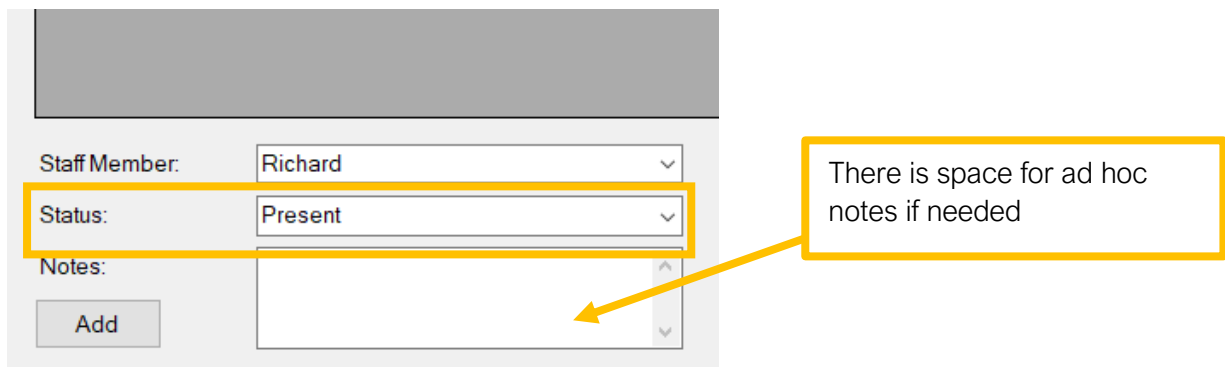
Adding a staff member to the rota for the day

Select the staff member you would like to add to the rota for the day.



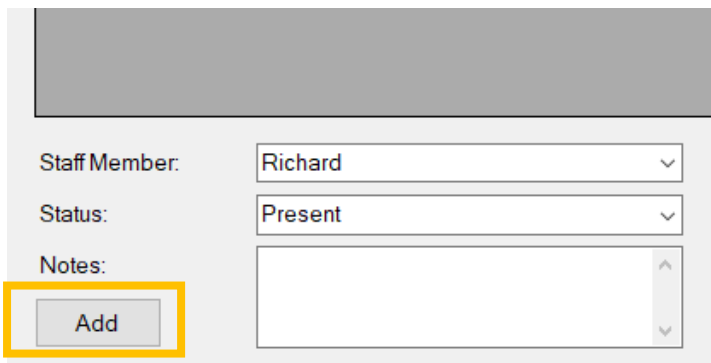
A screenshot of a web form for adding a staff member. The form has a grey header bar. Below it, there are three fields: 'Staff Member:' with a dropdown menu showing 'Richard', 'Status:' with a dropdown menu showing 'Present', and 'Notes:' with a text area. An 'Add' button is located below the 'Notes' field. The 'Staff Member' dropdown is highlighted with a yellow box.

Select the status of the staff member for the day.



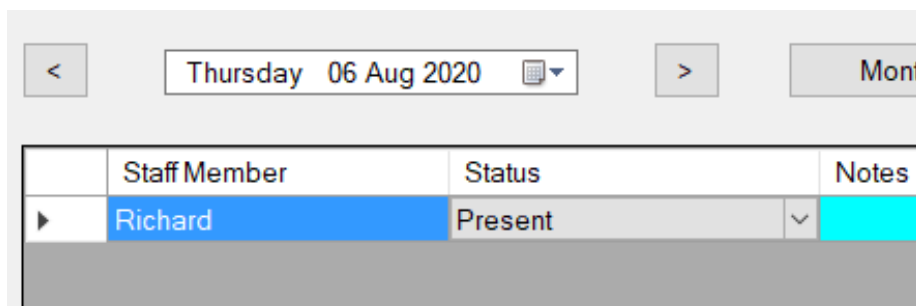
A screenshot of the same web form. The 'Status:' dropdown menu is highlighted with a yellow box. A yellow callout box with an arrow pointing to the 'Notes' text area contains the text: 'There is space for ad hoc notes if needed'.

Click Add.



A screenshot of the same web form. The 'Add' button is highlighted with a yellow box.

The staff member will be added to the rota for the day.



A screenshot of a staff rota table. The table has a header with navigation buttons for previous and next days, and a date field showing 'Thursday 06 Aug 2020'. The table has four columns: 'Staff Member', 'Status', and 'Notes'. The first row shows 'Richard' in the 'Staff Member' column, 'Present' in the 'Status' column, and a blue highlight in the 'Notes' column.

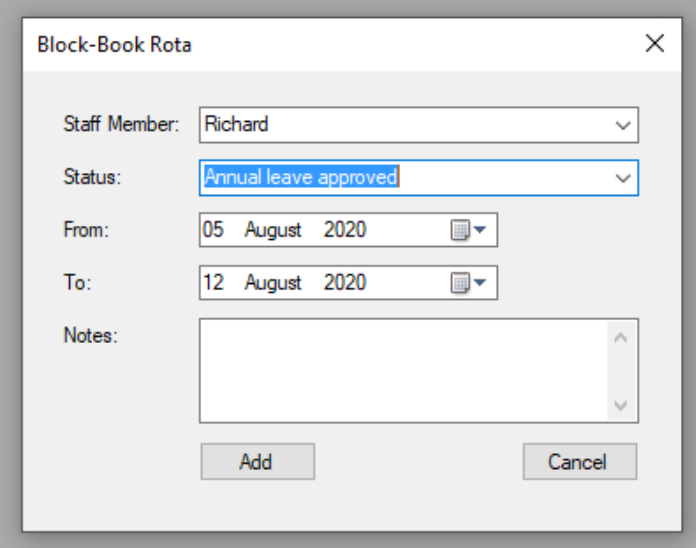
	Staff Member	Status	Notes
▶	Richard	Present	

Adding a staff member to the rota for more than one day at a time

Click on the button 'Add Block'



The block-book rota window will open

A screenshot of a "Block-Book Rota" dialog box. It contains the following fields: "Staff Member" with a dropdown menu showing "Richard"; "Status" with a dropdown menu showing "Annual leave approved"; "From:" with a date picker showing "05 August 2020"; "To:" with a date picker showing "12 August 2020"; and "Notes" with a text area. At the bottom are "Add" and "Cancel" buttons.

Select the Staff Member you would like to add to the rota.

Select the status you would like to add the staff member to the rota for.

Select the first day of the block in the 'from' field.

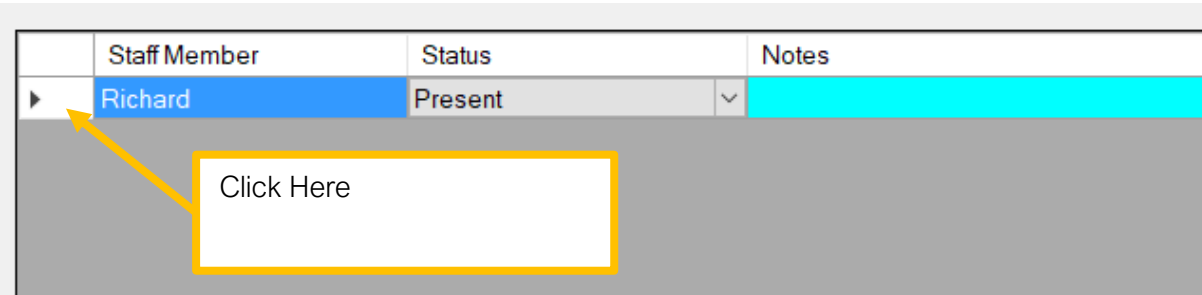
Select the last day of the block in the 'to' field.

Enter any ad hoc notes if required.

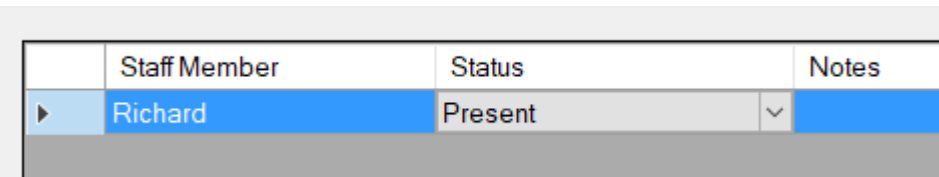
Click Add.

Removing a staff member from the rota

To remove a staff member from the rota click on the grey space next to their name.

A screenshot of a table with four columns: "Staff Member", "Status", and "Notes". The first row contains "Richard", "Present", and an empty "Notes" field. The entire row is highlighted in blue. A yellow arrow points to a grey rectangular area to the left of the "Richard" cell, which is enclosed in a yellow box with the text "Click Here" inside.

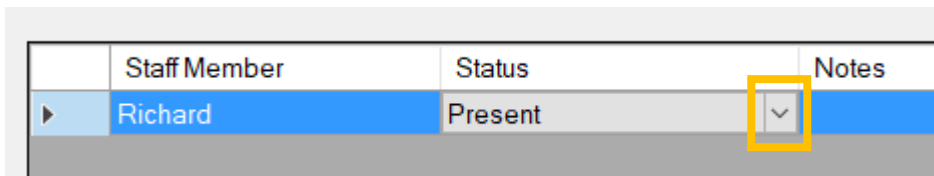
This will highlight their line in the rota.

A screenshot of the same table as above, but the row for "Richard" is now highlighted in a darker blue, indicating it is selected.

Then press the delete button on the keyboard.

Changing the status of a staff member for the day

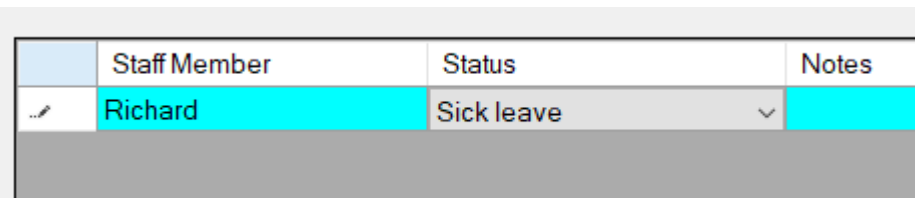
To change the status of a staff member for a day click on the arrow next to the current status selected.



	Staff Member	Status	Notes
▶	Richard	Present	▼

Select the new status from the available list.

The status of the staff member will be updated.

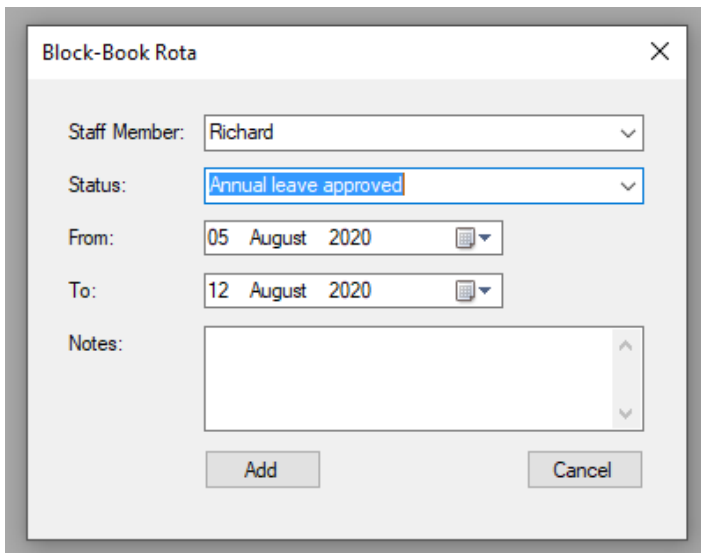


	Staff Member	Status	Notes
✎	Richard	Sick leave	▼

Changing the status for a staff member for more than one day at a time

The 'Add Block' function can be used to change the status of a user for a block of time.

Click the 'Add Block' button.



Block-Book Rota

Staff Member: Richard

Status: Annual leave approved

From: 05 August 2020

To: 12 August 2020

Notes:

Add Cancel

Select the staff member that you need to change the status for.

Select the new status.

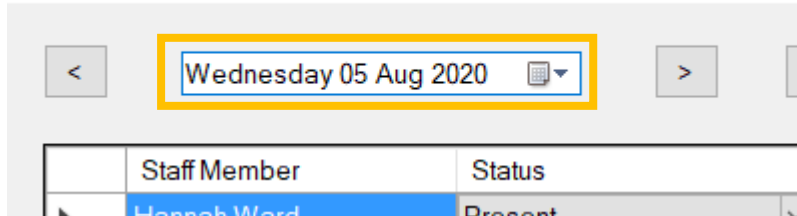
Select the start and end date of the block and click add.

This will change the status of the user for the days between the dates selected.

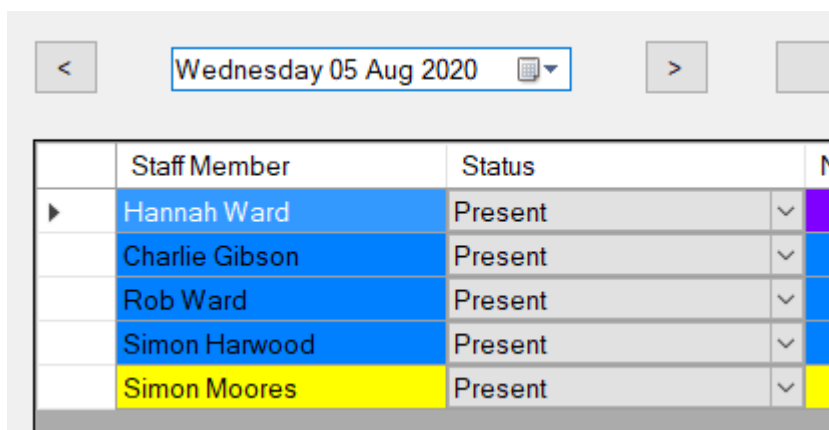
Duplicating the rota for one day to another

If you would like to duplicate the rota entries from one day to another, select the day you would like to duplicate from the top calendar.

 Staff Rota



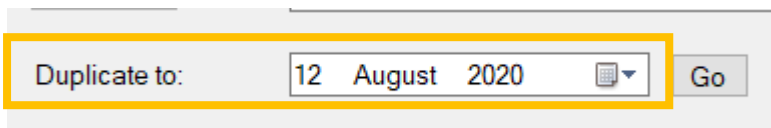
The day you want to duplicate will be displayed.



The screenshot shows the Staff Rota interface with the date selection dropdown set to "Wednesday 05 Aug 2020". Below the dropdown is a table with four columns: "Staff Member", "Status", a dropdown arrow, and a colored bar. The table contains the following data:

Staff Member	Status		
Hannah Ward	Present	▼	Purple
Charlie Gibson	Present	▼	Blue
Rob Ward	Present	▼	Blue
Simon Harwood	Present	▼	Blue
Simon Moores	Present	▼	Yellow

Select the day you would like to duplicate the rota entries to from the 'Duplicate To' calendar.



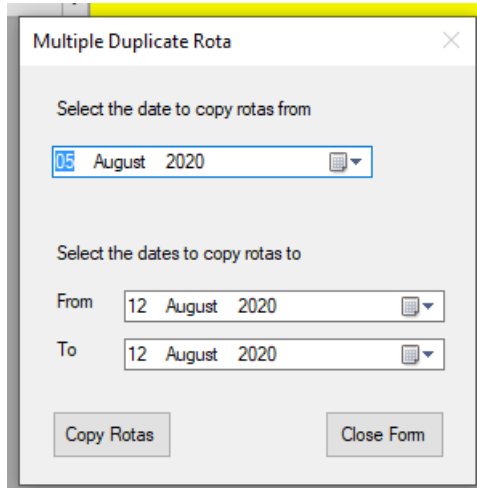
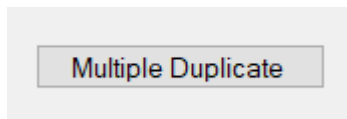
Click Go.

The rota entries will be duplicated to the date selected.

Any staff members already on the rota for the date selected will not be removed.

Duplicating the rota for one day to a series of other days

To duplicate the entries on the rota for a particular day to a series of other days click the 'Multiple Duplicate' button.

A dialog box titled "Multiple Duplicate Rota" with a close button (X) in the top right corner. It contains two sections: "Select the date to copy rotas from" with a date picker set to "05 August 2020", and "Select the dates to copy rotas to" with "From" and "To" date pickers both set to "12 August 2020". At the bottom are two buttons: "Copy Rotas" and "Close Form".

In the 'Multiple Duplicate Rota' window, select the day you would like to duplicate.

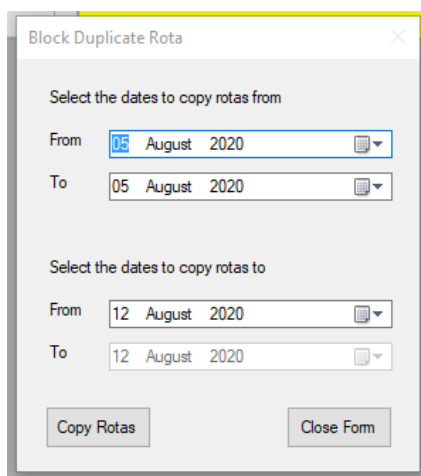
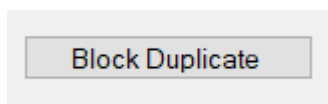
Then select the start and end date of the days you would like to copy the rota entries to.

Click Copy Rotas.

Duplicating a block of the rota to another block of time

To duplicate a block of rota entries to another block e.g. to copy a week block of rota entries to another week.

Click on the 'Block Duplicate' button.

A dialog box titled "Block Duplicate Rota" with a close button (X) in the top right corner. It contains two sections: "Select the dates to copy rotas from" with "From" and "To" date pickers set to "05 August 2020" and "12 August 2020" respectively, and "Select the dates to copy rotas to" with "From" and "To" date pickers both set to "12 August 2020". At the bottom are two buttons: "Copy Rotas" and "Close Form".

Select the start and end date of the block of days that you would like to duplicate.

Then select the start and end date of the block of days you would like to copy the rota entries to.

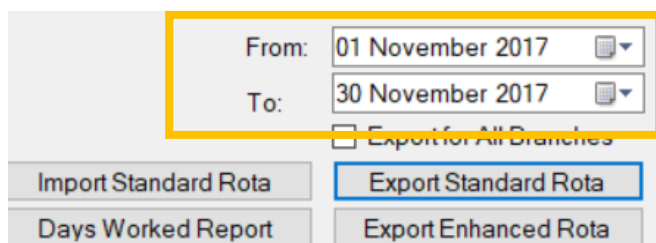
Click Copy Rotas.

Rota spreadsheets

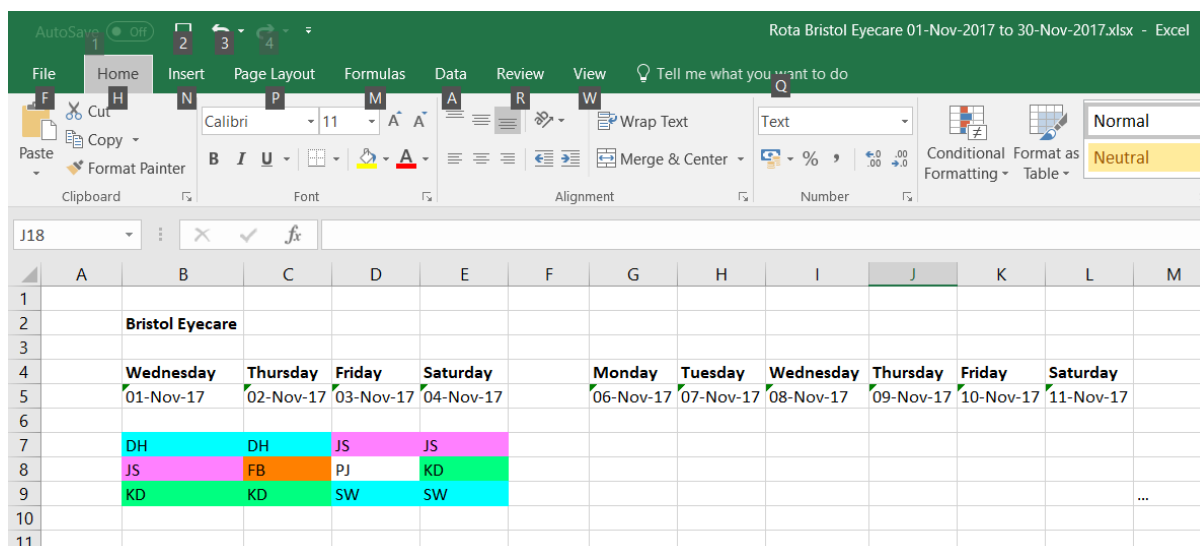
Standard Rota

You can also use spreadsheets to create your rota. The easiest way is to set up an initial period of rota entries, e.g. a week, from within the rota screen of i-Clarity.

Then use the 'Export Standard Rota' to create a spreadsheet for a longer period using the from and to date picker.



This will create a spreadsheet that looks like this:



	A	B	C	D	E	F	G	H	I	J	K	L	M
1													
2		Bristol Eyecare											
3													
4		Wednesday	Thursday	Friday	Saturday		Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	
5		01-Nov-17	02-Nov-17	03-Nov-17	04-Nov-17		06-Nov-17	07-Nov-17	08-Nov-17	09-Nov-17	10-Nov-17	11-Nov-17	
6													
7		DH	DH	JS	JS								
8		JS	FB	PJ	KD								
9		KD	KD	SW	SW								...
10													
11													

You can then complete this rota by adding each staff member's initials to the days that they are working. If you copy and paste the initials then the colours will be copied as well, if you simply type in the initials the cells will not be colour coded, but they will still import correctly.

When you have completed the rota spreadsheet then you can click the 'Import Standard Rota' button to import the new details.

Enhanced Rota

An export enhanced rota button will export the rota into a spreadsheet in the following format.

Wednesday 05-Aug-2020						Thursday 06-Aug-2020						Friday 07-Aug-2020					
Staff	Start	Lunch	Restart	End	Hrs	Staff	Start	Lunch	Restart	End	Hrs	Staff	Start	Lunch	Restart	End	Hrs
CG	09:00			13:00	3.00	CG	09:00			13:00	3.00	CG	09:00			13:00	3.00
HW	09:00	13:00	14:00	17:30	7.50	HW	09:00	13:00	14:00	17:30	7.50	HW	09:00	13:00	14:00	17:30	7.50
RW	09:00	13:00	14:00	17:00	7.00	RW	09:00	13:00	14:00	17:00	7.00	RW	09:00	13:00	14:00	17:00	7.00
SH	09:00	13:00	14:00	17:30	7.50	SH	09:00	13:00	14:00	17:30	7.50	SH	09:00	13:00	14:00	17:30	7.50
SM	09:00	13:00	14:00	17:30	7.50	SM	09:00	13:00	14:00	17:30	7.50	SM	09:00	13:00	14:00	17:30	7.50
						RA	Sick leave										

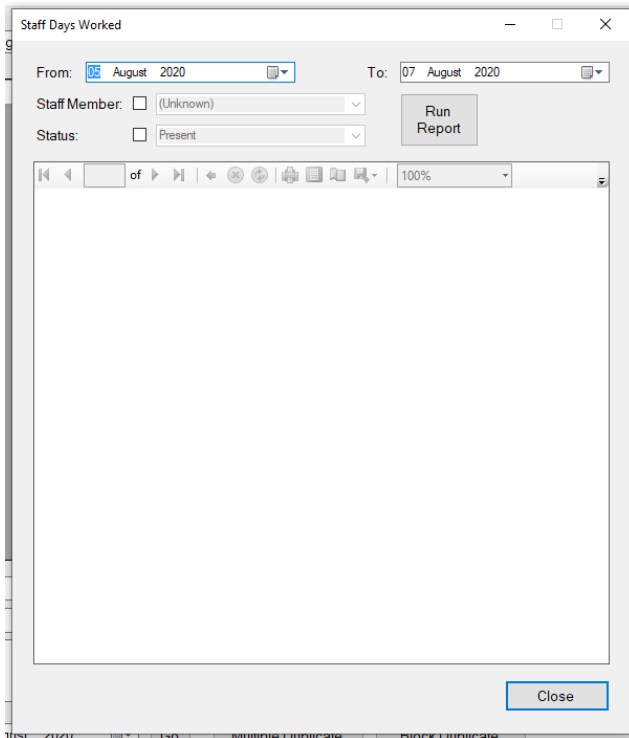
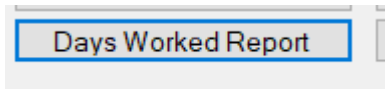
To control which days appear on the rota use the two date picker fields below.

The screenshot shows a user interface for managing a rota. It features two date picker fields: 'From: 05 August 2020' and 'To: 07 August 2020', both highlighted with a yellow border. Below these fields is a checkbox labeled 'Export for All Branches' which is currently unchecked. At the bottom, there are two buttons: 'Export Standard Rota' and 'Export Enhanced Rota', with the latter button highlighted by a blue border.

Other features of the staff rota

Days worked report

To run a days worked report click on the 'Days Worked Report' button.

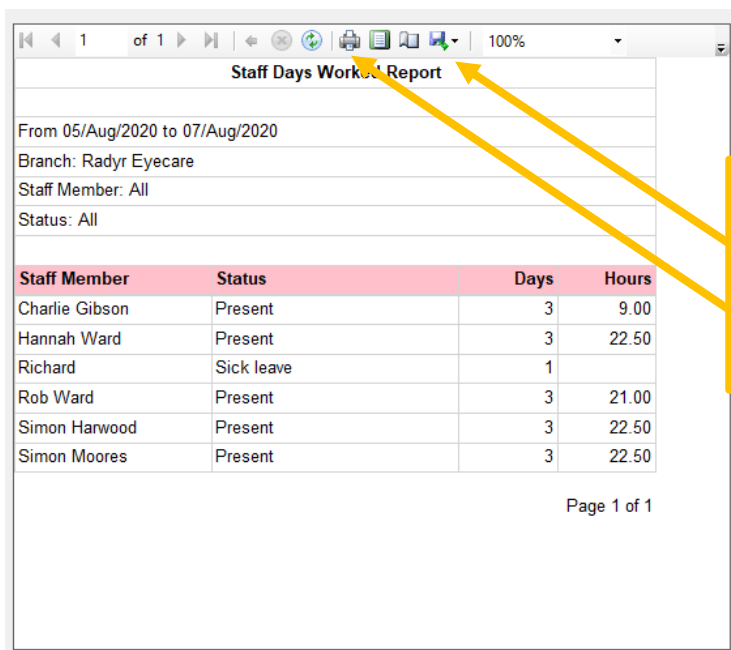


Select the dates that you would like to run the report 'From' and 'To'.

If you would like to filter the report to show a specific 'Staff Member' then tick the box next to the staff member text and select the staff member from the list.

If you would like to filter the report to show a specific status then tick the box next to the status text and select the status from the list.

Click Run Report.



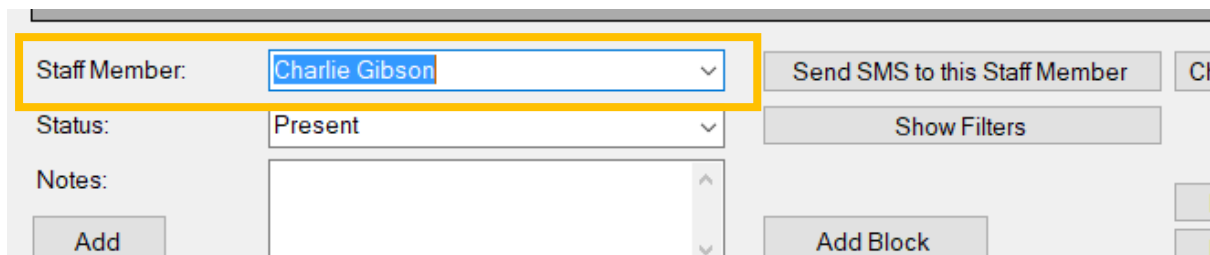
Staff Member	Status	Days	Hours
Charlie Gibson	Present	3	9.00
Hannah Ward	Present	3	22.50
Richard	Sick leave	1	
Rob Ward	Present	3	21.00
Simon Harwood	Present	3	22.50
Simon Moores	Present	3	22.50

Page 1 of 1

The report can be printed by clicking on the printer icon or exported by clicking on the floppy disk icon

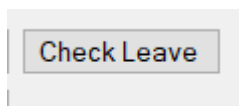
Check Leave

To check the amount of annual leave a staff member has used select the staff member's name from the drop down list.

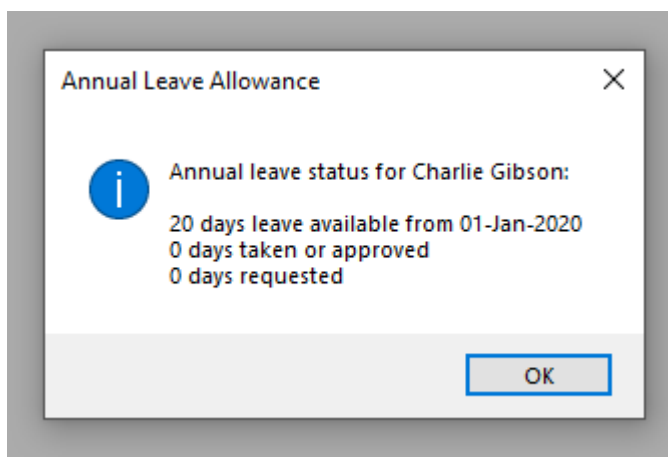


A screenshot of a software interface showing a form for staff member selection. The 'Staff Member' dropdown menu is highlighted with a yellow border and contains the name 'Charlie Gibson'. Below it, the 'Status' dropdown menu is set to 'Present'. To the right of the form are buttons for 'Send SMS to this Staff Member', 'Show Filters', and 'Add Block'. Below the 'Notes' field is an 'Add' button.

Click the 'Check Leave' button.



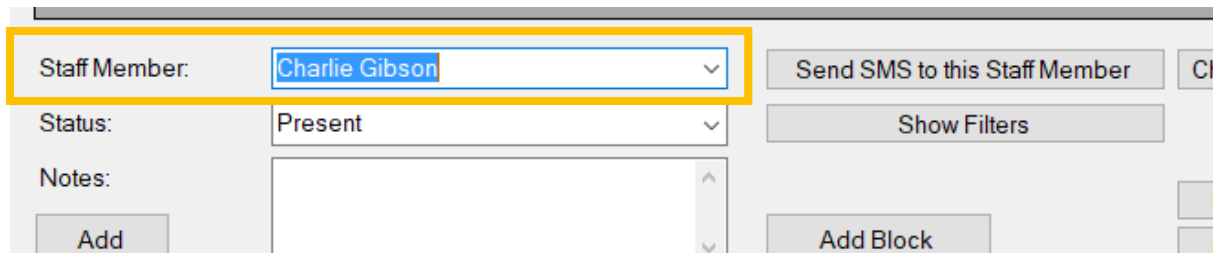
A close-up screenshot of a button labeled 'Check Leave'.



A screenshot of a dialog box titled 'Annual Leave Allowance'. It contains an information icon and the following text: 'Annual leave status for Charlie Gibson: 20 days leave available from 01-Jan-2020, 0 days taken or approved, 0 days requested'. An 'OK' button is located at the bottom right of the dialog.

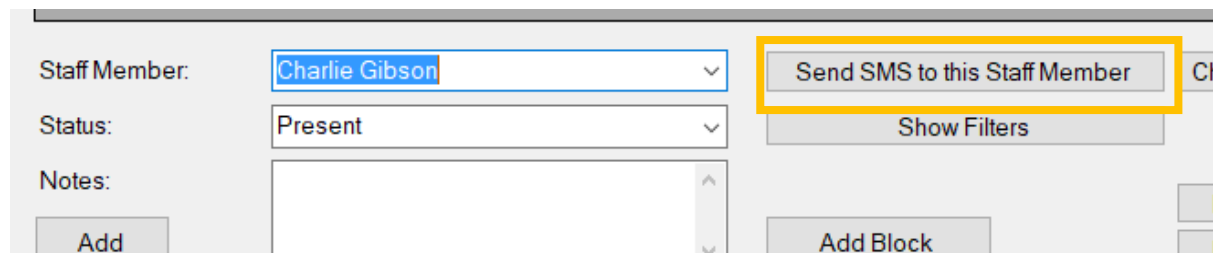
Send SMS to Staff Member

To send an SMS message to a staff member select the staff member's name from the drop-down list.



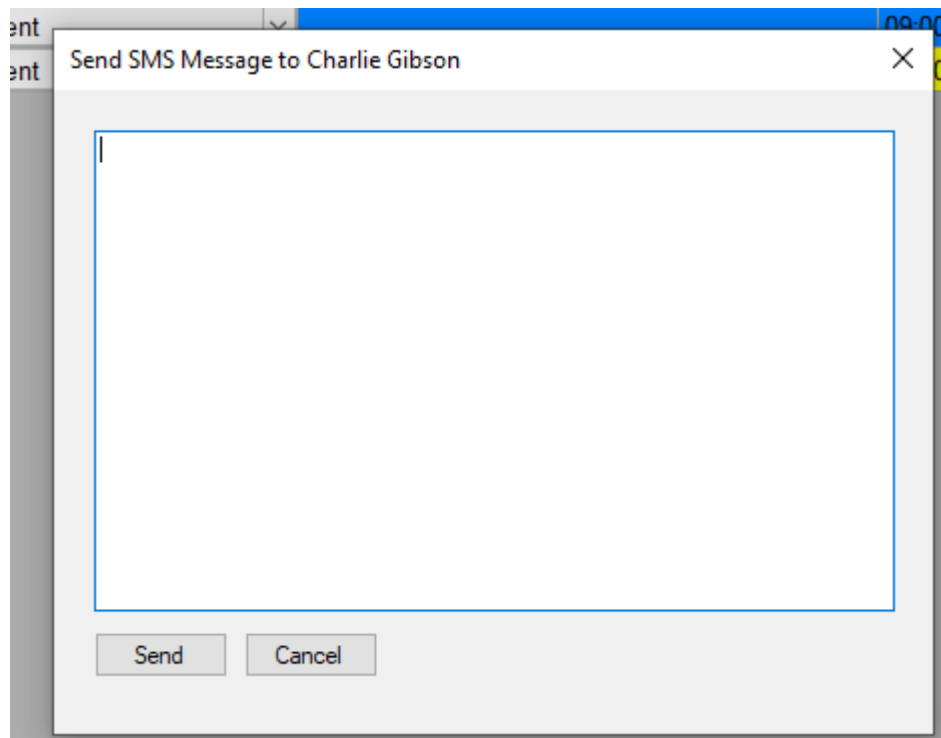
A screenshot of a software interface. The 'Staff Member:' dropdown menu is highlighted with a yellow box and contains the text 'Charlie Gibson'. To the right of this dropdown is a button labeled 'Send SMS to this Staff Member'. Below the dropdown are fields for 'Status:' (set to 'Present') and 'Notes:'. There are also buttons for 'Add', 'Add Block', and 'Show Filters'.

Click the button 'Send SMS to this Staff Member'.



A screenshot of the same software interface as above. The 'Send SMS to this Staff Member' button is now highlighted with a yellow box. The 'Staff Member:' dropdown still shows 'Charlie Gibson'.

Type the text message in the box and click the 'Send' button.



A screenshot of a dialog box titled 'Send SMS Message to Charlie Gibson'. The dialog box has a large empty text area for entering a message. At the bottom of the dialog box are two buttons: 'Send' and 'Cancel'.