EntireHR Version Release

# X2

Grace Thomson

Entire Software

# ENTIREHR

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## Recruitment

### Mobile-Friendly Applicant Portal

Introducing both a brand-new technology and mobile-friendly display in the Applicant Portal has re-invented the applicant portal with faster and more intelligent functionality than ever before!

Including:

• Applicants can now upload documents straight from their phone!

• Can now bulk upload multiple documents under one document name

  *i.e. multiple clinical placement notes*

• Removal of Save & Complete Stage Button – results will now automatically save as an applicant completes each section.

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## Permanent Resident Visa Changes

Visa functionality has been updated to accommodate members who have previously had a Working Visa and have now achieved their Permanent Residency.



**Permanent Residency Pop-Up[1]**



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[1] Date be entered must be less than the current date

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Permanent Residency Date is now in effect and previous working Visa is still visable but has no impact on number of hours Member can work.

Member Name: FELICITY SMOAK | Member Qualification: COMPANYSEC                                    ✕

| Compliances | **Visa** |
|---|---|

**Visa Details - Work Entitlement Check**
Non-Residents are required to complete visa information

Date of Permanent Residency: **10/02/2020**  **Permanent Resident**  Credit Limit : 216

| First Name | FELICITY | | Passport ID * (Characters Left: 14) | N71000 |
|---|---|---|---|---|
| Last Name | SMOAK | | Passport Country * (Characters Left: 64) | CANADA |
| Date of Birth | 24/07/1989 | | Passport Expiry | DD-MM-YYYY  ▦  **Check Visa Electronically** |

**Visa Details**  ( Fortnight Visa hours limit restriction is ON - 40 hours )

| Visa Class (Characters Left: 40) | visa class | | Grant Date | 30/09/2019 ▦ |
|---|---|---|---|---|
| Visa Subclass (Characters Left: 12) | visa subclass | | | |
| Visa Type Name (Characters Left: 50) | | | Expiry Date | 24/02/2020 ▦ |
| Visa Type Detail (Characters Left: 200) | | | | |

**Work Entitlements** (Characters Left: 500)

| Working hours limit | 40 | i | Exclusion Period | DD-MM-YYYY ▦ - DD-MM-YYYY ▦ |
|---|---|---|---|---|

Any work entitlements if you want to highlight...

**Visa Conditions** (Characters Left: 200)

Please write your specific conditions if you have...

## Talent Search improvements

New compact view allows ease of navigation while using Talent Search without compromising additional filters.

**Talent Search**

| Country * | AUSTRALIA ▼ | State | Select State ▼ | Industry | Select Industry ▼ | Qualification | Select Qualification ▼ |
|---|---|---|---|---|---|---|---|
| Service Office | Select Service Office ▼ | Job ref# | Select ▼ | Member only | No ▼ | Parsed CVs - Keywords search | ▼  **🔍 Search** |

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Provides option to expand to use additional filters if required

New and improved member card (sneak peeks shown below) is cleaner in design and functionality, with multiple tabs allowing ease of navigation and brand-new fun and exciting displays!

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*Member Card Sneak Peak 1*

**Felicity Smoak, 372923** ❌

| | Wallerawang, Australia | 0000000000 Rahul@entiresoftware.Com | Member Active | New South Wales 11-08-2017 |

Details | Skills | Resume | Shift Activities | **Availability** | Jobs | Notes | CV Parsed Results

**Availability**

| **February, 2020** | | | | | | |
|---|---|---|---|---|---|---|
| SUNDAY | MONDAY | TUESDAY | WEDNESDAY | THURSDAY | FRIDAY | SATURDAY |
| 26 | 27 | 28 | 29 | 30 | 31 | 01 Unknown |
| 02 Unknown | 03 Unknown | 04 Unknown | 05 Unknown | 06 Unknown | 07 Unknown | 08 Unknown |
| 09 Unknown | 10 Unknown | 11 ✔AM ✔PM ✖NS | 12 ✔AM ✔PM ✖NS | 13 ✔AM ✔PM ✖NS | 14 ✔AM ✔PM ✖NS | 15 ✔AM ✔PM ✖NS |
| 16 ✔AM ✔PM ✖NS | 17 Unknown | 18 Unknown | 19 Unknown | 20 Unknown | 21 Unknown | 22 Unknown |

*Member Card Sneak Peek 2*

**Felicity Smoak, 372923** ❌

| | Wallerawang, Australia | 0000000000 Rahul@entiresoftware.Com | Member Active | New South Wales 11-08-2017 |

Details | Skills | Resume | **Shift Activities** | Availability | Jobs | Notes | CV Parsed Results

**Current Assigned Shift**

| Shift Date | Type | Start | End | Qualification | Service Locat… | Delivery Location | Shift Location |
|---|---|---|---|---|---|---|---|
| There is no shift to display. | | | | | | | |

**Released Shifts available**

| Shift Date | Type | Start | End | Qualification | Service Locat… | Delivery Location | Shift Location |
|---|---|---|---|---|---|---|---|
| There is no shift to display. | | | | | | | |

**Previous booked 10 shifts**

| Shift Date | Type | Start | End | Qualification | Service Locat… | Delivery Location | Shift Location |
|---|---|---|---|---|---|---|---|
| There is no shift to display. | | | | | | | |

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any personnel may be selected (as shown above) and the following tasks may be actioned directly from the talent search screen

## Resume Parsing in Talent Search[2]

**The first phase of EntireHR's Resume Parsing has now been fully integrated!**

Resume's may now be parsed for any personnel with a resume on file[3] by first selecting relevant personnel and *Parse CV* which will display the below pop-up.
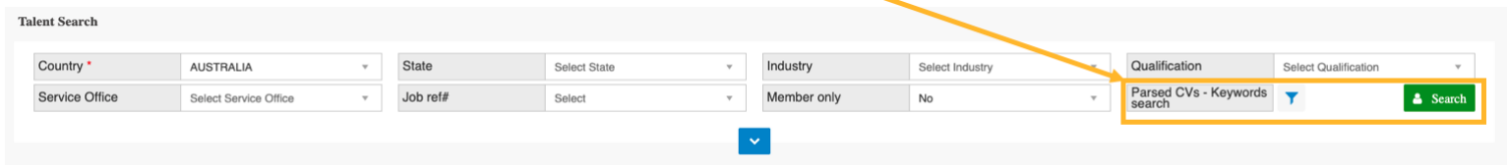


Selecting GO will begin the parsing!

Once completed - user will receive *a resume parsed successfully* notification

(Note: Credits required. One Credit Per Resume)

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[2] Credits available for purchase via EntireHR
[3] Credits available for purchase via EntireHR

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Once parsed; keywords or "words and phrases" (highlighted below) can be utilised to find appropriate candidates.
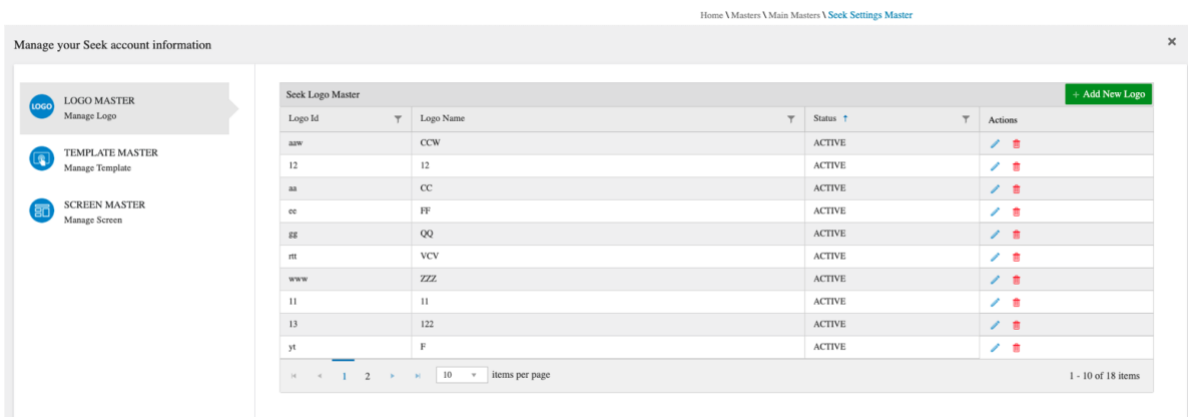
## SEEK Job Integration[4]:

*Pathway: Masters>Main Masters>Seek Settings*

The system now has a capability to create SEEK jobs within the system & release them on SEEK portal.

This includes the ability to edit and/or add:

- Logo
- Template
- Screen



## Member Allocation

### Enhancements + Fixes

*Pathway: Allocation>Member Allocation*

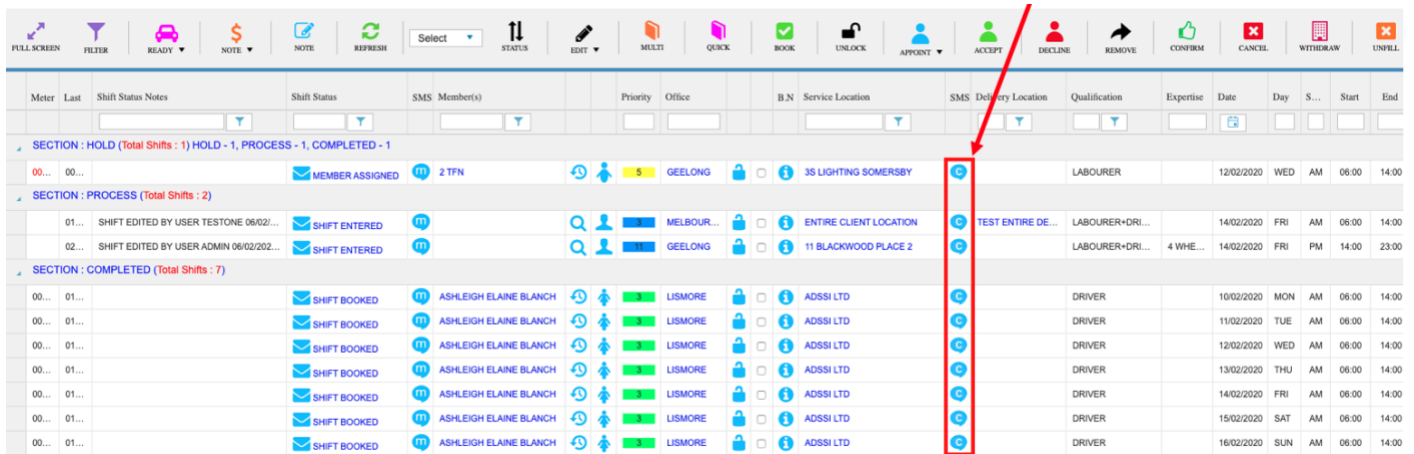---

[4] If this additional module has been purchased

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Member Allocations has received some TLC in X2, and has received the following enhancements and fixes:

- Reverse search feature shows members available per day (instead ofper shift) **and** will show all members in all areas by default (does not filter by Office).

- Member will now be removed from Member Allocations 'list' once booked into a shift on the day nominated.

## Client Allocations

### Client SMS Feature



A brand-new feature in X2, clients have their own dedicated column may now be SMS'd via the system the same as members.

The system will automatically populate Destination field with a valid <u>MOBILE</u> number on the client file in the following order:

1. Professional[5]
2. Delivery Location

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[5] Professional must have a professional profile/login + mobile number entered

**3.** Service Location



Note:
1. Multiple destinations can be entered seperately by a comma (,)

## New Member Pulled Out Functionality

This feature now provides the user the option to simultaneously adjust member's availability and adjust priority when pulling member out of shift.

Below shows the new member pulled out pop-up

# ENTIREHR
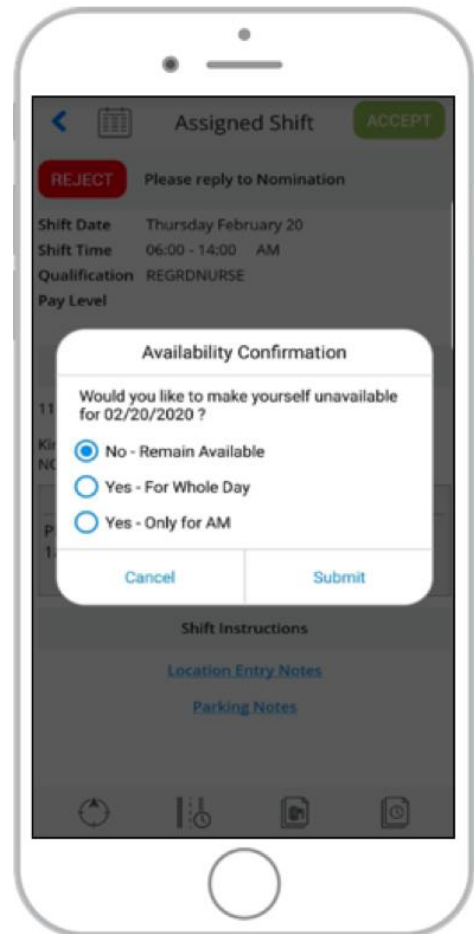
Below demonstrates how the member availability is adjusted (dependent on whether Day or Shift availability is selected).



### Enhanced Member Declined from App Functionality

When a member declines an offered shift6 via the app; they are now offered the opportunity to adjust their availabilities to reflect this as shown here.



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6 Whether shift has been Assigned or Broadcasted to member

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## Reports[7]

X2 introduces the new technology and logic for EntireHR reporting which enables us to provide greater depth and accuracy on the figures reported than ever before.

This new technology allows each report to be spilt into 'levels' or 'tiers' which summarise the data differently at each level.

Within each report additional tiers can be accessed by selecting any of the text in **blue**.

An overview of each report will include an individualised explanation of these tiers, however the purpose of each tier will follow the same general principles outlined below.

*Tier 1 – Provides an overall summary of requested data.*

*Tier 2: Provides an overall summary of the data (i.e. different clients/members) which accumulatively equal the amount in Tier 1.*

*Tier 3: Provides a detailed list of the different records (i.e. bookings) that accumulatively equal the amount in Tier 2.*

### Master Client Compliance Report

*Pathway: Reports>Client Reports>Client Compliance Report*

This report allows the user to search for client compliance entered as required by any of the fields shown above.

Additionally, once data is retrieved, using the ⋮ located in the title at the top of each column a user may either:

- filter for more specific information

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[7] All of these and future reports will be located in the Web Portal

- remove unrequired columns



## Override Member Compliance Report



*Pathway: Reports>Client Reports>Override Member Compliance Report*

This report will generate a record of each time a member's client compliance is overridden by an allocator.
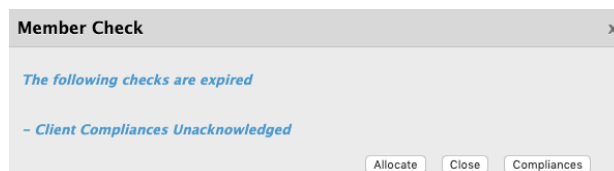


The details of the booking and the allocator opting to override these compliances will be recorded in the database each time the above M*ember Check* pop-up is displayed, and the user selects *allocate* to override the unacknowledged client compliances.

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## Tier 1

*Summary of all members who have had compliances overridden within the nominated period*

**Override Member Compliance Report** ✕

| Shift Period *( Max of 30 Days ) | 01/02/2020 📅 12/02/2020 📅 | Delivery Location | -- Select Delivery Location -- | Override Staff | -- Select Override Staff -- ▼ |
| Admin Location | -- Select Admin Location -- | Servicing Office | -- Select Servicing Office -- | Qualification | -- Select Qualification -- |
| Service Location | -- Select Service Location -- | | | | |

📄 Report    ⬇ Export    ✉ Send Email

| First Name | Last Name | Qualification | Email Address | Mobile Number | Office | Suburb |
|---|---|---|---|---|---|---|
| EXAMPLE | MEMBER | COMMUNICATIONS OFFICER | grace@entiresoftware.com | 0404651111 | PERTH | CARRUM DOWNS |
| GEORGE | CLOONEY | REGISTERED NURSE | steve@entiresoftware.com | 0434100111 | SYDNEY | NAREMBURN |
| JHON | JAMES | CARER | rahul@entiresoftware.com | 0897876356 | GEELONG | ADELAIDE |
| SARAH | CHALKE | PERSONAL SERVICE ASSISTANT | steve@entiresoftware.com | 0434100112 | SYDNEY | CENTENNIAL PARK |

|◄ ◄ 1 ► ►| 50 ▼        1 - 4 of 4 Items

## Tier 2

*Breakdown of bookings which were overridden*

**Override Member Compliance Report** ✕

| Shift Period *( Max of 30 Days ) | 01/02/2020 📅 15/02/2020 📅 | Delivery Location | -- Select Delivery Location -- | Override Staff | -- Select Override Staff -- ▼ |
| Admin Location | -- Select Admin Location -- | Servicing Office | -- Select Servicing Office -- | Qualification | -- Select Qualification -- |
| Service Location | -- Select Service Location -- | | | | |

📄 Report    ⬇ Export    ✉ Send Email

Details of Member Shift Overridden - Group by Service Location - Ordered by Chronological Date & Time    ← Back to Previous

| Service Location | Delivery Location | Qualification | Shift Date | Shift Type | Start Time | End Time | Worked Hrs | Override Date Time | Override Staff |
|---|---|---|---|---|---|---|---|---|---|
| FRANKSTON HOSPITAL | | REGRDNURSE | 11/02/2020 | AM | 06:00 | 14:00 | 08:00 | 10/02/2020 At 14:53 | DEMO INTERNAL STAFF |

|◄ ◄ 1 ► ►| 50 ▼        1 - 1 of 1 Items

## Tier 3

*Detailed breakdown of member's unacknowledged client compliances*

Details of Member's Outstanding Client Compliances - Group by Service Location - Ordered by Chronological Date & Time    ← Back to Previous

| Service Location | Delivery Location | Rule Title | Qualification | Acknowledgement Type | Expertise | Document Name | Rule Add/Edit Date |
|---|---|---|---|---|---|---|---|
| FRANKSTON HOSPITAL | | Peninsula Health Policies + Procedures | | Read & Sign | | PENINSULA HEALTH ORIENTATION | 01/09/2018 |
| FRANKSTON HOSPITAL | | Prebooked Shift | | Read & Sign | | PENINSULA HEALTH ALLOCATIONS | 01/09/2018 |
| FRANKSTON HOSPITAL | | Working with Children Check Required | | | | DUMMY HEALTH DOCUMENT | 02/09/2019 |
| FRANKSTON HOSPITAL | MATERNITY | Client Requires Working with Children Check | | | | WORKING WITH CHILDREN PERMIT | 02/09/2019 |
| FRANKSTON HOSPITAL | | Client Requires 2018 Flu Shot | | Read & Sign | | ORIGINAL RESUME | 07/09/2018 |
| FRANKSTON HOSPITAL | | Medication Room Protocol | REGRDNURSE | Information | | SPARE INDUCTION1 | 07/09/2018 |
| FRANKSTON HOSPITAL | | Client Requires CPR | REGRDNURSE | Read & Send Information | | FACILITY POLICIES + PROCEDURES | 10/09/2018 |
| FRANKSTON HOSPITAL | | Government Induction Required | | | | CLOVER | 11/09/2019 |
| FRANKSTON HOSPITAL | | Linked to Facility Parking Document | REGRDNURSE | Read & Sign | ENTIRE EXEPERTISE | FACILITY PARKING | 19/09/2018 |

|◄ ◄ 1 ► ►| 50 ▼        1 - 9 of 9 Items

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**Weekly Sales Report**[8]

*Pathway: Reports>Finance Reports> Sales Report*



This report allows sales figures to be collated and/or compared based on the period selected.

The tiers will summarise and categorise data as follows:

## Tier 1

*Summary of Total Figures for Period Selected*



## Tier 2

*Breakdown of Total Figures per Service Location*



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[8] Accessible as per User Role + Authorisation Level

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## Tier 3[9]

*Detailed Breakdown of Service Location Invoice History*

| Shift Date | TimeSheet No | Delivery Loc... | Qualification | Shift Code | Start | End | Break | Worked Hrs | Rate | Total | Allowances | Total (Exclud... | View Log |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 25-11-2019 | 614 | | LABOURER | AM | 06:00 | 14:00 | 0 | 8.00 | $30.00 | $240.00 | $1.05 | $241.05 | |
| 22-12-2019 | 598 | | LABOURER | PM | 14:00 | 23:00 | 0 | 9.00 | $36.00 | $324.00 | $0.00 | $324.00 | |
| 25-12-2019 | 451 | | LABOURER | PM | 14:00 | 23:00 | 0 | 9.00 | $30.00 | $270.00 | $0.00 | $270.00 | |
| 07-01-2020 | 739 | | LABOURER | AM | 06:00 | 22:15 | 0 | 16.25 | $30.00 | $487.50 | $1.05 | $488.55 | |
| 08-01-2020 | 740 | | LABOURER | AM | 06:00 | 22:15 | 0 | 16.25 | $30.00 | $487.50 | $1.05 | $488.55 | |
| 17-01-2020 | TEST005 | | LABOURER | AM | 06:00 | 14:00 | 0 | 8.00 | $24.00 | $192.00 | $1.05 | $193.05 | |
| 18-01-2020 | TEST06 | | LABOURER | AM | 06:00 | 14:00 | 0 | 8.00 | $36.00 | $288.00 | $2.10 | $290.10 | |
| 20-01-2020 | 581 | | LABOURER | AM | 06:00 | 14:00 | 0 | 8.00 | $30.00 | $240.00 | $1.05 | $241.05 | |
| 21-01-2020 | 582 | | LABOURER | AM | 06:00 | 14:00 | 0 | 8.00 | $30.00 | $240.00 | $1.05 | $241.05 | |
| 22-01-2020 | 583 | | LABOURER | O2 | 13:00 | 14:00 | 0 | 1.00 | $30.00 | $30.00 | $0.00 | $30.00 | |
| 22-01-2020 | 583 | | LABOURER | O1 | 10:00 | 13:00 | 0 | 3.00 | $30.00 | $90.00 | $39.00 | $129.00 | |
| 22-01-2020 | 583 | | LABOURER | AM | 06:00 | 10:00 | 0 | 4.00 | $30.00 | $120.00 | $1.05 | $121.05 | |
| 23-01-2020 | 584 | | LABOURER | O2 | 06:00 | 14:00 | 0 | 8.00 | $30.00 | $240.00 | $0.00 | $240.00 | |
| **Totals : 13** | | | | | | | | **106.50** | | **$3,249.00** | **$48.45** | **$3,297.45** | |

Service Location: FLEMINGTON RACECOURSE, Office Name: MELBOURNE, Date From: 01/01/2020, Date To: 31/01/2020 ← Back to Previous

1 – 13 of 13 items

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## *Coming Soon[10]*

*Stage 2 of this report will include a shift count.*

## Member Visa Detail Report

*Pathway: Reports>Member Reports> Member Visa Detail Report*

**Members Visa Details Report**

| | | | | | |
|---|---|---|---|---|---|
| Date Period *(Max 6 months) | 10/08/2019  10/02/2020 | State | -- Select State -- | Service Office | -- Select Service Office -- |
| Qualification | -- Select Qualification -- | Member Status | -- Select Member Status-- | Visa Sub Class | -- Select Visa Subclass -- |
| Group By | ● Members  ○ Visa Sub Class | | | | |

📄 Report  ⬇ Export  ✉ Send Email

This report has been designed to capture all visa holders (excluding residents who obtained a visa prior to commencement date of report) who have worked within the nominated period (maximum of 6 months.

This report can either be grouped by:

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[9] Currently Tier 3 reflects the same logic as payroll/invoicing in that NS is spilt
[10] Feature improvement due date not yet available

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1. **Member Name (no tiers)**

| | Report | Export | Send Email | | |
|---|---|---|---|---|---|

Details of members who were non-residents and worked for a company during the period 10/08/2019 - 10/02/2020

| ID | First Name | Last Name | M/F | Email Id | Visa Class |
|---|---|---|---|---|---|
| 271408 | SANJEEV | NISCHAL | F | rahul@entiresoftware.com | 600 |
| 3798082 | THOMAS | KELLY | M | rahul@entiresoftware.com | 34 |
| 3798066 | JAMES | FRANKEL | N | rahul@entiresoftware.com | test |
| 13502 | COOPER | WING | F | rahul@entiresoftware.com | sadfasf |
| 24753 | VIKTOR | EVANS | F | rahul@entiresoftware.com | bcvcvb |

|◄ ◄ **1** ► ►| 50 ▼ | | 1 - 5 of 5 Items |
|---|---|---|---|

2. **Visa/Subclass Type (2 Tiers)**

## Tier 1

*Summary of Subclasses + No. of Members within each Subclass during period requested.*

Employee Visa Details Report

| Visa SubClass | No Of Members |
|---|---|
| SUBCLASS 500 | 1 |
| SUBCLASS 189 | 1 |
| SUBCLASS 190 | 1 |
| SUBCLASS 498 | 1 |
| SUBCLASS 494 | 1 |

|◄ ◄ **1** ► ►| 50 ▼ | 1 - 5 of 5 Items |
|---|---|---|

## Tier 2

*Breakdown of Members who worked within this period with nominated Visa Type*

Details of members who were non-residents and worked for a company during the period 10/08/2019 - 10/02/2020     ← Back to Previous

| ID | First Name | Last Name | M/F | Email Id | Visa Class |
|---|---|---|---|---|---|
| 271408 | SANJEEV | NISCHAL | F | rahul@entiresoftware.com | 600 |

|◄ ◄ **1** ► ►| 50 ▼ | | 1 - 1 of 1 Items |
|---|---|---|---|

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## Client App + Portal

### Enhanced Shift Type Selection on App and Portal

Clients may now be restricted on the Client Portal (and App) to a reduced number of shift types (which have corresponding set times).



i.e. *Short AM* has been set to *default for this client* - allowing shift type and time to be set and awaiting remaining booking to be entered.

This enables clients to enter bookings without adjusting shift type or time.

This can be set in Masters by selecting Client Default.

*Pathway: Masters>Allocations Master>Members Shifts>Select and/or Create Shift Type*

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## Editing Shift on Client Portal

Previously, Clients' could only change Delivery Location and Booking Notes prior to Confirmation of Booking.

Now, as seen above - Clients' can change Delivery Location and/or Booking Notes at any time in the booking process – including when the shift status is *Shift Booked*.