Client (CLT) and Professional (PRF) Logins Explained

Reminder if you are using the Mobile Application on Tablets or Smartphones you MUST use a Professional login. Only the Professional login work when using the Mobile APP. If you are accessing your internet browser (such as Safari) then using the Client Login is fine.



1 - Home Screen

This is your computer desktop login from any computer or tablet. It gives the same options as the Mobile App with a more detailed overview.

2 - New Booking

Here you can create new bookings, select Agency staff for shifts or simply submit bookings for our Allocations staff to fill.

3 - Current Booking

This page allows you to view, edit, or cancel any current bookings you have placed with Agency. You can also upload documents for shifts here.

4 - Request & Restriction

Using this page allows your staff to either request/restrict agency personnel for a particular facility or for all your facilities.

5 - Staff Authorisation

Using this page you can authorise a staff member of your facility who can place orders, select staff and view reports/invoices if you wish.

6- Contact Details

These contact details are of the client login that you are using at this time. Professional logins will show details of the facility they are attached to.

7- History

Here you can view a full history of all shifts ever ordered by your staff or by calling agency directly. This history can also be exported to excel.

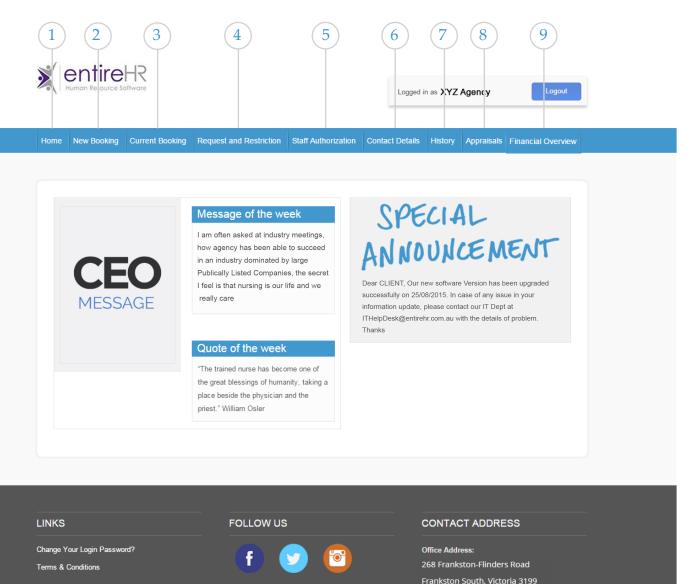
8 - Appraisals

Allows you to perform appraisals of agency staff Online.

9 - Financial Overview

Only available to select management staff you authorise, this page allows you to view invoices both paid and outstanding, run reports on agency shift fill times, shifts per month and by different facilities, view member dockets/timesheets, download and excel spreadsheets.

Desktop home screen using Client or Professional Login



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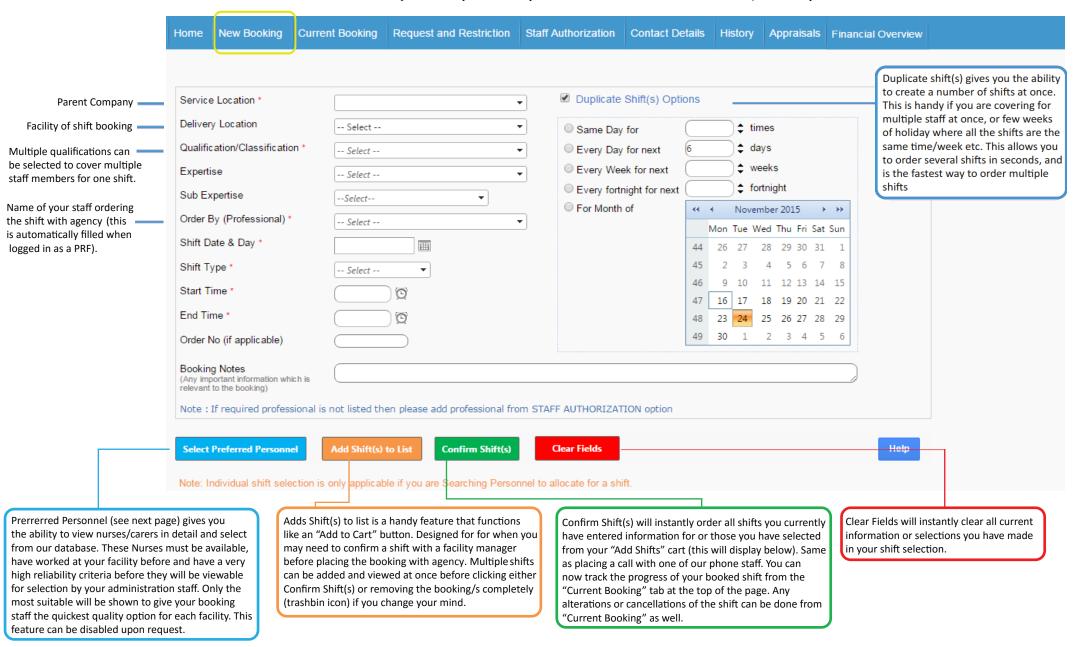
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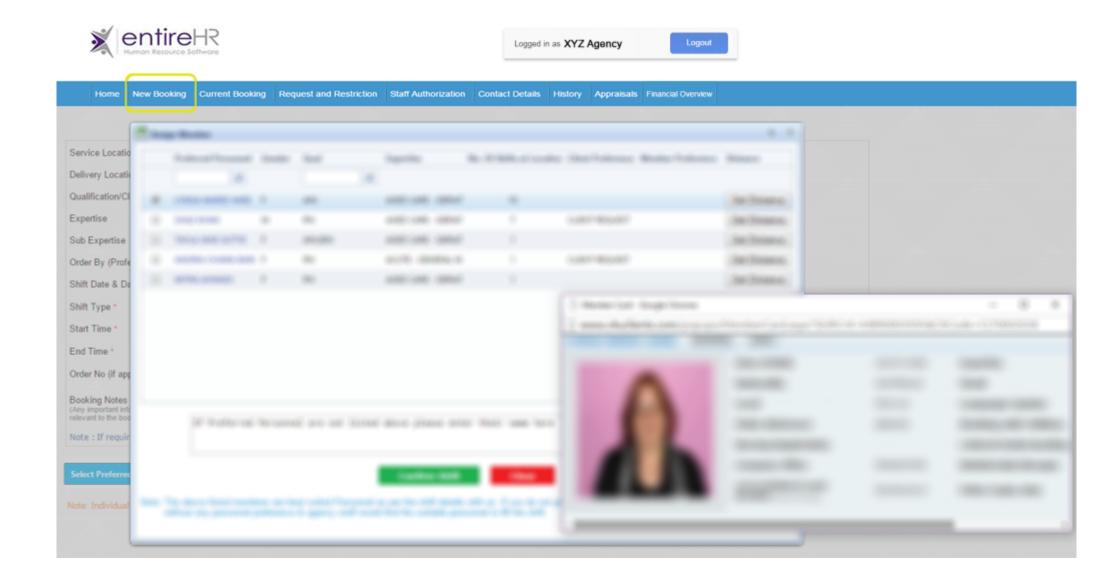
New Bookings Screen

Breakdown of the How to Book on a Computer Desktop. Please note professional Mobile APP has the same features just in a simplified format.

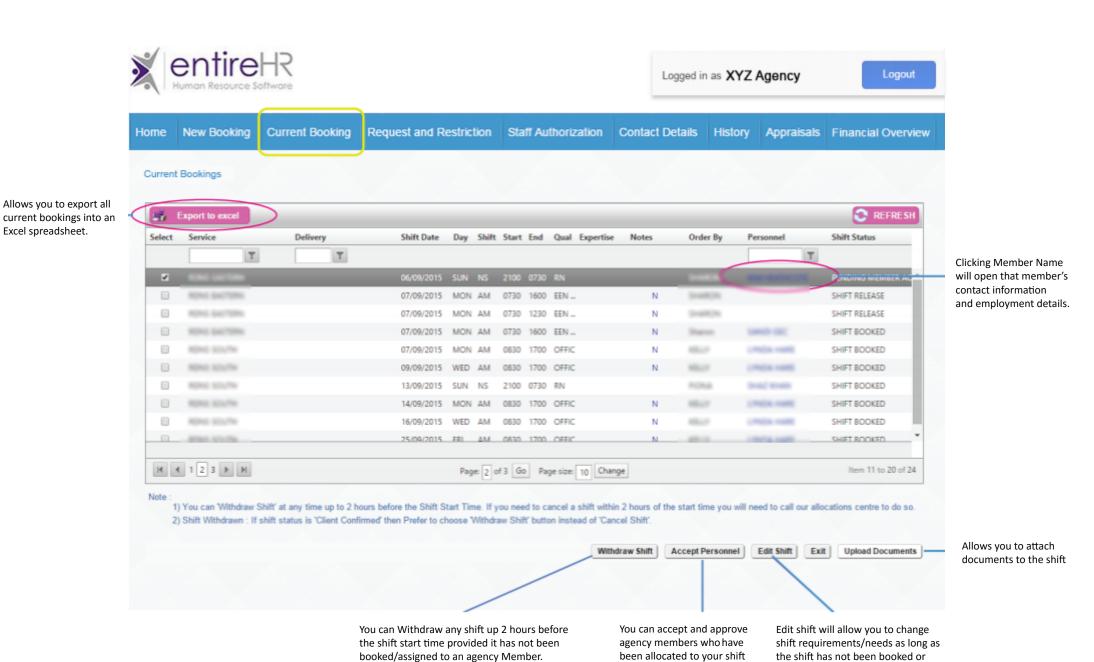


Select Preferred Personnel Screen Pop Up

This screen shows available staff to work at the facility as per the qualifications selected, additionally a member pop up is showing additional important information for your bookings staff. You can also view the distance from the agency member to your facility and also search for a particularly qualification or name from this page.



Current Booking Screen Overview



If you need to cancel a shift that has been booked

or within 2 hours of the shift start time you will

need to call agency.

directly from this screen,

App.

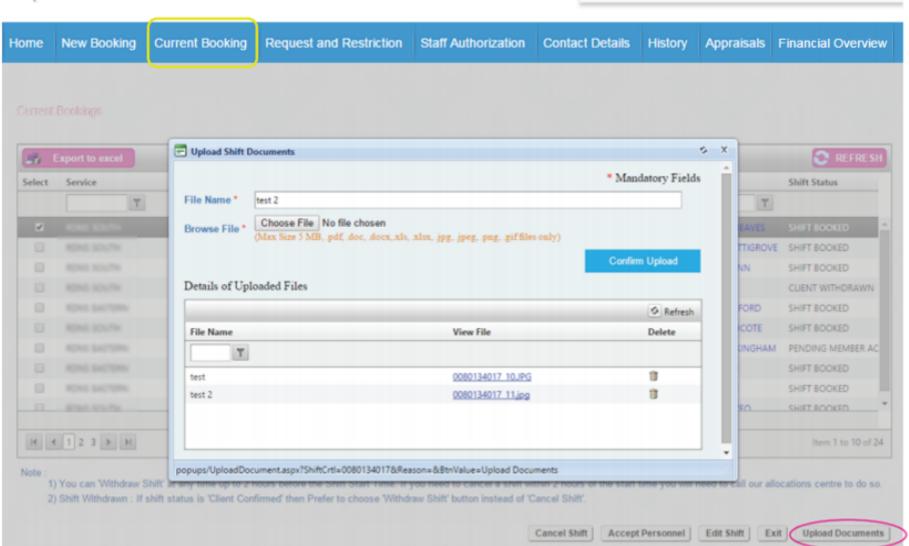
same as the using the Mobile

accepted yet.

Uploading Documents in Current Booking Screen

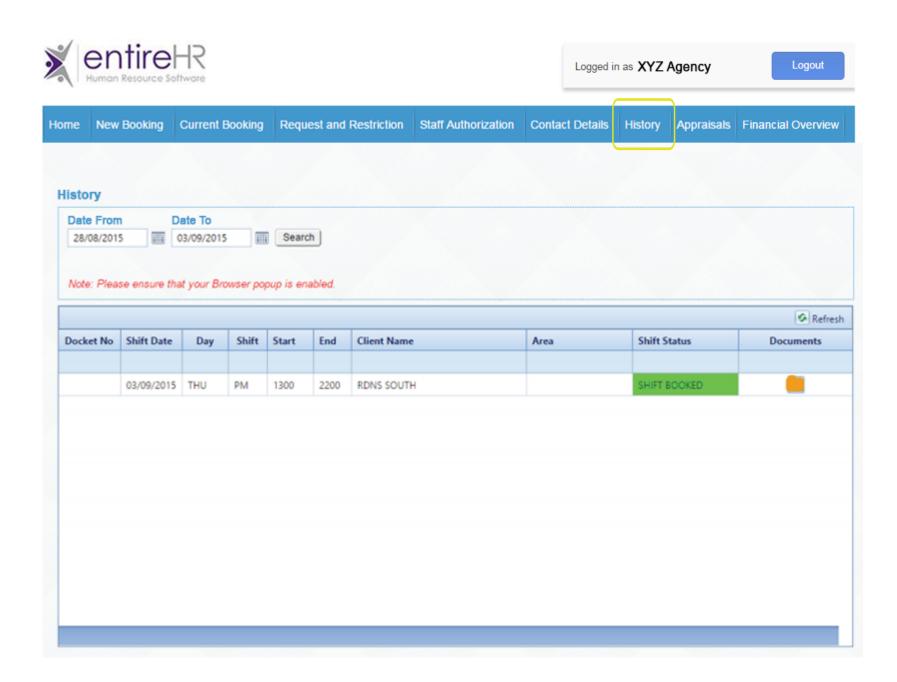
This pop up shows the upload shift documents screen, this is shown by selecting a shift and hitting the "Upload Documents" button at the bottom. Documents can be viewed once uploaded or deleted from this screen. If you have uploaded documents to a shift that shift will have a orange folder icon in the "History" screen (shown on the next page).





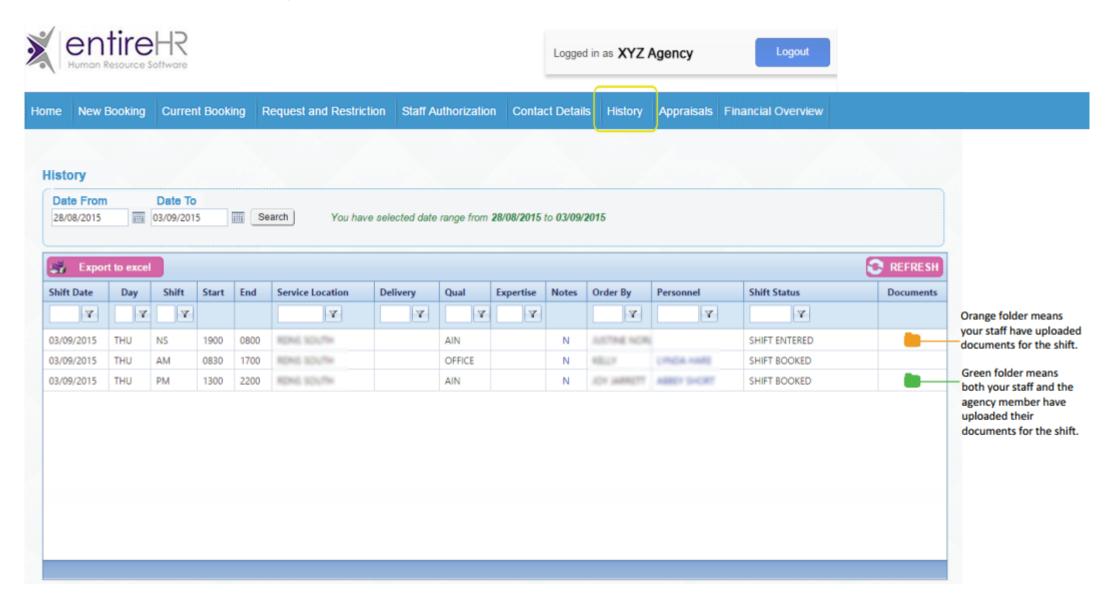
Agency Member point of view for document upload.

This is an example of what a agency member would see when looking at a shift they have worked at your facility would see. You can see the orange folder icon prompting them to upload their document to match with the document your staff have uploaded.

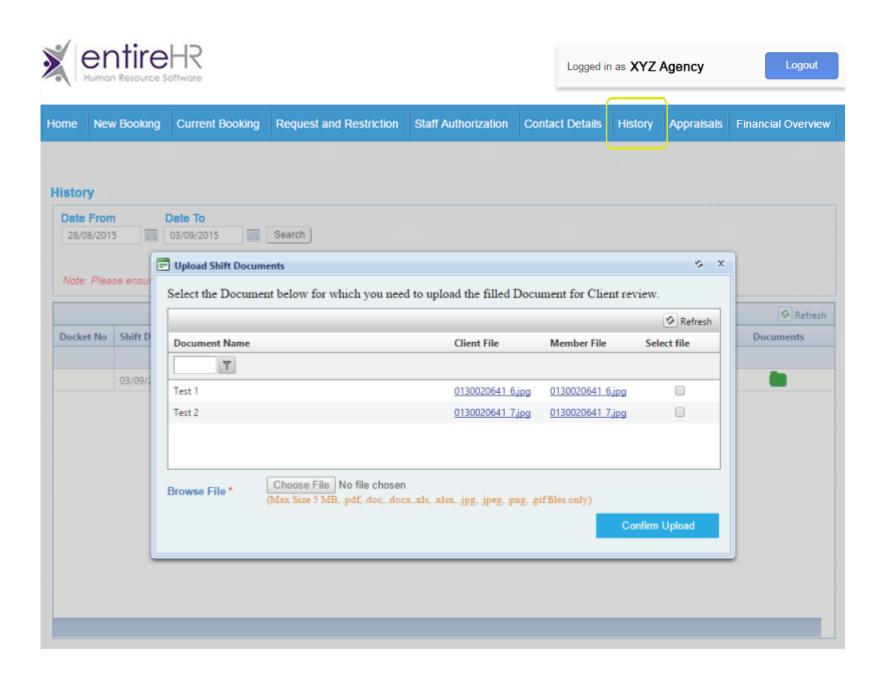


History Screen Overview

This page keeps a detailed memory log of every shift every ordered with agency, online, by Mobile APP or through calling our Allocations centre. You can export the information on this page into an excel spreadsheet if you wish, view notes for each shift and check the appropriate documents have been uploaded and download them if you wish.

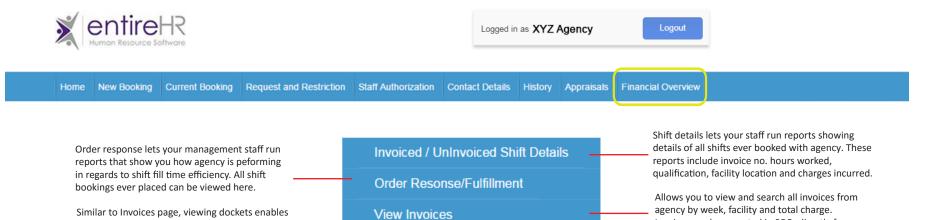


Pop up displaying all uploaded documents for a particular shift.



Financial Overview Screen for Your Authorised Satff

This screen can only be accessed by specially authorised staff such as your management or financial officers, if you wish a staff member to have access to this page please notify agency so we can enable this for them. It provides financial information and numerous reports.



View Dockets

you to search by dockets/timesheets as well as

showing all relevant invoice information. Every

submitted document by agency members is

available fo view here as well.

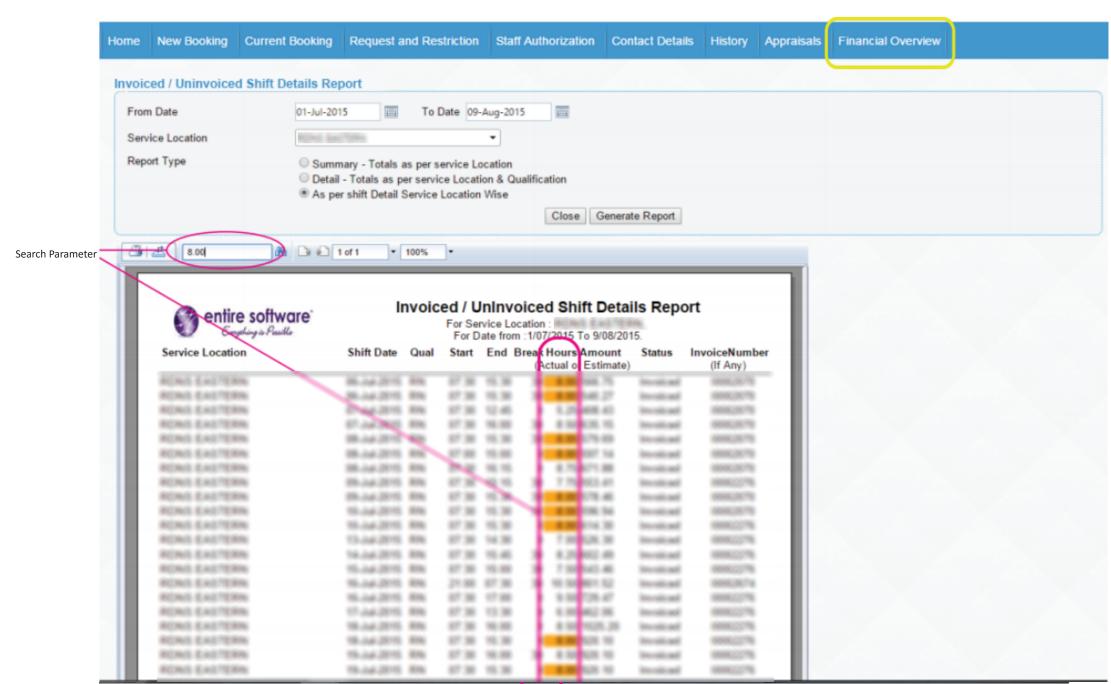
Invoices can be exported in PDFs directly from

this screen.

Example of Invoice Report by Location and Shift type with Details

These reports have a multitude of search parameters and can be exported to excel, pdf or printed and faxed depending on your needs.

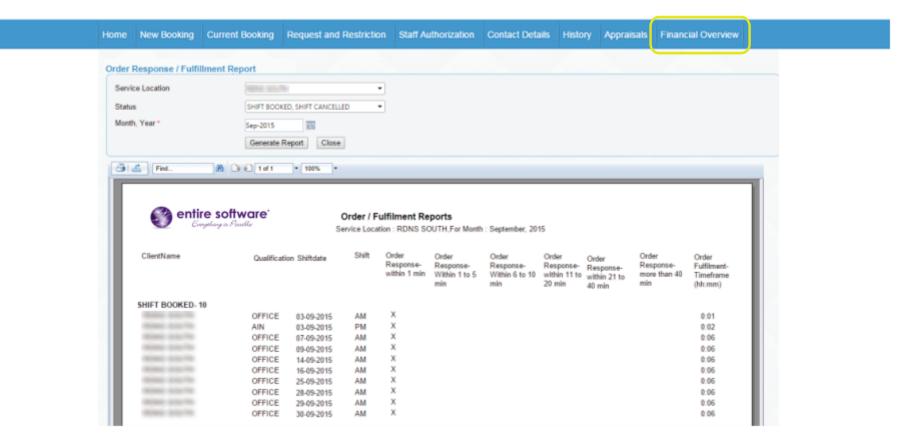




Example of the Order Response and Shift Fill rate report

These reports help you access agency performance in providing service and filling shifts and are included for your benefit.

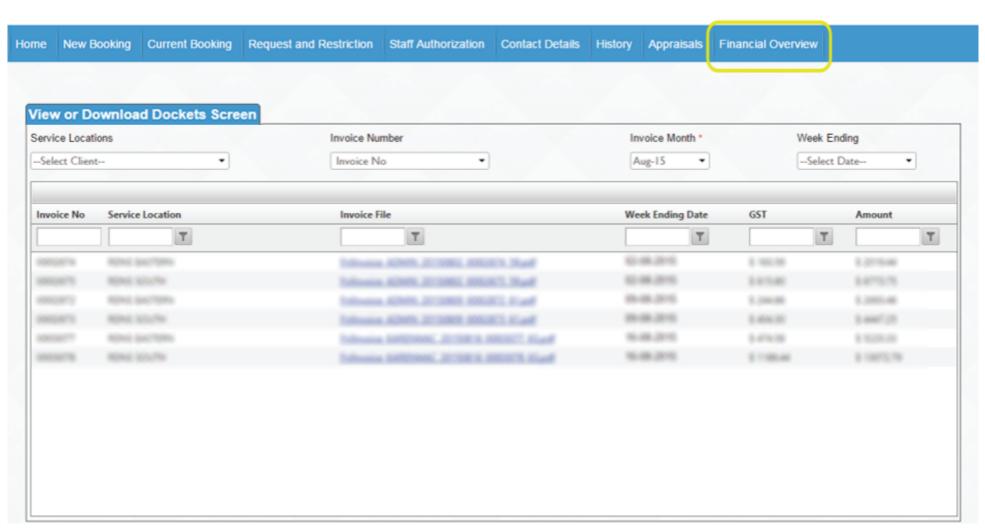




Download and View Invoices Screen

Allows you to view and search all invoices from agency by week, facility and total charge. Invoices can be exported in PDFs directly from this screen.



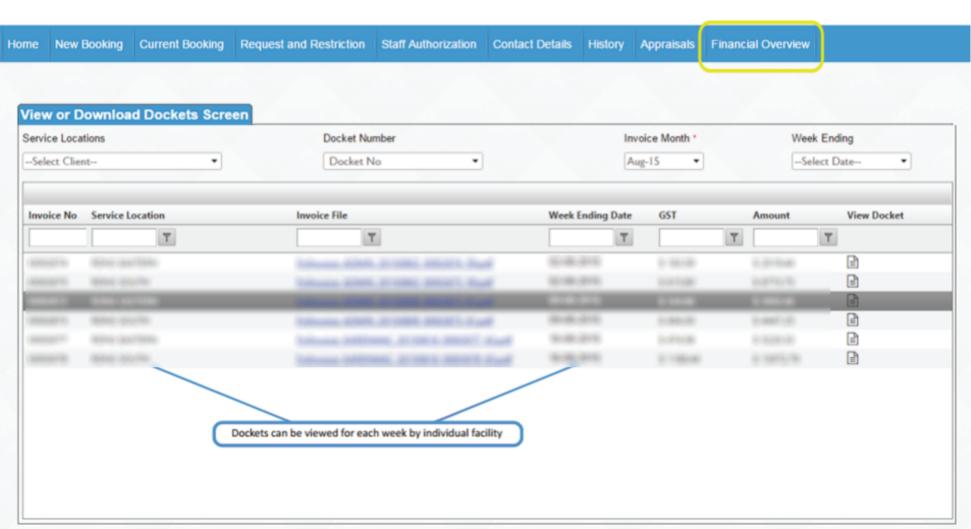


Dockets Screen Example

The Dockets screen has similar information to the invoice screen but also enables you to search by dockets/timesheets as well. You can search by numerous options as you can see and every document submitted by agency members is available fo view here as well.



Logged in as XYZ Agency



Dockets Screen when viewing Docket Numbers

By clicking "view docket" your staff can search and view all dockets provided for every shift in that invoice, provided the member has provided a photo of their docket/timesheet, shown with a "Y" under "Photo". You can individually download and view these if you wish.

