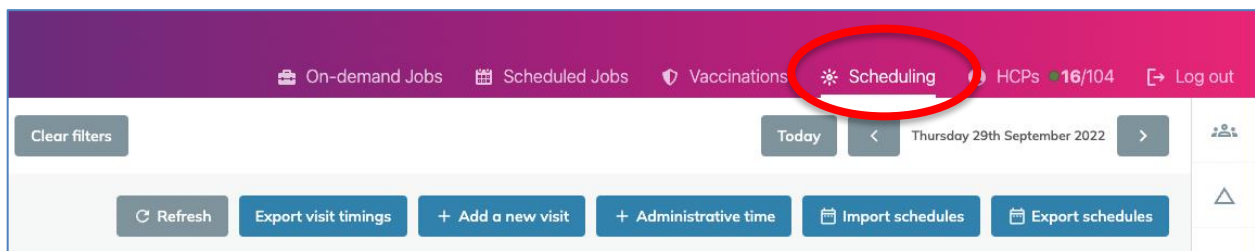


# Scheduling System – Controller Functions

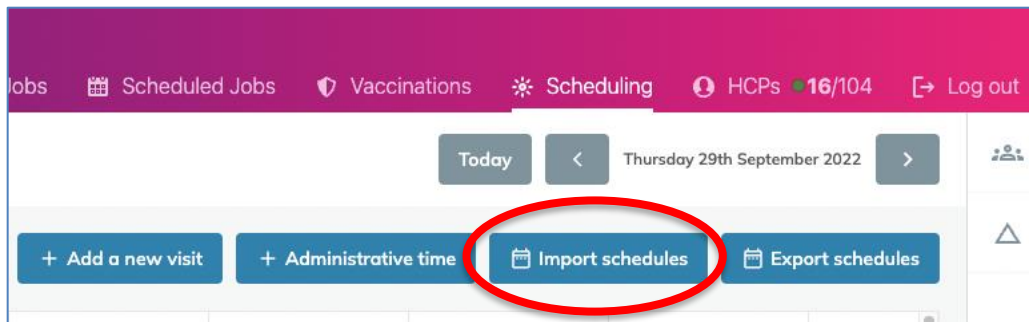
## Setting up staff availability

This feature enables controllers to set up via simple csv import the dates and times in which HCPs are available for work. HCP timeframes can be added, updated and removed using this method. This feature means that DocAbode can be operated independently of any existing rostering software; there is no reliance on building integrations.

1. Log in to Doc Abode as a COD <https://controller.docabode.com/> and select the Scheduling tab



2. Select the **Import schedules** button.



3. In the new window, you can upload the schedule as a **csv** file. An example file is available for you to fill in:, as shown below

userId	Date	startTime	endTime
test.user	21/01/2022	09:00	17:00
another.user	21/01/2022	08:00	12:00
another.user	21/01/2022	13:00	17:30
test.user	22/01/2022	09:00	13:00

There are four columns required:

- userId - the user ID of the HCP. This is seen immediately below the person's name in grid view and is usually set up as firstname.lastname
- date - the date of the schedule, must be in the format: DD/MM/YYYY

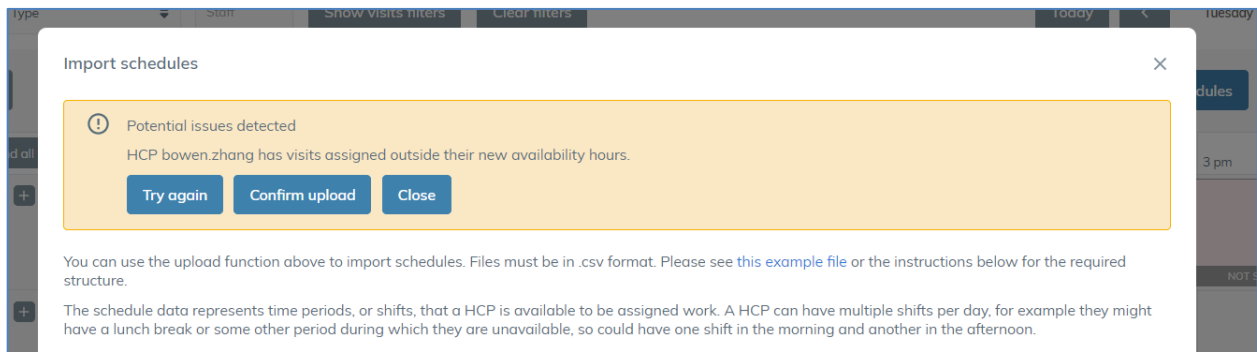
- startTime - the start time of the shift, must be written as a 24 hour time in the format: HH:MM
- endTime - the end time of the shift, must be written as a 24 hour time in the format: HH:MM

See section below for guidance on how best to populate this file.

4. Once the updated file is uploaded, staff with availability will have a green icon, and swim lanes will be shaded white for the specific hours they are available

The screenshot displays the Doc Abode scheduling interface. At the top, there is a navigation bar with the Doc Abode logo and 'On-demand Jobs'. Below this, there are filter buttons for 'Availability', 'HCP Type', and 'Staff', along with 'Show visits filters' and 'Clear filters'. A status bar indicates 'No urgent warnings 0' and includes 'Refresh', 'Export visit timings', and '+ Add a new visit' buttons. The main area is a grid with columns for time slots (8 am, 9 am, 10 am, 11 am, 12 pm) and rows for staff members: Imran Younis (IY), Bowen Zhang (BZ), Taras Diachyshyn (TD), and Mutaz Aldawoud (MA). Each staff member's row has a green availability indicator. Visits are shown as colored blocks: a pink block for 'Дячшин, Тарас' (Diachyshyn, Taras) from 10 am to 12 pm, and a pink block for 'diachyshyn, taras' from 9 am to 10 am. The latter block is labeled 'COMPLETED' with a green bar at the bottom. A green block for 'Administrative' is shown from 9 am to 10 am, labeled 'NOT STARTED' with a red triangle warning icon.

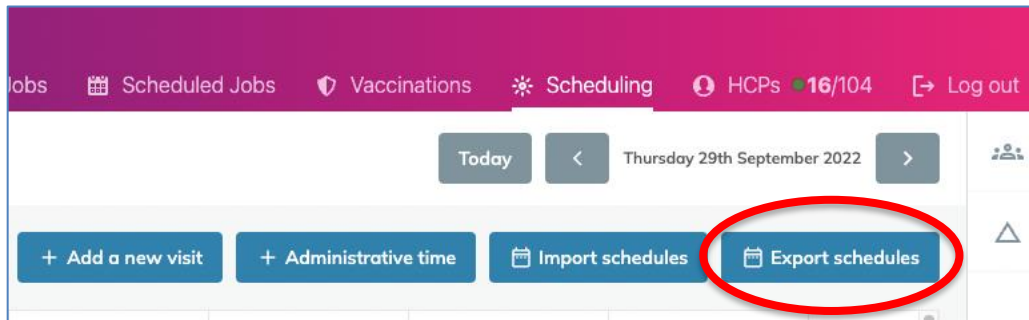
5. The system will alert you if there are any issues in the file.



In the example above, an HCP has visits assigned outside their working hours. There are two possible courses of action:

- the file can be updated to cover this period, or
- the warning can be ignored and the upload continued. In this case the visit will stay assigned to this HCP outside of their working hours.

6. The **Export schedule** button can be used to download a csv file of today's availability, which is useful as a basis for amending entries.



## Setting up the csv file

The following guidance provides further details on best use of the staff availability upload feature and some useful worked examples.

It is important to note that

- availability settings are only changed for the dates contained within the csv file: no other past or future dates are affected
- when a date appears in the csv file, then *all* entries for that date will be replaced with entries in the csv file.

The following examples should help to illustrate expected behaviours.

Let's assume the following availability has been loaded into Doc Abode. Note there are entries for three different dates.

Date	HCP	Time
22/06/2022	Oscar	08:00 to 16:00
22/06/2022	Dustin	08:00 to 16:00
23/06/2022	Oscar	08:00 to 16:00
23/06/2022	Dustin	08:00 to 16:00
24/06/2022	Oscar	08:00 to 16:00
24/06/2022	Dustin	08:00 to 16:00

Uploading a new file with

Date	HCP	Time
22/06/2022	Oscar	08:00 to 14:00

- Will **not** affect availability on the 23<sup>rd</sup> or 24<sup>th</sup>
- Will remove Dustin from the 22<sup>nd</sup>
- Will update Oscar's availability from 08:00 to 16:00 -> 08:00 to 14:00

Uploading a new file with

Date	HCP	Time
22/06/2022	Rachel	08:00 to 14:00

- Will **not** affect availability on the 23<sup>rd</sup> or 24<sup>th</sup>
- Will remove Dustin and Oscar from the 22<sup>nd</sup>
- Will add Rachel on the 22<sup>nd</sup> between 08:00 and 14:00

Uploading a new file with

Date	HCP	Time
22/06/2022	Rachel	08:00 to 16:00
22/06/2022	Joanne	08:00 to 16:00
23/06/2022	Claire	08:00 to 16:00
23/06/2022	Tara	08:00 to 16:00

- Will affect availability on the 22<sup>nd</sup> and 23<sup>rd</sup>
- Will **not** affect availability on the 24<sup>th</sup>
- Will remove Dustin and Oscar from the 22<sup>nd</sup>
- Will remove Dustin and Oscar from the 23<sup>rd</sup>
- Will add Rachel and Joanne on the 22<sup>nd</sup> between 08:00 and 16:00
- Will add Claire and Tara on the 23<sup>rd</sup> between 08:00 and 16:00

Uploading a new file with

Date	HCP	Time
22/06/2022	Oscar	08:00 to 16:00
22/06/2022	Dustin	08:00 to 16:00
22/06/2022	Tara	10:00 to 20:00

- Will **not** affect availability on the 23<sup>rd</sup> or 24<sup>th</sup>
- Will leave Oscar and Dustin unaffected on the 22<sup>nd</sup>
- Will add Tara on the 22<sup>nd</sup> between 10:00 and 20:00

Uploading a file with

Date	HCP	Time
22/06/2022	Oscar	10:00 to 20:00
24/06/2022	Oscar	10:00 to 20:00

- Will **not** affect availability on the 23<sup>rd</sup>
- Will remove Dustin on the 22<sup>nd</sup> and 24<sup>th</sup>
- Will update Oscar's availability from 08:00 to 16:00 -> 10:00 to 20:00 on both the 22<sup>nd</sup> and 24<sup>th</sup>