StaffBox

rota

HR

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User Guide

staff-box.co.uk

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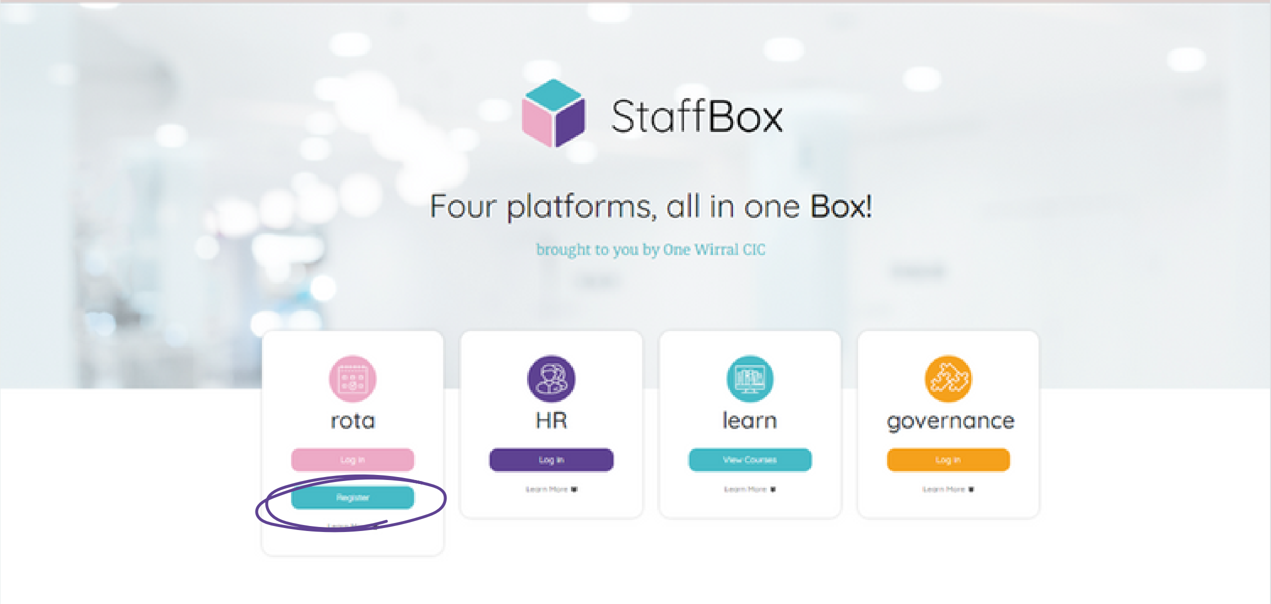
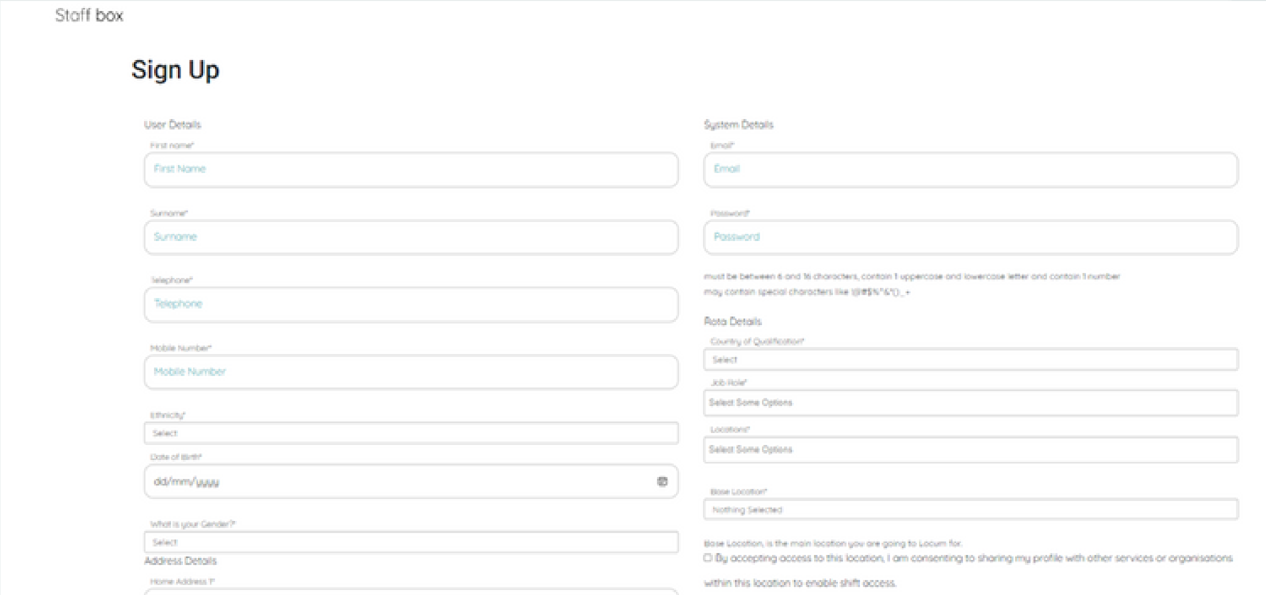
How to Register for StaffBox Rota

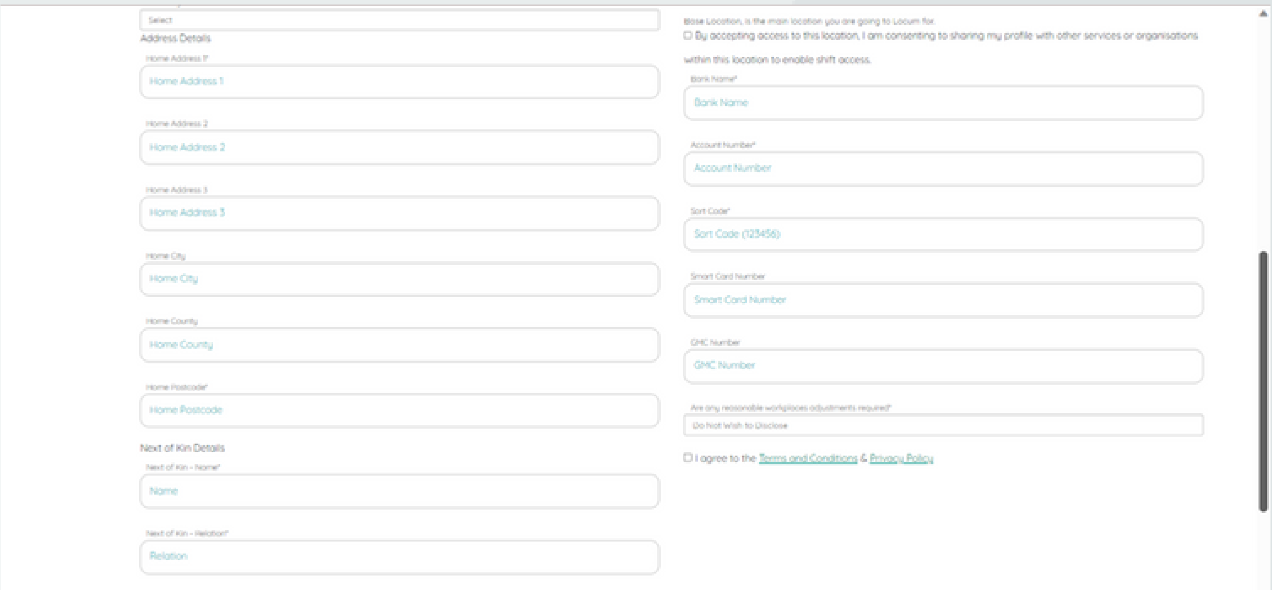


To **register for StaffBox Rota**, visit our StaffBox website.

From here, click the ‘**Register**’ button displayed underneath the pink Rota icon.

Register your account





Enter all mandatory information fields to register your account. You can also fill out any optional information that may be relevant to you and your needs at work, such as the reasonable adjustments section. If you choose to disclose your reasonable adjustments, StaffBox Rota will automatically notify any service admin you bid on a shift for, so your needs can be met.

After registering, you will be prompted to upload all relevant documents for your role.

Once you have uploaded your documents, your account will be sent to an admin from your chosen area/areas and will be approved.

Once your account is approved, you will receive an email confirmation from: **rota@staff-box.co.uk.**

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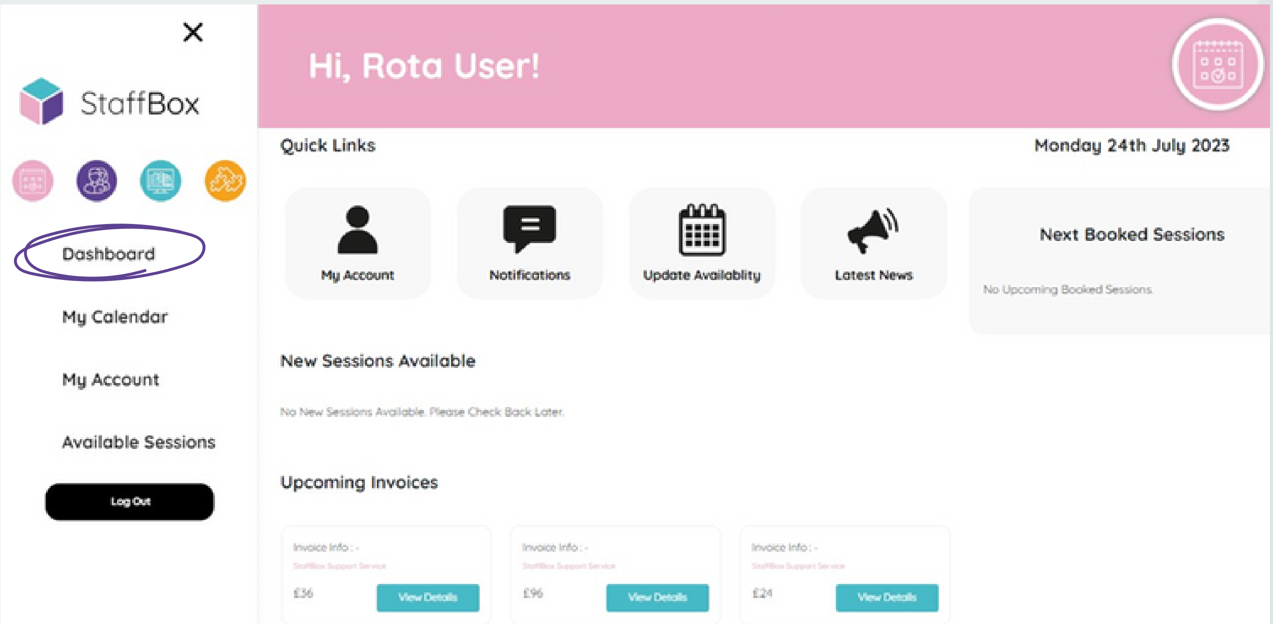
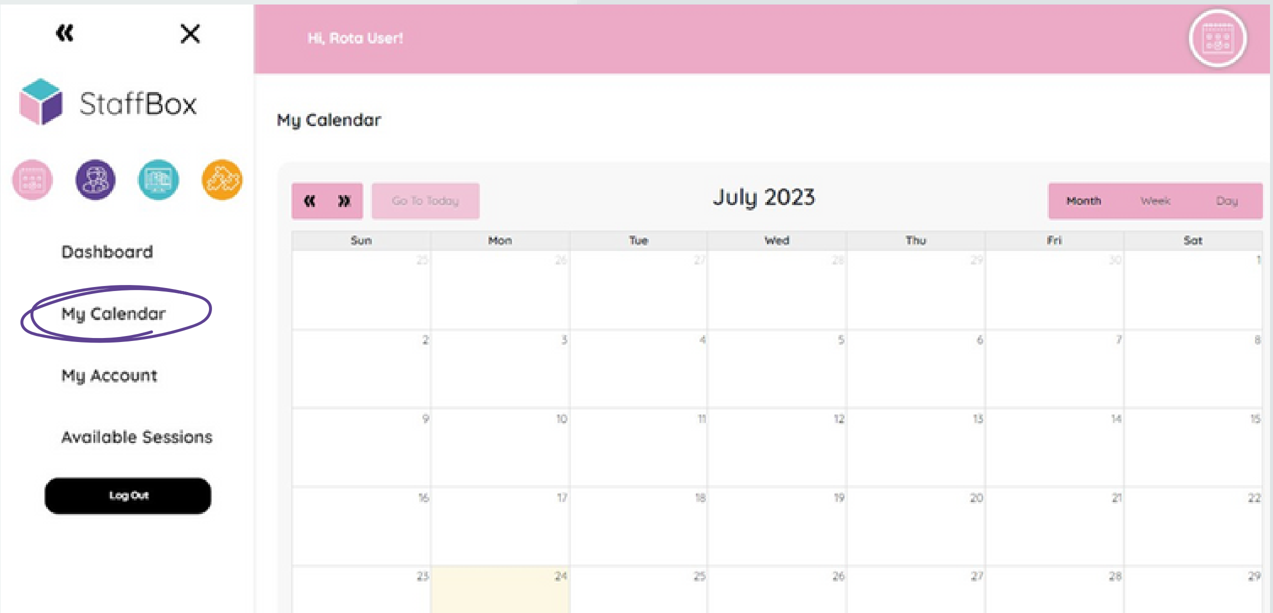
Dashboard



This is the **StaffBox Rota dashboard** for users. The dashboard is used as a main point of navigation through the platform, with quick links that direct you to different pages such as your account information, notifications, and the latest news for your organisation. The quick links can also be customised based on the needs of the user (they can change the links based on what pages they use the most).

Calendar



To access your Rota calendar, click on ‘**My Calendar**’ in the main side bar. Here you will see a month-by-month view of your shifts.

You can also filter what you are seeing to a view of the current day, the month or the week depending on what you need to see.

If you would like to cancel a shift from your calendar- click on the shift, then select ‘**Cancel**’. After choosing to cancel a shift, the admin from that service will be automatically emailed by Rota to inform them of your cancellation- reducing any need to contact the service directly.

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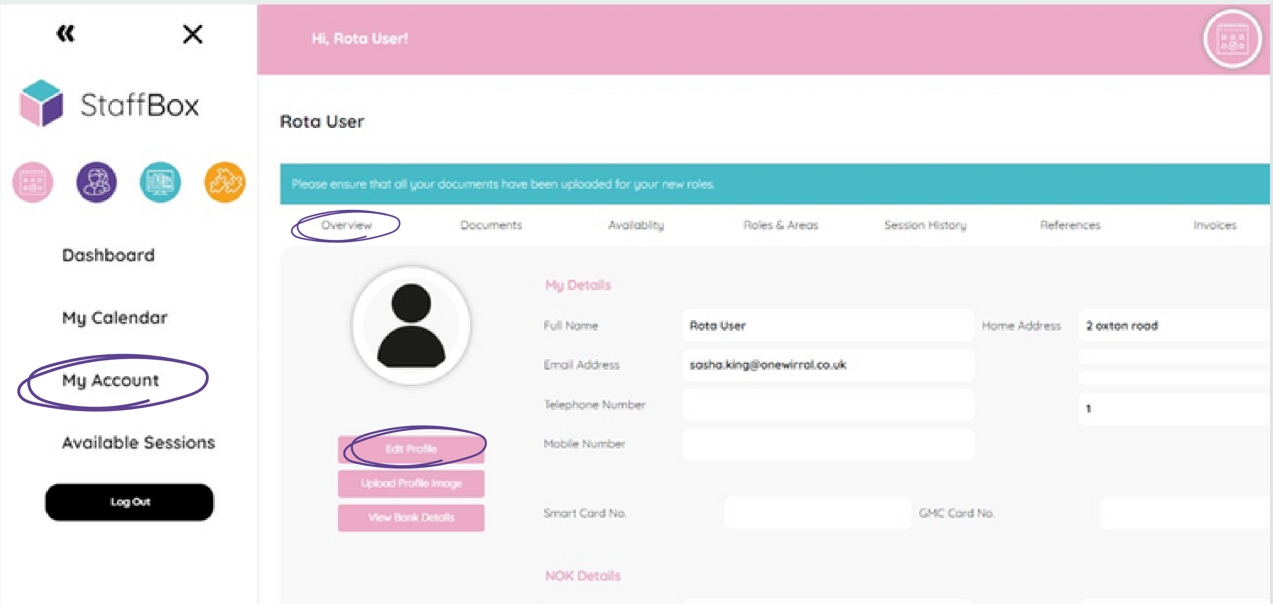
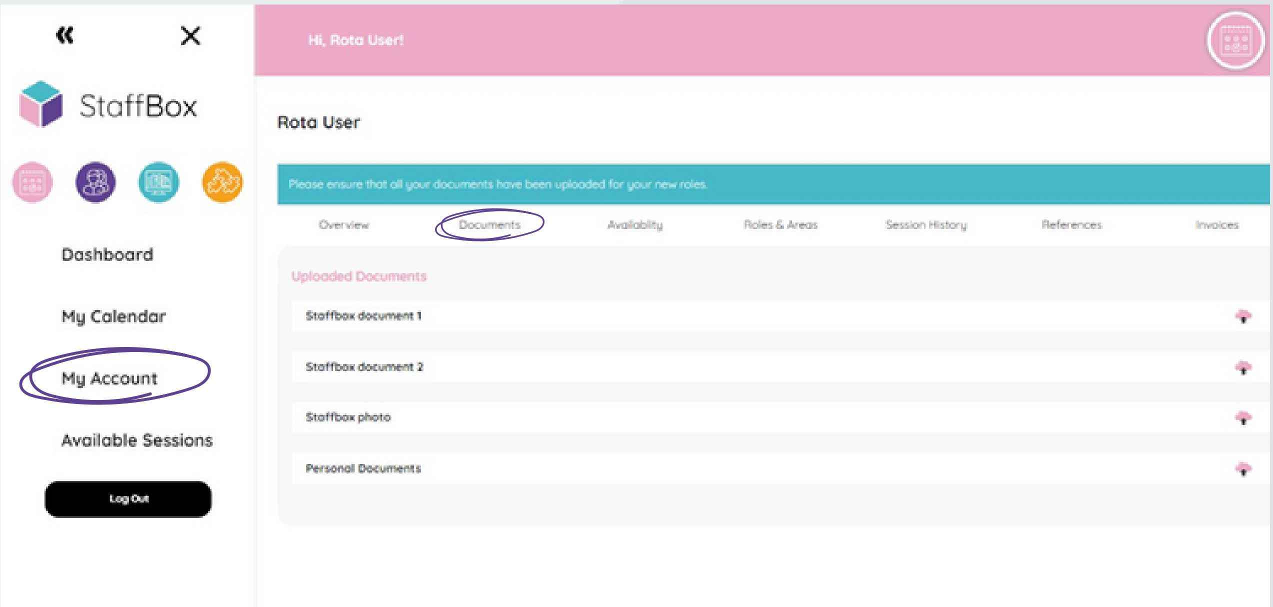
Account - Overview



To view your account details, click on the '**Overview**' tab in your account.
From here you will be able to view all personal information associated with your Rota account.

To edit this information**,** click on '**Edit Profile**' under your profile picture. In the same area you will also be given the option to **view your bank details** or **change your profile picture.**

Documents

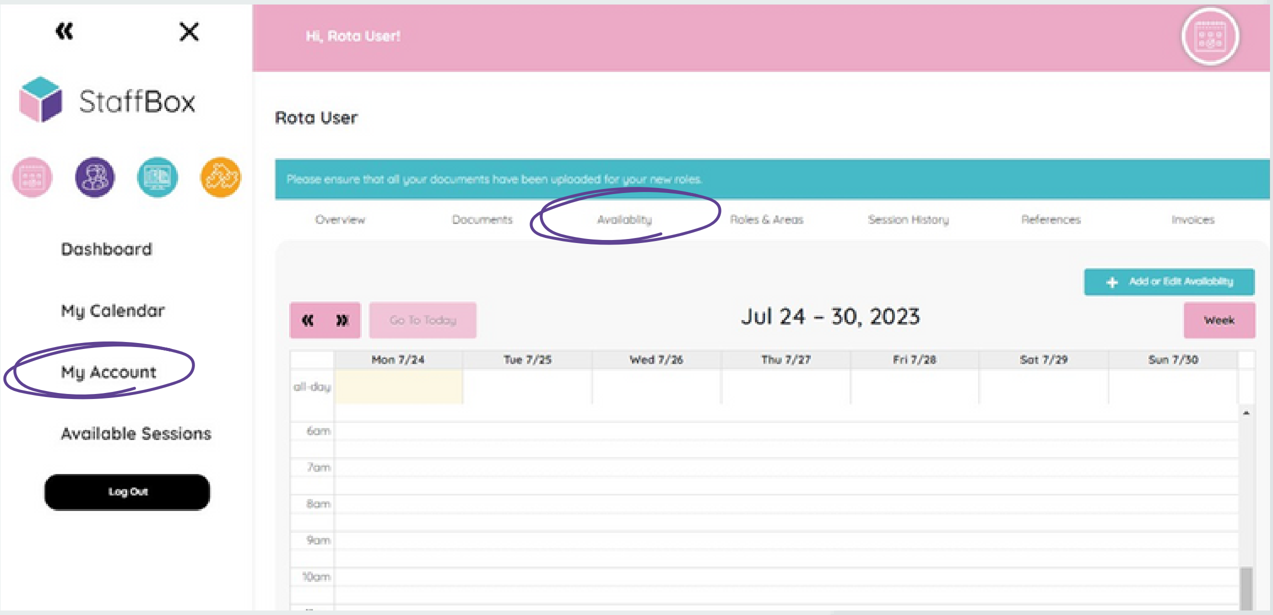


To view or upload your documents, click on the '**Documents**' tab from '**My Account**'.
From here **you can view and download previously** uploaded documents, along with uploading new documents that may be pending.

When you register for StaffBox and select your job role, our system will automatically request the required documents for your role. These required documents will appear under the '**Documents**' tab ready for you to upload. After uploading your documents, an admin from your chosen areas will be able to approve your account.

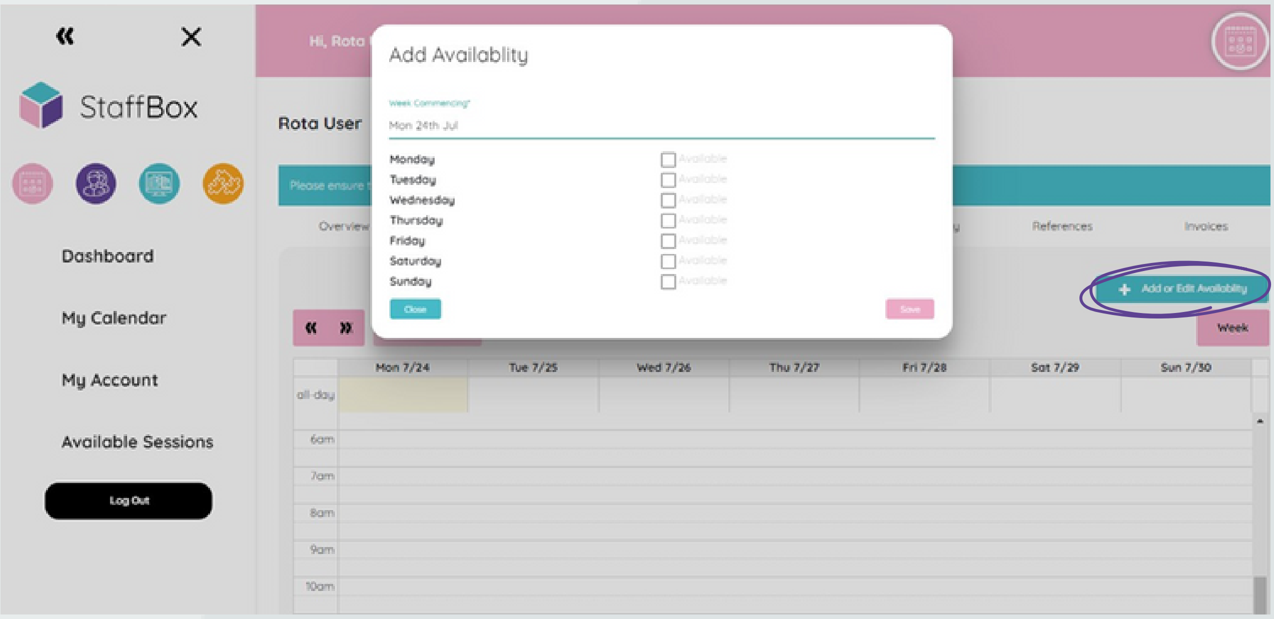
Alternatively, if you would like to upload documents that have not been requested, but you think may be useful, you can do so using the '**Personal Documents**' section.

Shift availability



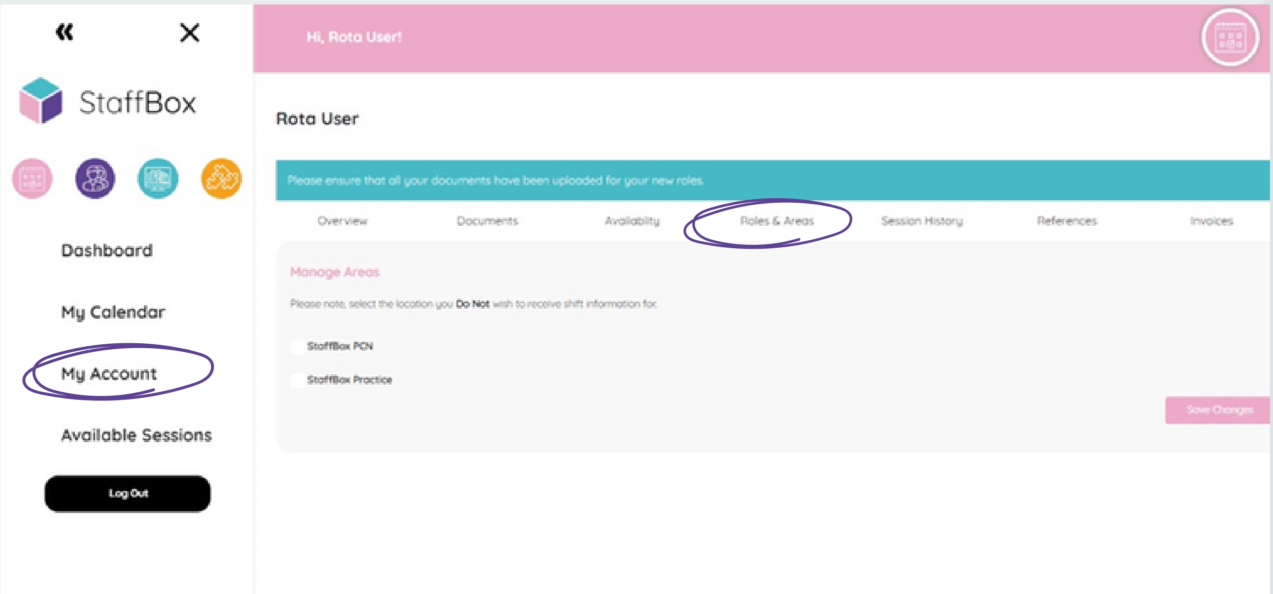
To **view your current shift availability**, go to '**My Account**' on the main sidebar followed by 'availability'. From here you will be able to see your current availability. Based on your availability, you may be sent more/less shift bids.

Edit availability



To edit your availability, click on the '**Edit Availability**' button to the right of the screen. Choose the week you would like to edit and click on the days you are available. If you have already said you are available, but are now not available, simply untick the days and weeks you would like to update.

Role & Area Preferences

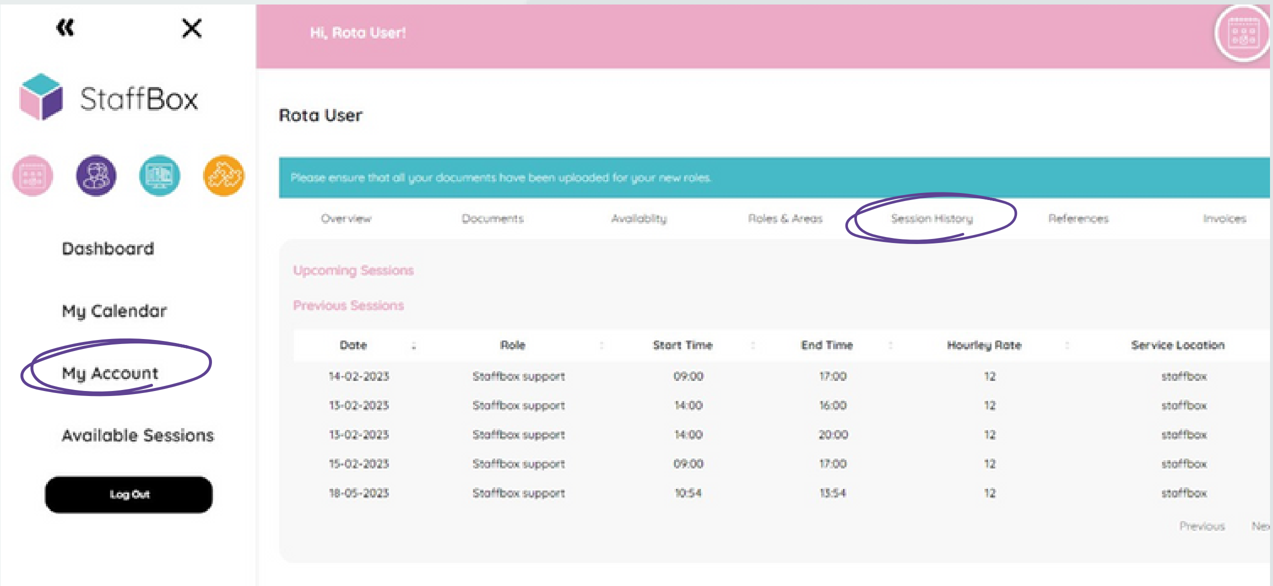


To update your role and area preferences, go to '**My Account**', then '**Roles & Areas**'. Based on your chosen roles, you will be shown a list of what areas you can work in. from this list, tick any areas that you **cannot** work in.

After making you changes, make sure to click the pink '**Save Changes**' button at the bottom right of the screen.

After saving your new preferences, you will be sent notifications for available shifts for all locations that are not ticked.

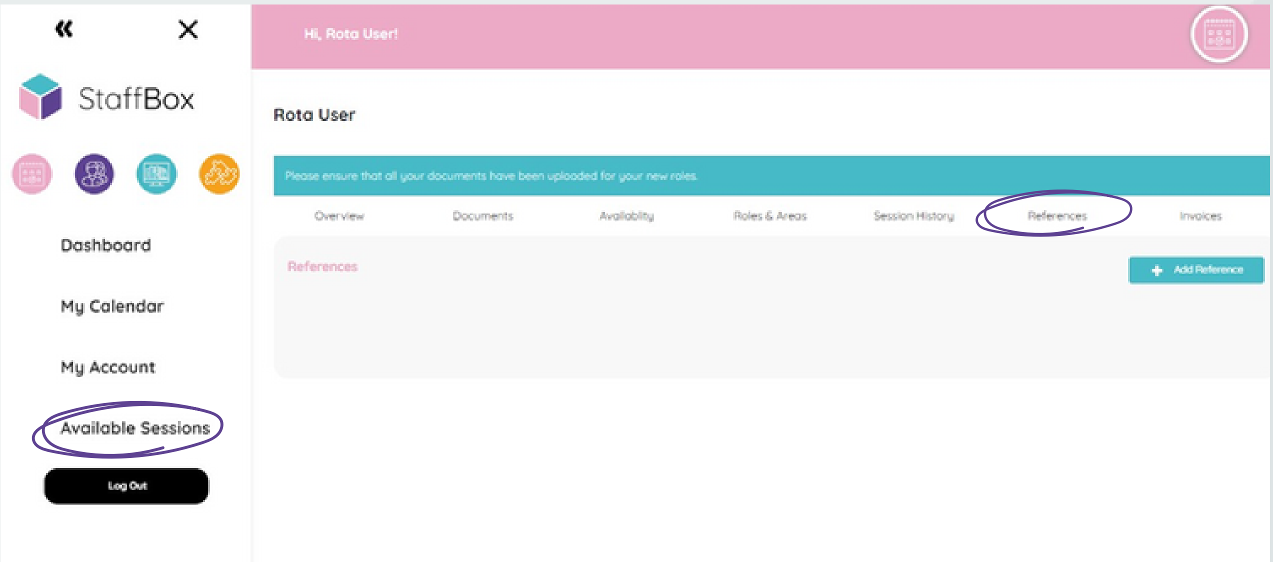
Previous Sessions



To view previous sessions, you have worked, go to '**My Account**' then '**Session History**'. Here you will be able to see details for all your past shifts, including start and end time, hourly rate, and service location.

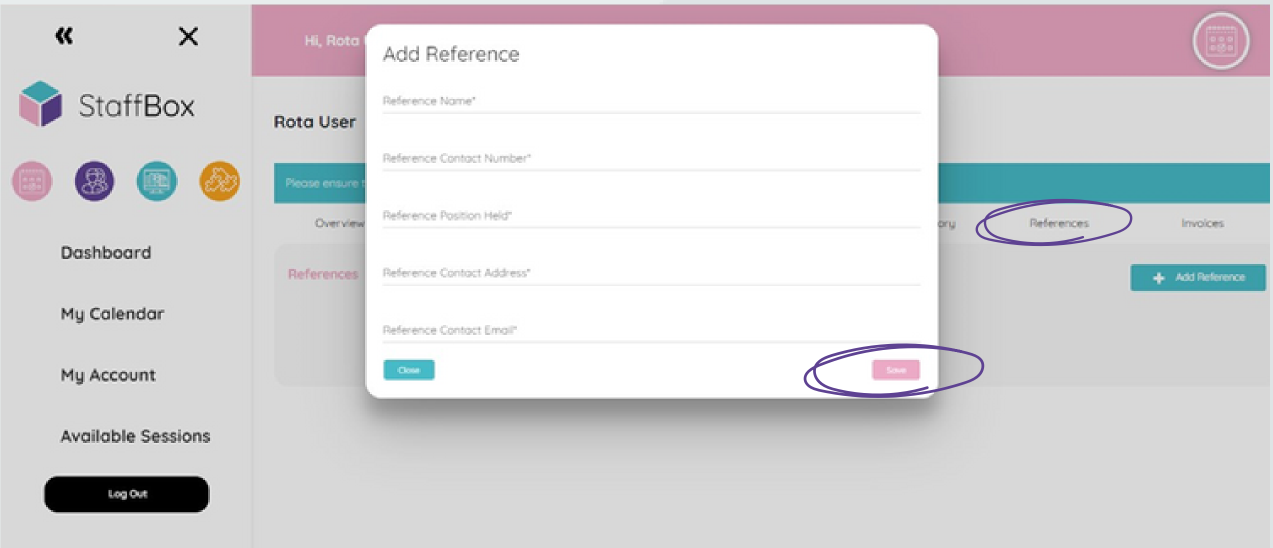
You will also be able to see a list of your upcoming sessions. If you need to **cancel an upcoming session**, you can do so through your calendar.

References



To view or upload your references, go to '**My Account**', then '**References**'. Here you will be able to view your previously uploaded references as well as upload a new reference.

Add a new reference



To add a new reference, go to the '**References**' page in '**My Account'**. To add a reference, click on the blue '**Add Reference**' button to the top right of the page.

Here you will be prompted to add any important details for your new reference, including contact details such as email, phone number and name. You will also be asked for their position or job title.

Once you fill out these fields and click '**Save**' your referee details will be added to the '**References**' section of your account.

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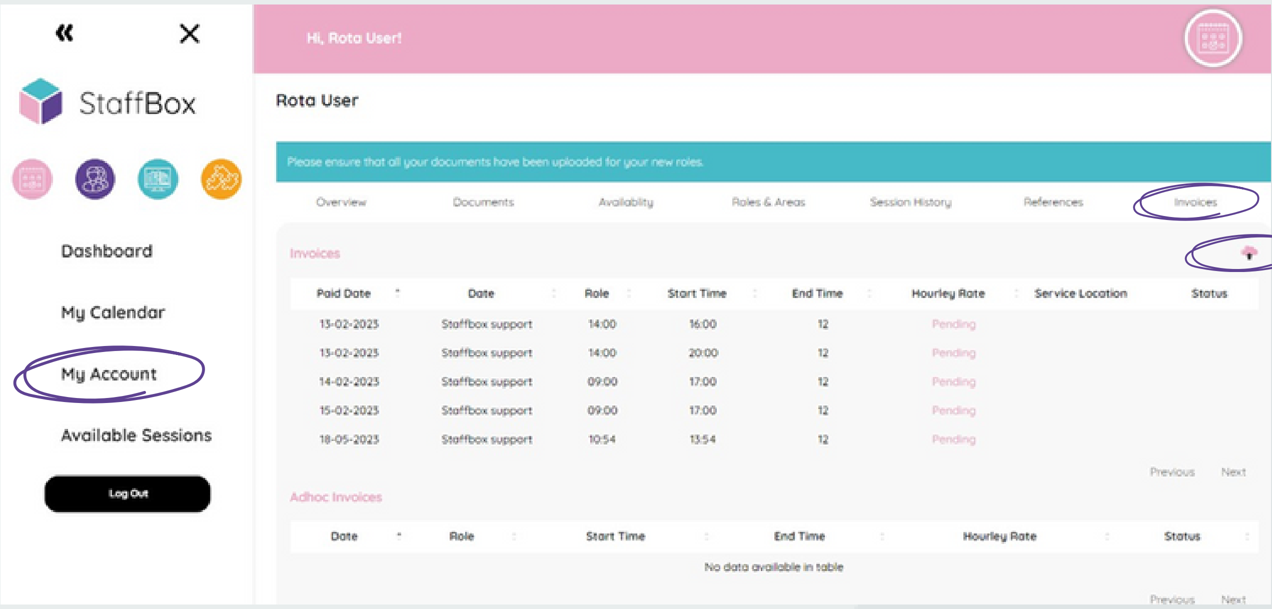
Invoices

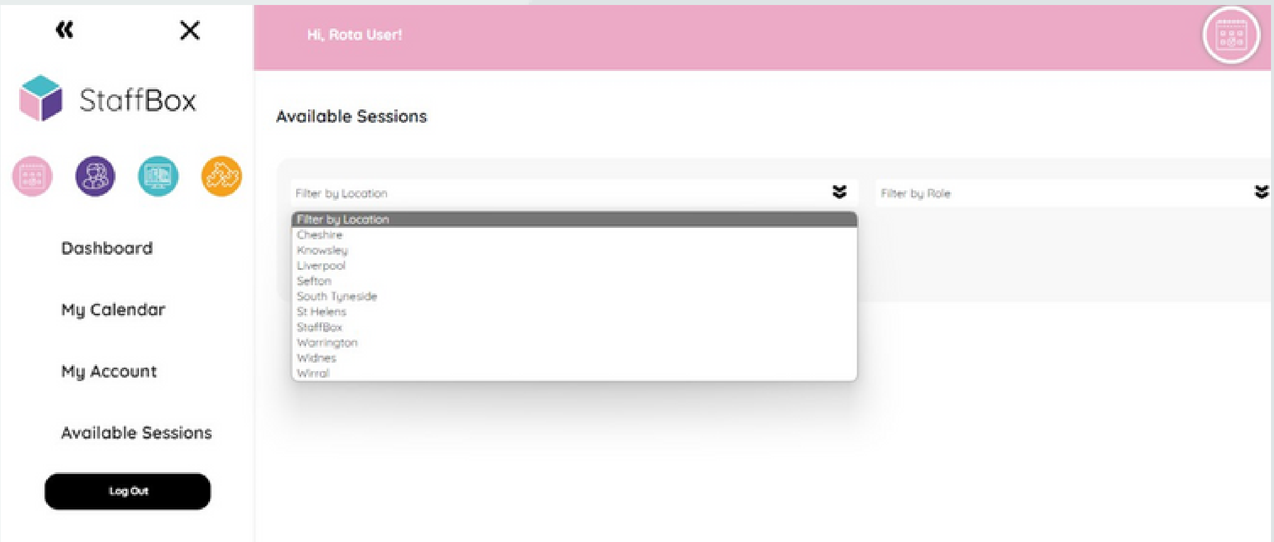


To view or download your invoices, go to ‘**My Account**’ on the main sidebar, followed by ‘**Invoices**’. Here you will see both a list of your current invoices, and ad-hoc invoices. You will be able to see when the invoice was paid, the service the invoice was for, the start and end time of the shift and the hourly rate for that service.

To **download your invoices**, click on the pink cloud icon to the top right of the screen. From here you will be promoted to select a date range you’d like the download to cover. After selecting this range, your invoices will export.

After working a shift, Rota will automatically generate an invoice for you after 3 days, reducing the need for you to contact the service itself.

Available Sessions



To view available sessions and **bid on a shift** click on ‘**Available Sessions**’ in the main sidebar. From here you will see a list of all available sessions for services in your chosen locations for your chosen roles.

To bid on the shift, simply click on ‘**Accept**’ by the shift you would like to confirm. If you are successful in your shift bid, you will be emailed directly by Rota with details of the confirmation.

To filter this list down, select what locations of roles you would specifically like to view shifts for in the two drop down boxes to the top of the page.