



SYGNAI USER ROLE PERMISSION DOCUMENT FOR ALL WEB MODULES

This document provides a comprehensive overview of the permissions required to access and use all modules in the Sygnal platform. It is intended for system administrators, security professionals, and other users who need to understand how to manage permissions for Sygnal.

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24. Registration Group View	26
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27. View Custom Levels	26
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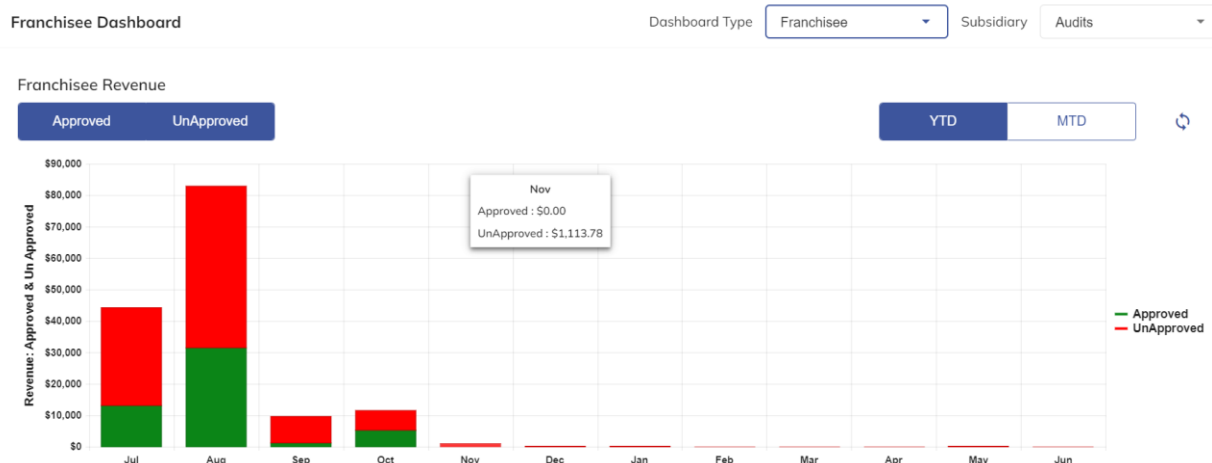
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Dashboard Module:

1. **Executive Dashboard:** With this permission user will be able to see the executive dashboard with approved and unapproved shifts revenue. This permission works together with View dashboard permission.



2. **Franchise Dashboard:** With this permission user will be able to see the franchise dashboard with approved and unapproved shifts revenue of selected subsidiary. This permission works together with View dashboard permission.



3. **Item approval widgets:** With this permission user will be able to see the widgets like incomplete RFI forms, pending HR documents, signatures.

Employee Summary

0
Incomplete RFI Forms

0
Awaiting Evidence

0
Pending HR Documents

0
Pending Signatures

Incomplete RFI Forms Item Approval

Form	Issued By
No incomplete items	

4. **View Dashboard:** This permission allows user to see the Dashboard module in the hamburger menu.

Client Module

1. **Add Client File:** This permission allows user to add files for the client.
2. **Add Shift Notes:** This permission allows user to add shift notes for resource.
3. **Allow user to manage Client Location:** This permission allows user to add\edit client locations under location tab.
4. **Allow user to retire Client Location:** This permission allows user to retire client's location.
5. **Client View:** This permission allows user to View client.

Leslie TUCKER (N/A Y | N/A julie.craig.tucker@gmail.com)

Aged Care Type Leslie T... Billing Contact N/A Agreement Status 01 Jan 0001 Management Fee Date

\$0.00 Government Funds \$0.00 Provider Funds

Status Login Enabled

OVERVIEW BILLING CONFIGURATION EXPENSES NOTES LOCATIONS FILES ADJUSTMENTS CDC STATEMENT AGREEMENTS

Search...

Transaction...	Date / Time	Reference Id	Transaction Type	Description	Amount	Remainin...
315	11/09/2023	991271	Shift	Leslie TUCKER (CDC- 0414785288) 18/08/2023 09:00 AM - 18/08/2023 10:00 AM [Domestic Assistance - Daytime]	-\$62.00	-\$3,330.65
67	01/09/2023	990619	Shift	Leslie TUCKER (CDC- 0414785288) 03/08/2023 02:00 AM -	-\$108.00	-\$3,268.65

Subsidies

Home Care Subsidy

N/A \$0.00

Supplements

6. **Create Adjustments:** This permission allows user to create shift and billing adjustments.

OVERVIEW BILLING CONFIGURATION EXPENSES NOTES LOCATIONS FILES ADJUSTMENTS AGREEMENTS

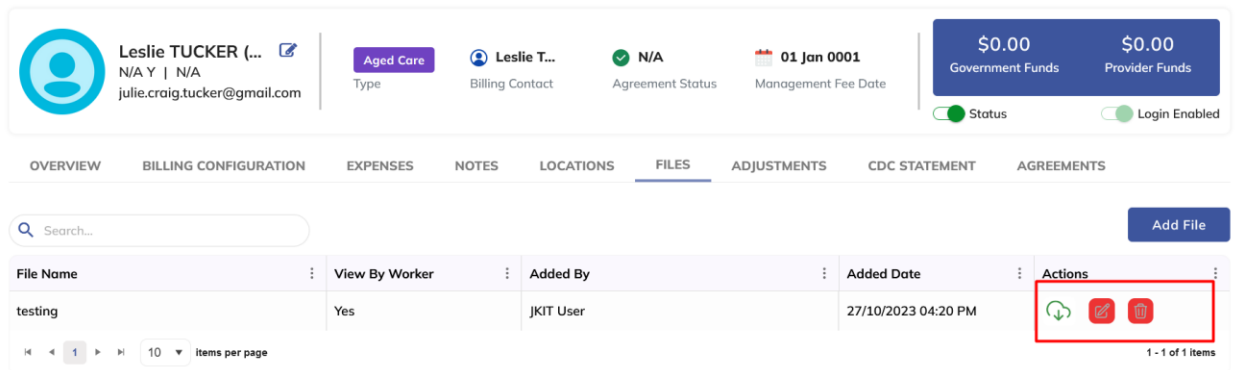
Search... Show All

Create

ID	Adjustment Date	Shift ID	Resource Name	Item Adjusted	Adjustment Description	Impacted Amount	Created By
No records available.							

10 items per page 0 - 0 of 0 items

7. **Edit Client File:** This permission allows user to edit client file name.



Leslie TUCKER (...)
N/A Y | N/A
julie.craig.tucker@gmail.com

Aged Care Type

Leslie T...
Billing Contact

N/A
Agreement Status

01 Jan 0001
Management Fee Date

\$0.00 Government Funds




\$0.00 Provider Funds

Status Login Enabled

OVERVIEW BILLING CONFIGURATION EXPENSES NOTES LOCATIONS FILES ADJUSTMENTS CDC STATEMENT AGREEMENTS

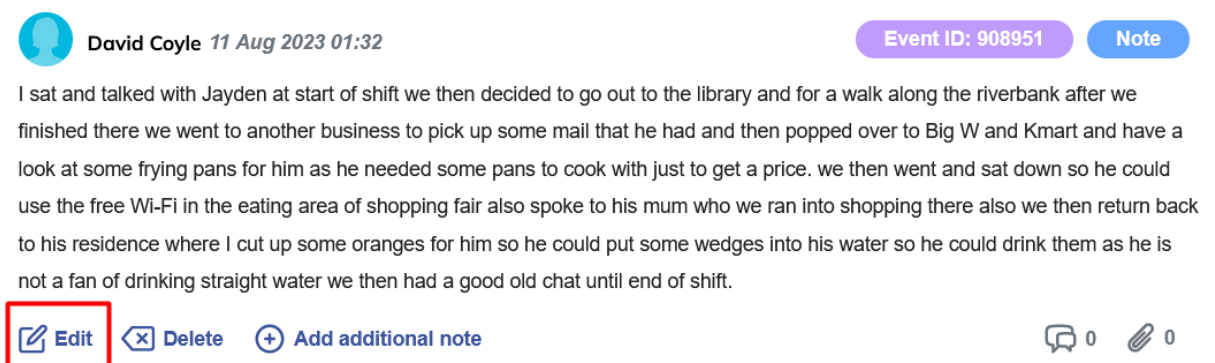
Search...

Add File

File Name	View By Worker	Added By	Added Date	Actions
testing	Yes	JKIT User	27/10/2023 04:20 PM	  

1 - 1 of 1 items




8. **Edit Client Note:** This permission allows user to edit the shift notes added



David Coyle 11 Aug 2023 01:32

Event ID: 908951 Note

I sat and talked with Jayden at start of shift we then decided to go out to the library and for a walk along the riverbank after we finished there we went to another business to pick up some mail that he had and then popped over to Big W and Kmart and have a look at some frying pans for him as he needed some pans to cook with just to get a price. we then went and sat down so he could use the free Wi-Fi in the eating area of shopping fair also spoke to his mum who we ran into shopping there also we then return back to his residence where I cut up some oranges for him so he could put some wedges into his water so he could drink them as he is not a fan of drinking straight water we then had a good old chat until end of shift.

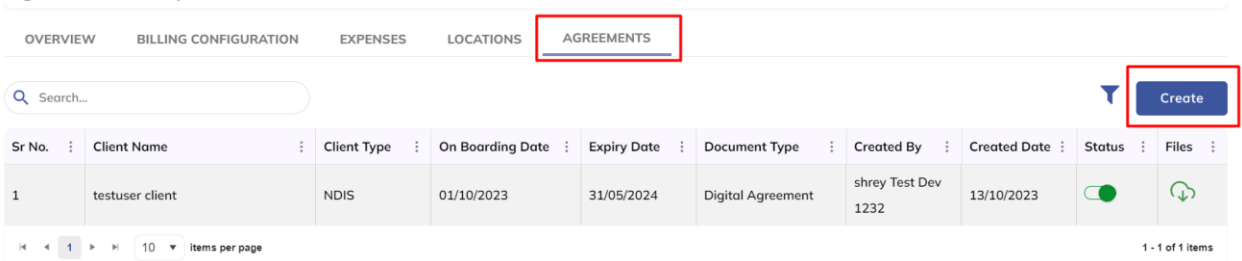
 Edit  Delete  Add additional note

0 0

9. **Generate CDC Statement:** This permission allows user to generate CDC statement for aged care clients.

10. **Manage Client:** This permission allows user to edit client's general info details from edit screen.



11. **Manage Client Agreement:** This permission allows user to create physical or digital agreement for client. This permission works along with View Client Agreement permission.



OVERVIEW BILLING CONFIGURATION EXPENSES LOCATIONS AGREEMENTS

Search...

Create

Sr No.	Client Name	Client Type	On Boarding Date	Expiry Date	Document Type	Created By	Created Date	Status	Files
1	testuser client	NDIS	01/10/2023	31/05/2024	Digital Agreement	shrey Test Dev 1232	13/10/2023		

1 - 1 of 1 items

12. **Manage Expenses:** This permission allows user to create expenses for the clients. This permission works along with View Expenses permission.

OVERVIEW

BILLING CONFIGURATION

EXPENSES

LOCATIONS

AGREEMENTS

Q

Search...

Create

Expense ID	Invoice Nu...	Date of Ex...	Expense T...	Amount	Supplier/P...	Created By	Created D...	Status	Status Up...	Due Date	Actions
No records available.											

10

Items per page

0 - 0 of 0 items

13. **Manage Self Debtor:** This permission allows user to create debtors (shared, agency and individual) for all type of clients

OVERVIEW

BILLING CONFIGURATION

EXPENSES

LOCATIONS

AGREEMENTS

Search...

Add Shared Billing Contact

Create NDIS Agency Billing Contact

Create

Code	Name	Type	Email	Mobile	Status	Actions
dd	dddd	Shared Billing Contact	dddd@ggg2.com	777799	Active	
N/A	h	Billing Contact	h@h.com	4564564658	Active	

14. **Retire Client Agreement:** This permission allows user to inactive client agreement. This permission works along with View Client Agreement and Manage Client Agreement permission.

OVERVIEW

BILLING CONFIGURATION

EXPENSES

NOTES

LOCATIONS

FILES

ADJUSTMENTS

CDC STATEMENT

AGREEMENTS

Q

Search...

Create

Sr No.	Client Name	Client Type	On Boarding Date	Expiry Date	Document Type	Created By	Created Date	Status	Files
1	Troy B1	Aged Care	25/10/2023	13/10/2026	Physical Agreement	JKIT User	25/10/2023	<div><div></div></div>	<div><div></div></div>

1

10 items per page

1 - 1 of 1 items

15. **View Adjustments:** This permission allows user to View all the adjustment made for clients.

OVERVIEW

BILLING CONFIGURATION

EXPENSES

LOCATIONS

ADJUSTMENTS

CDC STATEMENT

AGREEMENTS

Q

Search...

Show All

ID	Adjustment Date	Shift ID	Resource Name	Item Adjusted	Adjustment Description	Impacted Amount	Created By
+ AD-677	20/10/2023	N/A	N/A	Client Level	Client level adjusted from Enteral feeding supplement - Bolus to Enteral feeding supplement - Non-bolus effective from 20/10/2023	+\$0.85	shrey Test Dev 1232

16. **View All Clients:** This permission allows user to view all clients record.

Clients ▾

Search...

Create

Client ID	Client Name	Client Type	Reference N...	Available Fu...	Agreement Status	Subsidiaries	Case Manager
4289	Peter Roberts	NDIS	430011541	0	Pending	Prestons	N/A
4288	Perry Holzmann (PM)	NDIS	430397703	0	Pending	Prestons	N/A
4287	Mahmoud Bahsa	NDIS	430244776	0	Pending	Prestons	N/A
4286	Liza Stedfut	NDIS	430012718	0	Pending	Prestons	N/A

17. **View All in Subsidiaries:** This permission allows user to View all the client records for the Subsidiaries assigned to logged in user.

18. **View Client Agreement:** This permission allows user to View only all the physical and digital agreements.

19. **View Client File:** This permission allows user to only View all client files added.

OVERVIEW BILLING CONFIGURATION EXPENSES LOCATIONS **FILES** ADJUSTMENTS AGREEMENTS

Search...

File Name	View By Worker	Added By	Added Date	Actions
No records available.				

10 Items per page 0 - 0 of 0 items

20. **View Expenses:** This permission allows user to only view all the expenses created for clients.

21. **View Shift Notes:** This permission allows user to view only all the shift notes added for the clients.

OVERVIEW BILLING CONFIGURATION EXPENSES **NOTES** LOCATIONS FILES ADJUSTMENTS CDC STATEMENT AGREEMENTS

Notes Search...

Client Notes Are Not Available

22. **View Specific Clients:** This permission allows logged in user to view only those clients which are assigned to him\her only.

23. **View Favorite Services:** This permission allows logged in user to view only the favorite services like they can only view the favorite price line items.

24. **View Staff Restrictions:** This permission allows user to view only the restricted staff list for the client.

25. **Manager Favorite Services:** This permission allows user to add/edit/retire the favorite price line items for the client.

26. Manager Staff Restrictions: This permission allows user to add/edit/delete the staff restrictions.

Price List Module

1. **Manage Aged Care Price List:** This permission allows user to create\edit an aged care price line item.
2. **Manage NDIS Price List:** This permission allows user to create\edit a NDIS price line item.
3. **Manage Other Price List:** This permission allows user to create\edit other price line item.
4. **Manage Icare Price List:** This permission allows user to create\edit an iCare price line item.
5. **Manage Subsidy Management:** This permission allows user to manage rates and effective and expiry dates of Subsidy and supplements.
6. **NDIS Price List Upload:** This permission allows user to upload NDIS price list is prescribed template.
7. **Retire Aged Care Price List:** This permission allows user to retire aged care price line item.
8. **Retire NDIS Price List:** This permission allows user to retire NDIS price line item.
9. **Retire Other Price List:** This permission allows user to retire other price line item.
10. **Retire Icare Price List:** This permission allows user to retire iCare price line item.
11. **View Aged Care Price List:** This permission allows user to view only Aged Care Price list.
12. **View NDIS Price List:** This permission allows user to view only NDIS price list.
13. **View Other Price List:** This permission allows user to view only other price list.
14. **View Icare Price List:** This permission allows user to view only iCare price list.
15. **View Subsidy Management:** This permission allows user to View Subsidy & Supplements rates and expiry dates.

Approval Module

1. **Manage Expenses Approvals:** This permission allows user to manage expenses like approve\reject and mark as paid.
2. **View Expenses Approvals:** This permission allows user to view only all the expenses created for clients.

Employee Module

1. **Employee Add:** This permission allows user to create and add a new team member.

Team Members

Search...

Create

Code	Name	Email	Contact	Vendors	Subsidiary	Work Location	Status
318	otheform test	otheformtest@gmail.com	N/A	N/A	Audits	BLACKBUTT	<input checked="" type="checkbox"/>
317	Gladis Gearge	gladis.george@gg.com.au	0137561333	N/A	Dev 1	NURENMERENMONG	<input checked="" type="checkbox"/>
316	TestRoles Roleing	favabed900@czilou.com	9009900990	N/A	Audits	JUNEE	<input checked="" type="checkbox"/>

2. **Employee Availability:** This permission allows user to edit the availability of the team member.

OVERVIEW STATUS SUMMARY RFI FORMS ITEMS AVAILABILITY TIME OFF

Select available days

Mon Tue Wed Thu Fri Sat Sun

Edit

3. **Employee Download:** This permission allows user to download team members records.
4. **Employee Item Approval:** This permission allows user to create item like bank account, license etc.

OVERVIEW STATUS SUMMARY RFI FORMS ITEMS AVAILABILITY TIME OFF EMPLOYMENT MAPPING

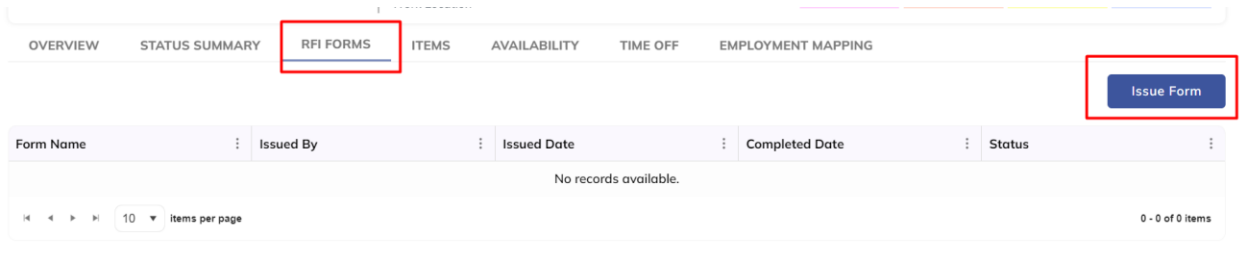
Create

Item Type	Item Name	Expiration Date	Item Status
No records available.			

10 Items per page 0 - 0 of 0 items

5. **Employee Item HR Form Issue:** This permission allows user to issue HR form for team members.
6. **Employee List:** This permission allows user to View team member option on hamburger menu.

7. **Employee RFI Form Issue:** This permission allows user to issue RFI form for team members.



Form Name	Issued By	Issued Date	Completed Date	Status
No records available.				

8. **Employee Status Change:** This permission allows user to change the active\inactive status of the team members.

Team Members

Search...

Download Create

Code	Name	Email	Contact	Vendors	Subsidiary	Work Location	Status
318	otheform test	otherformtest@gmail.com	N/A	N/A	Audits	BLACKBUTT	<input checked="" type="checkbox"/>
317	Gladis Gearge	gladis.george@gg.com.au	0137561333	N/A	Dev 1	NURENMERENMONG	<input type="checkbox"/>
316	TestRoles Roleing	favabed900@czilou.com	9009900990	N/A	Audits	JUNEE	<input checked="" type="checkbox"/>

9. **Employee Upload:** This permission allows user to upload team members records in the prescribed template provided.

10. **Manage Profile Image Approval:** This permission allows user to view and accept\reject team members profile image from HR dashboard.

11. **Manage Team Member:** This permission allows user to edit team members record.

12. **Manage Time Off:** This permission allows user to accept\reject the time off applied by team members.

Request Date	Request Leave Type	Start Date & Time	End Date & Time	Requested Hours/Days	Reason	Action
30/08/2023	Casual	02/09/2023 12:00 AM	02/09/2023 11:59 PM	1 Day	Personal leave	<input type="button" value="Delete"/>
31/08/2023	Casual	12/09/2023 12:00 AM	12/09/2023 11:59 PM	1 Day	Personal	<input type="button" value="Delete"/>
07/09/2023	Casual	28/09/2023 12:00 AM	28/09/2023 11:59 PM	1 Day	Demo test leave	<input type="button" value="Delete"/>

13. **Manage Vendor:** This permission allows user to manage vendor mapping to a team member.

Subsidiary	Vendor	Action
Corporate	Support Network	<input type="button" value="Edit"/>
Queensland	Support Network	<input type="button" value="Edit"/>

14. **Team Member Show All Records:** This permission allows user to view all the team member records.

Team Members

Code	Name	Email	Contact	Vendors	Subsidiary	Work Location	Status
318	otheform test	otheformtest@gmail.com	N/A	N/A	Audits	BLACKBUTT	<input checked="" type="checkbox"/>
317	Gladis Gearge	gladis.george@gg.com.au	0137561333	N/A	Dev 1	NURENMERENMONG	<input checked="" type="checkbox"/>
316	TestRoles Roleing	favabed900@czilou.com	9009900990	N/A	Audits	JUNEE	<input checked="" type="checkbox"/>

15. **Team Member Show Only Assigned Subsidiaries:** This permission allows user to see only assigned subsidiaries while creating a new team member record.

16. **Update Logging Email in client management:** This permission allows user to update client email id in client profile edit screen.

17. **Update Team Member Logging Email:** This permission allows user to update team members login email id.

18. **View Time Off:** This permission allows user to view only the time off applied by team members.

OVERVIEW STATUS SUMMARY RFI FORMS ITEMS AVAILABILITY TIME OFF						
Request Date	Request Leave Type	Start Date & Time	End Date & Time	Requested Hours/Days	Reason	
30/08/2023	Casual	02/09/2023 12:00 AM	02/09/2023 11:59 PM	1 Day	Personal leave	
31/08/2023	Casual	12/09/2023 12:00 AM	12/09/2023 11:59 PM	1 Day	Personal	
07/09/2023	Casual	28/09/2023 12:00 AM	28/09/2023 11:59 PM	1 Day	Demo test leave	

Roster Module

1. **Manage All Price List:** This permission allows user to manage price list on roster creation.
2. **Roster View by Client:** This permission allows user to only View roster by client name.

Roster View by Resource/Client/Subsidiary

Week Start Day ☒ Sunday ☐ Monday Clients ☒ Active & All ☒ Condensed view Timeline Week

Today	Sunday, September 24, 2023	Monday, September 25, 2023	Tuesday, September 26, 2023	Wednesday, September 27, 2023	Thursday, September 28, 2023	Friday, September 29, 2023	Saturday, September 30, 2023
Giuseppe (joe) REGINATO							
Barbara Rowan (CDC - 0414557289)							
Bryda Medcraft (CDC- 0414587137)							

3. **Roster View by Resource:** This permission allows user to only view roster by resource name.

Roster View by Resource/Client/Subsidiary

Week Start Day ☒ Sunday ☐ Monday Resources ☒ Active & All ☒ Condensed view Timeline Week

Today	Sunday, September 24, 2023	Monday, September 25, 2023	Tuesday, September 26, 2023	Wednesday, September 27, 2023	Thursday, September 28, 2023	Friday, September 29, 2023	Saturday, September 30, 2023
Amani Abdalla							
Ann Iwuchukwu - CareIntegrity							
Antony Antoniou							

4. **Shift Approval:** This permission allows user to approve pending shifts from the grid approve button and from detailed shift view.

Roster Review/Approval View

☒ Approve

<input type="checkbox"/>	Client Type	ID	Client	Staff	Subsidiary	Shift Start	Shift End	Status
								All
	Aged Care	2253	Monica Kell	Sandy Kell	Taree	30/10/2023 10:00 AM	30/10/2023 11:00 AM	Pending Approval

5. **Shift Cancel:** This permission allows user to cancel a shift which is not completely approved.

6. **Shift Create & Edit:** This permission allows user to create & edit existing shifts

Roster View by Resource/Client/Subsidiary

Week Start Day ☒ Sunday ☐ Monday Resources ☐ Active & All ☐ Condensed view Timeline Week

Today Sunday, October 29, 2023 - Saturday, November 4, 2023

	Sunday 29/10/2023	Monday 30/10/2023	Tuesday 31/10/2023	Wednesday 01/11/2023	Thursday 02/11/2023	Friday 03/11/2023	Saturday 04/11/2023
Neshlie Waban							
Paul Anthony Kane		<div>768988 N...</div> <div>Sean Pearson</div> <div>10:30 AM - 05:30 PM</div>	<div>785130 A...</div> <div>Charlotte De Lucia</div> <div>08:30 AM - 10:30 AM</div>	<div>991721 A...</div> <div>Charlotte De Lucia</div> <div>08:30 AM - 10:30 AM</div>			

7. **Shift Delete:** This permission allows user to delete draft\published\approved shifts.

Catheya Bounvan		<div>991605 N...</div> <div></div> <div>09:00 AM - 10:00 AM</div>	<div>991617 N...</div> <div></div> <div>09:00 AM - 10:00 AM</div>
-----------------	--	---	---

8. **Shift Publish & Unpublish:** This permission allows user to publish or unpublish a shift.

Shift - 991605

Shift

Client Info

Staff Info

Financial

9. **View All Shifts:** This permission allows user to View all the shifts on the approval screen page.

Roster Review/Approval View

	Client Type	ID	Client	Staff	Subsidiary	Shift Start	Shift End	Status
	Aged Care	2253	Monica Kell	Sandy Kell	Taree	30/10/2023 10:00 AM	30/10/2023 11:00 AM	Pending Approval
	Aged Care	2254	Monica Kell	Sandy Kell	Taree	01/11/2023 10:00 AM	01/11/2023 11:00 AM	Pending Approval
	Aged Care	2255	Monica Kell	Sandy Kell	Taree	03/11/2023 10:00 AM	03/11/2023 11:00 AM	Pending Approval
	Aged Care	18803	Thi Hieu LE(CDC_0414637914) Le	Thi Cam Thao Le	Edensor Park	03/11/2023 09:00 AM	03/11/2023 11:00 AM	Pending Approval

10. **View Shifts as Shift Manager:** This permission allows user to view only those shifts for which logged in user is shift manager.
11. **View Shifts as Subsidiary Member:** This permission allows user to view shift only with same subsidy as assigned to logged in user.

Incident module

1. **Incident Add:** This permission allows user create new incident.
2. **Incident Header Status Change:** This permission allows user to update incident status from open to close.
3. **Incident List:** This permission allows user to view Incident in menu.
4. **View All Incidents:** This permission allows user to view all the incidents.
5. **View Assigned Incidents by Subsidiaries:** This permission allows user to view incidents which are assigned to the logged in user mapped to the same subsidiaries assigned to the user.

Form Module

1. **Form Add/Edit:** This permission allows user to add\edit the new or existing forms.

Forms

Search...

Create

Name	Form Category	Status	Version	Published	Published Date	Published By	Actions
Client Details	Client Details	Active	v1	Yes	01/03/2021 10:47 PM	Sygnal Internal Admin	
Team Member Details	Team Member Details	Active	v1	Yes	23/08/2021 12:00 AM	Sygnal Internal Admin	

2. **Form Copy:** This permission allows user to copy the existing form.

Incident Report	Incident Primary	Active	v13	Yes	11/02/2022 05:04 AM	Juliana Scali	
RN Assessment: ASSESSMENT TOOL (FRAT)	Agreement Forms	Active	v1	Yes	01/04/2022 01:28 AM	Juliana Scali	
National Disability Insurance Support Service Agreement - Soteria	Agreement Forms	Active	v1	Yes	09/06/2022 04:30 AM	Sygnal Internal Admin	

3. **Form List View:** This permission allows user to view all the forms created.

Forms









Search...

Name	Form Category	Status	Version	Published	Published Date	Published By	Actions
Client Details	Client Details	Active	v1	Yes	01/03/2021 10:47 PM	Sygnal Internal Admin	
Team Member Details	Team Member Details	Active	v1	Yes	23/08/2021 12:00 AM	Sygnal Internal Admin	
Incident Report	Incident Primary	Active	v13	Yes	11/02/2022 05:04 AM	Juliana Scali	
RN Assessment: ASSESSMENT TOOL (FRAT)	Agreement Forms	Active	v1	Yes	01/04/2022 01:28 AM	Juliana Scali	

4. **Form Retire:** This permission allows user to retire a existing form.

Incident Report	Incident Primary	Active	v13	Yes	11/02/2022 05:04 AM	Juliana Scali	  
RN Assessment: ASSESSMENT TOOL (FRAT)	Agreement Forms	Active	v1	Yes	01/04/2022 01:28 AM	Juliana Scali	  
National Disability Insurance Support Service Agreement - Soteria	Agreement Forms	Active	v1	Yes	09/06/2022 04:30 AM	Sygnal Internal Admin	  

5. **Form Template Create:** This permission allows user to create template for the existing forms.

Client Details	Client Details	Active	v1	Yes	01/03/2021 10:47 PM	Sygnal Internal Admin	 
Team Member Details	Team Member Details	Active	v1	Yes	23/08/2021 12:00 AM	Sygnal Internal Admin	 
Incident Report	Incident Primary	Active	v13	Yes	11/02/2022 05:04 AM	Juliana Scali	 
RN Assessment: ASSESSMENT TOOL (FRAT)	Agreement Forms	Active	v1	Yes	01/04/2022 01:28 AM	Juliana Scali	 

Reports Module

1. **Audit Log:** This permission allows user to see the audit log report.

Audit Log

Search...



Action Date	Action User	Module	Channel	Action	Action Data
31/10/2023 06:11 AM	greg chilton	User Module	Web	User details updated	User - Purva Rohan Borawake
31/10/2023 06:10 AM	JKIT User	Employee Module	Web	Team member updated	Employee Id - 3072. Subsidiary not changed
31/10/2023 06:10 AM	greg chilton	User Module	Web	User details updated	User - Purva Rohan Borawake
31/10/2023 06:09 AM	JKIT User	User Module	Web	User details updated	User - Purva Rohan Borawake

2. **Client Expenses:** This permission allows user to export new expense report.

Client Expense

Search...

Create


From Date (Expense Approved Date)	To Date (Expense Approved Date)	Created Date	Created By	Download Status	Actions
01/01/2023	10/08/2023	10/08/2023 10:00 AM	John Kane	Completed	
01/05/2023	31/05/2023	01/08/2023 10:59 AM	greg chilton	Completed	

3. **Debtor/Agency:** This permission allows user to generate new debtor\agency report.

Debtor/Agency Billing History

Search...

Create

Client Type	Roster From (Roster E...	Roster To (Roster End ...	Billing Type	Report Type	Created Date	Created By	Actions
NDIS	29/08/2023	29/08/2023	Debtor	Generated	29/08/2023 06:25 PM	Sashin Senanayake	


1 - 1 of 1 items

- Roster:** This permission allows user to generate and download roster report for the selected time period for resource or client.

Roster

Search...

Create

Template Name	Resource/Client	Roster Start Date	Roster End Date	Created Date	Created By	Actions
Roster Standard Resource Template	Lackena Aung	01/06/2023	14/10/2023	31/10/2023 12:03 PM	Sashin Senanayake	




1 - 1 of 1 items

- Shift:** This permission allows user to generate and download all shift report for client\resource\subsidiary for select date range.

Shifts

Search...

Create




Client Type	Roster Start Date	Roster Finish Date	Created Date	Created By	Actions
All	01/10/2023	05/10/2023	11/10/2023 02:35 PM	JKIT User	
All	01/10/2023	04/10/2023	11/10/2023 02:33 PM	JKIT User	
All	01/07/2023	30/09/2023	11/10/2023 10:08 AM	JKIT User	

- Shift Scheduled:** This permission allows user to generate and download shift schedule report for client type.

Shift Schedules History

Search...

Create

Client Type	Roster Start Date	Roster End Date	Created Date	Created By	Actions
Aged Care	01/09/2023	20/09/2023	20/09/2023 03:15 PM	From Humanetix	
NDIS	01/09/2023	20/09/2023	20/09/2023 03:14 PM	From Humanetix	
All	01/09/2023	20/09/2023	20/09/2023 03:14 PM	From Humanetix	

- View Billing:** This permission allows user to only view and download the billing report with subsidiary, client type and scheduled & approved hours.

Billing




Search...

Client Type	Roster Start Date	Roster End Date	Created Date	Actions
NDIS	01/09/2022	30/09/2023	19/10/2023 09:44 AM	
iCare	01/09/2022	20/09/2023	20/09/2023 03:07 PM	
Aged Care	01/09/2023	20/09/2023	20/09/2023 03:06 PM	

- View Client Expenses:** This permission allows user to only view and download all the client expense reports generated

Client Expense

Search...

From Date (Expense Approved Date)	To Date (Expense Approved Date)	Created Date	Created By	Download Status	Actions
01/01/2023	10/08/2023	10/08/2023 10:00 AM	John Kane	Completed	
01/05/2023	31/05/2023	01/08/2023 10:59 AM	greg chilton	Completed	
01/07/2023	31/07/2023	01/08/2023 10:46 AM	greg chilton	Completed	

9. **View Debtor/Agency:** This permission allows user to only view and download the debtor\agency reports

Debtor/Agency Billing History

Search...

Client Type	Roster From (Roster E...	Roster To (Roster End ...	Billing Type	Report Type	Created Date	Created By	Actions
NDIS	29/08/2023	29/08/2023	Debtor	Generated	29/08/2023 06:25 PM	Sashin Senanayake	

1

10

items per page

1 - 1 of 1 items

10. **View Payroll:** This permission allows user to only view and download the generated payroll reports.

Payroll Export History

Search...

Client Type	Roster Start Date (Roste...	Roster End Date (Roster ...	Created Date	Created By	Actions
All	23/10/2023	23/10/2023	23/10/2023 04:28 PM	JKIT User	
Not Billable	23/10/2023	23/10/2023	23/10/2023 04:13 PM	JKIT User	
Not Billable	23/10/2023	23/10/2023	23/10/2023 03:09 PM	JKIT User	

11. **View Roster:** This permission allows user to only view the roster reports.
12. **View Shift:** This permission allows user to view only the generated shift reports.
13. **View Shift Scheduled:** This permission allows user to view only the shift scheduled reports.

User Module

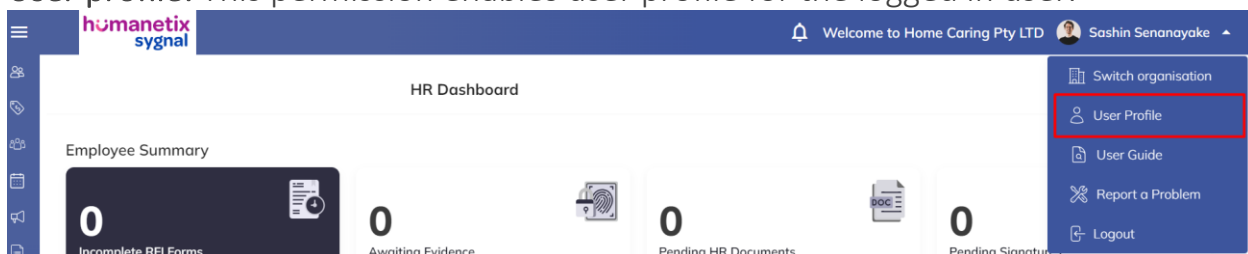
1. **User Edit:** This permission allows user to edit a user record by clicking on that.
2. **User Password Reset:** This permission allows user to reset the password for a user.

Users

Search...

Name	Email	User Type	Assigned Roles	Assigned Subsidiaries	Actions
Kim Tran		Client	Default Client	Inala	
Harry Farland		Client	Default Client	Glebe	
Ann Lawless		Client	Default Client	Glebe	

3. **User profile:** This permission enables user profile for the logged in user.



4. **User View:** This permission allows user to view all the users like clients and employees.

Users

Search...

Name	Email	User Type	Assigned Roles	Assigned Subsidiaries	Actions
Kim Tran		Client	Default Client	Inala	<input checked="" type="checkbox"/>
Harry Farland		Client	Default Client	Glebe	<input checked="" type="checkbox"/>
Ann Lawless		Client	Default Client	Glebe	<input checked="" type="checkbox"/>

Role Module

1. **Add Roles:** This permission allows user to create new roles.

Roles

Search...

Create

Name	Description	Created Date	Updated Date	Actions
Testing Yadv	permissin doc writing	30/10/2023	31/10/2023	<input checked="" type="checkbox"/>
My Role 1	This is a Role 1	29/10/2023	29/10/2023	<input checked="" type="checkbox"/>

2. **Edit Roles:** This permission allows user to edit existing roles and permissions for that role.
3. **View Roles:** This permission allows user to view only all the roles added.

Roles

Search...

Name	Description	Created Date	Updated Date	Actions
Testing Yadv	permissin doc writing	30/10/2023	31/10/2023	<input checked="" type="checkbox"/>
My Role 1	This is a Role 1	29/10/2023	29/10/2023	<input checked="" type="checkbox"/>
Testing	this is testing	29/10/2023	N/A	<input checked="" type="checkbox"/>
Test	This is test role	29/10/2023	N/A	<input checked="" type="checkbox"/>

Settings Module

1. **Calendar Event Manage:** This permission allows user to manage the Calendar events like public holidays etc.
2. **Calendar Event View:** This permission allows user to view only the Calander events like state or organization holidays.
3. **Client Type Create:** This permission allows user to edit the client type and add forms and agreements to client type


Client Types

Search...	
Client Types	Actions
Not Billable	
iCare	
Aged Care	

4. **Client Type View:** This permission allows user to view only all the client types.
5. **Configure company settings:** This permission allows user to configure the company setting and CDC statement like company logo and details, invoice prefix, geo radius and ABN number etc.

Company Configuration

Company Logo



Click on [Upload](#) to upload files

File size: Max 25MB, recommended dimensions: 152 x 46, and it should be in .jpeg, .jpg, or .png format

Invoice

Debtor Billing Invoice Start Number *

NDIS Invoice Prefix *

Aged Care Invoice Prefix *

iCare Invoice Prefix *

Credit Invoice Prefix *

Shift

Published Shift Ahead (start Date) *

Clocked in Before (minutes) *

Clocked in After (minutes) *

Sleeper Work Type External Id *

Location

Geo Radius(Km)

KM Export Work Type External Id *

KMs/Travel extended ☒

6. **Create Custom Levels:** This permission allows user to create new custom levels.

Custom Levels

Search...		Create
Name	Created By	Created On
Testing 674021	JKIT User	03/10/2023
Testing	JKIT User	25/09/2023
Custom Level 2	From Humanetix	22/09/2023

7. **Custom Flags Create:** This permission allows user to create and view custom flags.

Custom Flags

Search...

Create

Custom Flags Name	Created By	Created On	Actions
test	From Humanetix	22/09/2023	
Test Custom flag inactive	JKIT User	04/09/2023	
Test custom flag active	JKIT User	04/09/2023	

8. **Custom Flags Edit:** This permission allows user to edit the custom flags
9. **Custom Flags View:** This permission allows user to view only all the custom flags.

10. **Debtor List:** This permission allows user to view only all the debtors like shared, agency and individuals.

11. **Item Create:** This permission allows user to create and view the items.

Items

Search...

Create

Item Name	Item Type	Status	Actions
test	NIC	Retired	
Driving License	License	Active	
ID / Passport	NIC	Active	
Passbook	Bank Account	Active	

12. **Item Retirement:** This permission allows user to retire an existing item

Items

Search...

Create

Item Name	Item Type	Status	Actions
test	NIC	Retired	
Driving License	License	Active	
ID / Passport	NIC	Active	
Passbook	Bank Account	Active	

13. **Item Type Create:** This permission allows user to create item type

Item Types

Search...

Create

Item Name	Status	Actions
License	Active	
NIC	Active	
Bank Account	Active	

10 items per page

1 - 3 of 3 items

14. **Item Type View:** This permission allows user only to view all the items type.

- 15. **Item View:** This permission allows user to view only all the items.
- 16. **Line Item Create:** This permission allows user to create NDIS price line item.
- 17. **Line Item Retirement:** This permission allows user to retire the NDIS price line item.
- 18. **Line Item View:** This permission allows user to view only NDIS price line item.
- 19. **Manage Debtor:** This permission allows user to create shared debtors.

Debtors

Search...

Create

Code	Name	Type	Email	Mobile	Status	Actions
N/A	Valentine Kenney	Billing Contact	gracesteel03@gmail.com	(02)87860532	Active	
N/A	Thi My Loan Tran	Billing Contact	lenat_23@yahoo.com.au	0432543085	Active	
N/A	Sonia Eggelton	Billing Contact	soniaaether@yahoo.com	0447977717	Active	

- 20. **Manage Supplier:** This permission allows user to create new suppliers.

Suppliers

Search...

Create

Supplier ID	Supplier Name	Contact Person	Phone Number	Subsidiary	Created By	Last Modified	Last Modify User	Status
2	Supp 1	Supp	5454554554	Altona +2	JKIT User	22/09/2023	From Humanetix	Active
1	Supplier	Supplier	1234567890	Canning +146	JKIT User	22/09/2023	From Humanetix	Active

1 - 2 of 2 items

- 21. **Payroll:** This permission allows user to generate new payroll in reports module.

Payroll Export History

Search...

Create

Client Type	Roster Start Date (Roste...	Roster End Date (Roster ...	Created Date	Created By	Actions
No records available.					

0 - 0 of 0 items

- 22. **Registration Group Create:** This permission allows user to create new registration group.

Registration Groups

Search...

Create

Name	Support Category
test @#*&^&*&*(hj#\$%^ 22323	Category 10
Reg Group Inactive	Category 1

- 23. **Registration Group Edit:** This permission allows user to edit the registration group by clicking on the record.

24. **Registration Group View:** This permission allows user to view only all the registration groups.

Registration Groups

Search...

Name	Support Category
test @#*&^&^&*(^ (h)#\$%^ 22323	Category 10
Reg Grup Inactive	Category 1
Test Reg Grup active	Category 1

25. **Subsidiary Edit:** This permission allows user to edit the existing or add child subsidiaries.

Subsidiary

Search...

Subsidiary Name	Subsidiary Code	Registration Number	GST Code	Time Zone	Actions
▼ Corporate	N/A	N/A	N/A	New South Wales	🔔 ⚙️ ✎
Advanced Care	.123	4050026964	P2	Queensland	🔔 ⚙️ ✎
▼ CRT Program	N/A	N/A	N/A	New South Wales	🔔 ⚙️ ✎

26. **Subsidiary View:** This permission allows user to view only all the subsidiaries

Subsidiary

Search...

Subsidiary Name	Subsidiary Code	Registration Number	GST Code	Time Zone
▼ Corporate	N/A	N/A	N/A	New South Wales
Advanced Care	.123	4050026964	P2	Queensland
▼ CRT Program	N/A	N/A	N/A	New South Wales

27. **View Custom Levels:** This permission allows user to view only all the custom levels.

28. **View Debtor:** This permission allows user to view only all the debtors' records.

29. **View Supplier:** This permission allows user to view only all the suppliers record.

Mobile Module

1. **Hide Availability Module:** This permission will hide the “Availability” feature on the mobile application.
2. **Hide Client Mobile No.:** This permission will hide the client number on shift detail view and all client view screen on mobile application.
3. **Hide Shift Manager Mobile No.:** This permission will hide Shift Manager mobile no. from the shift detail view on mobile application.
4. **Hide Time Off Module:** This permission will hide Time Off feature on mobile application, user will not able to apply time off from mobile.

Age Care Finance

1. **Manage Age Care Finance:** This permission allows user to upload the finance for aged care clients, with the template available.
2. **View Age Care Finance:** This permission allows user to just view all the uploaded record entries on the grid.