



Job Roster

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View the Job Roster

To view the **Job Roster** on your Polixen system, click the **Job Roster** link in the main menu. You can choose to view it as **Daily Schedule**, **Weekly Calendar** or **Worker Calendar**.

Daily Schedule

If you opt for the **Daily Schedule**, you can view each day's list of jobs. You can use the **tabs** to navigate between the days of the week, the **blue arrow buttons** on the top right-hand side to change the week, or click the **date field** to jump to a different date.

You can also filter the jobs by **client**, **service**, **worker** or **activity**. To do that, click on the light blue button “Filter Jobs” on the top right side. That will show all the filters and you can use the drop-down menus to select the filters that you want.

Weekly Calendar

Another way to view the Job Roster is through the **Weekly Calendar**. To change views simply click on the orange button at the top right that says “Calendar View”. You can also go to **Job Roster > Weekly Calendar**.

This will display the job roster as a weekly schedule, with the days across the top and the times down the side. This view makes it easier to see when the jobs have been scheduled in relation to each other, as well as gives you the option to filter the jobs by **client**, **workers** or **service**.

24/08/2022 Filter by client: Please Select Filter by worker: Please Select Filter by service

21 Aug, 2022 - 27 Aug, 2022 4th Wednesday of August

	Sunday 21 Aug, 2022	Monday 22 Aug, 2022	Tuesday 23 Aug, 2022	Wednesday 24 Aug, 2022	Thursday 25 Aug, 2022	Friday 26 Aug, 2022	Saturday 27 Aug, 2022
2PM							
3PM							
4PM							
5PM							
6PM							

You can go back to the default view by clicking on the orange **Table View** button on the top right-hand side.

Worker Calendar

The **Worker Calendar** is pretty similar to the Weekly Calendar, but it will give you the names of each worker across the top and the jobs that have been assigned to them on a particular day.

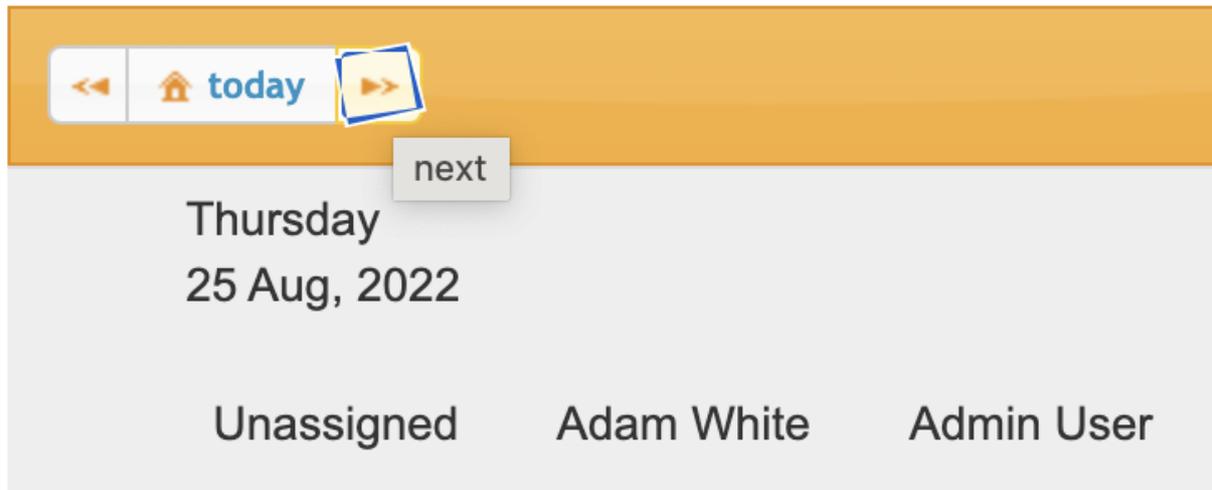
Job Scheduler Filter by worker Filter by group Move All Worker Jobs

24 Aug, 2022 - 24 Aug, 2022

Wednesday
24 Aug, 2022

	Unassigned	Adam White	Admin User	David Jones	Ellen Gill	Geoffrey Roberts	Kai Harris	Kate Smith	Priya White	Sinan Jones	Sue Jones
2PM											
3PM											
4PM											
5PM											

Use the arrows on the left side to change the date that you're viewing the jobs. You can use the middle button to get back to the current day.



Create New Jobs

On the **Daily Schedule** or **Weekly Calendar**, click the green **Create New Job** button on the top right-hand side to create a new job. The next step is to decide what type of job this will be.

The types are as follows:

- **Once Off:** These jobs are only for one particular date. They will not reoccur.
- **Weekly:** These jobs will happen once every week, on the day you select.
- **Fortnightly:** These jobs will happen once every fortnight, on the week and day you select.
- **Monthly:** These jobs will happen once every month, on the week and day you select.

The image shows a web form with a light gray background and a white border. At the top right, there is a small square button with a black 'X' icon. Below this, the text 'Please Select:' is displayed in a large, dark gray font. Underneath, there are four horizontal rectangular buttons stacked vertically, each containing a radio button and a label. The buttons are: a light blue button labeled 'Once Off', an orange button labeled 'Weekly', a green button labeled 'Fortnightly', and a dark blue button labeled 'Monthly'. The entire form is set against a dark gray background with a subtle grid pattern.

Once you've selected the type of job, you'll be taken to the **New Job** page. You can then fill in all the information about the job. Depending on the type you chose in the previous step, you may have different fields to fill in: eg. **day** and/or **week**.

Create Recurring New Job
Apples, Terry: 88 Smith St, Abbeywood 4613 ✕

Title	Start	End
<input type="text" value="test"/>	<input type="text" value="24/08/2022"/>	<input type="text" value="24/08/2023"/>

Service Outlet	Clients	Day
<input style="width: 90%;" type="text" value="All Clients"/>	<input style="width: 90%;" type="text" value="Apples, Terry ✕"/>	<input style="width: 90%;" type="text" value="Tuesday"/>

Activity	Start Time/Qty	End Time	
<input style="width: 90%;" type="text" value="01_002_0107_1_1 NDIS Assis..."/>	<input style="width: 90%;" type="text" value="08:00"/>	<input style="width: 90%;" type="text" value="10:00"/>	<input style="background-color: #4a90e2; color: white; width: 20px; height: 20px; border: none;" type="button" value="+"/> <input style="background-color: #e67e22; color: white; width: 20px; height: 20px; border: none;" type="button" value="✕"/>

Assigned Worker

Notes & Comments

Click on the green “Create New Job” button to save the job.

Edit a Job

To edit a job, go to either the daily schedule or the weekly calendar view of the **Job Roster**.

- **Daily Schedule:** click the orange **Information Button** next to the job you want to update.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Tuesday 30th of August 2022						
Clients		Job Activities			Workers	
test Apples, Terry 1 Client		Activity Type 01_002_0107_1_1 NDIS Assistance With Self-Care Activities - Standard - Weekday Night	Start 08:00 AM	End 10:00 AM	No Workers Allocated	

- **Weekly/Worker Calendar:** click on the **Job** itself.



On the **Job Page**, update the required fields and click **Save Changes** to update.

✎ Save Changes

Change Date: 6th Sep, 2022

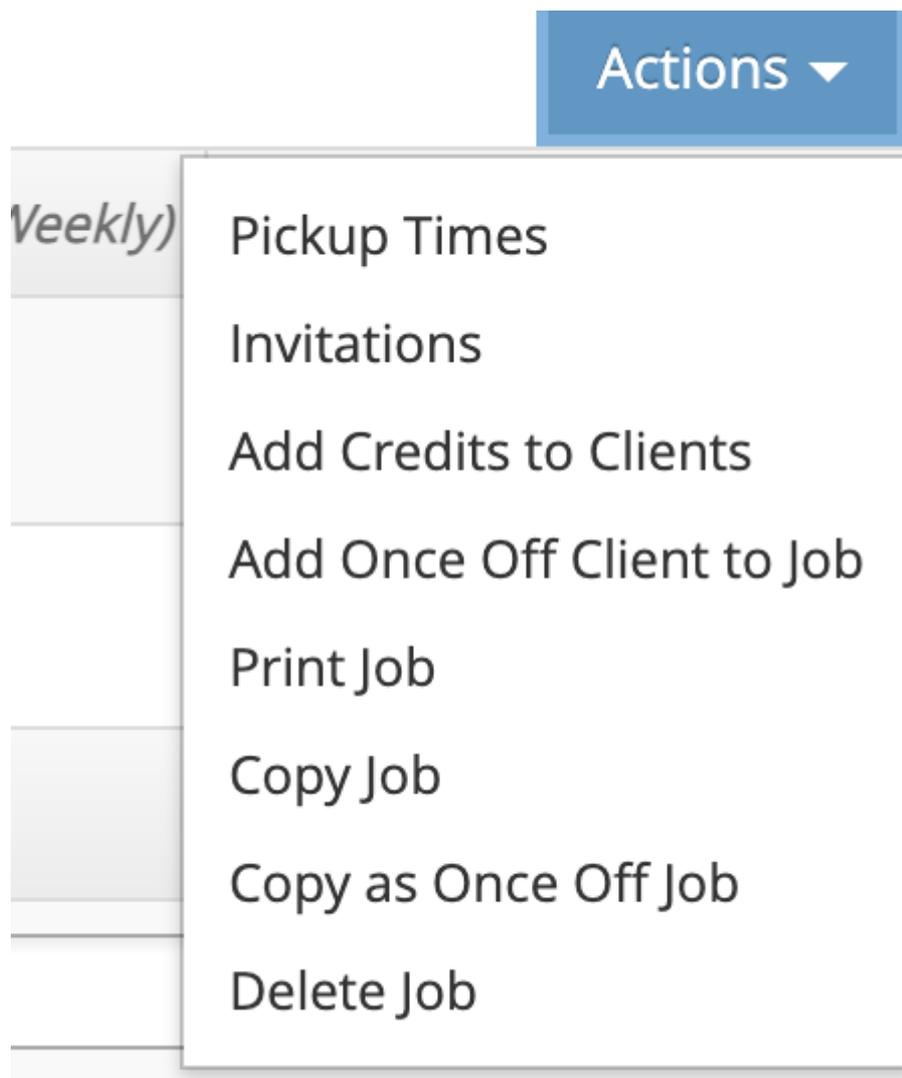
The information the assigned worker logged about the job once the job is completed will also be available on that page. You can see if there are any extra costs for meals or mileage for example as well as view the start and finish time for that job.

Assigned Workers Total: 0

Worker Name	Meals	Mileage	Costs	Clients	Started At	Finished At	Add Worker
Adam White (Staff) Apply as recurring from 6th	0	0	0	Please select	--:--	--:--	

Job Actions

You'll have a series of options if you click on the Actions tab on the top right-hand side.



Enter and print the pickup summary

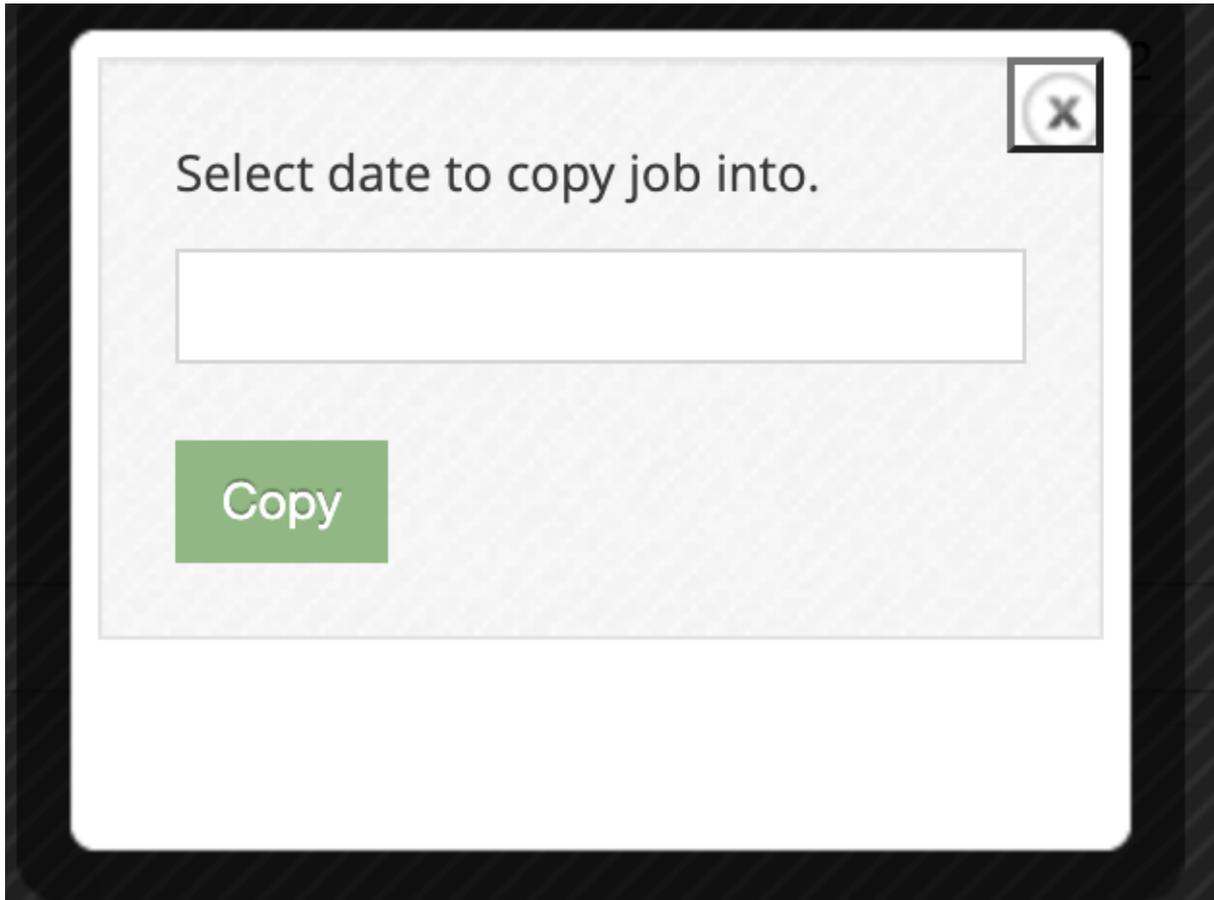
If you select the Pickup Times option, you can enter the pickup details of the job, such as when the client needs to be picked up, if they need to be contacted, etc.

You can fill out the information and save it by clicking “Save Change”. You can also print the details by selecting “Pickup Summary Report”.

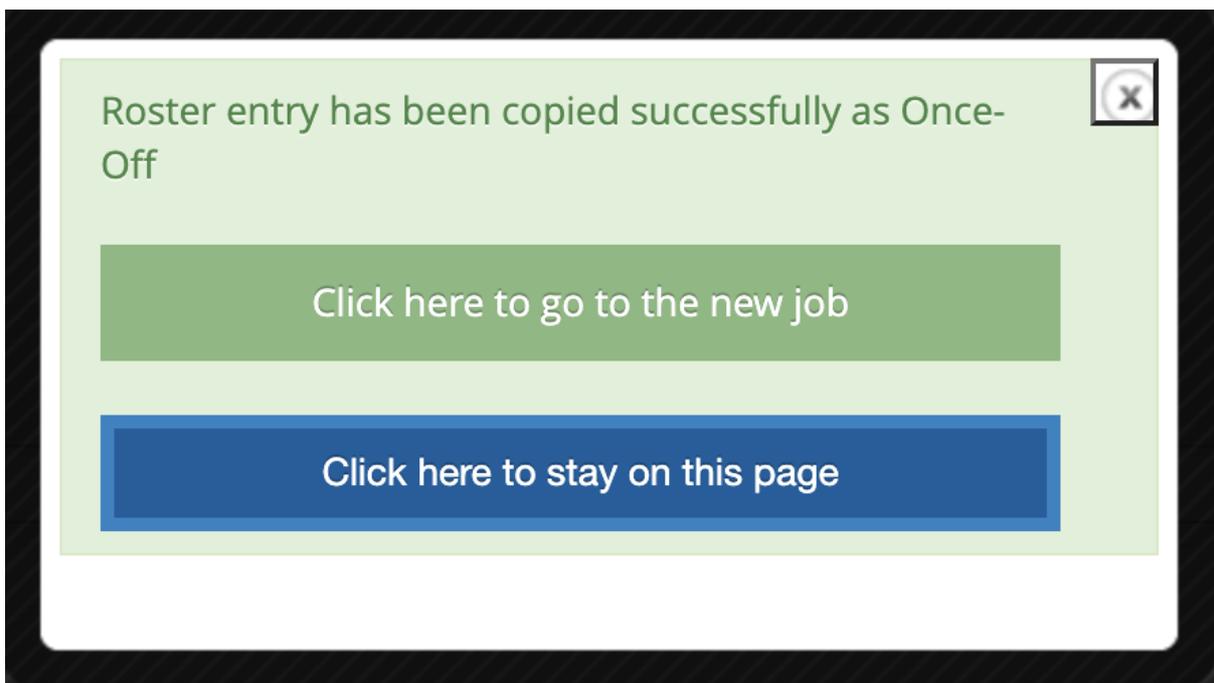
Client Name	Pickup Time	Phoned	Messaged	Call Again	Notes
Terry Apples Home : (07) 123 456	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>

Copy a recurring job as a Once-off

You also have the option to copy a recurring job as a once-off job. If you choose to do that, a pop-up box will open and you can enter a date to copy the job into.

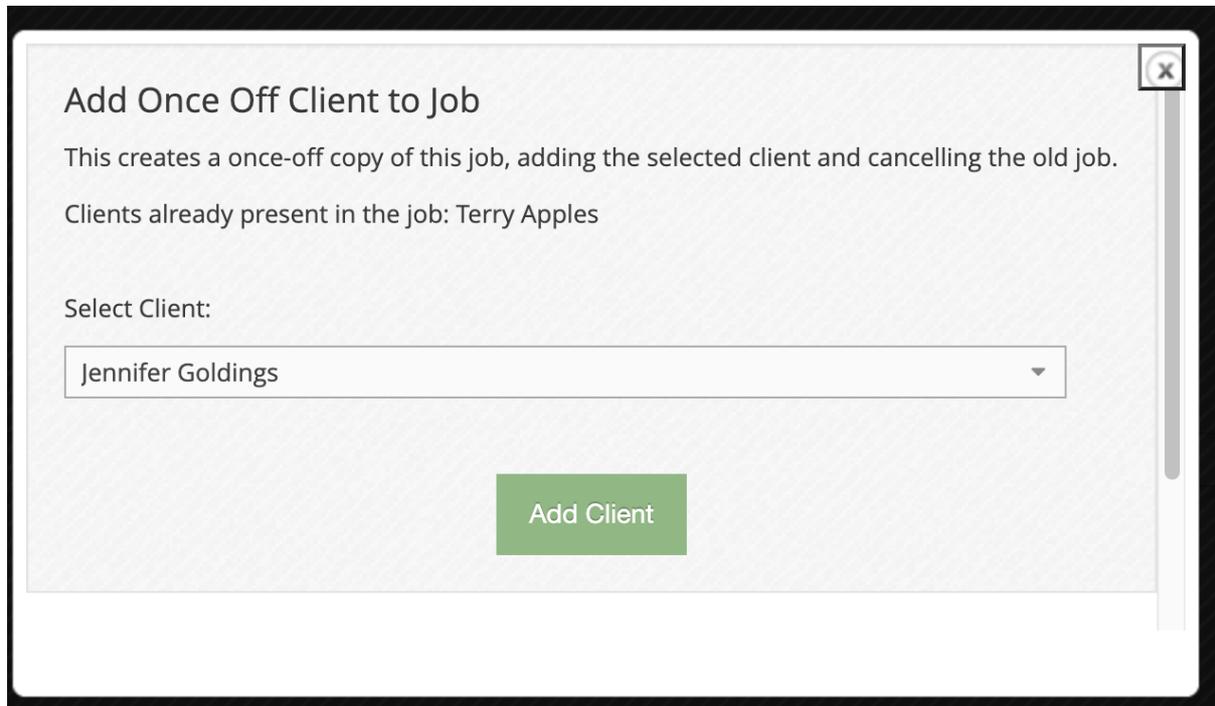


Once you copy the job, a new pop-up box will open giving you the option to stay on the page or go to the new job.



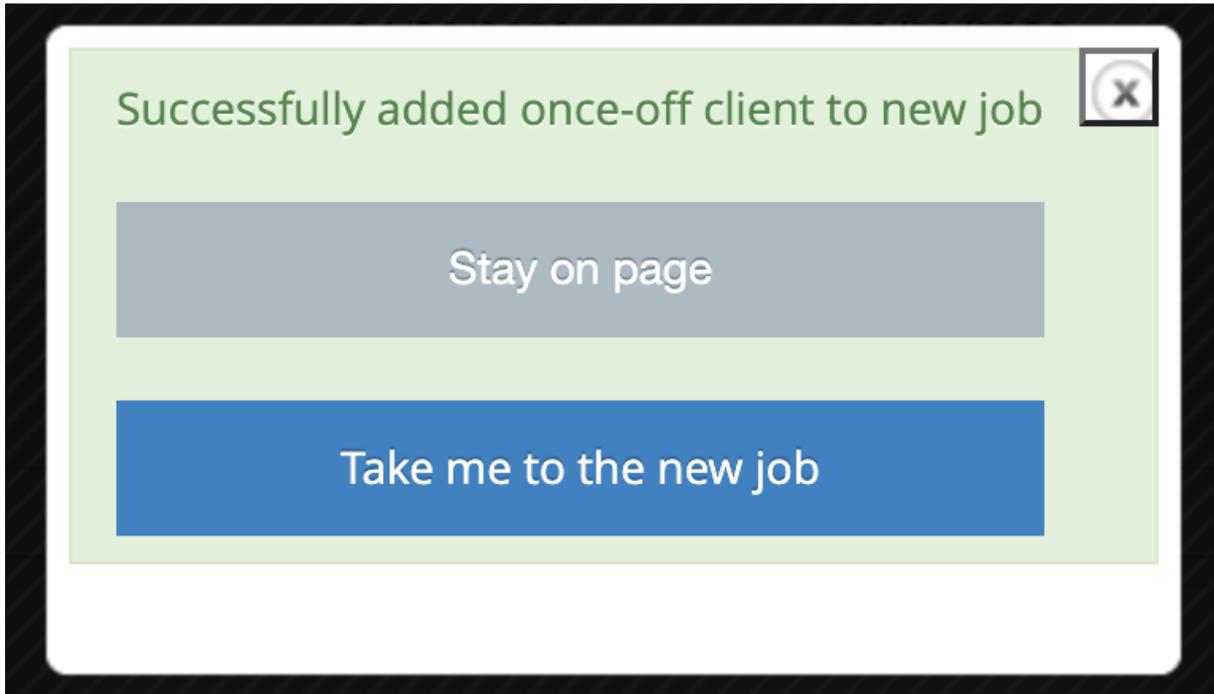
Add Once-Off Client to a Job

Under the actions button, you can also add a once-off client to that job. That creates a once-off copy of the job adding the selected client and cancelling the old job.



The screenshot shows a modal window titled "Add Once Off Client to Job" with a close button in the top right corner. The text inside the modal reads: "This creates a once-off copy of this job, adding the selected client and cancelling the old job." Below this, it states "Clients already present in the job: Terry Apples". There is a label "Select Client:" followed by a dropdown menu that currently displays "Jennifer Goldings". At the bottom center of the modal is a green button labeled "Add Client".

If you click on "Add Client", that will open a pop-up box giving you the option to stay on the page or go to the new job. When you go to the new job, you can see the new client added as a once-off.



Print a Job Sheet

You can print the **Job Sheet** by selecting “Print Job”.

Another way to print a job is to click on the grey printer icon next to the job on the Daily Schedule view.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Tuesday 30th of August 2022						
Clients		Job Activities			Workers	
test Apples, Terry 1 Client		Activity Type 01_002_0107_1_1 NDIS Assistance With Self-Care Activities - Standard - Weekday Night	Start 08:00 AM	End 10:00 AM	No Workers Allocated	

Delete a Job

To **Delete** the whole job select “Delete Job”. After confirming the action, the job will be permanently deleted.

Warning:
 This will delete this whole job forever.
 If this was not your intention, please cancel this job instead or update the end date for this job.
 Are you sure you want to delete this job?

NO - DO NOT DELETE
YES - DELETE

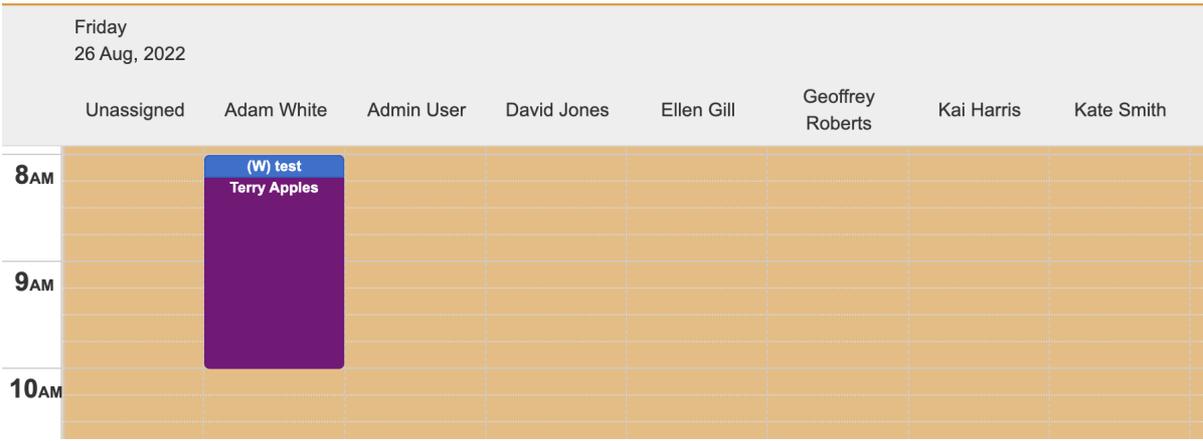
Change an assigned worker for a job

There are a couple of different ways you can change an assigned worker for a job. One is by going to the job page and selecting a new worker for that job.

Assigned Workers Total: 0

	Worker Name	Meals	Mileage	Costs	Clients	Started At	Finished At	
	<div style="border: 1px solid #ccc; padding: 2px;">Adam White (Staff) ▾</div> <div style="border: 1px solid #ccc; padding: 2px; margin-top: 2px;">Apply as recurring from 6th ▾</div>	0	0	0	Please select	--:-- ⌚	--:-- ⌚	<div style="background-color: #669933; color: white; padding: 2px 5px; border-radius: 3px;">Add Worker</div> <div style="text-align: right; margin-top: 5px;"> ✖ </div>

Alternatively, you can go to the Workers Calendar and simply drag a job to another worker. Changes will be saved automatically. You can also use this drag and drop tool to change the time of a job by moving it up or down.



If you need to move all jobs from one worker to another, you can select the green “Move all jobs” button on the top right. That will display a pop-up box where you can fill in the date and between what workers you want to move the jobs.

Move All Worker Jobs



Move Jobs Between Workers

Date:

dd/mm/yyyy



From:

Please Select



To:

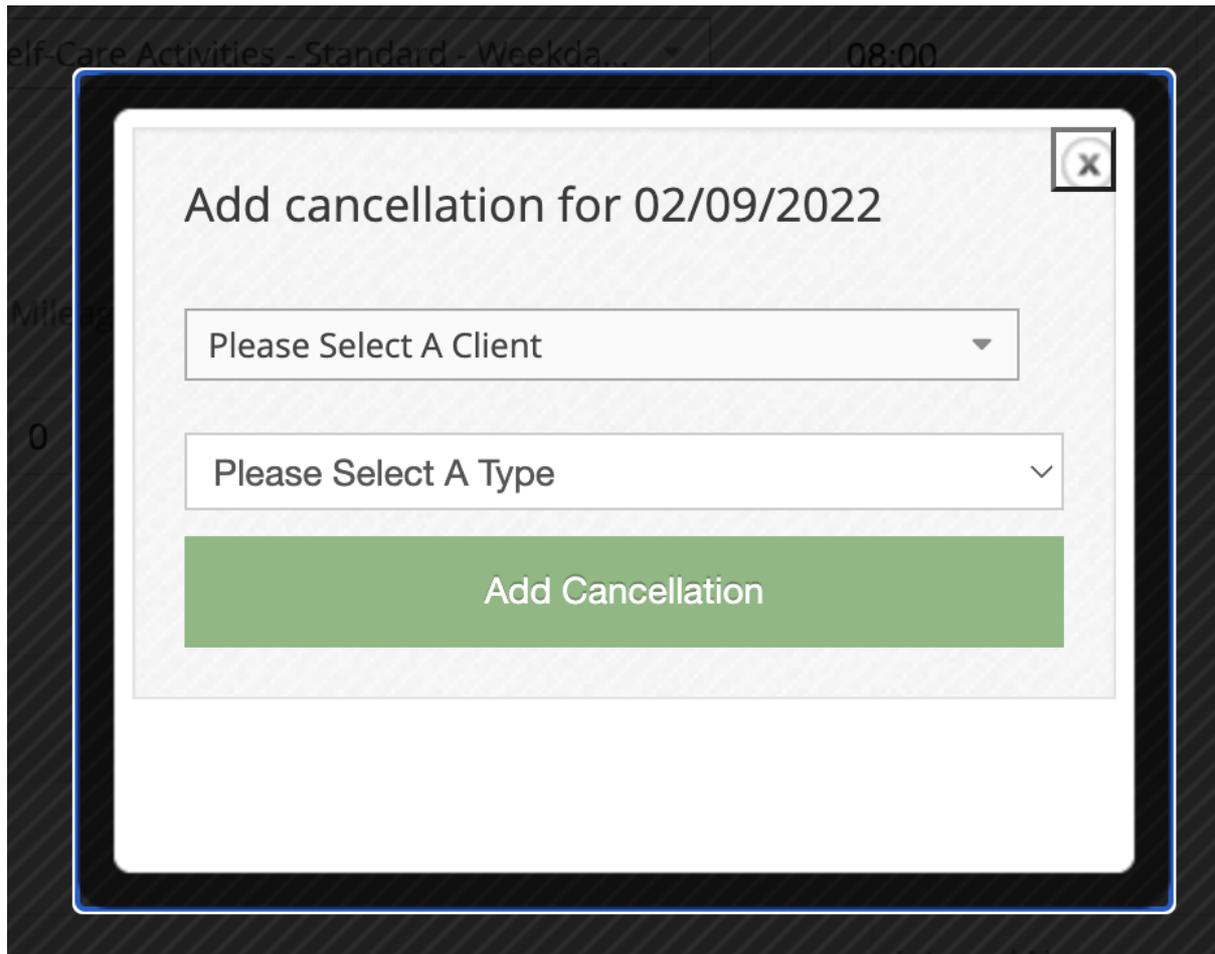
Please Select



Move

Add a cancellation

To cancel a job for a client, go to the Job Page and click on the “Add Cancellation” button on the right side under the “Cancellations” section. That will open a pop-up window where you can select the client to cancel the job and also select a cancellation type.



Click on “Add Cancellation” to save changes.

Cancellations For 02/09/2022

Client Name	Cancellation Type	Add Cancellation
Terry Apples	Cancellation - No Charge	

View Client & Volunteer Job Histories

You can easily view the **Job Histories** of your clients and workers in Polixen. A Job History is a date-ordered list of jobs assigned, with information about cancellation, times, and services provided. You can filter these histories by selecting a **start date** and an **end date** to get the data you require.

To get to the **Client's Job History**, navigate to the client's **Client Page**. If you need instructions on that, please consult our documentation on [Clients](#). Then select the **Service History** tab.

Client Information	Client Contacts	Other Information	Health Information	Meals On Wheels	Service History	Documents & Files	Job Notes	Actions ▾
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Services Provided Start: 10/08/2022 END: 07/09/2022 Service Status: Show All Update Print

Service Name	Date	Service Type	Worker Assigned												
test	Friday 2nd of September 2022	<table border="1"> <thead> <tr> <th>Service Name</th> <th>Scheduled Start</th> <th>Scheduled End</th> </tr> </thead> <tbody> <tr> <td>01_002_0107_1_1 NDIS Assistance With Self-Care Activities - Standard - Weekday Night</td> <td>08:00 AM</td> <td>10:00 AM</td> </tr> </tbody> </table>	Service Name	Scheduled Start	Scheduled End	01_002_0107_1_1 NDIS Assistance With Self-Care Activities - Standard - Weekday Night	08:00 AM	10:00 AM	<table border="1"> <thead> <tr> <th>Worker</th> <th>Start Time</th> <th>Finish Time</th> </tr> </thead> <tbody> <tr> <td>Adam White</td> <td>12:00 AM</td> <td>12:00 AM</td> </tr> </tbody> </table>	Worker	Start Time	Finish Time	Adam White	12:00 AM	12:00 AM
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test	Friday 26th of August 2022	<table border="1"> <thead> <tr> <th>Service Name</th> <th>Scheduled Start</th> <th>Scheduled End</th> </tr> </thead> <tbody> <tr> <td>01_002_0107_1_1 NDIS Assistance With Self-Care Activities - Standard - Weekday Night</td> <td>08:00 AM</td> <td>10:00 AM</td> </tr> </tbody> </table>	Service Name	Scheduled Start	Scheduled End	01_002_0107_1_1 NDIS Assistance With Self-Care Activities - Standard - Weekday Night	08:00 AM	10:00 AM	<table border="1"> <thead> <tr> <th>Worker</th> <th>Start Time</th> <th>Finish Time</th> </tr> </thead> <tbody> <tr> <td>David Jones</td> <td></td> <td></td> </tr> </tbody> </table>	Worker	Start Time	Finish Time	David Jones		
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Worker	Start Time	Finish Time													
David Jones															

To view a **Volunteer Job History**, navigate to the **Volunteer Page**. Instructions for doing that are in the [Volunteers](#) section. Then select the **Job History** tab. You can view the **Staff Job History** in the same manner, by navigating to the required **Staff Page** (Instructions in the [Staff](#) section) and selecting the **Job History** tab.