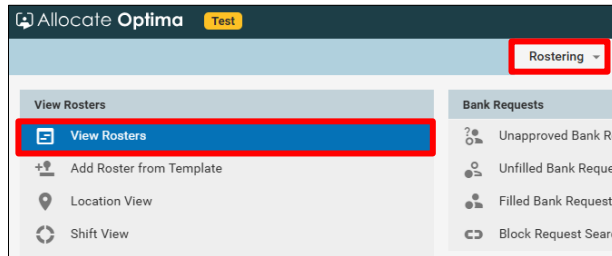


# Optima – Finalise a Roster

1

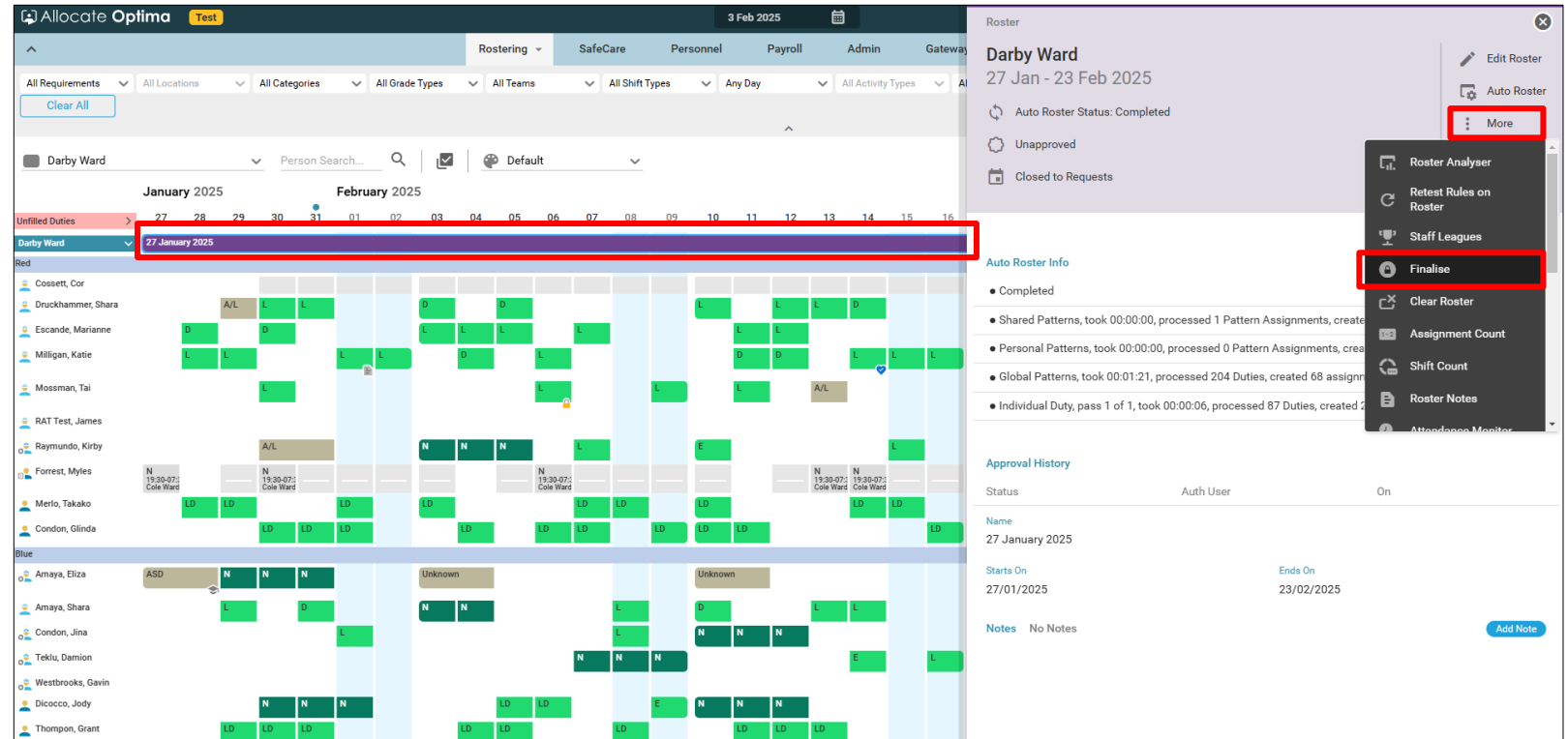
Navigate to the **Rostering** Top Menu, **View Rosters** Sub Menu, and then select **View Rosters**. Then locate your chosen roster.



2

Double click/tap on the **Purple Roster Bar** to display the Roster Panel. Select **More** then **Finalise** to proceed.

You could also reach this panel by **right clicking** on the **Purple Roster Bar** and selecting **Finalise** directly from there.



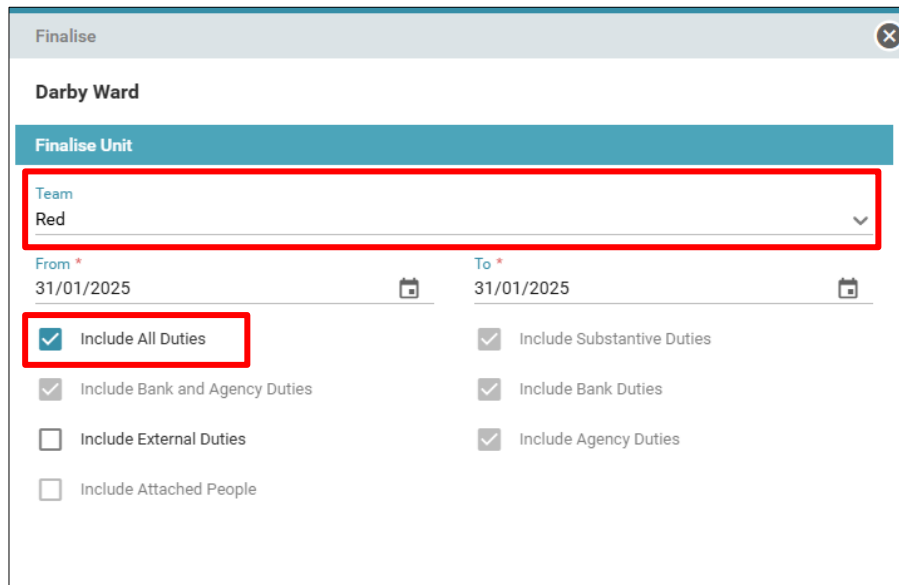
It is best practice to **finalise at the end of each day**, so you're aware of what's happened daily; but you could also choose to finalise at the end of every week, for example. All shifts for the previous week should be finalised **no later than 11am on a Monday**

# Optima – Finalise a Roster

3

In the **Finalise** panel, select the date range of duties you would like to finalise. You can also finalise by **Team** by selecting each team from the drop-down list.

**Include All Duties** has been set to be ticked automatically, this will finalise all rostered shifts including Bank and Agency shifts, if you would like to exclude any of the categories you should untick the **Include All Duties** box and then select the duties you would like to finalise individually.

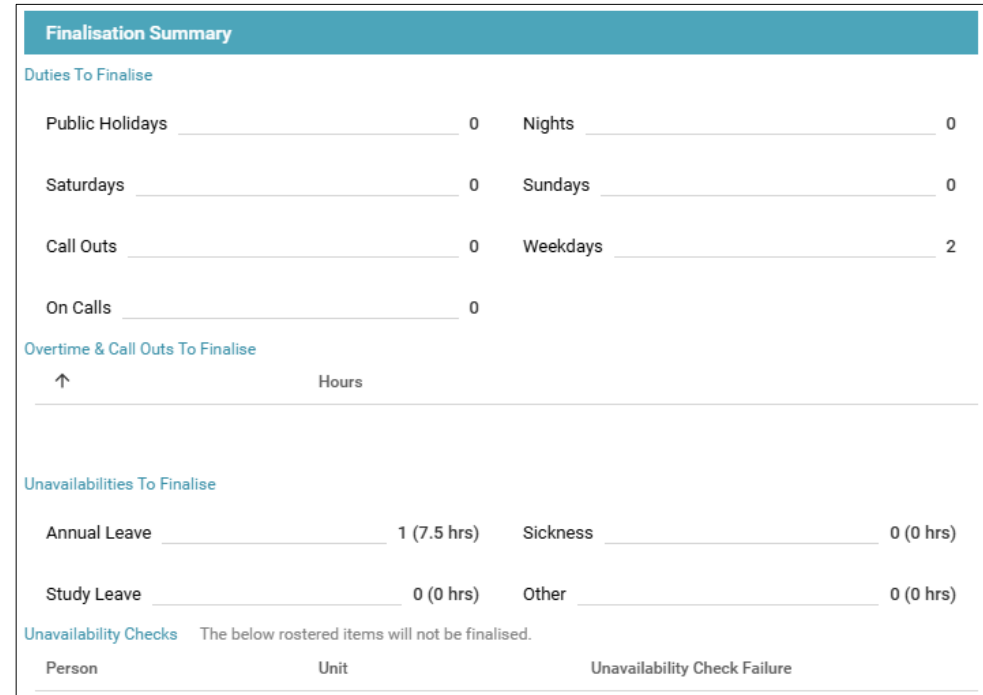


4

Further down the panel you will see the **Finalisation Summary**. Here you can review the items set to be finalized, and return to the roster to make changes if anything doesn't look right.

The **Finalisation Summary** provides a breakdown of the type of shifts that will be finalised from the dates selected.

The **Unavailabilities To Finalise** section provides a breakdown of hours for each unavailability that will be finalised.



Finalisation Summary			
<b>Duties To Finalise</b>			
Public Holidays	0	Nights	0
Saturdays	0	Sundays	0
Call Outs	0	Weekdays	2
On Calls	0		
<b>Overtime &amp; Call Outs To Finalise</b>			
↑ Hours			
<b>Unavailabilities To Finalise</b>			
Annual Leave	1 (7.5 hrs)	Sickiness	0 (0 hrs)
Study Leave	0 (0 hrs)	Other	0 (0 hrs)
<b>Unavailability Checks</b> The below rostered items will not be finalised.			
Person	Unit	Unavailability Check Failure	

# Optima – Finalise a Roster

5

At the bottom of the panel, the Finalisation Disclaimer will be displayed, you will need to read the statement, **tick the box** and select **OK** to confirm..

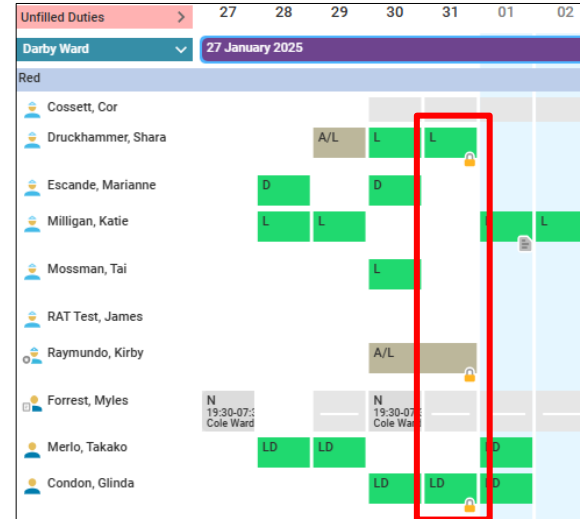
**Finalisation Disclaimer**

I am an authorised signatory for my ward/department. I approve these shift(s) have been undertaken/completed and are accurate for payment. I understand that if I provide false information this may result in disciplinary action, and I may be liable for prosecution.

Cancel **OK**

6

The selected items that were finalized will be updated on the roster, this is shown with a **padlock symbol**.



For your roster to go to Payroll, you need to ensure you have finalised **every single duty, cancelled duty, and unavailability on the roster**. Unless you do that, the unit will not be able to go to Payroll, and neither will any of your organisation's other units. If this happens, your roster may be taken off the batch list to go to Payroll.