

Creating and Managing Staff in BondiByte

Step-by-step guide for staff creation, compliance evidence, login access, availability and rostering configuration

What this guide covers

This guide combines staff creation and post-creation management into one workflow. It covers CSV import, manual staff creation, employment and rostering settings, evidence-backed capabilities, staff login access, document approvals, availability, site relationships, contracts and shifts.

Quick workflow

1. Choose CSV import for bulk onboarding or Add staff for one-at-a-time creation.
2. Capture profile, contact, employment, status, right-to-work and pay information.
3. Set the primary site, ordinary hours, rostering preferences and roster capacity.
4. Create the staff record and review the profile.
5. Add or approve compliance documents so evidence-backed capabilities are available to rostering.
6. Configure login access for staff portal/mobile access where required.
7. Maintain availability, leave, site relationships, contracts and shifts over time.

Before you start: understand how BondiByte decides who can be rostered

BondiByte separates three ideas that are easy to confuse: eligibility, availability and priority. Keeping them separate makes staff setup much easier to understand.

Concept	What it answers
Eligibility	Can this person work the shift? Mandatory capabilities, active status, overlaps and blocked/unavailable windows are part of suitability.
Availability	When can this person work? Availability, leave and blocked windows determine whether the shift time is workable.
Priority / ranking	Which eligible person should be preferred? Team relationship, continuity, fairness, fatigue, staff interest and other Smart Rostering factors influence ranking.

Important

A preference or team relationship never overrides a hard suitability block. For example, a preferred staff member who is unavailable, double-booked or missing a mandatory capability should not be assigned by Smart Rostering.

Step 1: Open Staff and choose a creation method

Open Staff from the left navigation. At the top-right of the Staff Records page you can either import staff in bulk or select Add staff to create an individual record.

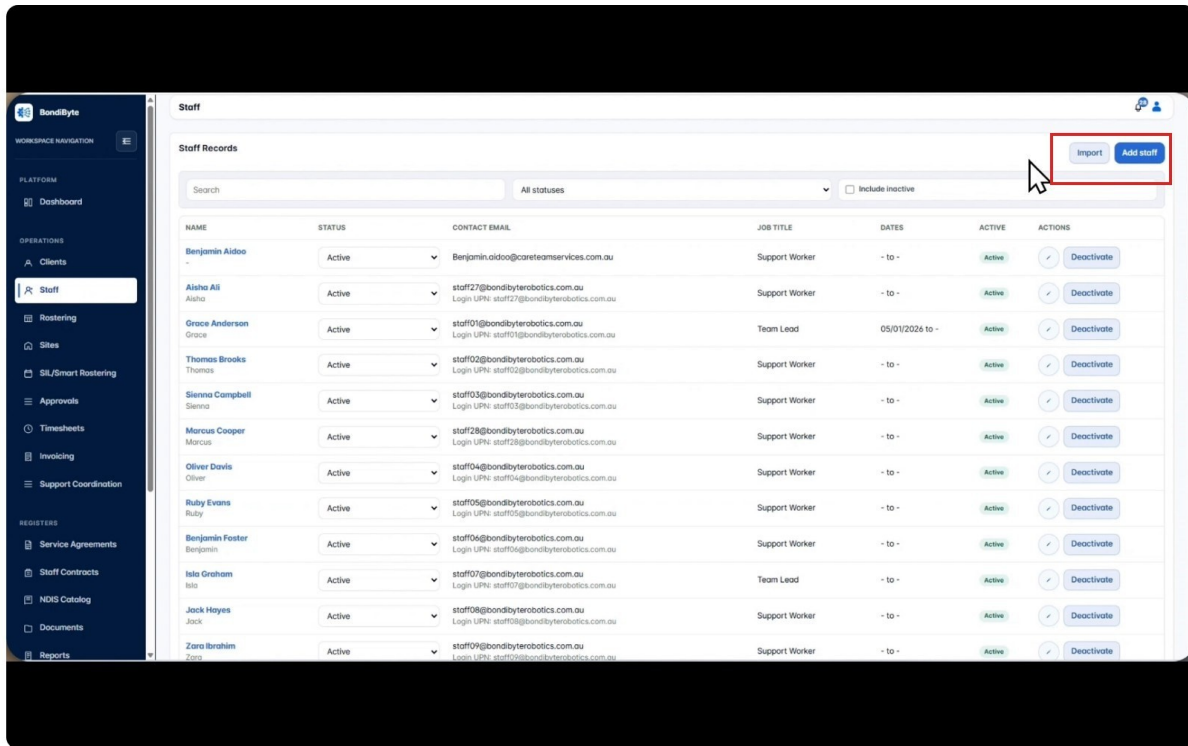


Figure 1. Staff Records provides both Import and Add staff actions.

Step 2: Import multiple staff using the CSV template

Use CSV import when onboarding several staff at once. Open Import, download the current BondiByte template, enter staff information without changing the column structure, save the file, then upload it back into the import dialog.

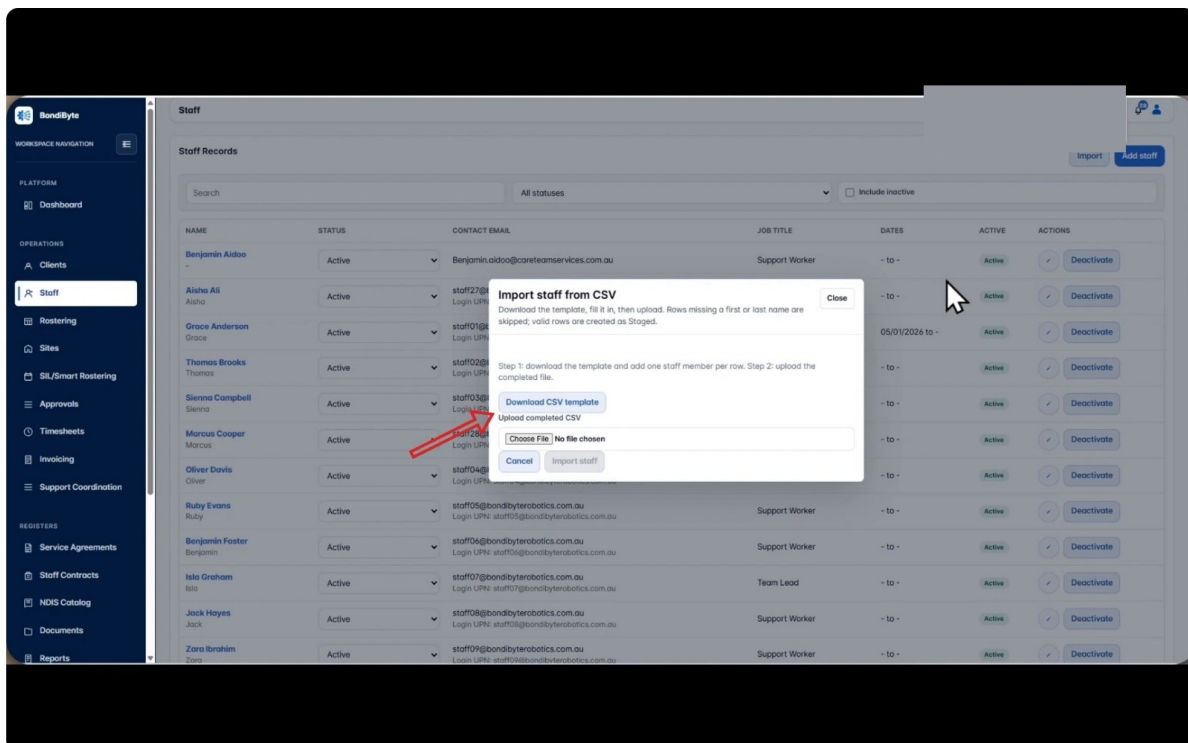


Figure 2. Download the current CSV template from the Import staff dialog.

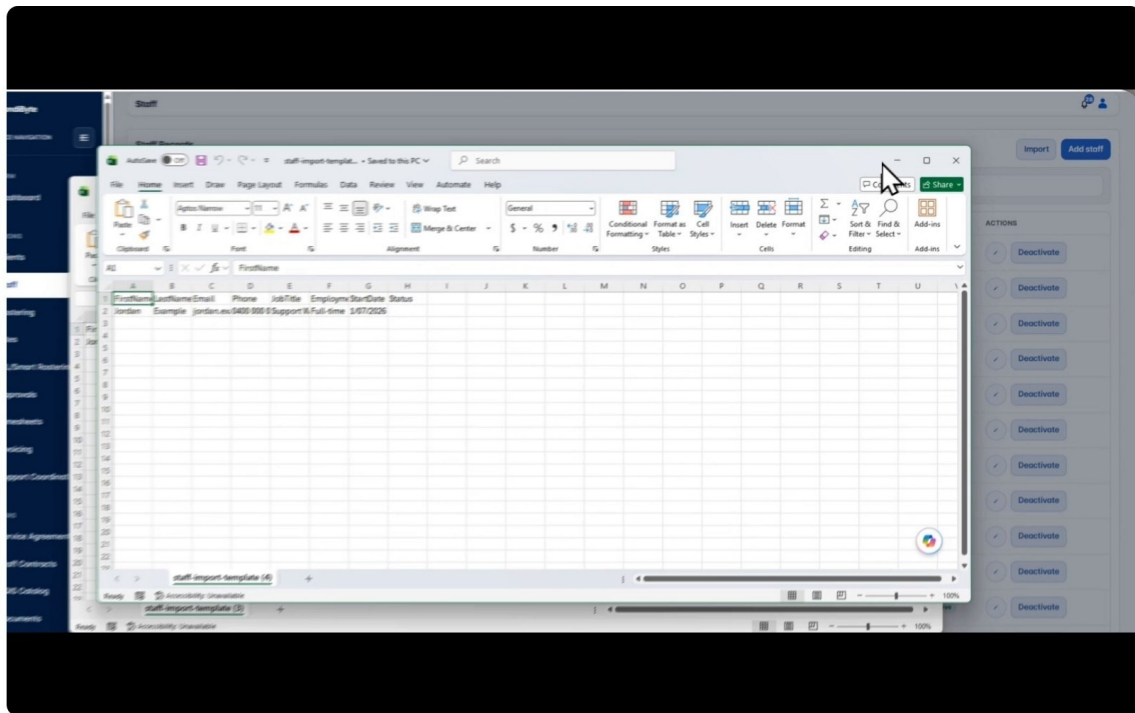


Figure 3. Complete the staff template before uploading it back to BondiByte.

After upload, run the import and review any validation feedback. Successfully created staff records will appear in the Staff list.

Step 3: Create an individual staff record

For one-at-a-time onboarding, select Add staff. Complete the basic profile and contact information, including the staff member's name, preferred name where relevant, date of birth, gender, staff reference, profile photo, phone/email and emergency contact details.

Figure 4. The Add staff form captures profile, contact, employment and rostering information.

Step 4: Set status and employment information correctly

Select the staff member's operational status and employment details. Use Active only for staff who are currently part of the workforce. Inactive or Terminated staff are excluded from normal rostering consideration and are not counted as active staff for active-staff limits or calculations that rely on the active staff count.

The screenshot displays the BondiByte Staff Management interface. On the left is a dark blue sidebar with navigation links under 'PLATFORM' (Dashboard), 'OPERATIONS' (Clients, Staff, Rostering, Sites, SIL/Smart Rostering, Approvals, Timesheets, Invoicing, Support Coordination), and 'REGISTERS' (Service Agreements, Staff Contracts, NDIS Catalog). The main area is divided into two panels. The left panel, titled 'Staff Records', contains a search bar and a table with columns 'NAME' and 'STATUS'. The table lists several staff members, all with a status of 'Active'. The right panel, titled 'Basic Details', is a form for capturing staff onboarding information. It includes fields for First name, Last name, Preferred name, Date of birth, Gender, Internal staff reference / employee number, Profile photo (with a 'Choose File' button), Status (a dropdown menu with 'Active' selected), Preferred contact method, Residential address line 1, Residential address line 2, Suburb, State, Postcode, Country (set to 'Australia'), and Emergency Contact. A mouse cursor is pointing at the 'Active' option in the Status dropdown menu.

Figure 5. Select the staff member's current operational status.

Status matters

Deactivating a staff record preserves its history. It should be used instead of deleting employment history simply because a worker leaves the organisation.

Step 5: Configure employment, right-to-work, pay and the initial site

Complete employment type, manager/supervisor, login UPN where used, start/end dates and right-to-work or residency information. Record these values accurately so the organisation's document and compliance workflows can request and track the correct evidence.

The screenshot shows the 'Employment Details' section of the staff creation form. The 'Job title' is 'Support Worker'. The 'Employment type' is 'Casual'. The 'Right to work in Australia' dropdown menu is open, showing options: 'Not recorded', 'Not recorded', 'Australian citizen', 'Permanent resident' (highlighted by a mouse cursor), and 'On a visa'. Other fields include 'Manager / supervisor' (Select manager), 'Login UPN' (name@example.com), 'End date' (dd/mm/yyyy), 'Primary site / house' (Select site), and 'Pay level' (Select pay level). The 'Rostering Preferences' section includes checkboxes for various work conditions, all of which are checked.

Figure 6. Employment and right-to-work details are captured as part of staff setup.

If your organisation uses BondiByte pay levels, select the appropriate pay level so the staff record is linked to the correct pay configuration.

This screenshot is a closer view of the 'Pay level' dropdown menu. The dropdown is open, showing 'Support Worker Level 1' as the selected option. The mouse cursor is pointing at the dropdown arrow. The background shows the same 'Employment Details' form as in Figure 6.

Figure 7. Assign a pay level where your organisation uses the pay-level model.

Select the staff member's initial primary site where appropriate. The creation form starts with one site; additional site relationships can be added after the staff record has been created.

Staff Records

Search

NAME	STATUS
Benjamin Aidoo	Active
Aisha Ali	Active
Grace Anderson	Active
Thomas Brooks	Active
Sienna Campbell	Active
Marcus Cooper	Active
Oliver Davis	Active
Ruby Evans	Active
Benjamin Foster	Active
Isia Graham	Active

Employment Details

Job title: Support Worker
 Employment type: Casual
 Right to work in Australia: Not recorded
 Type a new tenant-specific title or choose an existing one.
 Manager / supervisor: Select manager
 Login UPN: name@example.com
 Start date: dd/mm/yyyy
 End date: dd/mm/yyyy
 Ordinary hours per week:
 Pay level: Support Worker Level 1
 Employment notes:
 Primary site / house: Select site
 Select site:
 Banksia House (BANKSIA-HOUSE-SIL-001)
 Blue Wattle House (BLUE-WATTLE-HOUSE-SIL-001)
 Jacaranda House (JACARANDA-HOUSE-SIL-001)
 Liam Martin (LIAM-MARTIN-COMMUNITY-E24EC432)
 Rivergum House (RIVERGUM-HOUSE-SIL-001)
 Waratah House (WARATAH-HOUSE-SIL-001)

Rostering Preferences

Can work weekdays ☒	Can work weekends ☒	Can work mornings ☒
Can work afternoons ☒	Can work evenings ☒	Can work sleeper shifts ☒
Can work active night shifts ☒	Can work public holidays ☒	Can provide transport support ☒

Figure 8. Select the initial primary site during staff creation.

Step 6: Configure ordinary hours, preferences and roster capacity

Enter ordinary hours according to the staff member's employment arrangement. Then configure rostering preferences such as weekday/weekend work, mornings, afternoons, evening or night work, sleepovers/active nights, public holidays and travel preferences where relevant.

Staff Records

Search

NAME	STATUS
Benjamin Aidoo	Active
Aisha Ali	Active
Grace Anderson	Active
Thomas Brooks	Active
Sienna Campbell	Active
Marcus Cooper	Active
Oliver Davis	Active
Ruby Evans	Active
Benjamin Foster	Active
Isia Graham	Active
Jack Hayes	Active
Zara Ibrahim	Active

Employment Details

Job title: Support Worker
 Employment type: Casual
 Right to work in Australia: Not recorded
 Type a new tenant-specific title or choose an existing one.
 Manager / supervisor: Select manager
 Login UPN: name@example.com
 Start date: dd/mm/yyyy
 End date: dd/mm/yyyy
 Ordinary hours per week:
 Pay level: Support Worker Level 1
 Employment notes:
 Primary site / house: Select site
 Select site:
 Banksia House (BANKSIA-HOUSE-SIL-001)
 Blue Wattle House (BLUE-WATTLE-HOUSE-1)
 Jacaranda House (JACARANDA-HOUSE-SIL-001)
 Liam Martin (LIAM-MARTIN-COMMUNITY-E24EC432)
 Rivergum House (RIVERGUM-HOUSE-SIL-001)
 Waratah House (WARATAH-HOUSE-SIL-001)

Rostering Preferences

Can work weekdays ☒	Can work weekends ☒	Can work mornings ☒
Can work afternoons ☒	Can work evenings ☒	Can work sleeper shifts ☒
Can work active night shifts ☒	Can work public holidays ☒	Can provide transport support ☒

Max rostered hours

Use site default
 Hours per fortnight. Leave blank to use the site capacity setting.

General Notes

Onboarding notes

Create staff Cancel

Figure 9. Staff rostering preferences provide useful ranking signals to Smart Rostering.

Set the maximum rostered hours per fortnight when a staff-specific cap is required. Smart Rostering uses capacity and suitability controls together; the purpose is to prevent the automation from over-allocating the worker beyond the configured limit.

The screenshot shows the 'Create staff' form in the BondiByte Staff Management Guide. The form is titled 'Staff' and includes a sidebar with navigation options like 'Sites', 'Smart Rostering', 'Approvals', 'Timesheets', 'Invoicing', 'Support Coordination', 'Registers', 'Service Agreements', 'Staff Contracts', 'NDIS Catalog', 'Documents', 'Reports', 'Incidents', 'Administration', 'Automation Centre', 'Audit Centre', 'Pay Levels', 'Settings', and 'Configuration'. The main form area has a 'Staff Records' table with columns for NAME and STATUS. The form itself has a date picker (dd/mm/yyyy), a location dropdown (Blue Wattle House (BLUE-WATTLE-HOUSE-1)), and a support level dropdown (Support Worker Level 1). Below these are 'Ordinary hours per week' and 'Employment notes' text areas. The 'Rostering Preferences' section includes checkboxes for 'Can work weekdays', 'Can work weekends', 'Can work mornings', 'Can work afternoons', 'Can work evenings', 'Can work sleeper shifts', 'Can work active night shifts', 'Can work public holidays', and 'Can provide transport support'. There is also a 'Max rostered hours' section with a 'Use site default' option and a 'Hours per fortnight' field. The 'General Notes' section has an 'Onboarding notes' text area. The 'Create staff' button is highlighted at the bottom right of the form.

Figure 10. Configure a staff-specific maximum rostered-hours limit where required.

Preferences versus hard rules

Preferences help Smart Rostering rank otherwise eligible candidates. They do not make an ineligible person eligible and they do not bypass availability, overlap, mandatory capability or capacity checks.

Step 7: Create the record and review the staff profile

When the required information is complete, select Create staff. The worker will appear in Staff Records and can then be opened as a full staff profile.

This screenshot is identical to Figure 10, showing the 'Create staff' form. The 'Create staff' button is highlighted with a mouse cursor pointing at it.

Figure 11. Select Create staff after completing the onboarding form.

Profile Details
Core staff identity and employment information.

PREFERRED NAME: Aisha DATE OF BIRTH: -
GENDER: Female EMPLOYEE NUMBER: STAFF-27
LOGIN UPN: staff27@bondibytebotanics.com.au STATUS: Active
JOB TITLE: Support Worker LOGIN ACCESS ROLE: No linked login account
EMPLOYMENT TYPE: Part Time PRIMARY SITE: Blue Wattle House
MANAGER / SUPERVISOR: - PAY LEVEL: -
ORDINARY HOURS: 30 START DATE: -
END DATE: -

Contact Details
Phone, email, preferred contact method, and residential address.

STAFF CONTACT EMAIL: staff27@bondibytebotanics.com.au
PHONE: 0732001027
MOBILE: 0400401027
PREFERRED CONTACT METHOD: Email
RESIDENTIAL ADDRESS: 52 Blue Wattle Drive, Redcliffe QLD 4020, Australia

Emergency Contact
Emergency contact information for this staff member.

NAME: Aisha Ali Emergency RELATIONSHIP: Sibling
PHONE: 0400501027 EMAIL: staff27.emergency@bondibytebotanics.com.au
CAN CONTACT AFTER HOURS: No NOTES: -

Relationship Summary
Records currently linked to this staff profile.

2 Documentation 0 Reports
0

Figure 12. The staff profile becomes the central workspace for ongoing staff management.

Step 8: Use documents to establish staff capabilities

Capabilities represent qualifications, checks or evidenced skills used by rostering suitability. Examples include First Aid, CPR, worker screening, licences and other requirements configured by the organisation.

Capabilities
Document-backed qualifications, checks, and capabilities used by shift suitability.

Capability records are created and updated from uploaded staff documents such as screening checks, First Aid, CPR, driver licence, medication, manual handling, behaviour support, high intensity support, infection control, and site/client induction. Manual capability entry is disabled so rostering only relies on document evidence.

CAPABILITY	TYPE	STATUS	ISSUED	EXPIRY	SOURCE	ACTIVE
CPR Certificate	Qualification	Active	07/07/2026	08/10/2026	Document evidence	Active
First Aid Certificate	Qualification	Active	06/06/2026	14/11/2026	Document evidence	Active

Figure 13. The Capabilities tab shows the evidence-backed capabilities associated with the staff member.

Upload staff documentation through the Documentation area and select the correct document type. Where a document type is linked to a capability, BondiByte can derive or update that capability from the approved evidence and its expiry information.

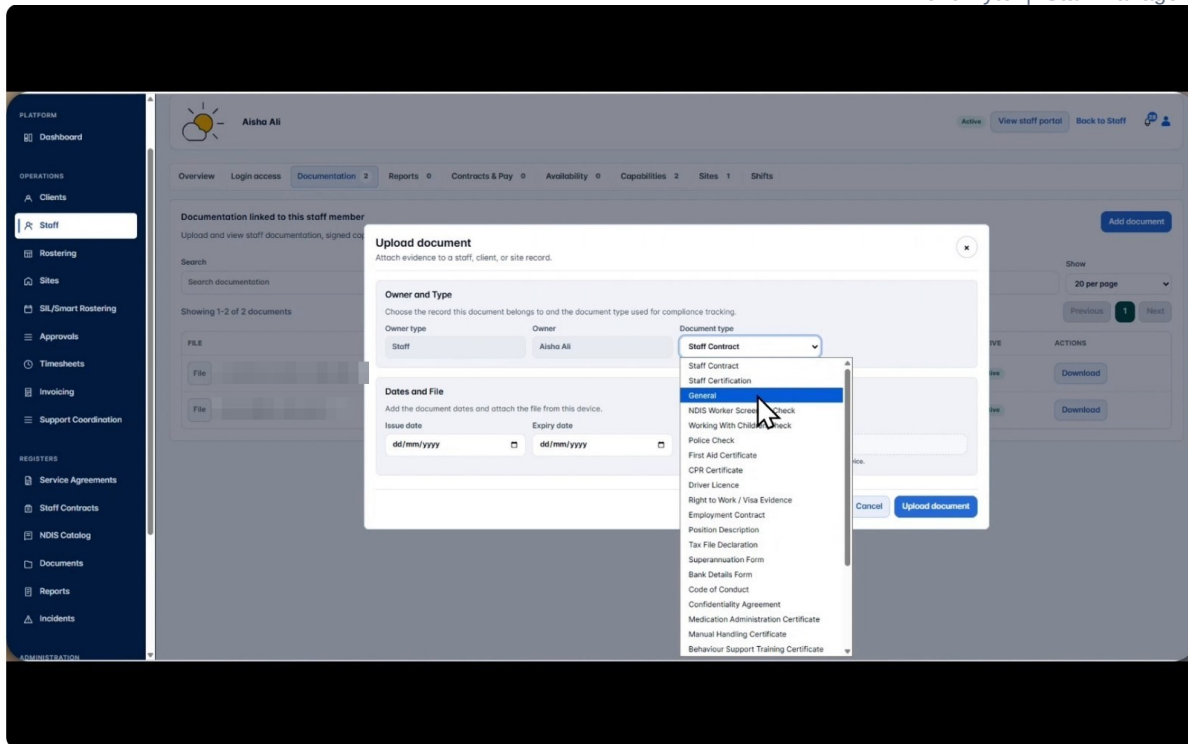


Figure 14. Selecting the correct document type allows evidence to feed the relevant capability.

How capabilities affect rostering

Missing a mandatory site capability is a hard suitability block. Missing an optional capability can be surfaced as a warning instead. Capabilities answer whether the person is eligible; availability answers when they can work.

Step 9: Review documents uploaded by staff

Staff can upload their own documents from the staff portal/mobile app. Staff-submitted documents follow an approval workflow before they become trusted profile evidence. Review pending items from Approvals, including the Document requests tab.

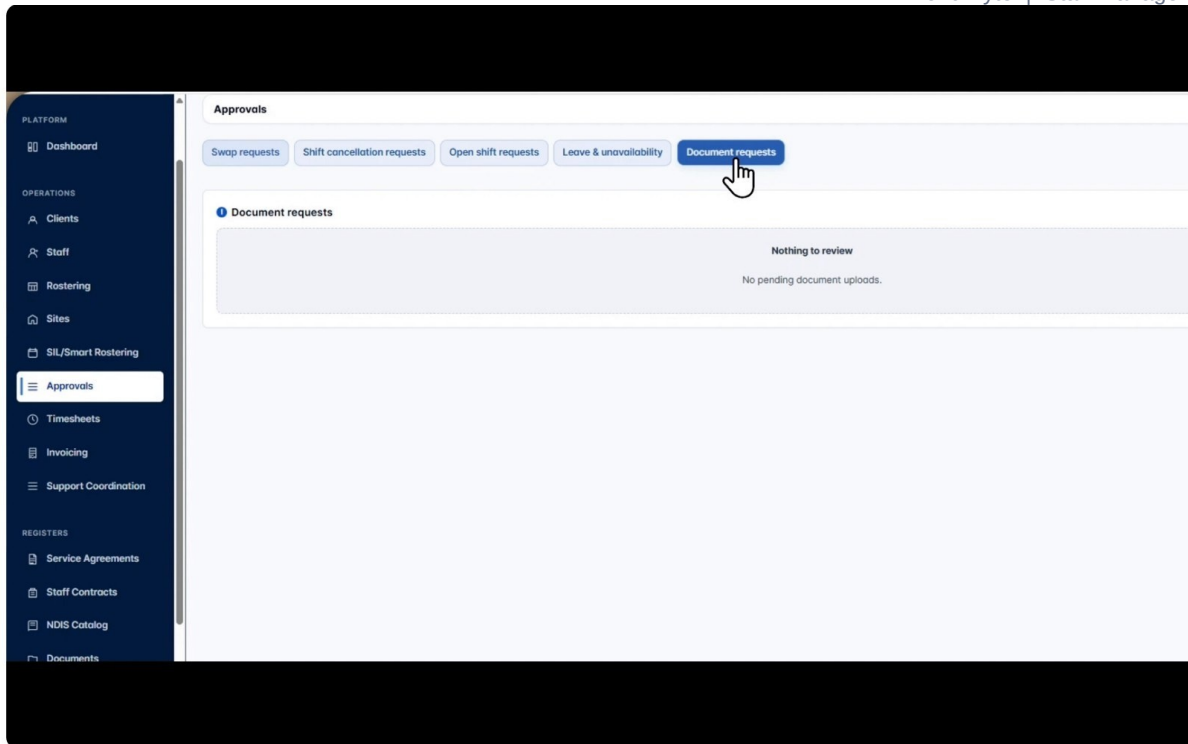


Figure 15. Staff document requests are reviewed from the Approvals workspace.

Once approved, the document becomes part of the staff member's documentation. If it maps to a capability, the resulting capability can then participate in rostering suitability checks.

Step 10: Configure staff login access

Open Login access on the staff profile when the worker needs access to the staff portal or mobile app. Access management is restricted to authorised users with the relevant permission.

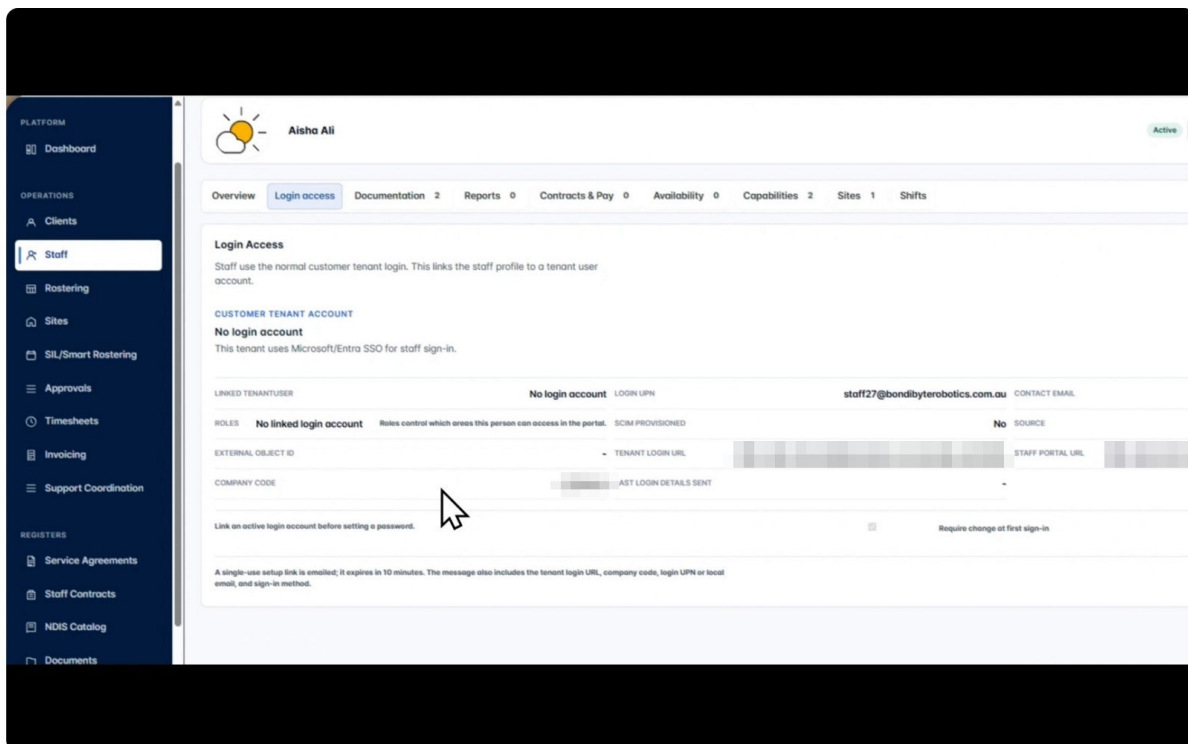


Figure 16. Login access is managed separately from the operational staff profile.

Depending on the account state and your organisation's identity configuration, authorised administrators can send staff setup/login details, link an existing tenant account, set a password, revoke active sessions and manage approved SSO exceptions.

Step 11: Manage availability, leave and unavailable windows

Availability controls when a staff member can work. Staff can maintain their own availability through the staff experience, and authorised managers can add or adjust availability from the staff profile.

ew Login access Documentation 2 Reports 0 Contracts & Pay 0 Availability 0 Capabilities 2 Sites 1 Shifts

Availability
Availability, unavailable, and blocked windows used by shift suitability.

[Add availability](#)

Rostering Preferences
Rostering preferences used to guide rostering. Dated exceptions stay in the table below.

Can work weekdays	Yes	Can work weekends	Yes
Can work mornings	Yes	Can work afternoons	Yes
Can work evenings	Yes	Can work sleepover shifts	Yes
Can work active night shifts	Yes	Can work public holidays	Yes
Can provide transport support	Yes	Willing to travel between sites	Yes

Preferred sites / houses
Blue Wattle House

No availability records
Add availability or blocked time to guide rostering suitability.

Figure 17. Availability and rostering preferences are maintained from the staff profile.

Blocked or unavailable windows are respected by manual suitability checks and Smart Rostering. A worker should not be newly allocated to a shift that overlaps a blocked/unavailable period. If availability changes after future shifts are already assigned, review those assignments rather than assuming historical assignments are silently removed.

Availability is a hard suitability input

Availability and blocked windows can prevent an assignment. Rostering preferences are different: they influence ranking but do not bypass hard blocks.

Step 12: Add site relationships and rostering priority

After staff creation, assign the worker to additional sites where required. Site-team relationships such as Primary, Secondary and Relief help describe how strongly the worker belongs to that site team and influence Smart Rostering ranking.

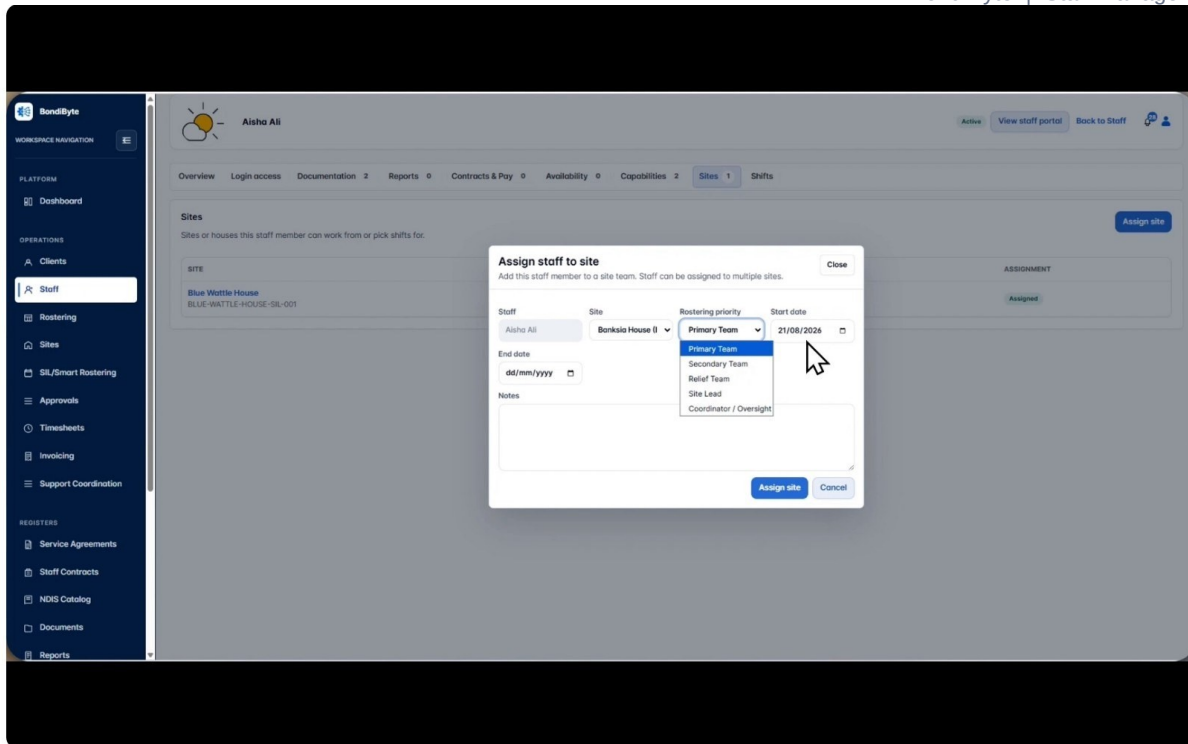


Figure 18. Assign staff to a site and select the appropriate team relationship and dates.

Being outside the preferred site team does not automatically make a worker unsuitable if they otherwise pass the required checks. Team relationship is primarily a ranking signal, while mandatory capabilities, availability and other hard suitability rules remain authoritative.

Step 13: Review reports, contracts and pay information

Use the staff profile to review reports and employment-related information. Where your organisation uses Staff Contracts, the Contracts & Pay area shows contract records and relevant pay information, subject to the user's permissions.

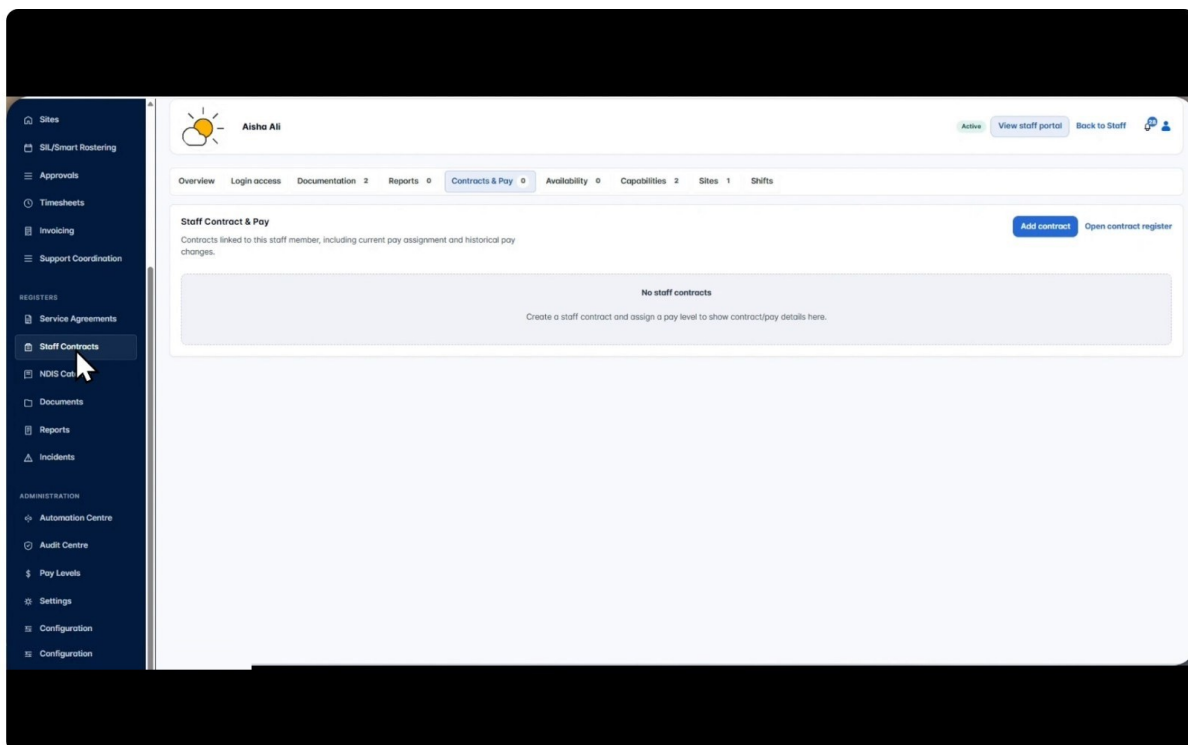


Figure 19. Contracts & Pay provides staff contract and pay-related information.

Step 14: Review the staff member's shifts

Open the Shifts tab to review the worker's rostered shifts, including future and historical assignments. From the list, open a shift when more detail or further action is required.

SHIFT	SITE	ROSTER	DATE	TIME	STATUS	PSL
Active Night Active Night	Blue Wattle House BLUE-WATTLE-HOUSE-SIL-001	Blue Wattle House-08/06/2026	14/06/2026	2026-06-14T23:00:00 → 2026-06-15T07:00:00	Draft	1/1 Open
Morning shift short Morning shift short	Blue Wattle House BLUE-WATTLE-HOUSE-SIL-001	Blue Wattle House-08/06/2026	15/06/2026	2026-06-15T07:00:00 → 2026-06-15T14:00:00	Draft	1/1 Open
Morning shift short Morning shift short	Blue Wattle House BLUE-WATTLE-HOUSE-SIL-001	Blue Wattle House-08/06/2026	16/06/2026	2026-06-16T07:00:00 → 2026-06-16T14:00:00	Draft	1/1 Open
Active Night Active Night	Blue Wattle House BLUE-WATTLE-HOUSE-SIL-001	Blue Wattle House-08/06/2026	17/06/2026	2026-06-17T23:00:00 → 2026-06-18T07:00:00	Draft	1/1 Open
Afternoon Shift Afternoon Shift	Blue Wattle House BLUE-WATTLE-HOUSE-SIL-001	Blue Wattle House-08/06/2026	20/06/2026	2026-06-20T15:00:00 → 2026-06-20T23:00:00	Draft	1/1 Open
Afternoon Shift Afternoon Shift	Blue Wattle House BLUE-WATTLE-HOUSE-SIL-001	Blue Wattle House-22/06/2026	22/06/2026	2026-06-22T15:00:00 → 2026-06-22T23:00:00	Completed	1/1 Open
Afternoon Shift Afternoon Shift	Blue Wattle House BLUE-WATTLE-HOUSE-SIL-001	Blue Wattle House-22/06/2026	26/06/2026	2026-06-26T15:00:00 → 2026-06-26T23:00:00	Completed	1/1 Open
Active Night Active Night	Blue Wattle House BLUE-WATTLE-HOUSE-SIL-001	Blue Wattle House-22/06/2026	27/06/2026	2026-06-27T23:00:00 → 2026-06-28T07:00:00	Completed	1/1 Open
Afternoon Shift Afternoon Shift	Blue Wattle House BLUE-WATTLE-HOUSE-SIL-001	Blue Wattle House-22/06/2026	04/07/2026	2026-07-04T15:00:00 → 2026-07-04T23:00:00	Completed	1/1 Open
Active Night Active Night	Blue Wattle House BLUE-WATTLE-HOUSE-SIL-001	Blue Wattle House-22/06/2026	05/07/2026	2026-07-05T23:00:00 → 2026-07-06T07:00:00	Completed	1/1 Open

Figure 20. The Shifts tab provides a staff-specific view of rostered work.

Final staff setup checklist

- Staff profile and contact details are complete.
- Operational status and employment details are correct.
- Right-to-work/residency information is recorded accurately.
- Pay level is assigned where the organisation uses pay levels.
- Primary and additional site relationships are configured where required.
- Ordinary hours, preferences and maximum roster hours reflect the employment arrangement.
- Required compliance documents have been uploaded and approved.
- Evidence-backed capabilities are present and current.
- Login access is configured only where the worker requires portal/mobile access.
- Availability, leave and blocked windows are current.
- Contracts and future shifts have been reviewed where applicable.

Result

The staff record is now ready to participate in BondiByte workforce workflows. Smart Rostering can evaluate the worker using evidence-backed eligibility, availability, capacity and ranking signals while managers remain in control of the final roster.