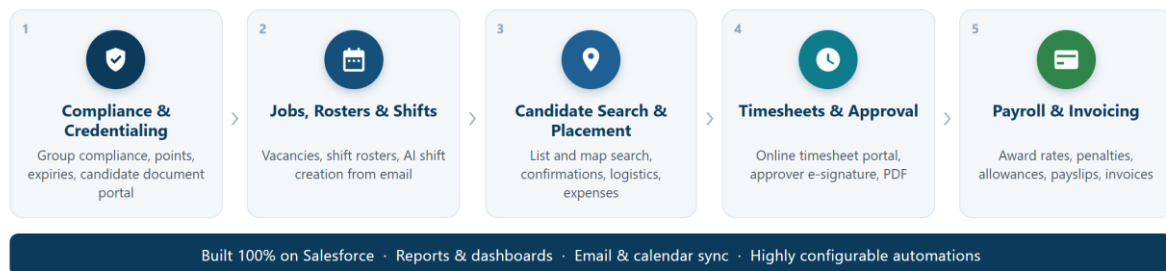




ATS & CRM

Product overview for recruitment and staffing agencies

One platform, from first contact to final invoice



October 2026

Introduction

CTC People ATS & CRM is an end-to-end recruitment and workforce platform for recruitment and staffing agencies, whether you place permanent, contract or temporary staff. It brings candidate compliance, rostering, placements, timesheets and invoicing together in one system, so information is entered once and flows through to the next step automatically.

The platform is built entirely on Salesforce, the world's leading CRM, giving your agency enterprise-grade security, reporting, mobile access and email and calendar integration as standard. Every screen, field and automation can be configured to match the way your agency works.

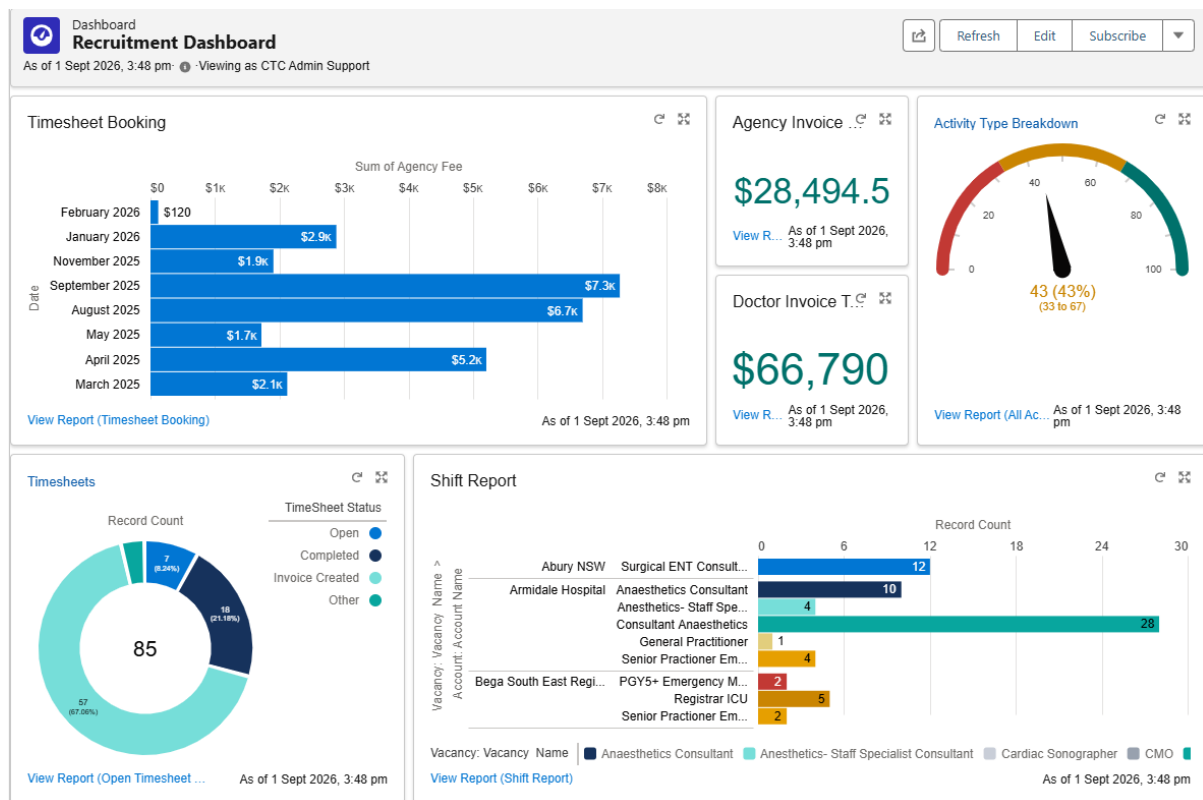
This document walks through the key screens, from the consultant's dashboard through to the final invoice. Sections marked **NEW** cover capabilities released during 2026.

New in 2026	What it does for your agency
Candidate Compliance	Colour-coded compliance by group, points-based identity checks, expiry tracking, verification and documents that cover several requirements at once.
Placement Compliance	Each placement's compliance list is built automatically from the client's requirements, showing exactly what the candidate holds and what is still needed.
Candidate Document Portal	Candidates receive one branded link to upload documents and complete online forms from any device, with automatic reminders and a live tracker for the consultant.
Automated References	Referees complete a structured online reference with e-signature; responses are saved to the candidate and filed as a PDF.
Candidate Map Search	See search results as pins on a map, within a radius of the client's site.
AI Shift Creation	Shift requests emailed by clients are read automatically and created as shifts ready for your team to fill.
Timesheet Portal	Candidates confirm their hours online and approvers sign off with an e-signature, producing a signed PDF timesheet automatically.

Your Consultants' Workspace

Home Page and Dashboards

- Reports can show any information in the system, including bookings, timesheets, invoices, placements and consultant activity KPIs.
- The most important figures appear on each consultant's home page dashboard.
- Each team can have its own dashboard and views.



Recruitment dashboard: timesheet bookings, invoice totals, activity and shift reporting.

Client Records

Each client, site or branch has a single record holding its contacts, files, jobs, placements and agreed terms.

Account		Armidale Hospital	
Details		Contacts	Files
Account Owner	CTC Admin Support	Phone	0288998899
Account Name	Armidale Hospital	Fax	
Parent Account		Email	armidale@hospital.com
Type	Public	Website	www.armidale.nsw.health.au
Area Health Type	NSW - Local Health District	Primary Contact	Luke Like
Area Health	Hunter New England Local Health District		
Terms and Fees			
Agency Fee	12.00	Send all Dr on one invoice	☐
Invoice Payment Terms	7 Days	Address to AP	☐

Client record (healthcare example).

Candidate Records

Every field on the candidate record can be configured. Track files, placements, availability, licences, registrations and banking details in one place.



Medical Home Accounts **Contacts** Vacancies Placements TimeSheets TimeSheet Entries Invoices Reports

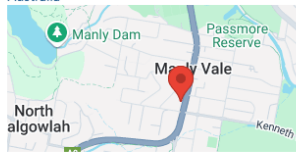
Contact
Dr. Curtis Portal

Details Files Placements Availability Related Records Activity

Contact Owner	CTC Admin Support	Contact Record Type	Candidate
Name	Dr. Curtis Portal	Candidate Status	
Preferred Name		Phone	0432878714
Current Title	Project Manager	Mobile	+61 432878777
Language	English	Email	curtis@ctcpeople.com
Working Rights	Australian	Able to travel?	☐
State	NSW	Is Preferred	☐
		Photo	
Seniority	General Practitioner		
Specialty	General Practice/GP Emergency		
Hospitals Worked	Alpha Multipurpose Health Service		
Hospitals Banned			

Address Information

Mailing Address	277 Condamine Street Manly Vale New South Wales 2094 Australia	Other Address	
-----------------	--	---------------	--



Additional Information

Birthdate	26/6/1975	Emergency Contact Name	
Fax		Emergency Contact Phone	
Gender	Male	Emergency Contact Email	
Home Phone		Emergency Contact Relationship	
Other Phone		Lead Source	Trade Show
Description			

Banking & Business

Bank	ING	Business Name	Dr's r Us
Bank Account Name		ABN Entity	
Account Number	887684	ABN	48256585874
BSB	061001	Formatted ABN	48 256 585 874
GST Registered?	☒	ABN Active	☒
GST Registered From	31/3/2022	TFN	

Compliance

NPC Number		NPC Issue Date	
WWCC Number		WWCC Check Date	
AHPRA Number		AHPRA Expiry Date	
Indemnity Insurance Number		Indemnity Insurance Expiry	

Candidate record: personal, professional, banking and compliance details.

Activities, Email and Calendar

Log calls, meetings, tasks and emails against the candidate. Emails and calendar events sync with Gmail or Outlook, so every conversation is visible to the team.

✉

▼

☎

▼

☑

▼

📅

▼

Filters: All time • All activities • All types

⚙

[Refresh](#) • [Expand All](#) • [View All](#)

▼ Upcoming & Overdue

>

📅

Demo with Curtis
 You have an upcoming event

2:00 PM | Today

▼

>

☑

☐ **Call Curtis**
 You have an upcoming task

Today

▼

View More

Activity timeline on a candidate record.

Compliance and Credentialing

NEW Candidate Compliance

Compliance is shown at a glance on the candidate record. Documents are organised into colour-coded groups (for example ID, references, licences and tickets, or a state or client's requirements): a group turns green once every required item is in place and red while anything is missing or out of date.

- **Required documents by group** – define what each role, client or state needs, including either/or alternatives such as a passport or a birth certificate.
- **Points-based identity checks** – primary and secondary points are totalled automatically against the 100-point standard.
- **Expiry tracking** – documents are flagged as Expiring before they lapse and marked out of date automatically.
- **Verification** – consultants preview each file side by side with its details, mark it Verified or Certified, and record dates.
- **One file, many requirements** – a single document can satisfy several items, such as one medical report covering several health checks, or one training record covering several tickets.
- **Send to clients** – compliance packs can be emailed to clients straight from the record.

General : 2 out of 4 compliant

☐	Name	Type	Document?	Expiry	Actions
☐ *	Jane Citizen-Resume.pdf	Resume	Yes		
☐ *	Jane Citizen-Police Check.pdf	Police Check	Certified	20-05-2027	
☐ *		Passport	No		
☐ *		Employment Agreement	No		
☐	Jane Citizen-Cover Letter.pdf	Cover Letter	Yes		

A compliance group showing what is held, certified and still missing.

ID Documents : 110 of 100 Primary Points Needed , 25 of 25 Secondary Points Needed

☐	Name	Type	Document?	Expiry	Points/Tier	Actions
☐	Jane Citizen-Passport.pdf	Passport	Certified	20-05-2031	70-Primary	
☐	Jane Citizen-Birth Certificate.pdf	Birth Certificate	Yes		40-Primary	
☐	Jane Citizen-Medicare Card.pdf	Medicare Card	Yes	01-2028	25-Secondary	
☐		Drivers Licence	No		40-Primary	

Points-based identity check.

Immunisations : 3 out of 6 compliant					
☐	Name	Type	Document?	Expiry	Actions
☐	Serology results Oct 2026.pdf	Immunisation Evidence confirm in Preview - 2 suggested	Not Confirmed		
☐	✓ Jane Citizen-Imms-HepBS_HepBV_MMRS.pdf	Immunisation Evidence covers 3	Yes		
	└ Hep B - Serology		Yes		
	└ Hep B - Vaccination		Yes		
	└ MMR - Serology		Yes		
☐ *		Influenza - Vaccination	No		

One report covering three requirements (healthcare example).

46%
Fit
Actual size

PATHOLOGY REPORT — Serology
Hepatitis B surface antibody Immune
Measles IgG Immune
Mumps IgG Immune
Rubella IgG Immune
Collected 01/10/2026

Not Confirmed. Check the document, tick what it covers and save to confirm it.

VERIFY

Verified Status
Verified

Applicable From
01/10/2026

Expiry Date

THIS FILE COVERS

☒ Hep B - Serology

☒ MMR - Serology

☐ Varicella - Serology

☐ TB - IGRA

Blank dates use the file's. Unticked types stay as rows with no file.

Save and confirm

Download File Close

Document preview and verification. Illustrative example with sample data.

NEW Placement Compliance

Every client, site and role has its own requirements, and they change from one placement to the next. CTC People builds the compliance list for each placement automatically, from that client's requirements together with the state and the way the candidate is paid. The recruiter no longer has to work out or keep track of what each placement needs: the list is ready the moment the placement is created.

- **Built for each placement** – the right documents appear for the client, state and pay arrangement, and nothing that does not apply.
- **Live view of the candidate** – see straight away what the candidate already holds, what is still missing and what is about to expire, at that point in time.
- **Clear reasons** – each requirement shows why it applies, such as the client's name, the state, or a requirement for every placement.
- **Collect once, reuse everywhere** – documents are held on the candidate, so a police check provided for one placement counts for the next.
- **Close the gaps quickly** – request only the missing items through the Candidate Document Portal, and send the completed compliance pack to the client.

Placement P-004812 · Emma Walsh · Registered Nurse ICU		Client Northern Beaches Hospital	State NSW	Pay method Agency Pays	Start 27-10-2026
Placement Requirements ID Documents Immunisations All					
Placement Requirements : 6 out of 8 compliant					
Name	Type	Document?	Expiry		
Emma Walsh-Police Check.pdf	Police Check Global	Certified	14-03-2027		
Emma Walsh-AHPRA.pdf	AHPRA Registration Global	Verified	31-05-2027		
Emma Walsh-WWCC.pdf	Working With Children Check NSW NSW	Yes	02-03-2029		
	NSW Health Code of Conduct NSW	No			
Emma Walsh-Serology.pdf	Hep B Serology Northern Beaches Hospital	Yes			
Emma Walsh-Fit Test.pdf	Fit Testing (N95) Northern Beaches Hospital	Expiring	20-11-2026		
	Hospital Orientation Module Northern Beaches Hospital	No			
Emma Walsh-TFN Declaration.pdf	Tax File Declaration Agency Pays	Yes			

Compliance on a placement, built from the client's requirements. Illustrative example with sample data.

NEW Candidate Document Portal

Request outstanding documents in a couple of clicks. The system emails the candidate a branded link listing exactly what is needed, and the candidate completes it from their phone or computer: no login or password required.

Send Request?

Due date

13/10/2026

Email from

Sam Recruiter <sam@agency.com>

Email and candidate page branding: **Agency Brand**

Note to the candidate, shown in the email and on the site (optional)

Needed before your first shift.

The following Document Types will be sent to the Candidate to complete

Name	Type of Upload
Employment Agreement	Online Form
Police Check	Uploadable File
Passport or Birth Certificate	Uploadable File

Preview email

Send

Close

The consultant selects the missing items and sends the request.

- Fully branded with your agency's logo and colours, in both the email and the portal.
- Candidates can complete part of the request now and return later using the same link.
- Uploads capture expiry dates, accept photos taken on a phone, and support multi-file reports.
- Secured by a one-time pass code, with lock-out after repeated incorrect attempts.
- Automatic reminders list only what is still outstanding and are never sent at weekends.
- Consultants are notified as documents arrive and can track progress, resend, pause or cancel at any time.

Harbourside Health Staffing

Subject: Harbourside Health Staffing: 5 documents needed by Fri 24 Oct

Hi Priya,

We need **5 documents** from you by **Fri 24 Oct**. You can do part now and come back later with the same link.

Needed before your first shift at St Vincent's.

[Provide my documents](#)

When asked, enter this pass code:

4 8 3 9 1 5

Thanks,

Sam Taylor

Harbourside Health Staffing · 02 9000 0000

What's needed

Employment Agreement	online form
Registration Form	download, complete, upload
Passport or Birth Certificate	upload
Serology (Hep B, MMR, Varicella)	upload, one or more files
Police Check	upload

harboursidehealth.com.au · Privacy

The request email the candidate receives. Illustrative example with sample data.

H Harbourside Health Staffing

Hi Priya
Documents requested by Harbourside Health Staffing

2 of 5 done · due Fri 24 Oct

▸ Instructions

Needed before your first shift at St Vincent's.
Sam Taylor, 02 9000 0000

To do (3) Completed (2)

- ☒ **Serology (Hep B, MMR, Varicella)** UPLOAD
- ☐ **Registration Form** DOWNLOAD
- ☐ **Passport or Birth Certificate** UPLOAD

Which are you uploading? You only need one. ☒ Passport ☐ Birth Certificate

Expiry date

Drop your file here or choose a file

Priya Nair-Passport.jpg · Received

The candidate's checklist: upload, download or complete online. Illustrative example with sample data.

✓ **Document request DRP-0012** In Progress 3 of 7 done

Sent 06/10/2026 9:30 am by Sam Recruiter · due 13-10-2026
First opened 06/10/2026 2:12 pm · last activity 07/10/2026 8:05 am · Next reminder: 08-10-2026

[View items](#) [Resend now](#) [Pause reminders](#) [Cancel request](#)

Live progress of the request on the candidate record.

Online Forms and e-Signature

CTC People includes its own forms solution for registrations, onboarding, employment agreements and declarations. Forms are completed online, pre-filled with information already held, and signed electronically. Answers are merged into your existing PDF forms, so the completed document looks exactly like your paper version and is filed against the candidate automatically.

- Questions show or hide depending on earlier answers.
- Progress is saved as the candidate goes, section by section.
- Signatures can be drawn, uploaded or reused, and are recorded with the date, time and IP address.
- Built in, so no separate document-signing subscription is required.

Harbourside Health Staffing

Employment Agreement

Section 3 of 3

Declaration
Please confirm your details and sign the agreement.

Full legal name *

Priya Nair

Date of birth *

04/07/1991

AHPRA registration number *

NMW0001234567

Available to start

27/10/2026

Do you hold a current Working With Children Check? *

☒ Yes
☐ No

Signature *

Change

Open the signature box and confirm your signature, even if one is already saved.

Cancel

Saved at 14:32

Save

Back

Submit

An online employment agreement with e-signature. Illustrative example with sample data.

NEW Automated Reference Checks

Send a reference request to a referee in one step, or record a verbal reference over the phone. The referee receives an email with a secure link and pass code, then completes a structured online reference covering skills, communication, employability and a signed declaration. Reference forms can follow your own templates, including industry formats such as NSW Health reference and clinical skills assessments.

Harbourside Health Staffing

1 Referees Details
2 Clinical Skills, Knowledge Base & Work Ethic
3 Communication and Interpersonal Skills
4 Employability
5 Declaration

Dr Emma Walsh Reference

Clinical Skills, Knowledge Base & Work Ethic

	Poor	Fair	Good	Very good	Excellent
Clinical judgement and decision-making skills	☐	☐	☐	☐	☒
Clinical knowledge appropriate to level of experience	☐	☐	☐	☒	☐
Punctuality and reliability (completion of set tasks on time)	☐	☐	☐	☐	☒
Ability to manage pressure / busy workload	☐	☐	☐	☒	☐
Documentation and record keeping	☐	☐	☐	☒	☐

Are you aware of any formal complaints, disciplinary or legal action against the applicant? *

☐ Yes ☒ No

Previous

Next

The referee's online reference form. Illustrative example with sample data.

Completed references are saved to the candidate with a filed PDF, the consultant is notified, and each reference's status is visible at a glance.

References (4) Request Reference					
Referee	Type	Professional capacity	Reference Status	Completed by	Form
Dr Michael Grant	Reference - Clinical Supervisor	Manager	Completed	Contact	Professional Behaviour 2.5.pdf
Sarah Kim, NUM	Reference 1	Clinical Facilitator	Completed	Contact	Reference Clinical Skills Assessment 2.2.pdf
James O'Brien	Reference 2	Colleague	Completed by Consultant	Consultant	Standard Reference.pdf
Dr Anita Rao	Reference 2	Manager	Requested		

References on the candidate record. Illustrative example with sample data.

Jobs, Shifts and Candidate Search

Jobs and Vacancies

- Track jobs for every client across temporary, contract, part-time and permanent work.
- Manage placements and shifts from within the job.


Vacancy
Locum O&G Consultant

Details	Advertise	Placements	Shifts	Timesheet
Vacancy Name	Locum O&G Consultant		Owner	CTC Admin Support
Client	Liverpool Hospital		Stage	JobOn
Client Contact	Audrey Airy		Record Type	Temporary Vacancy
State	NSW		Start Date	24/2/2025
Seniority	Senior Practitioner		End Date	
Specialty	Dermatologist		Rate Type	Daily
Grade	A		Candidate Pay Rate	\$2,500.00

Comments

Vacancy Description
 Job Details
 Inclusions

A vacancy with its placements, shifts and timesheets.

Roster and Shift Management

- Add shifts and assign them to candidates on a roster calendar.
- Import shifts in bulk.

Client
 Equals
 1 Mar 2025

Vacancy
 Equals
 All

Candidate
 Select Operator
 Candidate Search-D

Open : 5 Filled : 1 Close : 0

March 2025

Sun	Mon	Tue	Wed	Thu	Fri	Sat
23	24	25	26	27	28	1
2	3	4	5	6	7	8
S-00000012-08:00-Liverpool Hospital-Locum O&G Consultant		S-00000008-08:00-Liverpool Hospital-Locum O&G Consultant-Open				
S-00000011-08:00-Liverpool Hospital-Locum O&G Consultant		S-00000010-08:00-Liverpool Hospital-Locum O&G Consultant				
9	10	11	12	13	14	15
S-00000011-08:00-Liverpool Hospital-Locum O&G Consultant		S-00000011-08:00-Liverpool Hospital-Locum O&G Consultant				
16	17	18	19	20	21	22
S-00000008-08:00-Liverpool Hospital-Locum O&G Consultant		S-00000008-08:00-Liverpool Hospital-Locum O&G Consultant				
23	24	25	26	27	28	29
S-00000008-08:00-Liverpool Hospital-Locum O&G Consultant		S-00000008-08:00-Liverpool Hospital-Locum O&G Consultant				

Shift Name : S-00000008

Client : Liverpool Hospital
 Start Date : 17 Mar 2025
 Start Time : 08:00
 Week Days : Mon/Wed/Thu
 Units per Day : 1
 Shift Status : Filled
 Candidate : Curtis Portal
 Placement : P-000010

Vacancy : Locum O&G Consultant
 End Date : 28 Mar 2025
 End Time : 16:00
 Rate Type : Daily
 Rate : 2500
 Shift Type : Duty

Shift roster calendar.

NEW AI Shift Creation from Email

Clients can simply email their shift requirements to a dedicated address, in the body of the email or as a spreadsheet, PDF or Word attachment. The system reads the request using AI, matches the client, and creates the vacancy and shifts ready for your team to review and fill. Shifts already filled or closed are never overwritten, and anything the system cannot match is set aside for review.

From: Rostering, Northern Beaches Hospital
To: shifts@harboursidehealth.com.au
Subject: Locum shifts required – Emergency

Hi team,

Can you please fill the following:

- ED Registrar – Sat 25 Oct, 0800–1830
- ED Registrar – Sun 26 Oct, 0800–1830
- Senior RMO – Mon 27 Oct, 2200–0830 (night)

[ED_roster_Nov.xlsx](#)



AI reads the email body
and attachments

→

Shifts Vacancy: ED Registrar – Northern Beaches Hospital

Shift	Date	Start	End	Status
SH-04812	Sat 25/10/2026	08:00	18:30	Ready
SH-04813	Sun 26/10/2026	08:00	18:30	Ready
SH-04814	Mon 27/10/2026	22:00	08:30	Ready
SH-04815	Tue 4/11/2026	08:00	18:30	Ready
SH-04816	Wed 5/11/2026	08:00	18:30	Ready

Matched to the hospital account · ready for the consultant to review and fill

A client's email turned into shifts. Illustrative example with sample data.

NEW Candidate Map Search

Find the right person close to the shift. Search by suburb or postcode and radius, then switch between the list and a map of matching candidates. Each pin shows the distance and contact details, and the list and map stay linked as you select candidates.

Suburb or postcode

Radius

[Search](#)

[List](#)
[Map](#)

14 candidates plotted

- ☒ **Emma Walsh**
Registered Nurse · ICU
3.2 km · Westmead
- ☐ **Liam Chen**
Senior RMO
5.8 km · Blacktown
- ☐ **Priya Nair**
Registered Midwife
7.1 km · Baulkham Hills
- ☐ **Daniel Okafor**
ED Registrar
9.4 km · Ryde
- ☐ **Sophie Martin**
Enrolled Nurse
11.0 km · Penrith



Candidates within 25 km of the client's site. Illustrative example with sample data.

Placements, Logistics and Expenses

Automatic Placements and Timesheets

When shifts are assigned, the system creates the placement and the weekly timesheets automatically, so no booking is ever missed.

Vacancy

Locum O&G Consultant

Details

Advertise

Placements

Shifts

Timesheet

Placements (1)

1 item • Updated a few seconds ago

☐	Placement Name	Company	Start Date	End Date	Pay Rate	Pay Type	Placement ...		
1	☐	P-000010	Liverpool Hospital	17/03/2025	28/03/2025	\$2,500.00	Daily	Placed	

View All

TimeSheets (2)

2 items • Sorted by TimeSheet # • Updated a few seconds ago

☐	TimeSheet # ↑	TimeSheet Status	Candidate	Start Date	End Date	
1	☐	TS-000000013	Open	Curtis Portal	17/03/2025	23/03/2025
2	☐	TS-000000014	Open	Curtis Portal	24/03/2025	30/03/2025

View All

TimeSheetEntries (12)

12 items • Sorted by Entry # • Updated a few seconds ago

☐	Entry # ↑	Attendance Status	Candidate	Date	Day of Week	Shift Start ...	Shift End T...	Total Units	
1	☐	TSE-68	Pending Confirmation	Curtis Portal	17/03/2025	Monday	8.00	16.00	1.00
2	☐	TSE-69	Pending Confirmation	Curtis Portal	19/03/2025	Wednesday	8.00	16.00	1.00
3	☐	TSE-70	Pending Confirmation	Curtis Portal	20/03/2025	Thursday	8.00	16.00	1.00
4	☐	TSE-71	Pending Confirmation	Curtis Portal	24/03/2025	Monday	8.00	16.00	1.00
5	☐	TSE-72	Pending Confirmation	Curtis Portal	26/03/2025	Wednesday	8.00	16.00	1.00
6	☐	TSE-73	Pending Confirmation	Curtis Portal	27/03/2025	Thursday	8.00	16.00	1.00

Placements, timesheets and timesheet entries created from assigned shifts.

Placements

Manage the placement's confirmations, rates, totals and expenses in one place, and send confirmations to the candidate and client.



Placement
P-000010

Details Expenses Invoices Related

Placement Name	P-000010	Placement Status	Confirmed
Company	Liverpool Hospital	Vacancy	Locum O&G Consultant
Client Contact	Audrey Airy	Job Type	Locum
Recruiter	CTC Admin Support		
PO Number		People	Curtis Portal
Total Units	6.00	Start Date	17/3/2025
		End Date	28/3/2025

Rates and Fees

Pay Method	ABN	Pay Rate	\$2,500.00
Pay Type	Daily	Total Agency Fee	\$1,500.00
Agency Fee Type	%	Total Pay	\$15,000.00
Agency Flat Fee		Total Client Fee	\$16,500.00
Agency Fee Percent	10.00%		

System Information

TimeSheets (2)

2 items • Sorted by Start Date • Updated a few seconds ago

TimeSheet #	TimeSheet ...	Candidate	Vacancy	Total Pay	Total Agency ...	Start Date	End Date	Created Date	
1	TS-000000013	Confirmed	Curtis Portal	Locum O&G Co...	\$7,500.00	\$750.00	17/03/2025	23/03/2025	25/3/2025, 11:27 am
2	TS-000000014	Confirmed	Curtis Portal	Locum O&G Co...	\$7,500.00	\$750.00	24/03/2025	30/03/2025	25/3/2025, 11:27 am

Placement record.

Logistics

Arrange flights, accommodation and car hire for each placement, and send the complete itinerary to the candidate as a single pack. Each item can be assigned to a team member to book by the required date.

New Logistic

* Start Date

11/08/2025

Start Time

08:00

Travelling from

Sydney

* Travel Required

Yes

* Car required

Yes

* Accommodation required

Yes

Placement

P-003478

End Date

30/08/2025

End Time

17:30

Return to

Brisbane

Travel Information

Single airfare to Newcastle
Return airfare to Brisbane
Include partner

Car Information

5 days mid placement

Accommodation Information

Full 3 week duration
Client approved

Status

In Progress

Cancel

Save

Placement
P-003751

Details **Logistics** Expenses Invoice

Logistics (4)

4 items • Sorted by Logistics Number • Updated a few seconds ago

	☐ Logistic... ↑	Status	Start Date	Travelling from	Return to	End Date	Travel Req...	Car required	Accommo...	Created
1	☐ LN-0366	New	05/01/2026	Dubbo	Dubbo	16/01/2026	Yes	No	Yes	15/09/2
2	☐ LN-0367	New	02/02/2026	Dubbo	Dubbo	13/02/2026	Yes	No	Yes	15/09/2
3	☐ LN-0368	New	02/03/2026	Dubbo	Dubbo	13/03/2026	Yes	No	Yes	15/09/2
4	☐ LN-0369	New	30/03/2026	Dubbo	Dubbo	10/04/2026	Yes	No	Yes	15/09/2

View All

Creating a logistics item, and the logistics on a placement.

Expenses

Record expenses against a placement, timesheet or logistics item, upload receipts, and reconcile them with your accounts. Expenses paid by the client are added to the invoice automatically.

New Expense

* Type
 Accommodation

* GST Inclusive?
 Yes

* Quantity
 1.00

* Description
 2 Nights Accommodation

* Who's Paying?
 Client

* Date
 25/3/2025

* Unit Cost
 355.00

Status
 Approved

General Notes
 Arrange hotel for 24th and 26th, client pays

Cancel

Save

Placement
P-000010

Details **Expenses** Invoices Related

Expenses (3)

3 items • Sorted by ID • Updated a few seconds ago

	ID ↑	Date	Description	Quantity	Unit Cost	Total	GST Amount	Overall Total	Created
1	LIN0000046	25/03/2025	1 x Car Hire (Hertz)	1.00	454.55	\$454.55	\$45.46	\$500.01	25/03/2025
2	LIN0000047	25/03/2025	Return Flight - Qantas	1.00	795.95	\$795.95	\$79.60	\$875.55	25/03/2025
3	LIN0000048	25/03/2025	2 Nights Accommodation	1.00	322.73	\$322.73	\$32.27	\$355.00	25/03/2025

Adding an expense, and the expenses on a placement.

Timesheets and Approval

NEW Timesheet Portal

At the end of each week, candidates are emailed a secure link to confirm the hours they actually worked. They update the planned shifts, add any extra shifts or call-backs, and submit the week for approval. The client's approver reviews each timesheet online, queries individual days if needed, and approves with an e-signature. No logins, apps or paper.

Harbourside Health

Your timesheets
Enter the pass code from the email we sent you.

Pass code
4 8 3 9 1 5

[Continue](#)

Lost the email? [Send me the link and code again](#)

Harbourside Health

Your timesheet · w/e 19 Oct
Week total **38h 00m**

Day	Start	Finish	Break	Total	Action
Mon 13 Oct	07:00	15:30	30	8h 00m	Delete
Day					
Tue 14 Oct	07:00	15:30	30	8h 00m	Delete
Day					
Wed 15 Oct	14:30	23:00	30	8h 00m	Delete
Evening					

[Review](#)

Works on any phone: pass code, then the week's shifts. Illustrative example with sample data.

- Up to four shifts a day, each with its own shift type, start, finish and break, and the week total updates as times are entered.
- A review step and declaration before the candidate submits.
- "Did not work this week" takes one tap and alerts the consultant.
- Approvers can approve, or decline with a comment, and the candidate corrects and resubmits.
- Each approval records the approver's signature, time, IP address and a unique reference.
- A branded PDF timesheet is filed automatically against the timesheet, placement and candidate.
- Consultants can resend the email, create an unsigned PDF for paper sign-off, or submit on a candidate's behalf.

Harbourside Health Staffing

Your timesheet · w/e 19 Oct 2026

St Vincent's Private - Registered Nurse ICU

Week total **38h 00m**

[Add/Update the times you actually worked.](#) Shift Type – Start Time – End Time – Break Total Mins

Did not work this week?

Mon 13 Oct	Day	07:00	15:30	30 min	8h 00m	Delete
Tue 14 Oct	Day	07:00	15:30	30 min	8h 00m	Delete
Wed 15 Oct	Evening	14:30	23:00	30 min	8h 00m	Delete
Thu 16 Oct	No shift					Add Shift
Fri 17 Oct	Night	22:30	07:00	30 min	8h 00m	Delete
Sat 18 Oct	Day	07:00	13:00	0 min	6h 00m	Delete
Sun 19 Oct	No shift					Add Shift

Add the shifts you worked.

5 shifts · 38h 00m [Review](#)

The candidate's week, ready to review and submit. Illustrative example with sample data.

Harbourside Health Staffing

3 to review

Emma Walsh
w/e 19 Oct · 38h 00m

Liam Chen
w/e 19 Oct · 40h 00m

Priya Nair
w/e 19 Oct · 24h 00m

Each timesheet is opened and actioned on its own.

Emma Walsh

w/e 19 Oct 2026 · St Vincent's Private - Registered Nurse ICU

Total claimed **38h 00m**

DATE	SHIFT TYPE	TIMES	BREAK	WORKED	QUERY
Mon 13 Oct	Day	07:00 – 15:30	30 min	8h 00m	☐
Tue 14 Oct	Day	07:00 – 15:30	30 min	8h 00m	☐
Wed 15 Oct	Evening	14:30 – 23:00	30 min	8h 00m	☐
Thu 16 Oct	Did not work				☐
Fri 17 Oct	Night	22:30 – 07:00	30 min	8h 00m	☐
Sat 18 Oct	Day	07:00 – 13:00	0 min	6h 00m	☐
Sun 19 Oct	Did not work				☐

Total for the week 38h 00m

Comment — optional to approve, required to decline

Signature [change](#)

Signing records the time, your IP address and a unique reference on the timesheet, and all three print on the PDF.

Approving is final.

[Decline](#) [Approve](#)

The approver's view: review, sign and approve. Illustrative example with sample data.

Timesheets and Invoices

- Manage weekly timesheets, with statuses (such as In Progress and Completed) set automatically.

- Confirm days, times and call-backs.
- Create invoices from one or more timesheets.

TimeSheet
TS-000000013

[Details](#)
[Expenses](#)
[Invoices](#)
[Related](#)

Details

TimeSheet #	TS-000000013	TimeSheet Status	Completed
Placement	P-000010	Candidate	Curtis Portal
Vacancy	Locum O&G Consultant	Start Date	17/3/2025
Vacancy Name	Locum O&G Consultant	End Date	23/3/2025
Company Name	Liverpool Hospital		
Total Units	5.00		

Information

Pay Method	ABN	Total Agency Fee	\$810.00
Pay Type	Daily	Total Pay	\$8,100.00
Agency Fee Type	%	Total Client Fee	\$8,910.00
Attended TSE	4		
Created By	CTC Admin Support , 25/3/2025, 11:27 am	Last Modified By	CTC Admin Support , 25/3/2025, 11:49 am

TimeSheet Entries (4)

4 items • Sorted by Date • Updated a few seconds ago

☐	Entry #	Attendance Status	Day of Week	Date	Shift End T...	Shift Start ...	Shift Type	Pay Rate
☐	TSE-68	Attended	Monday	17/03/2025	16.00	8.00	Duty	\$2,500.00
☐	TSE-69	Attended	Wednesday	19/03/2025	16.00	8.00	Duty	\$2,500.00
☐	TSE-80	Attended	Wednesday	19/03/2025	20.00	16.00	Call Back	\$300.00
☐	TSE-76	Not - Attended	Thursday	20/03/2025	16.00	8.00	Duty	\$2,500.00

Timesheet record with its daily entries.

Create Invoices from Timesheets

- Create the agency invoice, and optionally a contractor invoice, in one step.
- Client-paid expenses are included on the invoice automatically.

New Expense

Create/Update Invoice

Edit

▼

Create/Update Invoice

COMPLETED

Agency Invoice was Created
Doctor Invoice Created

Finish

TimeSheet
TS-000000013

[Details](#)
[Expenses](#)
[Invoices](#)
[Related](#)

Timesheet Invoices (2)

New
Change Owner

2 items • Updated a few seconds ago

☐	TI Number	Invoice	Invoice Type	Created Date
☐	TI-000030	INV0000020	Agency	25/3/2025, 11:53 am
☐	TI-000031	INV0000021	Doctor	25/3/2025, 11:53 am

View All

Creating invoices from a timesheet.

Integrations

CTC People integrates with many third-party providers across the areas below, and more. Because the platform is built natively on Salesforce, it also works with the wide range of applications already available for Salesforce, so your agency can keep the services it relies on today and add new ones as it grows.

- **Flexible** – choose the providers that suit your agency, and change them later without changing how your team works.
- **Easy** – connections are configured for you, so information flows between systems without re-keying.
- **Native** – results are stored on the candidate, placement or invoice in CTC People, alongside everything else.

Where you would like to use a provider we are not yet connected to, we can add it. We can also introduce you to our integration partners where required.

Job Boards and Advertising Australian, New Zealand and international job boards, and your own careers site	Reference Checks Automated referee requests and reports
Background Checks Police, visa, identity and right-to-work checks	Assessments Psychometric, skills and eLearning
Video Interviewing Recorded and live video interviews	Document Generation and e-Signature Contracts, agreements and signed forms
Payroll and Finance Payroll, accounting and invoicing systems	SMS and Telephony Bulk and two-way SMS, calling and meetings
Email and Calendar Gmail and Outlook email and calendar sync	Resume Parsing and Search Importing and searching candidate resumes

Find out more

Every process and automation in this document can be configured to suit your agency. We would be glad to show you the system working with your own scenarios.

Curtis Johnson – Managing Director

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