



Separate Employee User Guide

Staff Module



Introduction

At some point, most admins will need to separate an employee within StaffReady. Like many HR functions, there are usually multiple steps to take into account.

The Separate Employee User Guide outlines how to conduct the steps of this operation accurately, making sure employees are no longer assigned tasks or placed on the schedule. It also ensures that your employee roster and headcount stay current. When you renew your license of StaffReady, your headcount only reflects your current list of employees.

Mastering this series of steps keeps your license of StaffReady up-to-date and streamlines usage of your custom license. Separating an employee within StaffReady can be seamless and speedy.

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Separate An Employee

To begin separating an employee, first navigate to the Staff module and select the **Employees** tab. (Figure 1)

Navigate through the menus to locate the employee you wish to separate. In this case, we've selected Andrea Olson.

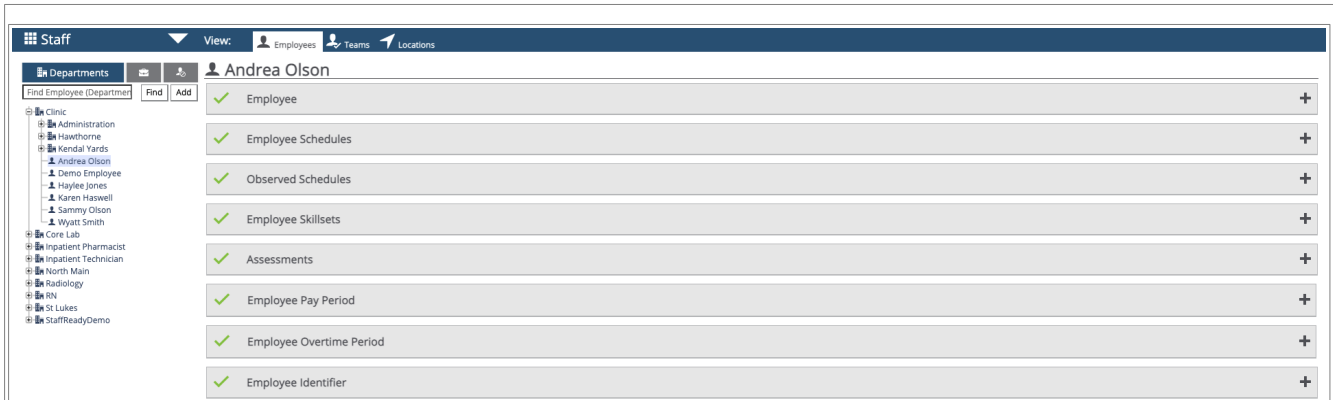


Figure 1

Before you can separate an employee, they must be removed from any **Skillsets**, **Schedules**, **Qualified Personnel (QP) Assignments**, or **Active Revisions** they are assigned or are a part of. If you attempt to separate an employee without removing them from the elements listed above, you will see an error message. (Figure 2)

Note: It is important to note that the process of separation can be done partially through either the Scheduling or Competency modules, however, performing the separation from the Staff module requires fewer steps and less navigation through the software.

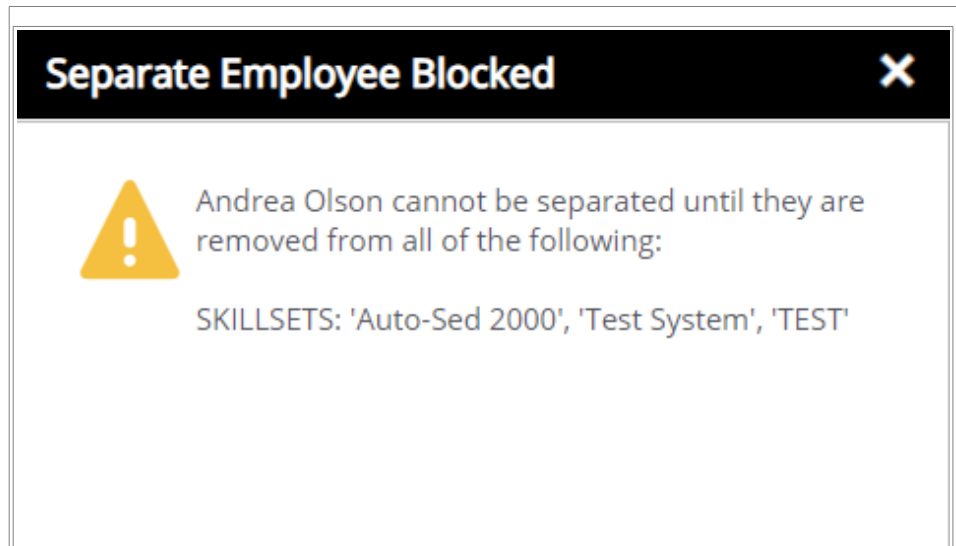


Figure 2

Removing Employee From Skillsets

In this example, the employee in question needs to be removed from 3 **Skillsets**. The following images will cover that scenario. The same basic rules can largely be applied to each different color bar with a few exceptions. The Employee Schedules color bar requires you to select the Edit button instead of the Remove button in order to remove an employee from a schedule.

It should be noted that you will only be able to remove employees from skillsets you manage. If the **Skillset** falls outside your access, please contact the appropriate manager within your organization to remove the employee.

Select the **Employee Skillsets** color bar (**Figure 1**) to expand it and then select the **Remove** button next to each individual **Skillset** or the **Remove All** link.

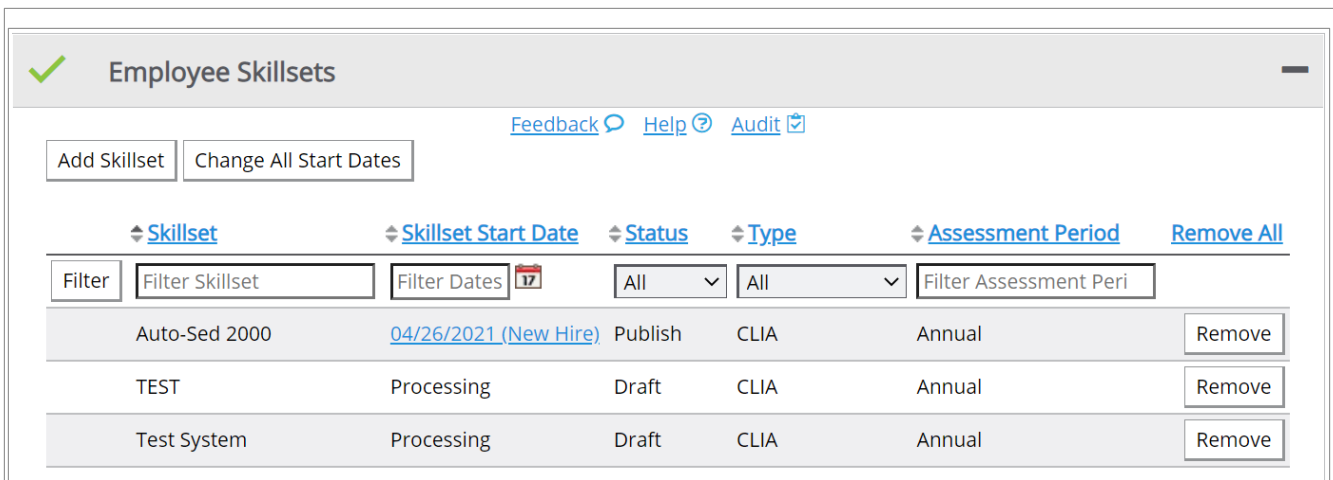


Figure 1

If you selected **Remove All**, you will be prompted to enter your PIN and select the **Save Changes** button. (**Figure 2**)

If you would like to learn more about setting up your PIN, please check out our getting started guide located [here](#).

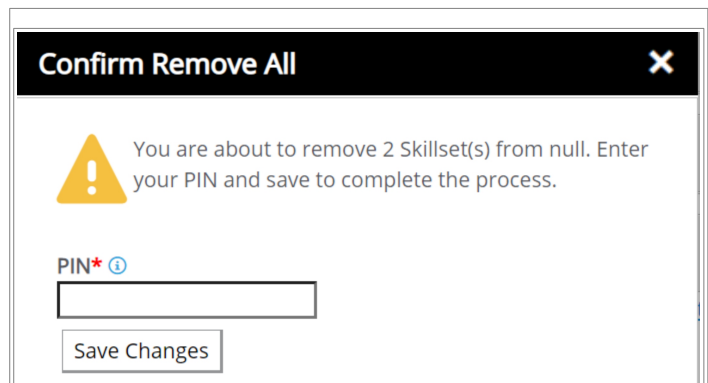


Figure 2

Removing Employees From QP Assignments

To remove an employee from their QP assignment, first navigate to the Staff Module and then locate and select the employee in the Department perspective. (Figure 1)

Next, select the QP Assignments color bar to expand it. By default, you will be able to view all assignments that are able to be assigned to that employee. (Figure 2)



Figure 1

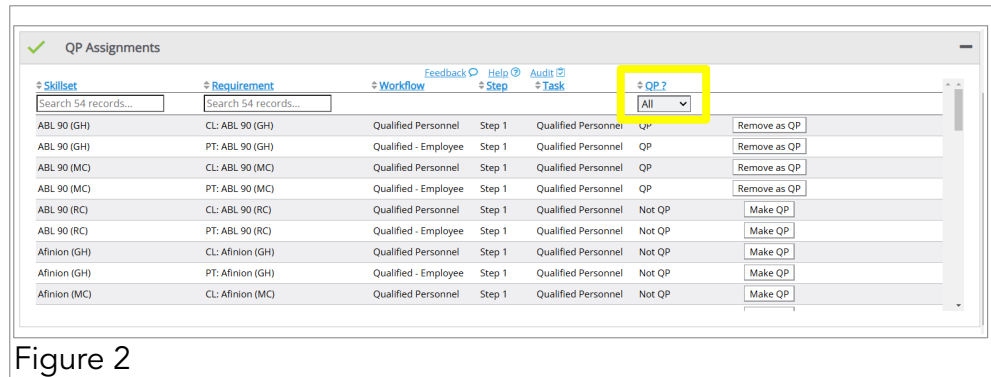


Figure 2

Click to sort by the 'QP?' column or select the 'QP?' filter (Yellow box, Figure 2) to expand it. (Figure 3) This will allow you to refine your search results.

Select the **Remove as QP** button (Green box, Figure 4) to remove an assignment from the employee.

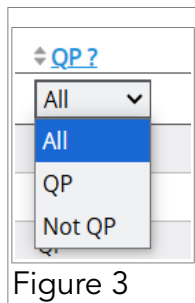


Figure 3

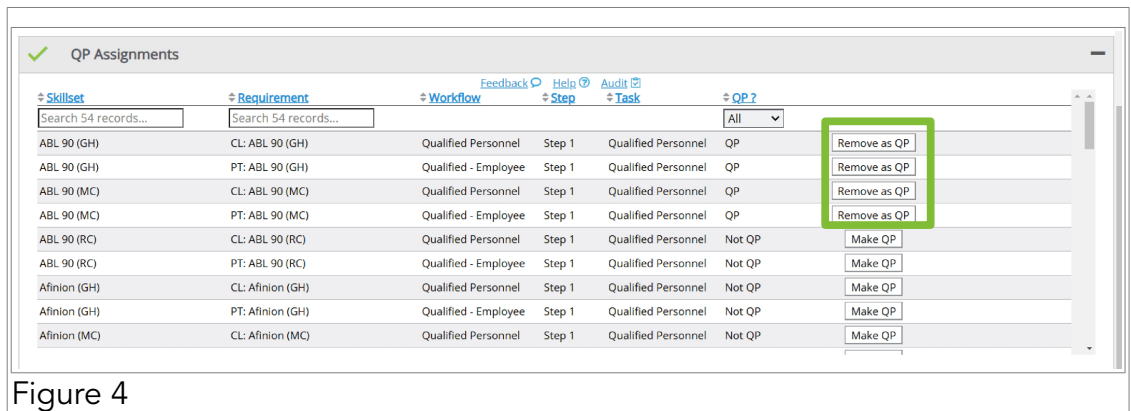


Figure 4

Finishing the Separation

Once you've removed the employee from all relevant categories, navigate to the **Employee Profile** pop-up window by . (Figure 1) Select the **Separate Employee** button to open the **Separate Employee** pop-up window. (Figure 2)

The 'Employee Profile' window displays the following information for Andrea Olson:

Full Name*	Andrea Olson	Hire Date*	07/26/2018	Employee Id*	AOlson
StaffReady Login Id*	AOlson	Reset Password		Require Password Change*	07/26/2028
Department*	Clinic	Job Title	[not set]		

Buttons: Save Changes, Separate Employee

Figure 1

Enter in the date that you want the employee to become separated on in the **Separate Date** field. When finished, select the **Save Changes** button. The employee has now been separated and will no longer appear in the software outside the Separated perspective. (Figure 3)

The 'Separate Employee' window contains a 'Separate Date' field with a calendar icon and a 'Save Changes' button.

Figure 2

The 'Departments' list shows the following structure:

- Departments
 - Find Employee (Department) Find Add
 - Clinic
 - Core Lab
 - Inpatient Pharmacist
 - Inpatient Technician
 - Radiology
 - RN
 - StaffReadyDemo
 - Testing Department
 - Henry Hammer
 - Karl Rover

Figure 3

Reinstating a Separated Employee

If at any juncture you need to reinstate a previously separated employee or view their completed Competency records, first navigate to the **Employees** tab in the Staff module and select the **Separated** perspective. (Yellow box, Figure 1)

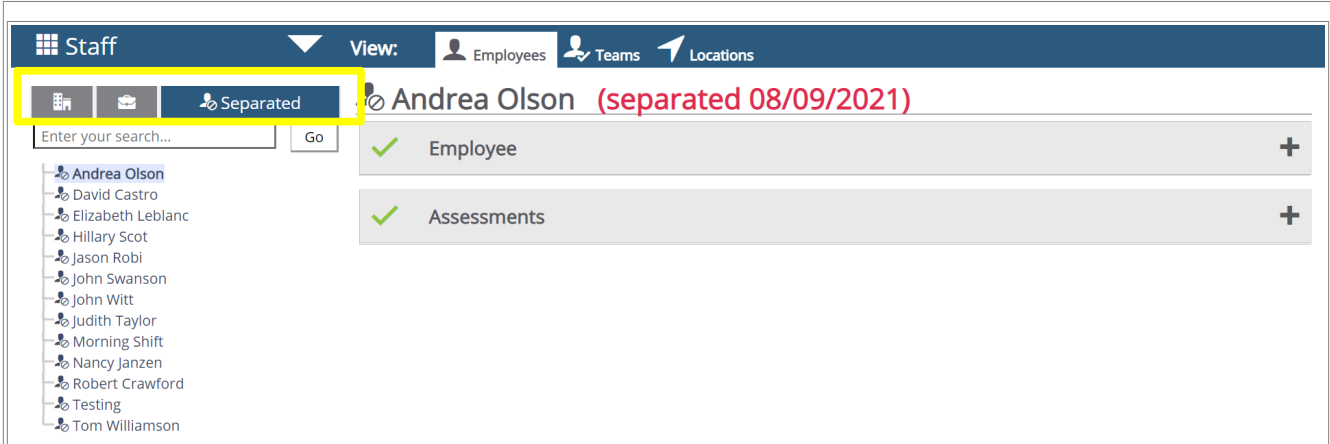


Figure 1

Select the **Employee** color bar to expand it and then select the **Reinstate Employee** button. (Yellow box, Figure 2)

Your employee will reappear within the department they were previously assigned to. Reinstating an employee will not reinstate anything they were previously assigned to, so you will need to reassign to the employee any **Schedules**, **Skillsets** or other assignments they had been previously assigned.

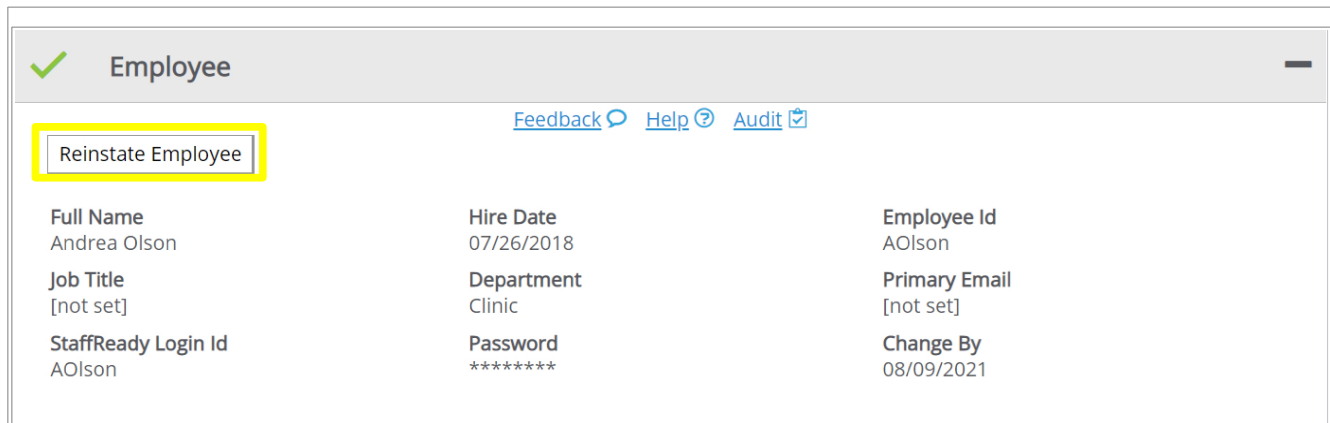


Figure 2

Resources

This concludes the User Guide for **Separating an Employee**. We hope that you have a better understanding of this feature and how it functions within the entire framework of the Staff module.

For more focused Guides on the functions and features discussed in this document, please check out the linked Guides on this page for supplemental reading.

For further assistance, please contact our Support Team directly.

Our service hours are Monday through Friday, 6am to 5pm PST.

Phone: 1-877-229-5230

[Online Support Form](#)

Related Topics

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