

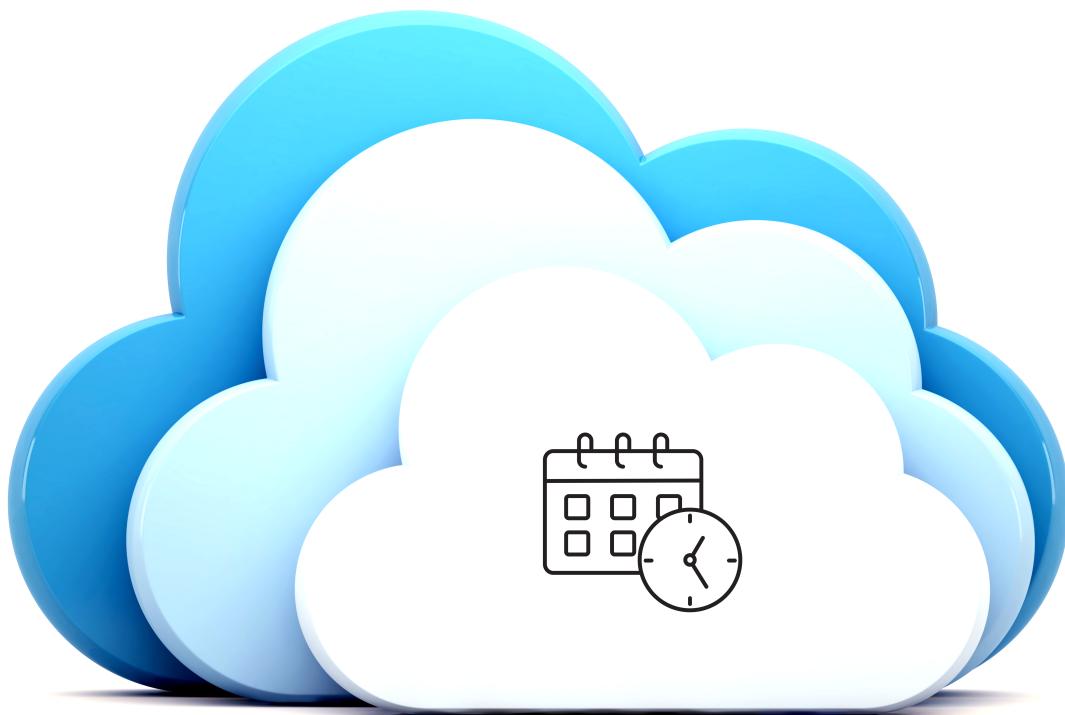


## StaffReady Scheduling

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### Overview

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## Introduction

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Staff scheduling remains one of the most challenging management tasks for healthcare administrators and managers. StaffReady Scheduling was designed to address those pressing needs.

The Scheduling module was designed to make staff scheduling significantly less-time intensive while utilizing employee and shift-specific data as each schedule is auto-generated. Alerts and triggers guide you through the schedule editing processes while allowing you to always communicate in real time with staff regarding their schedule and leave.

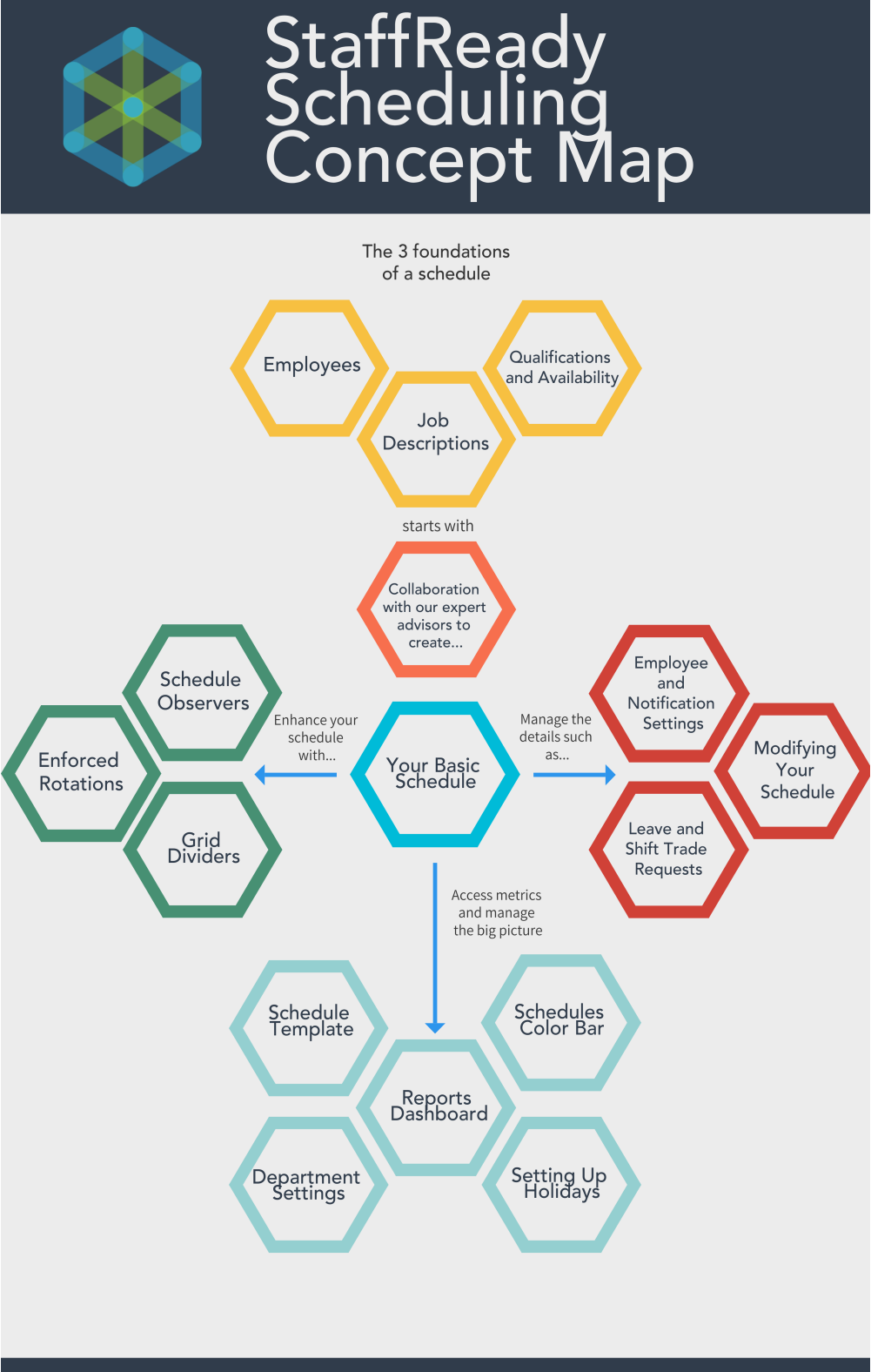
Our cloud-based solution is your one stop shop for creating schedules, storing employee data, boosting employee morale and improving the entire schedule management process.

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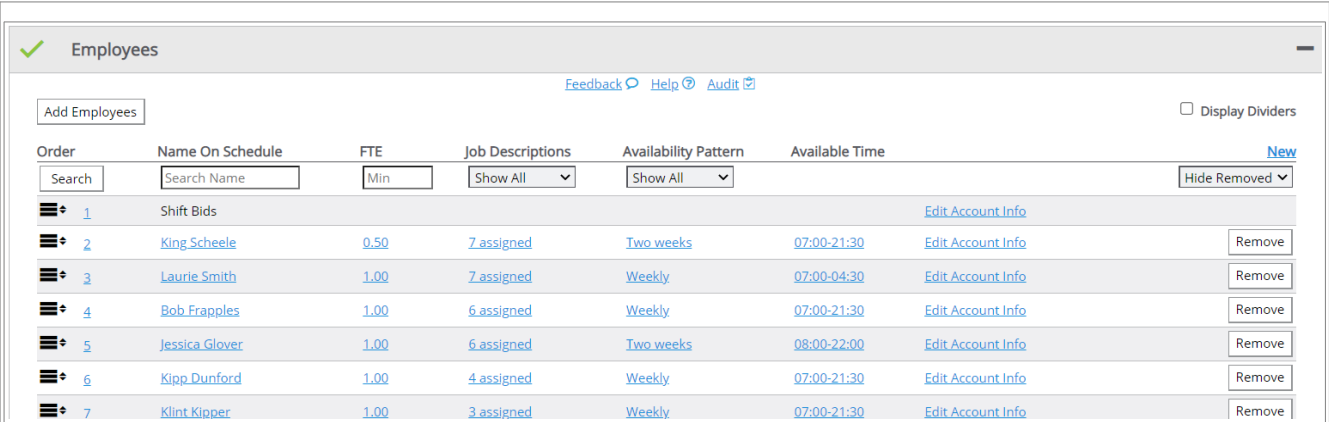
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# StaffReady Concept Map



# Employees

With StaffReady Scheduling, you'll be able to electronically store and retrieve critical employee data. Unlike manual scheduling methods, the software easily stores information on employee skill levels, availability, seniority, pay-rate, job title, etc. and then uses that to automatically construct your schedule.



The screenshot shows the 'Employees' management interface. At the top, there is a green checkmark icon and the title 'Employees'. Below the title are links for 'Feedback', 'Help', and 'Audit'. A search bar labeled 'Add Employees' is on the left, and a 'Display Dividers' checkbox is on the right. The main area contains a table with the following columns: Order, Name On Schedule, FTE, Job Descriptions, Availability Pattern, and Available Time. A 'New' link is located at the top right of the table. Below the table header, there are search filters for 'Search Name', 'Min', 'Show All', and 'Show All', along with a 'Hide Removed' dropdown. The table lists seven items, each with an expandable menu icon on the left and an 'Edit Account Info' link or 'Remove' button on the right.

Order	Name On Schedule	FTE	Job Descriptions	Availability Pattern	Available Time	
1	Shift Bids					<a href="#">Edit Account Info</a>
2	<a href="#">King Scheele</a>	0.50	7 assigned	Two weeks	07:00-21:30	<a href="#">Edit Account Info</a> <input type="button" value="Remove"/>
3	<a href="#">Laurie Smith</a>	1.00	7 assigned	Weekly	07:00-04:30	<a href="#">Edit Account Info</a> <input type="button" value="Remove"/>
4	<a href="#">Bob Frapples</a>	1.00	6 assigned	Weekly	07:00-21:30	<a href="#">Edit Account Info</a> <input type="button" value="Remove"/>
5	<a href="#">Jessica Glover</a>	1.00	6 assigned	Two weeks	08:00-22:00	<a href="#">Edit Account Info</a> <input type="button" value="Remove"/>
6	<a href="#">Kipp Dunford</a>	1.00	4 assigned	Weekly	07:00-21:30	<a href="#">Edit Account Info</a> <input type="button" value="Remove"/>
7	<a href="#">Klint Kipper</a>	1.00	3 assigned	Weekly	07:00-21:30	<a href="#">Edit Account Info</a> <input type="button" value="Remove"/>

Figure 1

Once all employee information ([Employee Prerequisites](#)) have been entered, our software will be able to automatically build a schedule which incorporates all of the data you've entered.

To learn more about this feature and how it works, please check out the full user guide [here](#).

# Job Descriptions

Job Descriptions are essentially containers for shifts that your employees are assigned within your organization. The auto-schedule generation process matches qualified employees with appropriate shifts. You can perform any number of actions to your job descriptions whenever you need to, including adding new ones, editing existing ones, discontinuing old ones and much more.

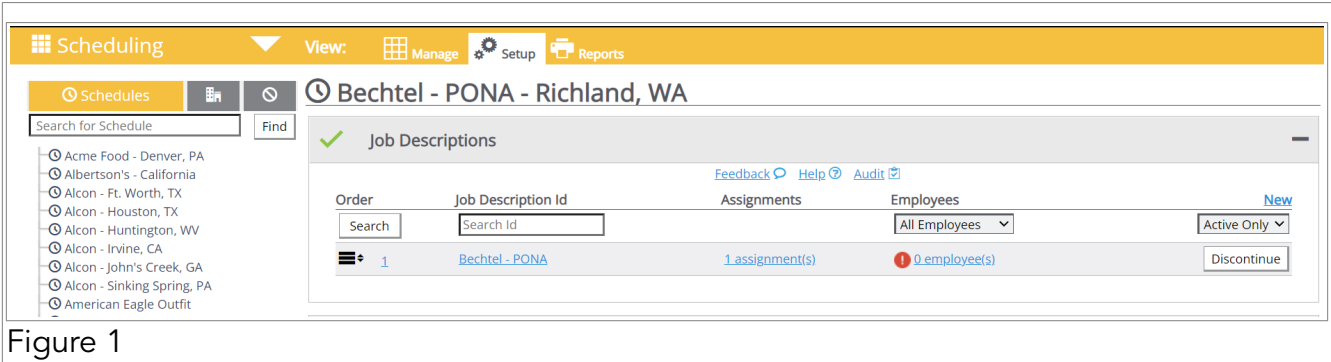


Figure 1

To learn more about this feature and how it works, please check out the full user guide [here](#).

# Qualifications and Availability

For the automatic schedule build to function properly, you must qualify employees to work the job descriptions you've created. This will require setting up how many consecutive days they can work as well as assigning them a skill level.

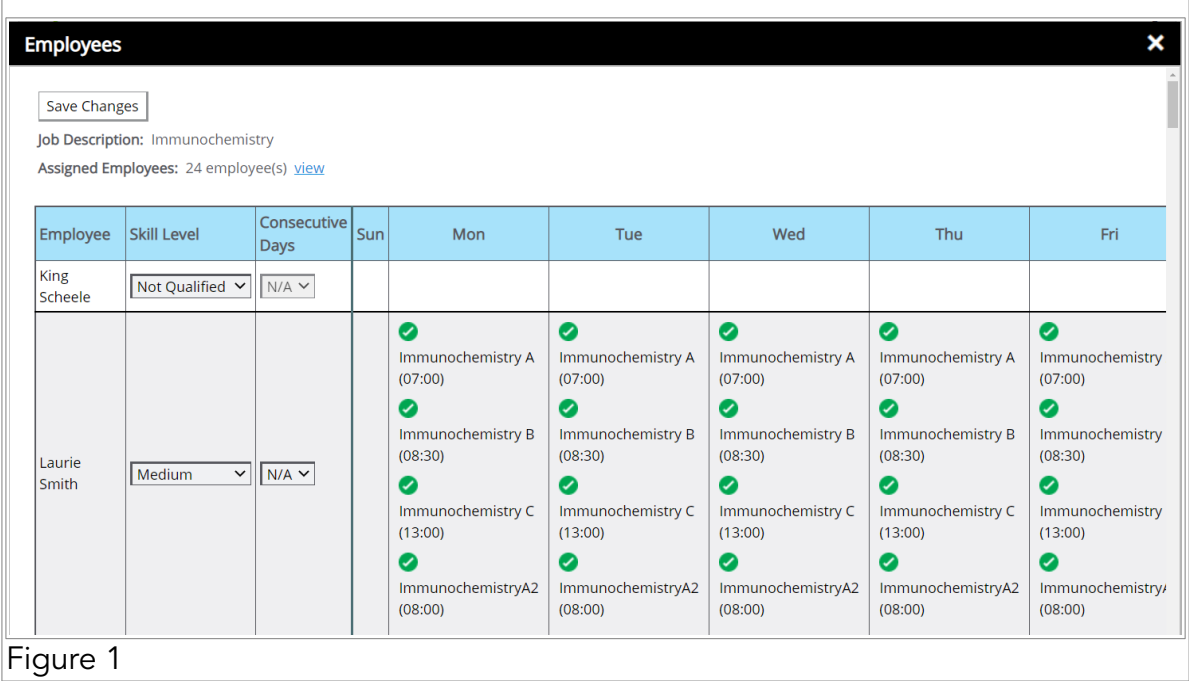
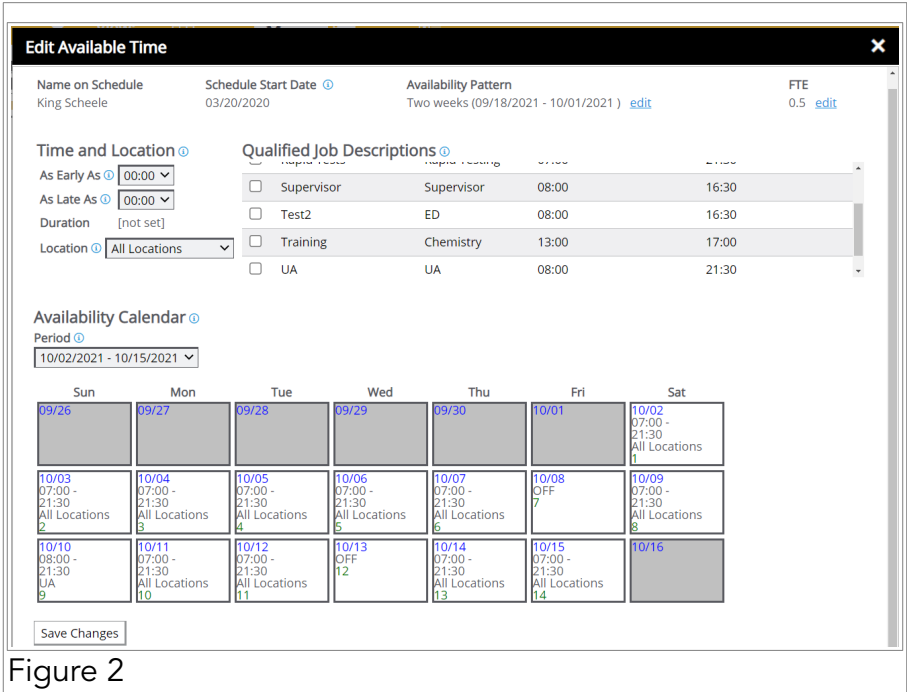


Figure 1

Additionally, you can set each employee's availability which is both what days they are available and what times during those days they are able to work.



To learn more about this feature and how it works, please check out the full user guide [here](#).

Figure 2

## Enforced Rotations

Enforced Rotations are one of several schedule enhancements and a great way to ensure a fair and equitable distribution of shifts throughout your organization. Enforced Rotations are easy to set up and are useful in precluding an employee being repeatedly assigned a shift in the same time slot. (i.e. a night shift) By assigning a team of employees who rotate through a given shift, you fairly distribute the workload in an equitable way.

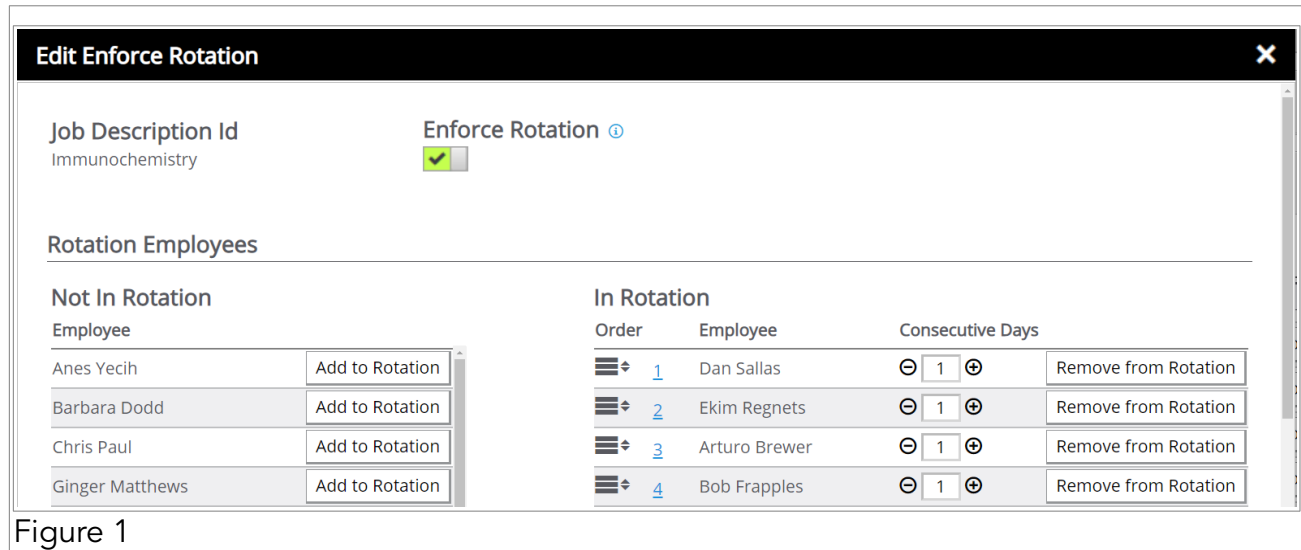


Figure 1

To learn more about this feature and how it works, please check out the full user guide [here](#).

## Schedule Observers

Another schedule enhancement is the ability to set up managers, administrators, or regular employees as observers for a given schedule. Observers have the power to view a schedule but are not able to edit it. This is useful for increasing interdepartmental transparency and for performing sanity checks on the schedule to ensure it's been created correctly.

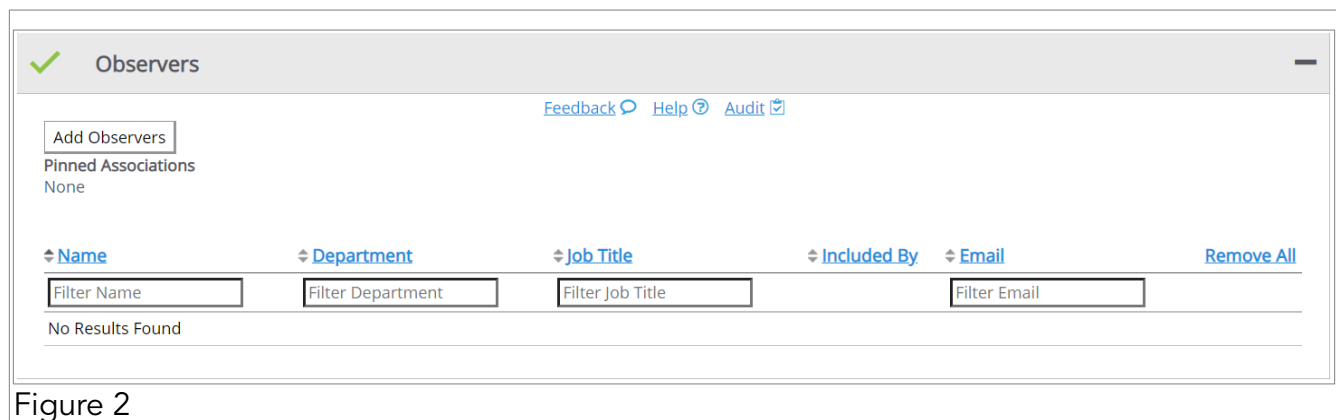


Figure 2

To learn more about this feature and how it works, please check out the full user guide [here](#).

## Grid Dividers

Grid Dividers add a visual separator to your schedule so you can organize employees by department, job title, or whichever hierarchy you need. You can choose a unique color and caption for each divider and move them as needed.

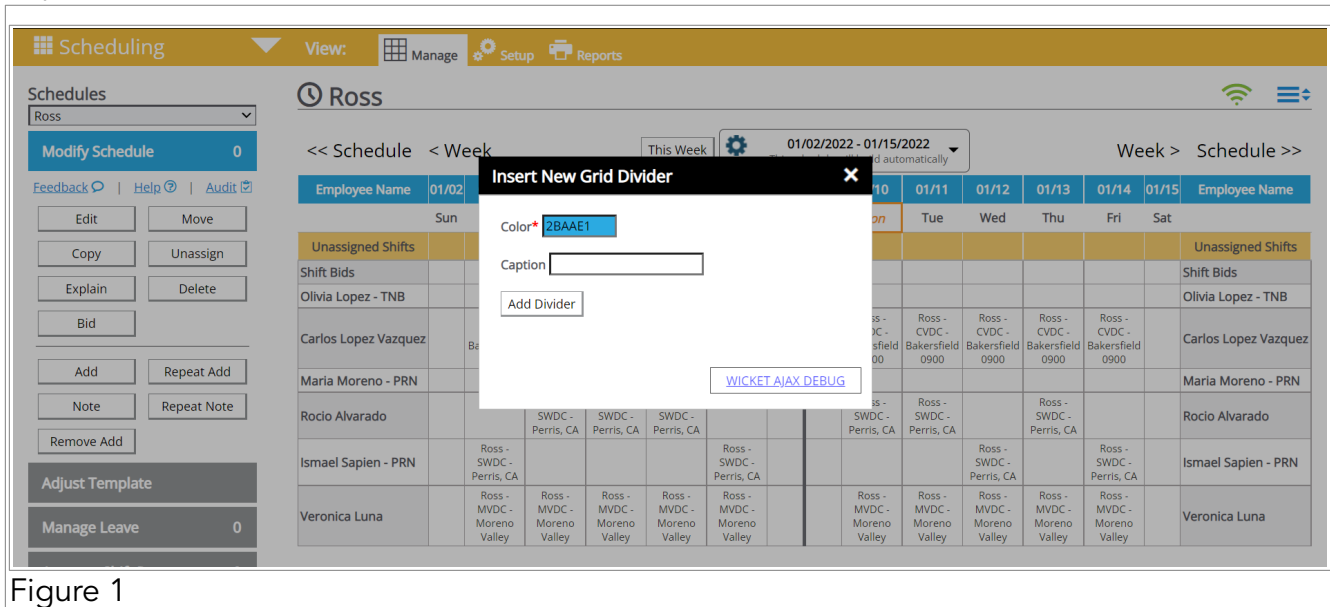


Figure 1

Adding Grid Dividers is a timesaving measure that makes viewing and browsing schedules easier. This leads to quicker schedule editing and clearly defined departments. These dividers will appear on the Setup tab as well as any Scheduling reports you generate.

To learn more about this feature and how it works, please check out the full user guide [here](#).

## Messages

You can add notification messages to your schedule so that employees are automatically notified whenever changes are made to a schedule or whenever one of their leave or shift requests is approved or denied.

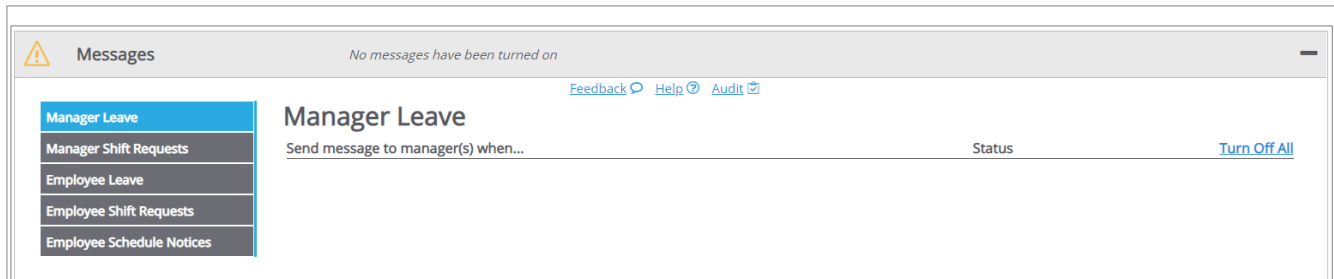


Figure 1

You can also determine what conditions will trigger notifications being sent to managers such as when employees make leave requests or when a shift request is deleted.

This includes when employees accept shift giveaway requests, when shift trades between employees are accepted, when a shift unassign request is made or is canceled, or when an employee accepts or refuses a shift bid.

## Managers

You can also set individuals within your organization as schedule managers who have expanded user privileges over basic employees. Managers can make edits to schedules and edit employee information as needed. Managers are crucial for keeping schedules organized and organizations running smoothly.

Full Name	Email	Department	User Id		
Filter Full Name	Filter Email	Filter Department	Filter User Id	New	
Andrea Charles	<a href="#">Adjust Email Settings</a>	acharles@staffready.com	Radiology	ACharles	<button>Remove</button>
Andrea Garisson	<a href="#">Adjust Email Settings</a>	[not set]	KY	AGarisson	<button>Remove</button>
Anne Horak	<a href="#">Adjust Email Settings</a>	[not set]	A-P Schedule	AHorak	<button>Remove</button>
Barbara Dodd	<a href="#">Adjust Email Settings</a>	bdodd@staffready.com	Core Lab	BDodd	<button>Remove</button>
Bart Daniels	<a href="#">Adjust Email Settings</a>	[not set]	NM Pharmacy	BDaniels	<button>Remove</button>
Chad Fogus	<a href="#">Adjust Email Settings</a>	[not set]	Core Lab	Cfogus	<button>Remove</button>
Hayk Tarpinian	<a href="#">Adjust Email Settings</a>	test@test.test	Core Lab	htarpinian	<button>Remove</button>

Figure 2

To learn more about both of these features and how they work, please check out the full user guide [here](#).

# Modify Your Schedule

StaffReady Scheduling offers you ultimate control over your schedule and the flexibility to make changes on the fly. The Modify Schedule menu is a robust tool that lets you make micro adjustments as needed, so that you're never left understaffed. You can easily move shifts from one employee to another, edit existing shifts, and plenty more.

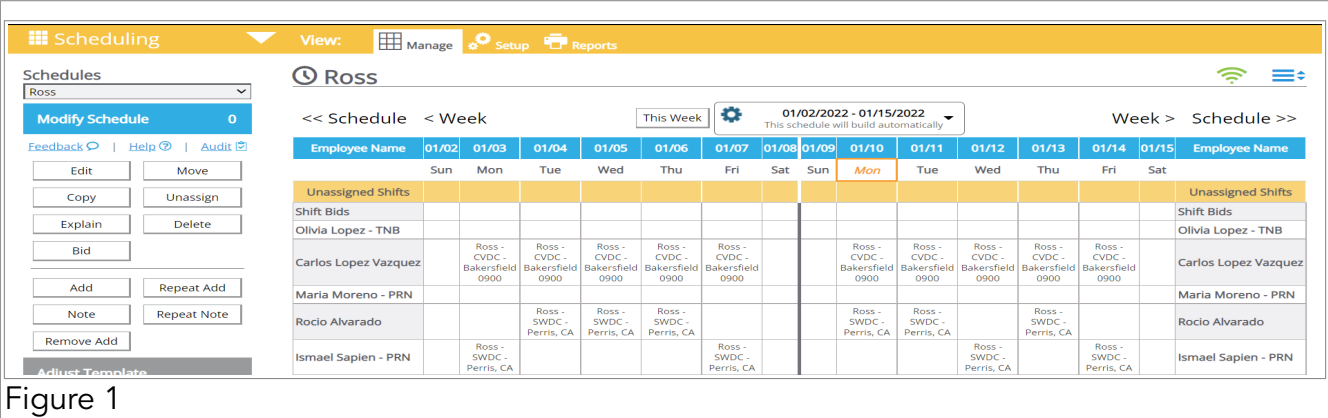


Figure 1

To learn more about this feature and how it works, please check out the full user guide [here](#).

# Schedule Template

The Schedule Template is a robust tool that you can use for creating and planning schedules many months in advance. By taking data from the availability information for each employee, the system will build a schedule automatically. The benefit of using a template is that once it's created, you will only need to make schedule changes to manage the exceptions. By using both a template and the enforced rotations feature, you drastically reduce the amount of time you spend each week maintaining the schedule.

To learn more about this feature and how it works, please check out the full user guide [here](#).

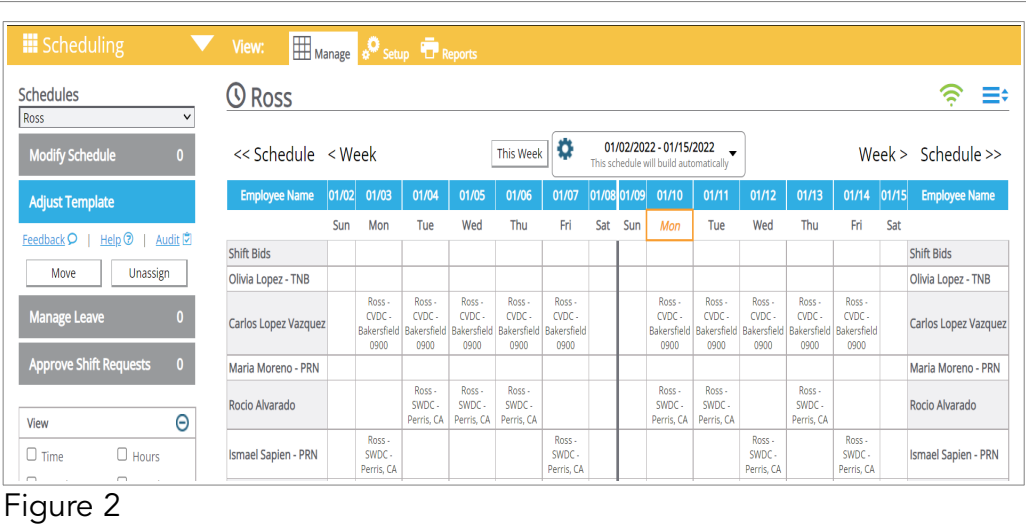


Figure 2

# Manage Leave and Shift Requests

Life is more than just work though, you have to leave time for living. Our software makes it easy to manage employee leave requests using the Manage Leave menu.

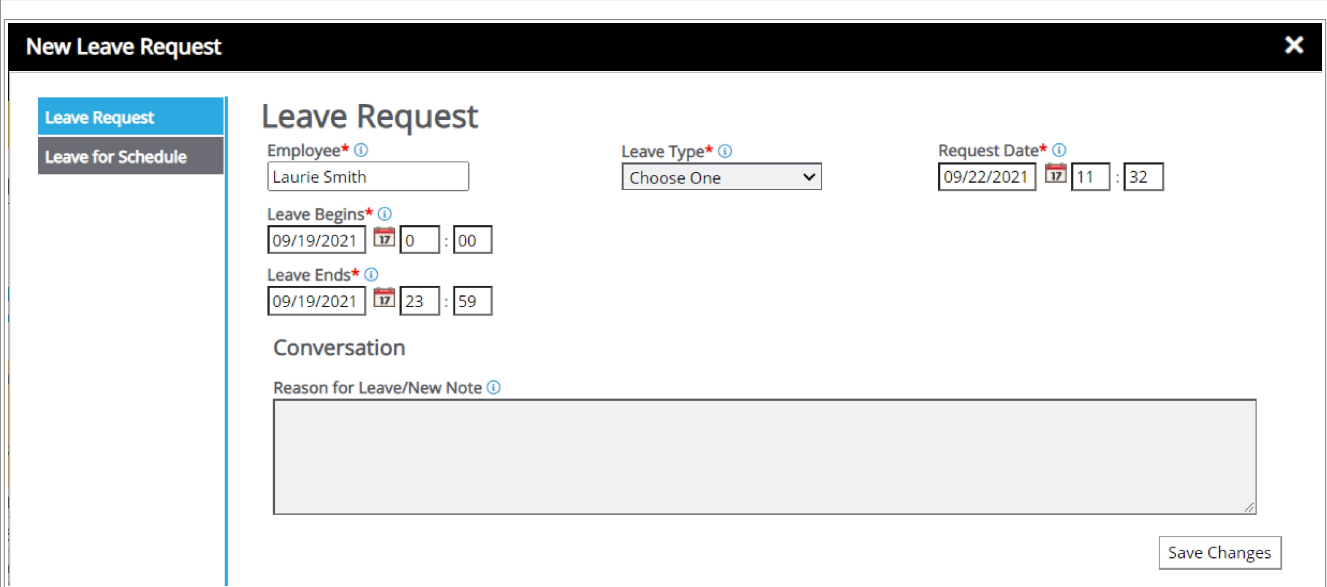


Figure 1

You can also easily manage shift requests using the Approve Shift Requests menu. This include employee requests to trade shifts with another employee, give away one of their shifts to another employee, and putting shifts up for employees to bid on using our shift bid system.

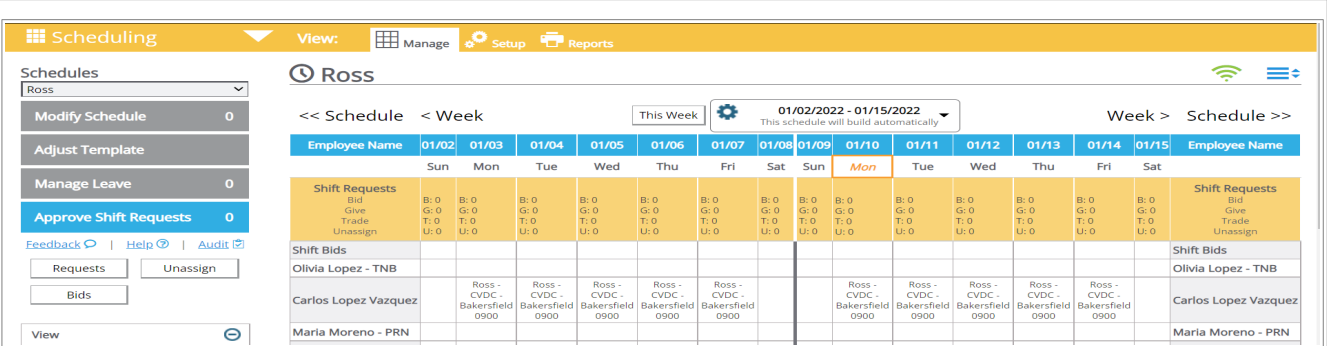


Figure 2

To learn more about this feature and how it works, please check out the full user guide [here](#).

# Reporting

All of this data is worthless if you can't organize it effectively. With our Reports Dashboard feature, you can generate reports on most metrics available within the Scheduling Module. This includes reports for productivity, how many employees are scheduled during a given period, how many employees are on leave and several other types of reports.

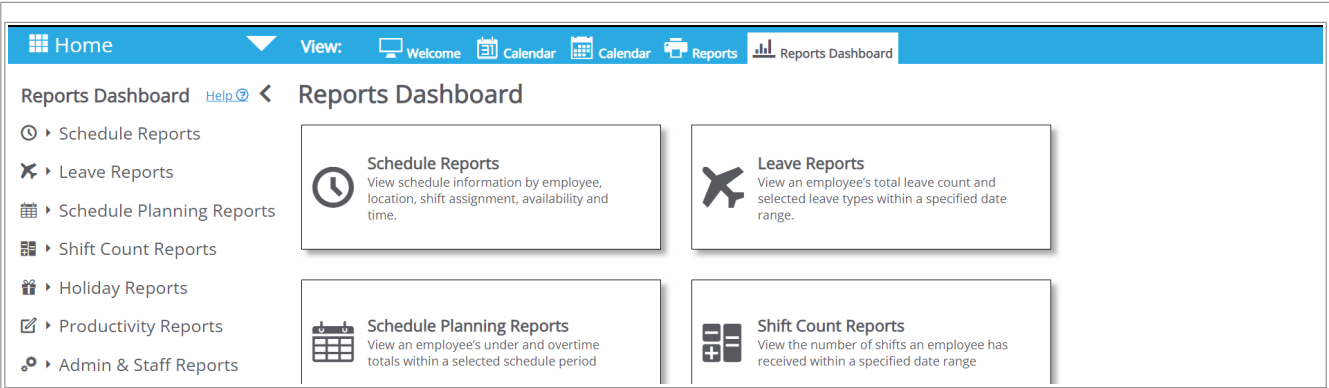


Figure 1

If you need to, you can also export these reports into an Excel or PDF format, depending on the type of report you generate.

To learn more about this feature and how it works, please check out the full user guide [here](#).

# Properties

Finally, our software allows you a great deal of options for customizing your license at a departmental level and an organizational level. This includes setting up what kind of leave requests employees are able to make, overtime parameters, how long a pay period is, the maximum number of hours an employee can work, and much more.

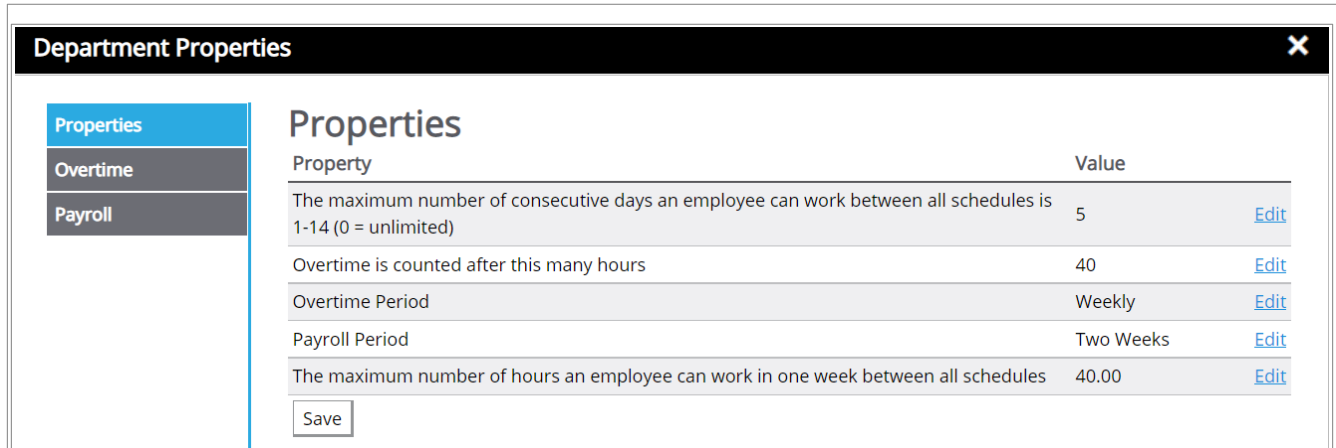


Figure 1

If you need to make bigger changes or don't want to make a bunch of individual changes, you can also update organizational properties. This can include holidays, leave types, overtime properties, and much more.

**Note:** For larger organizational changes, senior managers or administrators often handle systemic changes like this.

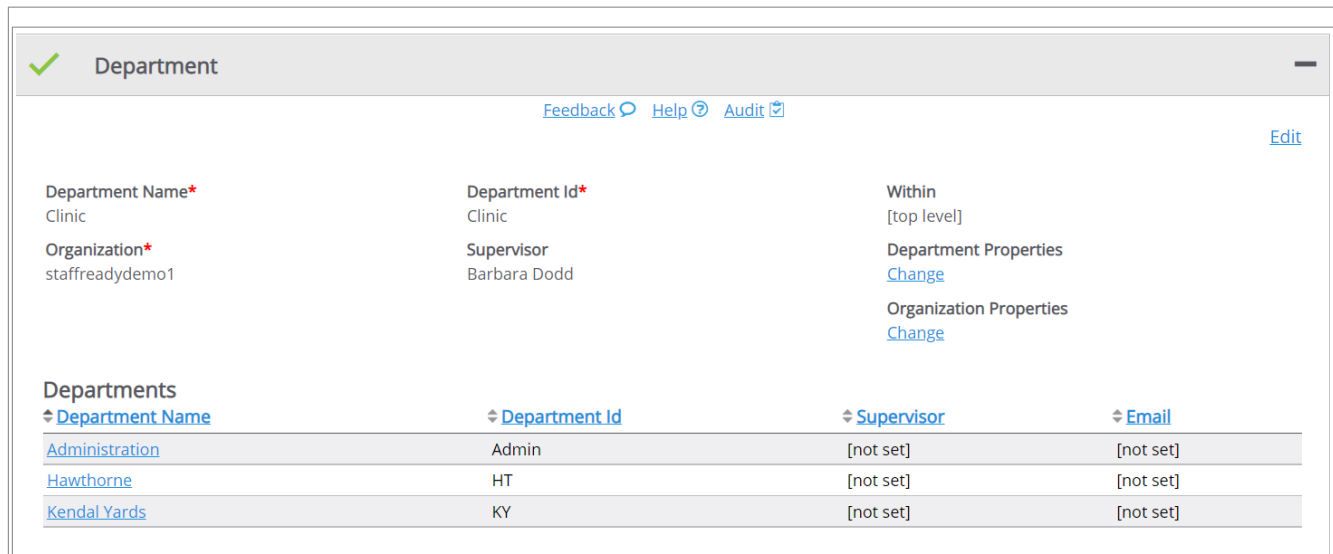


Figure 2

To learn more about this feature and how it works, please check out the full user guide [here](#).

# Resources

This concludes the overview guide for the **Scheduling Module**. We hope that this guide has given you a high level outline of what you can expect to find while using our software.

For additional resources, please check out the User Guide Directory located under your employee profile in the upper right hand corner of each screen. **(Yellow box, Figure 1)** See sample guides under Related Topics below.

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](#)

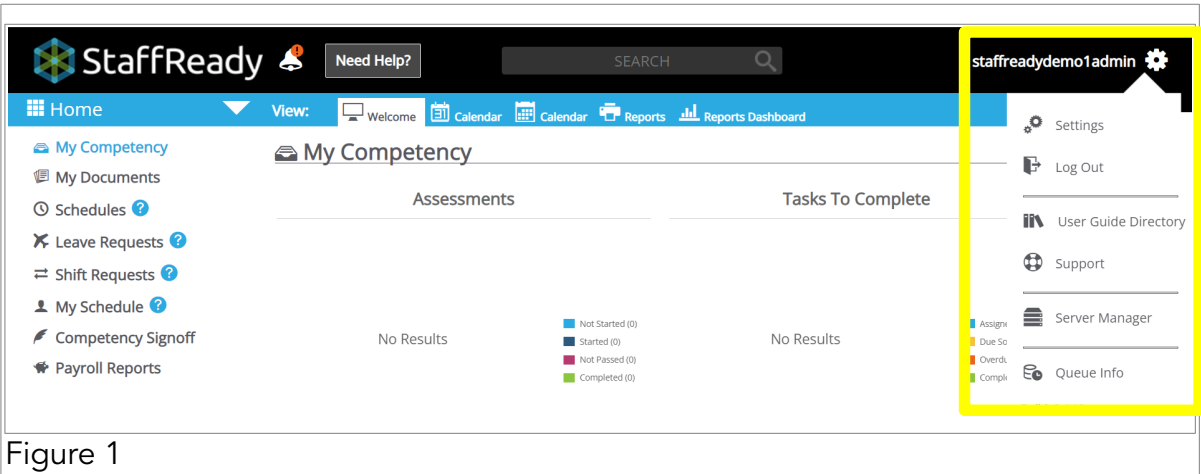


Figure 1

## Related Topics

Please select any link to skip to that topic.

<a href="#">Getting Started: Scheduling User Guide</a>	<a href="#">PDF Document</a>
<a href="#">Job Descriptions User Guide</a>	<a href="#">PDF Document</a>
<a href="#">Employee Prerequisites User Guide</a>	<a href="#">PDF Document</a>
<a href="#">Schedules Editor Overview</a>	<a href="#">PDF Document</a>