

Scheduling – Availability Override

This reference guide provides a comprehensive overview for utilizing the Availability Override feature within the StaffReady Scheduling module. The following process steps and instructional information are provided in this document:

- [Availability Override Overview](#)
- [Availability Override Setup](#)
- [Availability Override Utilization](#)

Edit Available Time
✕

Availability Pattern

Availability Override

Availability Override

Name on Schedule Barbara Dodd	Schedule Start Date ⓘ 10/29/2017	Availability Pattern Weekly (02/03/2019 - 02/09/2019) edit	FTE 1 edit
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Override Time ⓘ

As Early As ⓘ

As Late As ⓘ

Duration [not set]

Availability Override Calendar ⓘ

Period ⓘ

Sun	Mon	Tue	Wed	Thu	Fri	Sat
02/10 OFF 1	02/11 OFF 2	02/12 OFF 3	02/13 OFF 4	02/14 OFF 5	02/15 OFF 6	02/16 OFF 7

1 | Availability Override Overview

Explanation of the Availability Override Feature

- **Availability Override** will automatically change the shift times for any shifts the employee is assigned on the days it is configured.
- This feature is particularly useful when you want the scheduling system to assign a specific staff member during the hours that he or she is available, and continue to assign the shift's regular hours to other employees.

The next section describes how to enable **Availability Override** for your staff.

Edit FTE
✕

Employee Chad Fogus	Number of Schedules 1 view	Payroll Period Two weeks	Overtime Period Weekly
FTE ⓘ <input type="text" value="1"/>	Float or Per Diem ⓘ <input type="text" value="No"/>	Schedule Priority ⓘ <input type="text" value="1"/>	

[Advanced Edit](#)

Employee Properties

Property	Value
The maximum number of consecutive days an employee can work between all schedules is 1-14 (0 = unlimited)	10
The schedule that is used to determine the primary leave types available to the employee	Support
The maximum number of hours the employee can work in one pay period between all schedules	80.00
This employee is not an actual person and/or schedule data should not export for this employee	False

Schedule Hour Properties

Property	Value
The maximum number of hours the employee should work in a pay period	80.00
The minimum number of hours the employee should work in a pay period	8.00

Schedule Shift Properties

Property	Value
The maximum number of shift assignments the employee should be assigned in a pay period	10
The minimum number of shift assignments the employee should be assigned in a pay period	1

Schedule Day Properties

Property	Value
The maximum number of days the employee should work in a pay period	10
The minimum number of days the employee should work in a pay period	1

Schedule Override Properties

Property	Value
Employees uses availability overrides.	True

2 | Availability Override Setup

Steps to Setup Availability Override in StaffReady Scheduling

1. **Availability Override** can be enabled from the **StaffReady Setup** view tab.

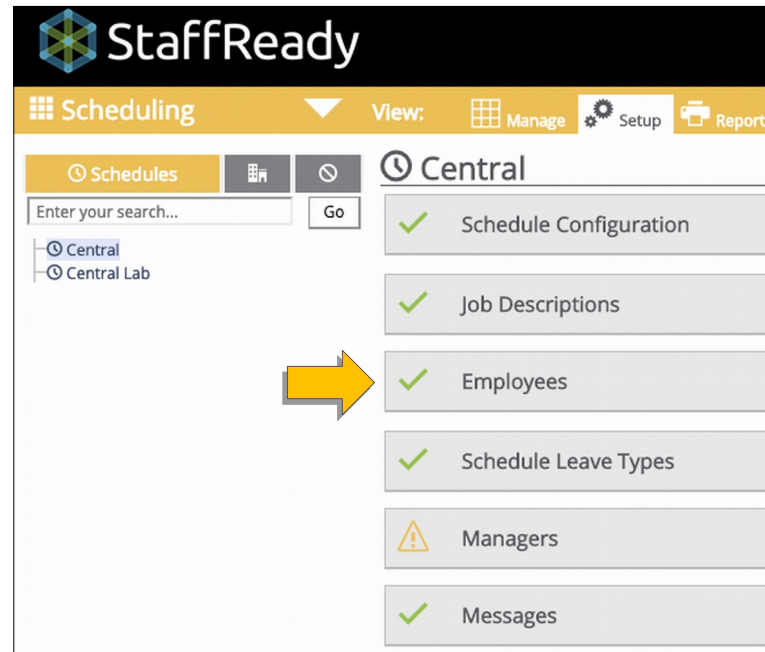
The screenshot displays the StaffReady dashboard interface. At the top, the StaffReady logo is visible on the left, and a navigation bar contains 'Home', 'View: Welcome', 'Calendar', and 'Reports'. Below this, the dashboard is organized into several colored tiles:

- Home (Blue):** Contains 'Welcome', 'Calendar', and 'Reports'.
- Scheduling (Yellow):** Contains 'Manage', 'Setup' (highlighted with a yellow arrow), and 'Reports'.
- Competency (Green):** Contains 'Manage', 'Setup', 'Dashboard', and 'Employees'.
- DocumentControl (Red):** Contains 'Manage', 'Setup', and 'Teams'.
- Staff (Dark Blue):** Contains 'Employees'.

A 'close [x]' button is located in the bottom right corner of the dashboard area.

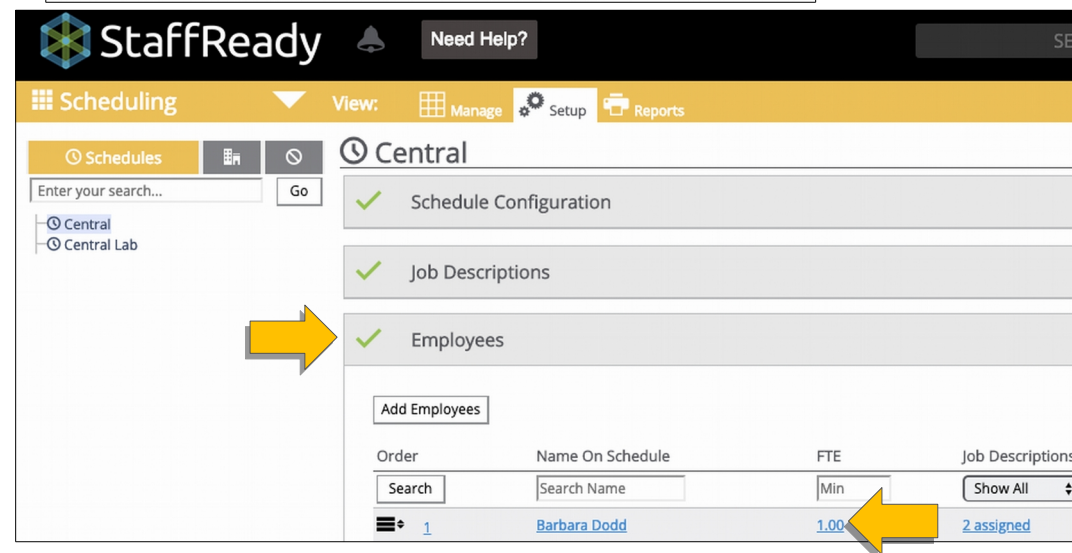
| Availability Override Setup, Cont.

2. Click on the **Employees** color bar to display the list of employees assigned to your schedule.



The screenshot shows the StaffReady Scheduling Central interface. The 'Employees' menu item is highlighted with a yellow arrow pointing to it from the left. The interface includes a search bar, a 'Go' button, and a list of menu items: Schedule Configuration, Job Descriptions, Employees, Schedule Leave Types, Managers, and Messages.

3. Click on the **FTE** link for the employee you want to configure with an **Availability Override**.



The screenshot shows the StaffReady Scheduling Central interface with the 'Employees' menu item selected. A yellow arrow points to the 'FTE' column header in the table below. The table has columns for Order, Name On Schedule, FTE, and Job Descriptions. A search bar is present above the table.

Order	Name On Schedule	FTE	Job Descriptions
1	Barbara Dodd	1.00	2 assigned

| Availability Override Setup, Cont.

4 Click the **Advanced Edit** link in the **Edit FTE** window.

5. Scroll to the bottom of the Advanced Edit window to find the **Employees uses availability overrides** option.

6. Select **True** from the drop-down menu.

7. Click the **Save Changes** button to save and exit the window.

Edit FTE

Employee Barbara Dodd	Number of Schedules 4 view	Payroll Period Two weeks
FTE ⓘ <input type="text" value="1"/>	Float or Per Diem ⓘ <input type="text" value="No"/>	Schedule Priority ⓘ <input type="text" value="1"/>

[Advanced Edit](#)

Edit FTE

Employee	Number of Schedules	Payroll Period	Overtime Period
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Edit FTE > Advanced Edit

Schedule Shift Properties

Property	Value	
The maximum number of shift assignments the employee should be assigned in a pay period	10	<input type="text" value="10"/>
The minimum number of shift assignments the employee should be assigned in a pay period	1	<input type="text" value="1"/>

Schedule Day Properties

Property	Value	
The maximum number of days the employee should work in a pay period	10	<input type="text" value="10"/>
The minimum number of days the employee should work in a pay period	1	<input type="text" value="1"/>

Schedule Override Properties

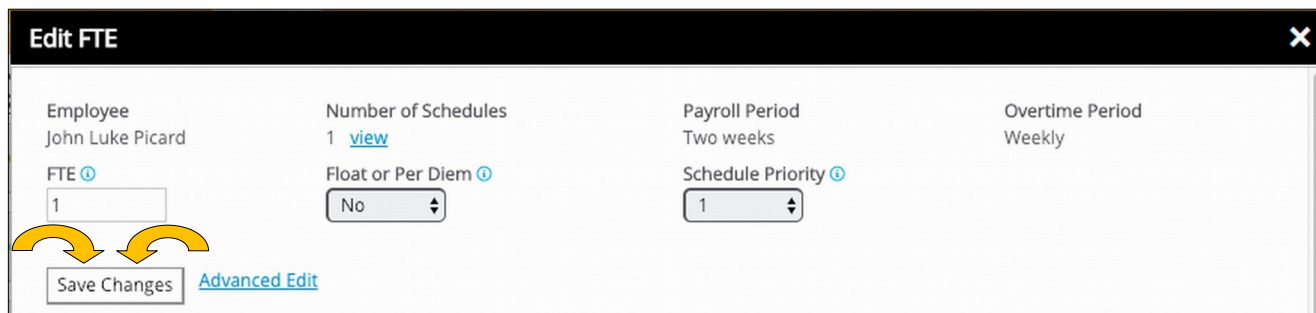
Property	Value
Employees uses availability overrides.	False <input type="text" value="True"/>

| Availability Override Setup, Cont.

8. Important Next Step!

In order for the **Availability Override** change under Advanced Edit to take affect, click the **Saves Changes** button on the **Edit FTE** screen to save and exit the screen.

9. The **Availability Override** option is now enabled for the selected employee.



Employee	Number of Schedules	Payroll Period	Overtime Period
John Luke Picard	1 view	Two weeks	Weekly
FTE ⓘ	Float or Per Diem ⓘ	Schedule Priority ⓘ	
1	No	1	
Save Changes		Advanced Edit	

3 | Availability Override Utilization

Using Availability Override Within a StaffReady Schedule

1. In the Employees color bar, click Available Time link for the employee you want to configure **Availability Override** for.

2. Click on the **Availability Override** tab on the sidebar.

3. Enter the **As Early As** and **As Late As** override times.

4. Click the days you would like **Availability Override** to be active.

5. If needed, repeat the two previous steps for any days you would like **Availability Override** to assign different hours.

6. Leave any days that **Availability Override** should not be active set to Off.

7. Click the **Save Changes** button.

Order	Name On Schedule	FTE	Job Descriptions	Availability Pattern	Available Time
1	Shift Bids				
2	⚠ Non-Override Employees	1.00	0 assigned	Two weeks	0:00-3:00
3	John Luke Picard	1.00	1 assigned	Weekly	8:00-16:30

Edit Available Time

Availability Pattern

Availability Override

Availability Override

Name on Schedule: John Luke Picard Schedule Start Date: 09/04/2016 Availability Pattern: Weekly (01/27/2019 - 02/02/2019) [edit](#) FTE: 1 [edit](#)

Override Time

As Early As: 7:30 As Late As: 14:00 Duration: 6 hours 30 minutes

Availability Override Calendar

Period: 02/03/2019 - 02/09/2019

Sun	Mon	Tue	Wed	Thu	Fri	Sat
02/03 OFF 1	02/04 7:30 - 14:00 2	02/05 7:30 - 14:00 3	02/06 OFF 4	02/07 7:30 - 14:00 5	02/08 7:30 - 14:00 6	02/09 OFF 7

[Save Changes](#)

Availability Override Utilization: Example Use Case

Using Availability Override Within a StaffReady Schedule

7. Example scenario of the Availability Override utilization:

a. Staff employee Barbara Dodd typically works the Specimen Processing job under the Central schedule. She works standard swing shift hours, Monday thru Friday.

b. She has new shift availability beginning the week of 2/24/2019. We want her to be assigned to her regular available and qualified shifts, as well as assigned to 12:00 to 8:30PM override time on Monday and Tuesday for this schedule period. Click **Save Changes** and rebuild your schedule.

c. Barbara's **Availability Override** days and times have been set to Monday and Tuesday for this schedule period. Click **Save Changes** and rebuild your schedule.

Edit Available Time

Availability Pattern

Name on Schedule: Barbara Dodd | Schedule Start Date: 10/29/2017 | Availability Pattern: Weekly (02/03/2019 - 02/09/2019) | FTE: 1

Time and Location

As Early As: 15:00 | As Late As: 0:00 | Duration: 9 hours 30 minutes | Location: SPE

Qualified Job Descriptions

Job Description	Location	Earliest Start	Latest End
Chemistry	2 Locations	7:00	17:30
<input checked="" type="checkbox"/> Specimen Processing	Specimen Processing	15:00	0:30

Availability Calendar

Period: 02/10/2019 - 02/16/2019

Sun	Mon	Tue	Wed	Thu	Fri	Sat
02/10 OFF 1	02/11 15:00 - 0:30 SPE 2	02/12 15:00 - 0:30 SPE 3	02/13 15:00 - 0:30 SPE 4	02/14 15:00 - 0:30 SPE 5	02/15 15:00 - 0:30 SPE 6	02/16 OFF 7

Save Changes

Edit Available Time

Availability Override

Name on Schedule: Barbara Dodd | Schedule Start Date: 10/29/2017 | Availability Pattern: Weekly (02/03/2019 - 02/09/2019) | FTE: 1

Override Time

As Early As: 12:00 | As Late As: 20:30 | Duration: 8 hours 30 minutes

Availability Override Calendar

Period: 02/24/2019 - 03/02/2019

Sun	Mon	Tue	Wed	Thu	Fri	Sat
02/24 OFF 1	02/25 12:00 - 20:30 2	02/26 12:00 - 20:30 3	02/27 0:00 - 8:15 4	02/28 0:00 - 8:15 5	03/01 0:00 - 8:15 6	03/02 OFF 7

Save Changes

Availability Override Utilization: Example Use Case, Cont.

Using Availability Override With a StaffReady Schedule

8. This first screenshot illustrates the schedule *before* the **Availability Override** feature has been used. Notice that Barbara's shift assignments are in line with her current shift **Availability Pattern**.

Important Note

The Availability Override pattern in every time period repeats, so even if you skip ahead to just the week you want to change, the updates will continue to populate to every schedule going forward.

9. This second screenshot illustrates the same schedule *after* the **Availability Override** feature has been applied. Barbara's other regularly assigned shifts have not been affected.

Central

<< Schedule < Week This Week 02/24/2019 - 03/09/2019 This schedule will build automatically

Employee Name	02/24	02/25	02/26	02/27	02/28	03/01	03/02
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Barbara Dodd		Specimen Processing 1 15:00-23:30	Specimen Processing 1 15:00-23:30	Specimen Processing 1 15:00-23:30	Specimen Processing 1 15:00-23:30	Specimen Processing 1 15:00-23:30	
	03/03	03/04	03/05	03/06	03/07	03/08	03/09
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
		Specimen Processing 1 15:00-23:30	Specimen Processing 1 15:00-23:30	Specimen Processing 1 15:00-23:30	Specimen Processing 1 15:00-23:30	Specimen Processing 1 15:00-23:30	

Central

<< Schedule < Week This Week 02/24/2019 - 03/09/2019 This schedule will build automatically Week > Schedule >>

Employee Name	02/24	02/25	02/26	02/27	02/28	03/01	03/02	03/03	03/04	03/05	03/06	03/07	03/08	03/09
	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Barbara Dodd		Specimen Processing 1 12:00-20:30	Specimen Processing 1 12:00-20:30	Specimen Processing 1 15:00-23:30	Specimen Processing 1 15:00-23:30	Specimen Processing 1 15:00-23:30			Specimen Processing 1 12:00-20:30	Specimen Processing 1 12:00-20:30	Specimen Processing 1 15:00-23:30	Specimen Processing 1 15:00-23:30	Specimen Processing 1 15:00-23:30	

Yellow arrows indicate the shift change for Barbara Dodd on 02/25 and 03/04, and double-headed arrows indicate the continuation of the original 15:00-23:30 shift on 02/26-02/28 and 03/05-03/08.

| Availability Override Utilization: Example Use Case, Cont.

10. From the **Schedule Manage** tab, we want to reassign the 2/26 shift to another employee.

11. Click the **Move** button under the **Modify Schedule** option, located on the left side action menu.

The screenshot shows the StaffReady Scheduling interface. At the top, there's a navigation bar with 'Scheduling', 'View: Manage', 'Setup', and 'Reports'. Below this, the 'Central' schedule is selected. A table shows shifts for 02/24 (Sun), 02/25 (Mon), and 02/26 (Tue). The 'Unassigned Shifts' section is expanded, showing various shift types like 'Blood Bank Wkd', 'Chemistry Wkd', 'Admin Wkd', and 'Technician Wkd'. A yellow arrow points to the 'Move' button in the left-hand action menu under the 'Modify Schedule' section.

Employee Name	02/24 Sun	02/25 Mon	02/26 Tue
Unassigned Shifts Show More	Blood Bank Wkd 7:00-15:30	Audiology 7:00-15:30	Audiology 7:00-15:30
	Chemistry Wkd 7:00-17:30	Admin 8:00-16:30	Accessioning 8:00-16:30
	Admin Wkd 9:00-17:30	FB 8:00-16:30	Admin 8:00-16:30
	Technician Wkd 15:00-23:30	Technician 15:00-23:30	FB 8:00-16:30
Barbara Dodd		Specimen Processing 1 12:00-20:30	Specimen Processing 1 12:00-20:30
Laurie Pope		Hematology 8:00-16:30	

| Availability Override Utilization: Example Use Case, Cont.

12. Click once on the Specimen Processing job to highlight the shift you intend to move.

13. Click the box for the staff member receiving the shift.

**Notice that the override time changes back to the regularly scheduled shift time. The Availability Override function can only be used on days where availability is already setup.*

14. Moving the shift assignment back will adjust the override time assignment to the Availability Override time you designated for that employee.

Barbara Dodd		Specimen P1 12:00-20:30	
Laurie Pope		Hematology 8:00-16:30	Specimen P1 15:00-23:30



The screenshot shows the StaffReady Scheduling interface. At the top, there's a navigation bar with 'StaffReady', a bell icon, and a 'Need Help?' button. Below that is a 'Scheduling' header with a dropdown menu set to 'Central'. There are icons for 'Manage', 'Setup', and 'Reports'. The main area shows a weekly schedule for 'Central' from 02/24 to 02/26. On the left, there are buttons for 'Modify Schedule' (68), 'Feedback', 'Help', 'Audit', 'Edit', 'Move', 'Copy', 'Unassign', 'Explain', 'Delete', 'Bid', 'Add to Schedule', 'Adjust Template', and 'Manage Leave' (0). The 'Move' button is highlighted with a yellow arrow. The schedule table shows shifts for various departments like Blood Bank, Chemistry, Admin, Technician, and Specimen Processing. A yellow arrow points to the 'Specimen Processing 1' shift on 02/26, which is currently assigned to Barbara Dodd. Another yellow arrow points to the 'Hematology' shift on 02/26, which is currently assigned to Laurie Pope.

Availability Override Utilization: Example Use Case, Cont.

14. The **Schedule Manage** grid shows you where **Availability Override** is being used. Under the **View** options located in the left side action menu, check the **Time** and the **Availability** boxes.

15. With these settings enabled, the **Schedule Manage** grid displays the override time, the regular availability time and the regular shift times.

16. The **Blue** colored boxes shows where **Availability Override** is being used. The **Green** colored boxes indicates normal shift availability.

For assistance with **Availability Override** or other **StaffReady Scheduling** features, please contact our Customer Support team:

7am-5pm PST
 Monday thru Friday
 Phone: 1.877.229.5230
[Online Support Form](#)

Scheduling
View: Manage
Setup Reports

Schedules

Central

Modify Schedule
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Feedback
Help
Audit

Edit

Move

Copy

Unassign

Explain

Delete

Bid

Add to Schedule

Adjust Template

Manage Leave 0

Approve Shift Requests 0

View

Time

Hours

Location

Overtime

Availability

Notes

Errors

🕒

Central

<<
Schedule
<
Week

Employee Name	02/24	02/25	02/26
	Sun	Mon	Tue
Unassigned Shifts Show More	Blood Bank Wkd 7:00-15:30	Audiology 7:00-15:30	Audiology 7:00-15:30
	Chemistry Wkd 7:00-17:30	Admin 8:00-16:30	Accessioning 8:00-16:30
	Admin Wkd 9:00-17:30	FB 8:00-16:30	Admin 8:00-16:30
	Technician Wkd 15:00-23:30	Technician 15:00-23:30	FB 8:00-16:30
		Specimen Processing 2 16:00-0:30	Technician 15:00-23:30
Barbara Dodd	OFF	12:00-20:30 Specimen Processing	12:00-20:30 Specimen Processing
Laurie Pope	OFF	8:00-16:30 Hematology	8:00-16:30 3rd Floor
Caroline Beck	8:00-16:30 Any Location	8:00-16:30 Any Location	8:00-16:30 Any Location
Juanita Garza	9:00-17:30 Any Location	7:00-17:30 Any Location	7:00-17:30 Any Location
Shift Bids	OFF	OFF	OFF