



Staff - Employees View

Employee Schedules Color Bar

This reference guide provides a comprehensive overview of the Employee Schedules color bar in the Staff module. The following process steps and instructional information are provided in this document:

- Employee Schedules Color Bar Overview
- Add Schedule
- Edit Employee Schedule
- Filtering Options

1 | Employee Schedules Color Bar Overview

Information Found in the Employee Schedules Color Bar

The Employee Schedules color bar provides the following employee information: **Schedule Id**, the **Name on Schedule**, the **Start Date**, and the **Close Date**.

The screenshot shows the StaffReady interface for the 'Staff' module, specifically the 'Employees' view for Barbara Dodd. The interface includes a navigation menu on the left with 'Departments' and 'Medical Center' expanded. The main content area shows the 'Employee Schedules' section for Barbara Dodd, which includes an 'Add Schedule' button and a table of existing schedules. The table has columns for 'Schedule Id', 'Name on Schedule', 'Start Date', and 'Close Date'. The table contains three rows of data, each with an 'Edit' button.

Schedule Id	Name on Schedule	Start Date	Close Date
Central	Barbara Dodd	10/29/2017	[not set]
General Lab	Barb Dodd	01/05/2012	01/05/2012
SUH North Lab	Barbara Dodd	06/04/2017	[not set]

2 | Add Schedule

Adding a Schedule to an Employee

1. Type the name of the desired Employee in the **Find Employee** text field.

2. Click the **Find** button.

The screenshot shows the StaffReady interface. The top navigation bar includes the StaffReady logo, a 'Need Help?' button, a search bar, and the user name 'Barbara Dodd'. The main content area is titled 'Staff' and shows a list of departments under the 'Clinic' view. The 'Find Employee' text field and the 'Find' button are highlighted with yellow boxes. A yellow arrow points from the 'Find' button to the 'Find Employee' text field.

3. Once the selected employee is displayed, click the **Employee Schedules** color bar to open it.

The screenshot shows the StaffReady interface with the 'Employee Schedules' section for Barbara Dodd. The 'Employee Schedules' color bar is highlighted with a yellow box, and a yellow arrow points to it. The 'Employee Schedules' section is expanded, showing a list of employee-related items with green checkmarks: Employee, Employee Schedules, Employee Skillssets, Assessments, Employee Pay Period, Employee Overtime Period, Employee Identifier, Contact, External Calendar, Messaging, and Permissions.

4. Click the **Add Schedule** button.

Employee Schedules

Feedback Help Audit

Add Schedule

Schedule Id	Name on Schedule	Start Date	Close Date
Core Lab	Barbara Dodd	05/04/2018	[not set]

Edit

5. Choose the desired **Schedule** that you would like to add to the employee from the drop down menu.

6. Verify that the **Name on Schedule** matches the name of the desired employee.

7. Enter the **Start Date** or choose a date by clicking on the calendar icon.

***Note:** This is the first day that the employee will appear on the schedule.

8. Click the **Save Changes** button.

Add Schedule

Schedule* Choose One

Name on Schedule* Barbara Dodd

Start Date* 01/07/2019

Save Changes

Add Schedule

Schedule* ✓ Choose One Pharmacists

Barbara Dodd

3| Edit Employee Schedule

Editing the Details of an Existing Schedule

1. Type the name of the desired Employee in the **Find Employee** text field.

2. Click the **Find** button.

The screenshot shows the StaffReady interface. At the top, there's a navigation bar with 'StaffReady', 'Need Help?', a search bar, and the user name 'Barbara Dodd'. Below this, there's a 'View:' dropdown set to 'Employees'. The main content area shows a 'Clinic' department with various status bars like 'Department Employees', 'Department Holidays', and 'Department Managers'. A search bar labeled 'Find Employee (Department)' is visible, with 'Find' and 'Add' buttons. A yellow box highlights the search results area, which lists 'Clinic', 'Core Lab', 'North Main', and 'StaffReadyDemo'. A yellow arrow points to the 'Find' button.

3. Once the selected employee is displayed, click the **Employee Schedules** color bar to open it.

The screenshot shows the StaffReady interface with the 'Employee Schedules' details for Barbara Dodd. The 'Employee Schedules' color bar is highlighted with a yellow box and a yellow arrow pointing to it. The details include: Employee, Employee Schedules, Employee Skillssets, Assessments, Employee Pay Period, Employee Overtime Period, Employee Identifier, Contact, External Calendar, Messaging, and Permissions.

4. Click the **Edit** button.

Employee Schedules

Feedback Help Audit

Add Schedule

	Schedule Id	Name on Schedule	Start Date	Close Date	
Filter	Filter Schedule Id	Filter Name on Schedu	Filter Dates	Filter Dates	
	Core Lab	Barbara Dodd	05/04/2018	[not set]	Edit

5. Verify that the **Name on Schedule** matches the name of the desired employee.

6. To change the **Start Date**, type in a different date or choose one by clicking on the calendar icon.

7. Enter the **Close Date** or choose a date by clicking on the calendar icon.

***Note:** This is the last day that the employee will appear on the schedule.

8. Click the **Save Changes** button.

Edit Employee Schedule

Schedule Id
Core Lab

Name on Schedule*
Barbara Dodd

Start Date*
05/04/2018

Close Date
[empty]

Save Changes

4| Filtering Options

Available Filtering Options

The following **Filter** options are available:

- **Schedule Id**
- **Name on Schedule**
- **Start Date**
- **Close Date**

To use the filtering options:

1. Type the content into the associated text field.

2. Click the **Filter** button.

***Note:** Click the link above the appropriate text field to **sort** by any of these options.

The screenshot shows the 'Employee Schedules' interface. At the top, there is a header with a green checkmark and the title 'Employee Schedules'. Below the header, there are links for 'Feedback', 'Help', and 'Audit'. A 'Add Schedule' button is on the left. Below this, there are four filter options: 'Schedule Id', 'Name on Schedule', 'Start Date', and 'Close Date'. Each option has a dropdown arrow and a corresponding text field. The 'Filter' button is located to the left of the 'Filter Schedule Id' field. Below the filter fields, there is a table with two rows of schedule data. A yellow arrow points to the 'Filter' button.

	Schedule Id	Name on Schedule	Start Date	Close Date	
Filter	Filter Schedule Id	Filter Name on Schedu	Filter Dates	Filter Dates	
	Core Lab	Barbara Dodd	05/04/2018	[not set]	Edit
	Pharmacists	Barbara Dodd	01/07/2019	[not set]	Edit