

## Scheduling – Enforce Rotations

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

- [Enforce Rotations Overview](#)
- [Enforce Rotations Setup](#)
- [Using Enforce Rotations](#)

Edit Enforce Rotation
✕

Job Description Id Enforce Rotation   
 Supervisor

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Rotation Employees

**Not In Rotation**

Employee	
Tom Williamson	<a href="#">Add to Rotation</a>

**In Rotation**

Order	Employee	Consecutive Days	
1	Laurie Pope	1	<a href="#">Remove from Rotation</a>
2	Barbara Dodd	1	<a href="#">Remove from Rotation</a>

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Shift Assignments

Order	Shift Name	Shift Time	Shift Days							Include in Rotation
1	Supv	08:00 - 16:00	Sun.	Mon.	Tue.	Wed.	Thu.	Fri.	Sat.	<input checked="" type="checkbox"/>

[Save Changes](#)

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Rotation Preview

	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu
Laurie Pope		Supv		Supv		Supv				Supv		
Barbara Dodd			Supv		Supv				Supv		Supv	

[Apply Rotation to Template](#)

## 1 | Enforce Rotations Overview

### Explanation of the Enforce Rotations Feature

The **Enforce Rotations** feature provides a quick and easy method for scheduling administrators to rotate and assign shifts for chosen employees. The rotation will distribute shifts across qualified employees, based on the configuration you specify.

The **Enforce Rotations\*** feature in StaffReady's Scheduling module rotates a shift assignment(s) through specified employees for a set of number of days.

**Enforce Rotations** works as an interface to the **Scheduling Template**. Once **Shift Assignments** are created within a **Job Description**, the shift rotations are applied directly to the **Scheduling Template**.

\*In order to utilize the **Enforce Rotations** feature, the **StaffReady Scheduling** module must be enabled under your software license.

The screenshot displays the StaffReady Scheduling interface. The top navigation bar includes the StaffReady logo, a 'Need Help?' button, a search bar, and the user name 'Barbara Dodd'. The main navigation bar shows 'Scheduling' with options for 'View: Manage', 'Setup', 'Reports', and 'Departments'. The left sidebar lists 'Schedules' with a search bar and 'Add' button, and a tree view showing 'Core Lab', 'Inpatient Pharmacist', 'Inpatient Technician', and 'Pharmacists'. The main content area is titled 'Core Lab' and shows a table of 'Job Descriptions'. The table has columns for 'Order', 'Job Description Id', 'Assignments', 'Employees', 'Enforce Rotations', and 'Discontinue'. The 'Enforce Rotations' column for 'Immunochemistry' is highlighted with a yellow arrow pointing to 'Turned On'. Other job descriptions include Hematology, Rapid Testing, UA, Chemistry, Supervisor, Radiology, and On Call. A yellow arrow points to the 'Job Descriptions' header, and another points to the 'Enforce Rotations' column header.

Order	Job Description Id	Assignments	Employees	Enforce Rotations	Discontinue
1	Hematology	22 assignment(s)	33 employee(s)	Off	Discontinue
2	Rapid Testing	17 assignment(s)	16 employee(s)	Off	Discontinue
3	Immunochemistry	15 assignment(s)	20 employee(s)	Turned On	Discontinue
4	UA	17 assignment(s)	19 employee(s)	Off	Discontinue
5	Chemistry	17 assignment(s)	34 employee(s)	Off	Discontinue
6	Supervisor	5 assignment(s)	3 employee(s)	Turned On	Discontinue
7	Radiology	0 assignment(s)	0 employee(s)	Off	Discontinue
8	On Call	2 assignment(s)	32 employee(s)	Off	Discontinue


## 2 | Enforce Rotations Setup

### Steps to Setup Enforce Rotations in StaffReady Scheduling

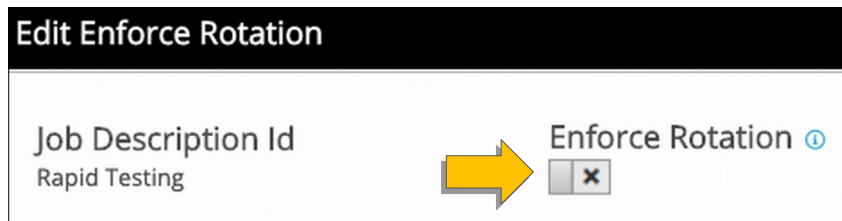
1. To enable the **Enforce Rotations** feature for your organization, please contact the StaffReady Customer Support team:

Phone:  
1.877.229.5230

Email:  
[Online Support Form](#)

Chat Session:  


Live Support is available during the following business hours:  
**6am-5pm PST, Monday thru Friday**



**Rotation Employees**

Not In Rotation		In Rotation	
Employee	Add to Rotation	Order	Employee
Bart Daniels	Add to Rotation	2	Gary Long
Emma Bowers	Add to Rotation	1	Danielle Garrett
Megan Gross	Add to Rotation	1	Ellie Sumner
Megan Stoler	Add to Rotation	1	Jim Hernandez
Robert Smith	Add to Rotation		

**Shift Assignments**

Order	Shift Name	Shift Time	Sun.	Mon.	Tue.	Wed.	Thu.	Fri.	Sat.	Include in Rotation
1	Rapid Testing A	09:00 - 17:00		Mon.	Tue.	Wed.	Thu.	Fri.	Sat.	<input checked="" type="checkbox"/>
2	Rapid Testing B	07:00 - 15:00		Mon.	Tue.	Wed.	Thu.	Fri.	Sat.	<input type="checkbox"/>
3	Rapid Testing C	13:00 - 21:00	Sun.	Mon.	Tue.	Wed.	Thu.	Fri.	Sat.	<input type="checkbox"/>

**Rotation Preview**

	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed
Gary Long		Rapid Testing A	Rapid Testing A						Rapid Testing A	Rapid Testing A	
Danielle Garrett				Rapid Testing A							Rapid Testing A
Ellie Sumner					Rapid Testing A						
Jim Hernandez						Rapid Testing A					

## Enforce Rotations Setup (continued)

### Steps to Setup Enforce Rotations in StaffReady Scheduling

2. Click on the StaffReady Main Menu.

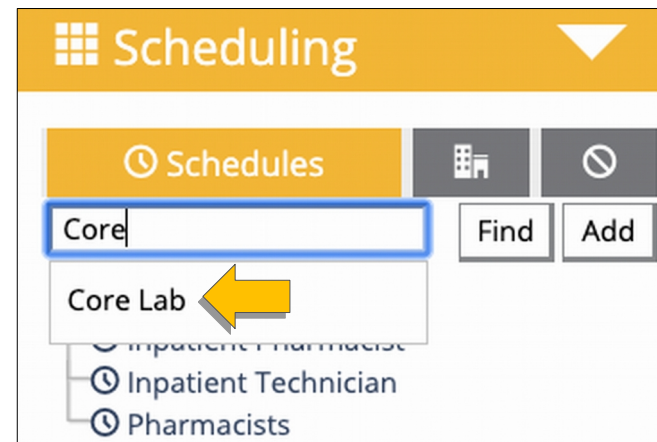
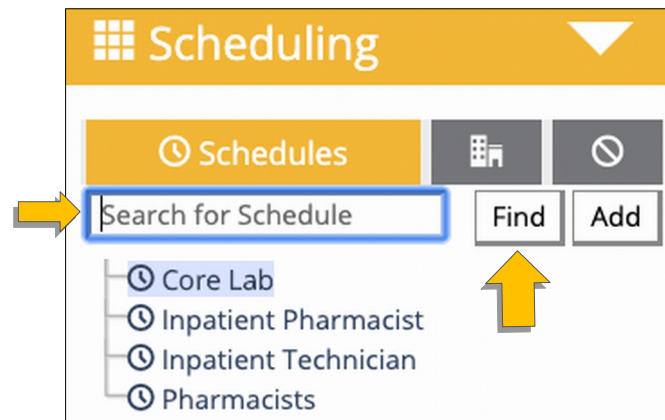
3. Click on **Setup** under the **Scheduling** module.

The screenshot displays the StaffReady main menu interface. At the top, the StaffReady logo is on the left, a bell icon, and a 'Need Help?' button. Below this is a navigation bar with 'Scheduling' selected, a dropdown arrow, and 'View:' followed by 'Manage', 'Setup', 'Reports', and 'Departments' icons. The main menu consists of five colored tiles: 'Home' (blue), 'Scheduling' (orange), 'Competency' (green), 'DocumentControl' (red), and 'Staff' (dark blue). The 'Scheduling' tile is highlighted with a yellow arrow pointing to its 'Setup' option, which is also highlighted with a yellow arrow. The 'Setup' option is located under the 'Scheduling' module.

## Enforce Rotations Setup (continued)

### Steps to Setup Enforce Rotations in StaffReady Scheduling

4. If multiple schedules are being managed, use the **Search for Schedule** text field to locate the desired schedule.
5. Click the **Find** button or choose from an auto-populated search list.
6. Click on the schedule you want to add a rotation to. In this example, the *Core Lab* schedule has been selected.



7. Click on the **Job Descriptions** color bar to open it.

**Core Lab**

Job Descriptions

Feedback Help Audit

Order	Job Description Id	Assignments	Employees	Enforce Rotations
Search	Search Id		All Employees	All
1	Hematology	22 assignment(s)	33 employee(s)	Off
2	Rapid Testing	17 assignment(s)	9 employee(s)	Off
3	Immunochemistry	15 assignment(s)	20 employee(s)	Turned On
4	UA	17 assignment(s)	19 employee(s)	Off
5	Chemistry	17 assignment(s)	34 employee(s)	Off
6	Supervisor	5 assignment(s)	3 employee(s)	Turned On
7	Radiology	0 assignment(s)	0 employee(s)	Off
8	On Call	2 assignment(s)	32 employee(s)	Off

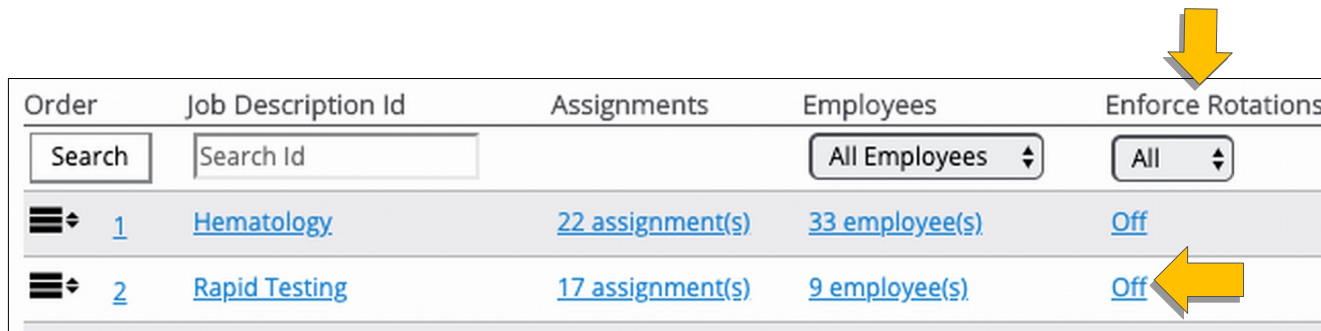
## Enforce Rotations Setup (continued)

### Steps to Setup Enforce Rotations in StaffReady Scheduling

8. Under the **Enforce Rotations** column, click the [Off](#) link within the job to you would like to add a rotation to. In this example, **Enforce Rotations** will be enabled for the *Rapid Testing* Job Description.

9. Click the 'X' toggle to enable **Enforce Rotations** for the selected shift assignment.

In this example, the **Enforce Rotations** option has been setup for this *Rapid Testing* job for the *Core Lab* schedule.



Order	Job Description Id	Assignments	Employees	Enforce Rotations
Search	Search Id		All Employees	All
1	<a href="#">Hematology</a>	<a href="#">22 assignment(s)</a>	<a href="#">33 employee(s)</a>	<a href="#">Off</a>
2	<a href="#">Rapid Testing</a>	<a href="#">17 assignment(s)</a>	<a href="#">9 employee(s)</a>	<a href="#">Off</a>

**Edit Enforce Rotation**

Job Description Id  
Rapid Testing

Enforce Rotation ⓘ

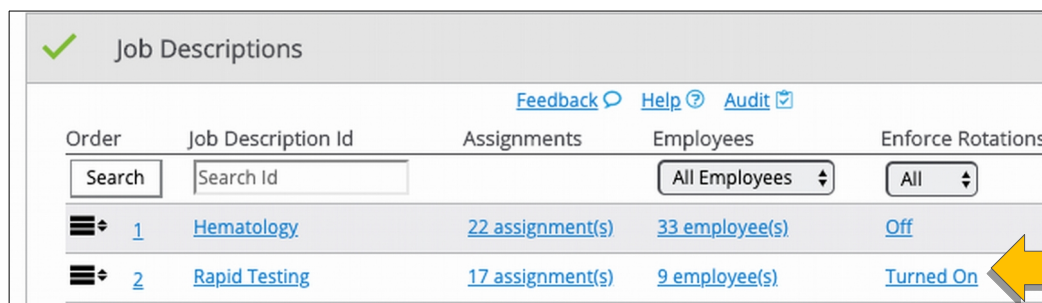
X

**Edit Enforce Rotation**

Job Description Id  
Rapid Testing

Enforce Rotation ⓘ

✔ Job Descriptions
 
[Feedback](#) ⓘ [Help](#) ⓘ [Audit](#) ⓘ



Order	Job Description Id	Assignments	Employees	Enforce Rotations
Search	Search Id		All Employees	All
1	<a href="#">Hematology</a>	<a href="#">22 assignment(s)</a>	<a href="#">33 employee(s)</a>	<a href="#">Off</a>
2	<a href="#">Rapid Testing</a>	<a href="#">17 assignment(s)</a>	<a href="#">9 employee(s)</a>	<a href="#">Turned On</a>

### 3 | Using Enforce Rotations

#### Apply Enforce Rotations Settings to a StaffReady Scheduling Template

1. To change **Enforce Rotations** settings for a job, click on the **Turned On** link under the **Enforced Rotations** column.

The **Edit Enforce Rotation** screen contains the following options:

- a. **Enforce Rotation** toggle
- b. **Not in Rotation:** lists all qualified employees not included in the shift rotation.
- c. **In Rotation Employees:**
  - lists all qualified staff employees that are in the shift rotation
  - sets the number of consecutive days that each employee will be assigned the shift before it rotates to the next employee on the list

#### Core Lab

✓ Job Descriptions
 
[Feedback](#) [Help](#) [Audit](#)

Order	Job Description Id	Assignments	Employees	Enforce Rotations
Search	Search Id		All Employees	All
1	Hematology	22 assignment(s)	33 employee(s)	Off
2	Rapid Testing	17 assignment(s)	9 employee(s)	Turned On

#### Edit Enforce Rotation

Job Description Id: Rapid Testing Enforce Rotation

**Rotation Employees**

**Not In Rotation**

Employee	Add to Rotation
Bart Daniels	Add to Rotation
Emma Bowers	Add to Rotation
Megan Gross	Add to Rotation
Megan Stoler	Add to Rotation
Robert Smith	Add to Rotation

**In Rotation**

Order	Employee	Consecutive Days	Remove from Rotation
1	Danielle Garrett	1	Remove from Rotation
2	Gary Long	2	Remove from Rotation
3	Ellie Sumner	1	Remove from Rotation
4	Jim Hernandez	1	Remove from Rotation

**Shift Assignments**

Order	Shift Name	Shift Time	Shift Days	Include in Rotation
1	Rapid Testing A	09:00 - 17:00	Sun. Mon. Tue. Wed. Thu. Fri. Sat.	<input checked="" type="checkbox"/>
2	Rapid Testing B	07:00 - 15:00	Sun. Mon. Tue. Wed. Thu. Fri. Sat.	<input type="checkbox"/>
3	Rapid Testing C	13:00 - 21:00	Sun. Mon. Tue. Wed. Thu. Fri. Sat.	<input type="checkbox"/>

You have unsaved changes.

**Rotation Preview**

Cannot display preview with unsaved changes.

Must save changes before you can apply template!

## Using Enforce Rotations (continued)

### Apply Enforce Rotations Settings to a StaffReady Scheduling Template

d. **Shift Assignments:** lists the **Shift Names, Shift Times, Shift Days** and an **Include in Rotation** shift selection checkbox.

**Edit Enforce Rotation**

Job Description Id: Rapid Testing      Enforce Rotation

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**Rotation Employees**

Not In Rotation		In Rotation	
Employee	Add to Rotation	Order	Employee
Bart Daniels	Add to Rotation	1	Danielle Garrett
Emma Bowers	Add to Rotation	2	Gary Long
Megan Gross	Add to Rotation	3	Ellie Sumner
Megan Stoler	Add to Rotation	4	Jim Hernandez
Robert Smith	Add to Rotation		

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**Shift Assignments**

Order	Shift Name	Shift Time	Shift Days	Include in Rotation
1	Rapid Testing A	09:00 - 17:00	Sun. Mon. Tue. Wed. Thu. Fri. Sat.	<input checked="" type="checkbox"/>
2	Rapid Testing B	07:00 - 15:00	Sun. Mon. Tue. Wed. Thu. Fri. Sat.	<input type="checkbox"/>
3	Rapid Testing C	13:00 - 21:00	Sun. Mon. Tue. Wed. Thu. Fri. Sat.	<input type="checkbox"/>

     You have unsaved changes.

e. **Rotation Preview:** preview your rotation shift assignments before applying the rotation to the scheduling template.

**Rotation Preview**

	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed
Danielle Garrett		Rapid Testing A							Rapid Testing A		
Gary Long			Rapid Testing A	Rapid Testing A						Rapid Testing A	Rapid Testing A
Ellie Sumner					Rapid Testing A						
Jim Hernandez						Rapid Testing A					

## Using Enforce Rotations (continued)

### Apply Enforce Rotations Settings to a StaffReady Scheduling Template

2. Click the **Add to Rotation** button to add an employee to the **In Rotation** list.

3. Click the **Remove from Rotation** button to remove the employee from the **In Rotation** list.

4. Adjust the number of **Consecutive Days** for each employee using the + or - buttons, or type the number of Consecutive Days in the provided field.

5. Click the **Include in Rotation** checkbox to add a shift to the rotation.

6. Click the **Save Changes** button to save the configuration and activate the **Rotation Preview** pane.

Rotation Employees			
Not In Rotation		In Rotation	
Employee		Order	Employee
Bart Daniels	Add to Rotation	1	Danielle Garrett
Emma Bowers	Add to Rotation	2	Gary Long
Megan Gross	Add to Rotation	3	Ellie Sumner
Megan Stoler	Add to Rotation	4	Jim Hernandez
Robert Smith	Add to Rotation		

Order	Employee	Consecutive Days	
1	Danielle Garrett	1	Remove from Rotation
2	Gary Long	2	Remove from Rotation
3	Ellie Sumner	1	Remove from Rotation
4	Jim Hernandez	1	Remove from Rotation

Shift Assignments										
Order	Shift Name	Shift Time	Shift Days							Include in Rotation
1	Rapid Testing A	09:00 - 17:00	Sun.	Mon.	Tue.	Wed.	Thu.	Fri.	Sat.	<input checked="" type="checkbox"/>
2	Rapid Testing B	07:00 - 15:00	Sun.	Mon.	Tue.	Wed.	Thu.	Fri.	Sat.	<input type="checkbox"/>
3	Rapid Testing C	13:00 - 21:00	Sun.	Mon.	Tue.	Wed.	Thu.	Fri.	Sat.	<input type="checkbox"/>

**Save Changes**

## Using Enforce Rotations (continued)

### Apply Enforce Rotations Settings to a StaffReady Scheduling Template

In this **Enforce Rotations** example, four employees were added to the In Rotation list. The **Rapid Testing A Shift Assignment** was selected and changes saved.

#### Rotation Employees

Not In Rotation		In Rotation	
Employee		Order	Employee
Bart Daniels	<a href="#">Add to Rotation</a>		
Emma Bowers	<a href="#">Add to Rotation</a>		
Megan Gross	<a href="#">Add to Rotation</a>		
Megan Stoler	<a href="#">Add to Rotation</a>		
Robert Smith	<a href="#">Add to Rotation</a>		

	Employee	Consecutive Days	
1	Danielle Garrett	1	<a href="#">Remove from Rotation</a>
2	Gary Long	2	<a href="#">Remove from Rotation</a>
3	Ellie Sumner	1	<a href="#">Remove from Rotation</a>
4	Jim Hernandez	1	<a href="#">Remove from Rotation</a>

#### Shift Assignments

Order	Shift Name	Shift Time	Shift Days	Include in Rotation
1	Rapid Testing A	09:00 - 17:00	Sun. Mon. Tue. Wed. Thu. Fri. Sat.	<input checked="" type="checkbox"/>
2	Rapid Testing B	07:00 - 15:00	Sun. Mon. Tue. Wed. Thu. Fri. Sat.	<input type="checkbox"/>
3	Rapid Testing C	13:00 - 21:00	Sun. Mon. Tue. Wed. Thu. Fri. Sat.	<input type="checkbox"/>

[Save Changes](#)

#### Rotation Preview

	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed
Danielle Garrett		Rapid Testing A							Rapid Testing A		
Gary Long			Rapid Testing A	Rapid Testing A						Rapid Testing A	Rapid Testing A
Ellie Sumner					Rapid Testing A						
Jim Hernandez						Rapid Testing A					

7. To observe how the rotation will assign shifts to employees *before* applying changes to the scheduling template, see the **Rotation Preview** pane.


## Using Enforce Rotations (continued)

### Apply Enforce Rotations Settings to a StaffReady Scheduling Template

8. When the **Shift Rotation** is configured, click the **Apply Rotation to Template** button.

Rotation Preview

	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed
Danielle Garrett		Rapid Testing A				Rapid Testing A					
Robert Smith			Rapid Testing A						Rapid Testing A		
Megan Stoler				Rapid Testing A						Rapid Testing A	
Megan Gross					Rapid Testing A						Rapid Testing A



9. To review the **Rotation** on the scheduling template, click on the schedule **Manage** tab.

Scheduling View: Manage Setup

10. Click on the **Adjust Template** side menu.

11. Click either the **Move** or **Unassign** buttons to open the **Editing Template** window.

Schedules

Core Lab 9

**Adjust Template**

[Feedback](#) | [Help](#) | [Audit](#)

Manage Leave 0

Approve Shift Requests 0

## Using Enforce Rotations (continued)

### Apply Enforce Rotations Settings to a StaffReady Scheduling Template

12. Click the **Show Rotation Shifts** checkbox in the **Template Information** window to view **Rotation** shift assignments. **Rotation** shifts will be highlighted in **blue**.

Template Information ⊖


Template Starts: 08/04/2019


Template Duration: 4 Weeks

Previous: 08/04/2019 (Week 4)


Current: 08/11/2019 (Week 1)

Next: 08/18/2019 (Week 2)

Show Rotation Shifts 

[Export](#) 

→ Repeat steps 7-9 in [Section 2](#) to enable **Enforce Rotations** on other jobs, as needed.

Employee Name	09/08	09/09	09/10	09/11	09/12	09/13	09/14
Danielle Garrett	 Rapid Testing A	Rapid Testing A	UA 3			Rapid Testing A	
Robert Smith			Rapid Testing A				
Megan Stoler	Rapid Testing C		Chemistry 2	Rapid Testing A			Rapid Testing C
Megan Gross					Rapid Testing A		

Notes About the Enforce Rotation Feature

08.06.2019 - Important notes about the **Enforce Rotations** feature:

→ The **Enforce Rotations** feature is disabled by default. Please contact StaffReady Support to have this activated.

→ The number of shifts in a rotation must be less than the number of employees who will be assigned to the rotation.

→ The **In Rotation** employee sort order determines the order in which employees will be assigned to the rotation shift(s), but does not affect the order that employees are displayed on the schedule. The employee sort order displayed on the Manage and Reports tabs is configured in the Employees color bar in the Setup tab. For more information, see the [Employee Sort Order](#) training guide.

### Rotation Employees

Not In Rotation		In Rotation		
Employee		Order	Employee	Consecutive Days
Bart Daniels	<input type="button" value="Add to Rotation"/>	☰	1 Danielle Garrett	⊖ 1 ⊕ <input type="button" value="Remove from Rotation"/>
Ellie Sumner	<input type="button" value="Add to Rotation"/>	☰	2	
Emma Bowers	<input type="button" value="Add to Rotation"/>	☰	3	
Gary Long	<input type="button" value="Add to Rotation"/>	☰		
Jim Hernandez	<input type="button" value="Add to Rotation"/>	☰		
Megan Gross	<input type="button" value="Add to Rotation"/>	☰		
Megan Stoler	<input type="button" value="Add to Rotation"/>	☰		
Robert Smith	<input type="button" value="Add to Rotation"/>	☰		

### Shift Assignments

Order	Shift Name	Shift Time	Shift Days							Include in Rotation
☰ 1	Rapid Testing A	09:00 - 17:00	Sun.	Mon.	Tue.	Wed.	Thu.	Fri.	Sat.	<input checked="" type="checkbox"/>
☰ 2	Rapid Testing B	07:00 - 15:00	Sun.	Mon.	Tue.	Wed.	Thu.	Fri.	Sat.	<input type="checkbox"/>
☰ 3	Rapid Testing C	13:00 - 21:00	Sun.	Mon.	Tue.	Wed.	Thu.	Fri.	Sat.	<input type="checkbox"/>

### Rotation Preview

Shift count must be less than the employee count



### In Rotation

Order	Employee	Consecutive Days		
☰ 1	Danielle Garrett	⊖	1	⊕ <input type="button" value="Remove from Rotation"/>
☰ 2	Megan Gross	⊖	1	⊕ <input type="button" value="Remove from Rotation"/>
☰ 3	Robert Smith	⊖	1	⊕ <input type="button" value="Remove from Rotation"/>
☰ 4	Megan Stoler	⊖	1	⊕ <input type="button" value="Remove from Rotation"/>

## Visit Our Training Center

To learn more about the **Staff Ready Scheduling** module, please review the following documents in the **Training Media Center**.

For assistance with **StaffReady Scheduling** features, please contact our Customer Support team:

6am-5pm PST  
Monday thru Friday  
Phone: 1.877.229.5230

[Online Support Form](#)

→ Click the **Need Help?** box in StaffReady to access our new online Chat feature!



Schedule Editor Overview	<a href="#">PDF Document</a>
Modify Schedules Menu	<a href="#">PDF Document</a>
Add to Schedule Menu	<a href="#">PDF Document</a>
Manage Leave Menu	<a href="#">PDF Document</a>
Approve Trades Menu	<a href="#">PDF Document</a>
Availability Override	<a href="#">PDF Document</a>
Schedule Leave Types	<a href="#">PDF Document</a>
Editing Employee Availability Pattern	<a href="#">PDF Document</a>
Editing Employee Availability Times	<a href="#">PDF Document</a>
Managers Color Bar	<a href="#">PDF Document</a>
Messages Color Bar	<a href="#">PDF Document</a>

