

Schedule360 Captivate Training Adding A New Employee

Add New

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To add a new employee click on the Add New link from the Staff tab



Fill out the contact screen. All red box fields are required. We recommend entering the user's email for communicating the username and password to the employee once created.





Click submit



The Duplication screen will appear if other users have the same last name. When adding new it is important to review the possible duplications to verify that they have not been added already.



After verifying that you are not duplicating the employee, click continue



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The employee's profile screen will display the employee's profile specifications.

Update the primary, secondary, and tertiary license or role. The primary license/role dropdown is required.

When entering a new profile always begin at the top of the screen.

The Scheduling Type will identify which bucket the employee belongs to and define their privileges for features such as post & exchange and entering availability.

Next you will identify any special scheduling types that the employee is qualified to work.

For example, if OnCall is not checked the employee will not match to OnCall shifts on the schedule.

Then add any work hour requirements for tracking. These are utilized to ensure all staff are optimized.





Then click submit

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The division screen allows you to define which group the employee will be scheduled into. Only select the divisions that apply.

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Click submit





The assignment screen controls which location(s) the employee matches to for scheduling. When reviewing the assignment screen always begin at the top by adding the home location. The home location is where time off requests will pend for manager approval. The employee must be qualified and assigned to their home location.

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For Qualified Locations check all of the locations the employee can match to for scheduling in a critical need situation.



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For Assigned Locations check all of the locations the employee can match to for scheduling on a regular basis.



Clinic Staff are typically QUALIFIED to many locations where they would pick up a hot shift or be scheduled for a critical need and only ASSIGNED to one or a few locations that they work regularly.

Float and PRN staff cross between locations regularly, so they are QUALIFIED and ASSIGNED to all of the locations they could potentially be scheduled to work.

Then click submit



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The Summary screen is visible to the employee's login. As mentioned they can only update their contact information. All other profile criteria can only be changed by an admin user.

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Click on the Active link from the Staff tab to return to the staff list for the clinic

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New employee is now showing on the staff list. Click on the employee's dropdown



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