YOUR SCHEDULING SOLUTION CHECKLIST

Scheduling is at the core of your organization and has the potential to provide huge time and cost saving benefits. Good scheduling software should not only be simple and intuitive to use, but should be able to handle your complex requirements & rules - while providing actionable oversight and reporting.

Now it's time for you to reap the benefit of scheduling software. Use this 3-step checklist to evaluate your options and make an informed decision.

STEP 1
Identify your Goals

What are the top 3 overall goals you want to get out of your scheduling solution:

Enter your Goals:

1. _____

2. _____

3. _____

Examples of Goals:

- I want better management oversight

- I want to be able to identify and reduce overtime

- I need more accountability for scheduling changes

- I need something that can handle my complex scheduling rules

STEP 2
Scheduling Solution Checklist

Vendor Explored:

Usability
When it comes to day-to-day functionality look for the following:

- ☐ *Month View:* Ability to view your entire. schedule a month out and make scheduling changes from the same screen.

- ☐ *Find Specifically Skilled Staff:* Ability to run a query on your employees and find staff with specific skills/training who comply with your union rules to work a shift.

- ☐ *Minimum Staffing:* The scheduling solution should show you your coverage levels down to the minute and notify you if a scheduling change puts you below minimum staffing.

- ☐ *Easy Daily Changes:* Do simple scheduling changes, like swapping shifts, take a few clicks or is it a more complex process than it needs to be?

- ☐ *Intra-Shift Scheduling:* Can you make scheduling changes within a shift? Ie. Include a 1-hour block of training with a pay differential within a regular day shift.

- ☐ *Alerts & Notifications:* System should notify you if a scheduling change puts you into overtime, below minimum staffing or does not comply with organizational rules.

- ☐ *Postings & Signups:* Solution should be able to quickly post out multiple shifts to employees to sign-up for. The system needs to be able to filter all employee signups based on your rules and allow you to schedule the best qualified employee to work the shift.

- ☐ *Post-Based Scheduling:* Schedule your employees based on what location they are stationed at in your detention center or Jail. Easily view which posts have adequate staffing and make adjustments on the fly.

- ☐ *Employee Communication:* Your employees should be able to access their schedules and make leave and overtime requests via a web portal or mobile app.

Organizational Rules
The system needs to be able to handle your complex organizational rules and all of the below:

- ☐ *FLSA & Fatigue Rules:* In addition to managing FLSA rules, the system should be able to warn or prevent you from scheduling an employee who has not met the minimum required rest time between shifts.

- ☐ *Overtime & Union Rules:* You probably have different rules for mandatory and voluntary overtime, so your system needs to have custom rule sets to filter employee signups.

- ☐ *Different Pay Rates:* The system should be able to handle all your different pay rates, premiums and differentials and attribute them to specific activities or shifts.

- ☐ *Custom User Role Permissions:* You may have multiple people managing different parts of your schedule and only want them to have access to certain parts. If this is the case, make sure your system allows custom user roles.

- ☐ *Multiple Levels of Approval:* If your organization requires multiple levels of approval for leave requests and/or signups, look for a system that can accommodate this.

Oversight & Reporting
Your scheduling solution should provide you with reporting and tools to help you measure the impact of your scheduling decisions.

- ☐ *History Tracking:* It's important to have a record of all changes made to the schedule. This keeps your schedulers accountable for their actions.

- ☐ *Overtime Reports:* You need to have reporting that allows you to know how much you are spending on overtime, what specific activities are contributing to the most overtime and who is approving overtime. This gives you the ability to take action and reduce unnecessary overtime.

- ☐ *Advanced Reporting:* Good reporting gives you insight into employee and scheduler behavior and the impactscheduling decisions make on your budget.

Modules & Integrations

All of the above features should come standard, but you may realize that you need more out of the software than you anticipated. Ask if these features are built in and if the system can easily integrate with your payroll solution:

- ☐ *Extra-Duty Scheduling:* Integrated extra-duty and regular day-to-day scheduling allows you to effectively reduce employee fatigue issues and gives you the ability to know where your employees are at all time.

- ☐ *Exception-Based Timekeeping:* Presumably your scheduling system will have all your employee overtime, timebanks, leaves and pay rules. Exception-based timekeeping uses this info to automatically populate your timesheets; meaning the only thing you need to manage is approvals.

- ☐ *Asset Tracking:* Assign equipment to employees and track usage history.

- ☐ *Training & Certification:* Tracks and makes sure your staff have the required training to work specific shifts.

- ☐ *Subpoena Management:* Sync your schedule with local courts to prevent court-related scheduling conflicts. The system should be able to electronically deliver subpoenas and give you the oversight to reduce court overtime.

- ☐ *Payroll Integration:* Is the system able to seemlessly integrate with your current payroll system?

Other

- ☐ *Free Trial:* It's a major red flag if a vendor doesn't give you the option of trying their product before you buy. Ideally, a trial should include some of your data and employee details.

- ☐ *Dedicated Hands-On Support:* Make sure you are getting dedicated phone support and 24/7 critical support.

STEP 3
Compare your Options

Use the checklist to evaluate several options and refer back to the goals you set in part 1. Which solution is helping you to achieve these goals with the most efficiency? Make sure the solution not only checks all the boxes, butis efficient and easy enough to use on a daily basis.

Not Checking all the Boxes?

Give InTime a shot and see how it stacks up to the competition. Schedule a demo today by clicking the link below:

REQUEST A DEMO

...or call us at 1-877-603-2830