

# WORKFORCE TECHNOLOGY SOLUTIONS PLAYBOOK SERIES: SCHEDULING SOFTWARE

## Solution Purpose: Efficiency and Convenience

- Provide widespread, real-time access to schedule
- Streamline schedule changes, posting open shifts, pick-up approvals
- Improve attendance tracking/accountability
- Enable better communication between scheduler, employees, and leadership
- Improve employee experience
- Track staffing levels and match with census and acuity

## Budget:

- Setup fee: Some solutions charge a setup fee per user/employee (\$5-\$10) and others charge a flat rate for setup (\$500-600). You will either have a per user/employee fee or a flat rate fee but not both. Setup includes the initial training offered by the solution.
- Training costs: Initial costs included in setup fee
- Ongoing costs: Range from \$3-\$10/user depending on scale, added features (i.e., timeclock) and fee structure (monthly vs. annual)

*Specific pricing for each vendor is not included in this playbook because the fees structures vary significantly. Contact information for each solution is included in the matrix to access accurate pricing for your operations.*

# VENDOR MATRIX

	ONSHIFT	EASYSHIFTS*	ABILITY/ INOVALON	SCHEDULEPOP
FEATURES				
SET UP COST	One-time flat fee for set up	Per-user setup fee	One-time flat fee for setup	One-time flat fee for setup
ACTIVE PRESENCE IN MN?	✓	✓	✓	✓
TOP EHR INTEGRATIONS	PCC, MatrixCare, Yardi	PCC	PCC	PCC, MatrixCare, Experience Care
TOP HRIS/PAYROLL INTEGRATIONS	ADP, Paycor, V1ventium, UKG/Kronos, Proliant	ADP	ADP, Paylocity, UKG/Kronos, PeopleSoft, Great Plains	ADP, Paycor, UKG/Kronos, Paychex
TOP TIMECLOCK INTEGRATIONS	ADP, UKG/Kronos, Paylocity, Paychex, Attendance on Demand	No integrations - use a proprietary timeclock solution	ADP, UKG/Kronos, Paycom	ADP, UKG/Kronos, Paycor, Paychex
OWN TIMECLOCK FEATURE?	✓	✓	✓	X
PARTIAL SHIFT PICKUPS?	✓	✓	✓	✓
IMPELMENTATION SUPPORT <small>(PROVIDED BY SOLUTION REPRESENTATIVE)</small>	<ul style="list-style-type: none"> <li>• Takes the lead on implementation.</li> <li>• 24/7 support.</li> <li>• On-demand learning portal</li> <li>• Free monthly training webinars.</li> </ul>	<ul style="list-style-type: none"> <li>• Completes initial setup.</li> <li>• Ongoing support provided at no charge to customers.</li> </ul>	<ul style="list-style-type: none"> <li>• Establish contacts for successful implementation.</li> <li>• Implementation Kick-Off Call.</li> <li>• Warm transition to the support team.</li> </ul>	<ul style="list-style-type: none"> <li>• Manages all set up and training.</li> <li>• Unlimited support.</li> <li>• Customized roll-out plan.</li> <li>• Commitment to training/ onboarding entire group in 30 days or less.</li> </ul>
KEY DIFFERENTIATOR <small>(PROVIDED BY SOLUTION REPRESENTATIVE)</small>	Platform built for long-term care & senior living. Innovative approach helps providers dramatically reduce turnover rates, decrease costs, and improve the quality and continuity of care.	Customer service, development, partial shifts, longevity in the space.	Provides real-time communication, open shift management, overtime tracking, and mobile access to schedules and timeclocks all in one place.	The easiest to use smart scheduling platform in the senior care industry, with dedicated web, Manager, and Staff apps. Intuitive features built specifically for senior care.
CONTACT	<b>General:</b> 800.385.1494, <a href="mailto:info@onshift.com">info@onshift.com</a>	<b>General:</b> 920-403-0405 <a href="mailto:support@easyshifts.com">support@easyshifts.com</a> <b>Direct Contact:</b> Ben Oburn: 937-344-1037	<b>General:</b> 301-809-4000 <a href="http://Inovalon.com/support">Inovalon.com/support</a> <b>Direct Contact:</b> Steve VanDerMeer, 612-277-1417 <a href="mailto:steve.vandermeer@inovalon.com">steve.vandermeer@inovalon.com</a>	<b>General:</b> 919-244-2461 <b>Direct Contact:</b> Robert Renquist, 919-986-9198 <a href="mailto:robert@schedulepop.com">robert@schedulepop.com</a>
WEBSITE	<a href="http://OnShift">OnShift</a>	<a href="http://EasyShifts">EasyShifts</a>	<a href="http://Inovalon Workforce Management">Inovalon Workforce Management</a>	<a href="http://SchedulePop">SchedulePop</a>

# IMPLEMENTATION

## Key Personnel for Successful Implementation

**Project Lead(s):** (responsible for internal coordination and vendor communication):

Personnel to consider for Project Lead role: Staffer, department leader, HR, or administrative intern

*Note: Recommend co-leads to maintain continuity if change in employment, illness, etc.*

**End-users:** (Individuals and groups who will interact with the software)

- All supervisors who are responsible for scheduling support
- All employees who will be using the software for their schedule
- All on-call leaders/supervisors who will support staffing needs
- Corporate/regional/community leadership (reporting purposes)

**Vendor Selection Team:** (Key stakeholders who should be part of the decision-making process because they have a vested interest or expertise)

- Project Lead
- Administration
- IT/Tech support
- Staffing coordinator
- Department leader
- End-user representative(s)

**Team/Staff to Support Product Launch:** (Key stakeholders who will play a vital role with training, troubleshooting and will be ambassadors of the changes needed)

- Project Lead
- Operations/administration/executive director
- Department leadership
- Human resources
- Staff education/training role
- IT/Tech support
- End-user representative(s)

**Follow-up Supporting Coalition Team:** (Individuals who play a key role with reinforcing the rollout success because of their job description and/or leadership responsibilities)

- Staffer/staffing coordinator
- Department leadership
- Operations/administration/executive director
- Staff education/training role

# IMPLEMENTATION

## Best-Practice Implementation

**Key software integration/compatibility:** This technology can be impactful on its own. Additional efficiencies can be gained integrating it with existing systems or software, including:

- Payroll
- Time & attendance
- HR systems
- EHR (to match staffing with census and acuity levels)

### Infrastructure/equipment requirements:

- Robust Wi-Fi throughout community
- Dedicated mobile device for staffer
- Dedicated mobile device for on-call staffing support (department leadership)
- Connected device in key department areas including breakroom

### Expected timelines after vendor is selected: *Approximately 6 months*

- 4-6 weeks for software setup (logins, app downloads, system integrations may require additional time)
- 6-8 weeks for staff training, communication and policy and procedure review/revisions
- 4-6 weeks of advanced oversight and monitoring after roll-out to ensure success
- 4 weeks follow-up and check-in touchpoints

**Location Needs:** No physical location required; Web-based solutions, remotely accessed through computers and mobile devices (phones/tablets)

### Policies/Procedures impacted:

- Adding/removing/editing employee schedules
- Approving shift changes and overtime
- Pick-up request notification
- Call-in processes/policies
- Orientation/onboarding – embed training into new employee orientation at time of launch

### What to expect post-implementation:

- Improved utilization of PRN staff and pick-ups
- Reduction in pickup incentives
- Improved retention due to reduced friction with scheduling processes
- Overtime will not be eliminated or drastically reduced solely due to scheduling software. You may gain benefits with reduced overtime, but this may happen over a longer period because of a better utilization of part-time or PRN employees and seamless communication about open shifts.

# IMPLEMENTATION

## Tips:

- Remove old processes at time of launch
- Preschedule checkpoints for Follow-up Supporting Coalition Team to reconvene after launch weekly/biweekly to strengthen change management and implementation success
  - Spot checking with employees about their use/comfort with the new software. Troubleshoot/retrain on the spot.
  - Monitor for attempts to return to old system for shift swapping/pickups or scheduling communication. Troubleshoot/retrain on the spot.
- Online system enables easy access for entire department.
  - Review pick-up incentive processes: Consider rewarding people for picking up before the pay period starts. Create incentive for filling the schedule in advance.

## What's next for this technology?

- These solutions continue to advance in their ability to integrate with other systems and most are on an open platform capable of broad levels of integration.

## Playbook development and disclaimer:

This playbook was developed to assist care providers and operators in the understanding of scheduling software but cannot include all systems that may be available. Products mentioned in this playbook serve as illustrative examples and were included because of the following:

- Recommendations from LeadingAge members
- Information gathering from solution providers
- Product demos and Q&A meetings with solution providers
- Information gathered directly from active users of scheduling software
- Provider case studies

Please use this playbook as a general guide in understanding functionalities and capabilities of these solutions as well as a means to implement your chosen solution more successfully. These solutions have not been tested or verified by LeadingAge Minnesota. Providers are strongly advised to verify functionalities of vendor solutions prior to final selection through demonstrations, site visits, reference checking and other due diligence.