

Schedule360 Captivate Training

Adding A New Employee

Add New

Active Employees

Facilities Location TX - CLIN - Waco All Locations TX - CLIN - Waco

Scheduling Staff Admin Logout

Directory Type

TX - CLIN - Waco

Staff

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

Name	APR	MAY	JUN	Primary Phone	Secondary Phone	Notes	Messages	
Abdul, Farida LMRT	▼	Act	Max	Jun	419-496-1818	419-496-1818	Notes	Messages 1
Bishop, Justin MCP	▼	Act	Max	Jun	419-496-1818	419-496-1818	Notes	Messages 1
Clark, Lauren NCI	▼	Act	Max	Jun	419-496-1818	419-496-1818	Notes	Messages 10
Dalmeida, Samantha PSA	▼	Act	Max	Jun	419-496-1818	419-496-1818	Notes	Messages 2
Finley, April PSA	▼	Act	Max	Jun	419-496-1818	419-496-1818	Notes	Messages 2
Harris, Melissa MB	▼	Act	Max	Jun	419-496-1818	419-496-1818	Notes	Messages 1
Herman, Britney PSA	▼	Act	Max	Jun	419-496-1818	419-496-1818	Notes	Messages 2
Jakobs, Kim MCP	▼	Act	Max	Jun	419-496-1818	419-496-1818	Notes	Messages 20
Johnson, Sandra PSA	▼	Act	Max	Jun	419-496-1818	419-496-1818	Notes	Messages 2
Joseph, James NCI	▼	Act	Max	Jun	419-496-1818	419-496-1818	Notes	Messages 1
Mason, Emily LMRT	▼	Act	Max	Jun	419-496-1818	419-496-1818	Notes	Messages 2
Moore, Sarah MA	▼	Act	Max	Jun	419-496-1818	419-496-1818	Notes	Messages 1
Murphy, John LMRT	▼	Act	Max	Jun	419-496-1818	419-496-1818	Notes	Messages 2
Phelan, Julia PSA	▼	Act	Max	Jun	419-496-1818	419-496-1818	Notes	Messages 2
Phelan, Anthony LMRT	▼	Act	Max	Jun	419-496-1818	419-496-1818	Notes	Messages 2
Roemer, Jackie MA	▼	Act	Max	Jun	419-496-1818	419-496-1818	Notes	Messages 2
Smith, Elizabeth MB	▼	Act	Max	Jun	419-496-1818	419-496-1818	Notes	Messages 2
Thompson, Corey PSA	▼	Act	Max	Jun	419-496-1818	419-496-1818	Notes	Messages 2
Waller, Tracy MA	▼	Act	Max	Jun	419-496-1818	419-496-1818	Notes	Messages 2
Williams, Corey LMRT	▼	Act	Max	Jun	419-496-1818	419-496-1818	Notes	Messages 2
Wilson, Cherie RT	▼	Act	Max	Jun	419-496-1818	419-496-1818	Notes	Messages 2
Wright, Brian LMRT	▼	Act	Max	Jun	419-496-1818	419-496-1818	Notes	Messages 2

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

Contact Screen

Facilities Location TX - CLIN - Waco All Locations TX - CLIN - Waco

Scheduling Staff Admin Logout

TX - CLIN - Waco: Contact - ▼

Contact Profile Divisions Assignment Summary

Contact Info Active Inactive

First Name Last Name

Primary Phone Unfilled

Secondary Phone Unfilled

Email Unfilled

Call Phone Messaging Add New/Select Profile Unfilled

Profile Specifications

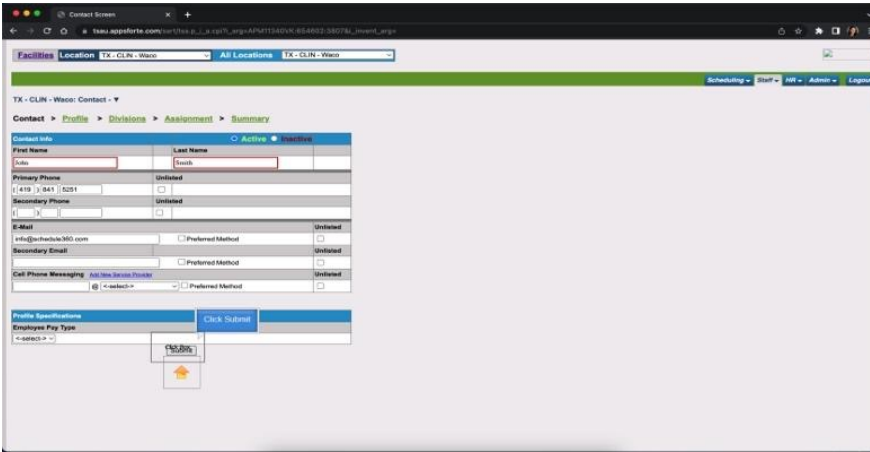
Employee Pay Type

Submit

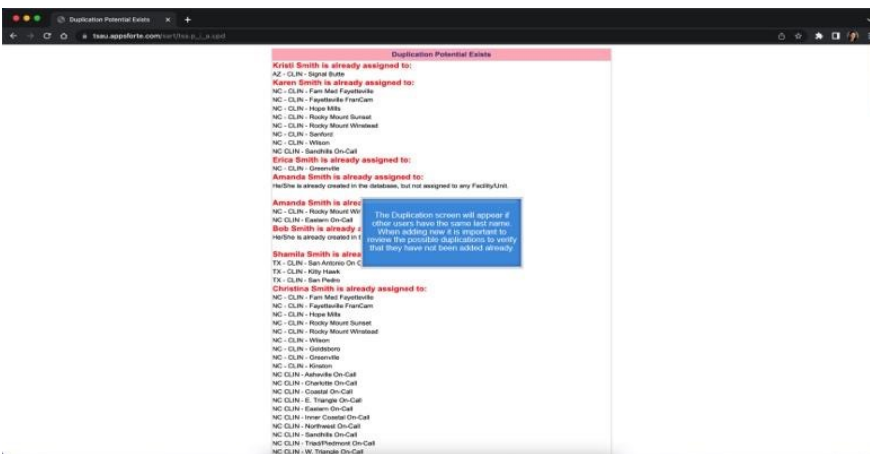
Fill out the contact screen. All red box fields are required.

We recommend entering the user's email for communicating the username and password to the employee once created.

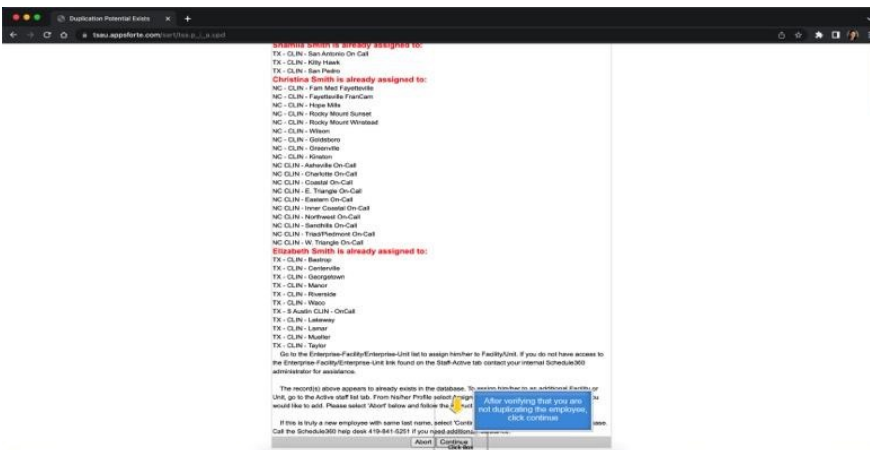
Fill out the contact screen. All red box fields are required. We recommend entering the user's email for communicating the username and password to the employee once created.



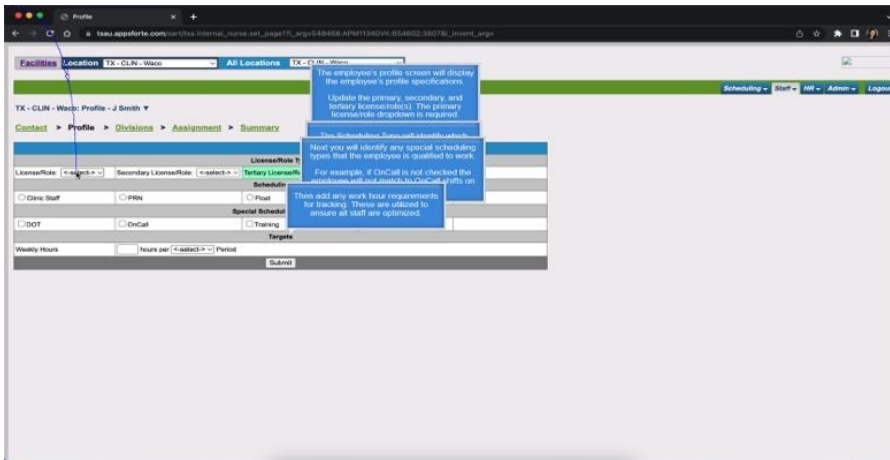
Click submit



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



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.

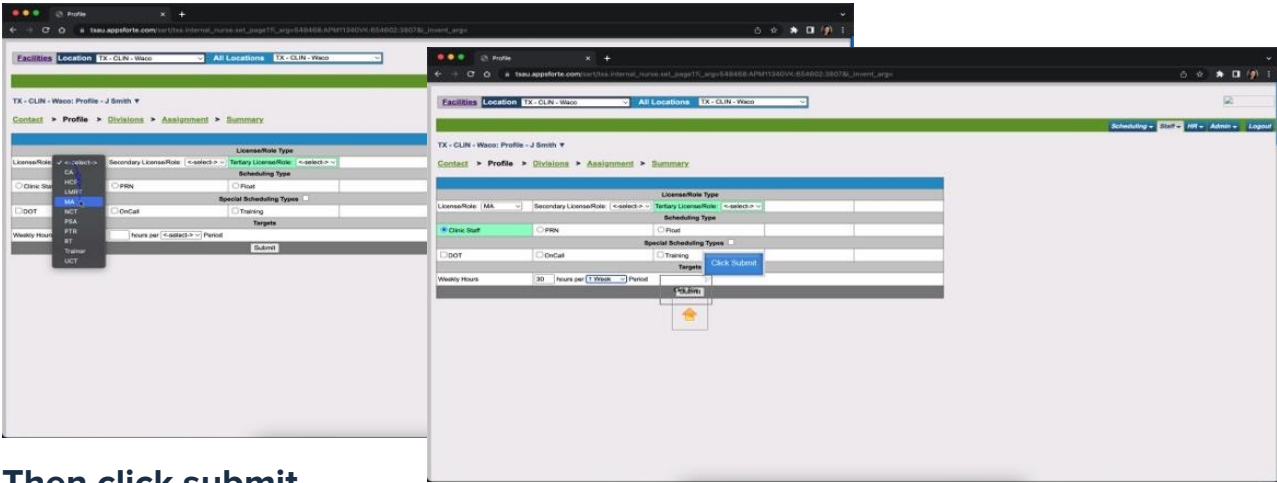
When entering a new profile always begin at the top of the screen.

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

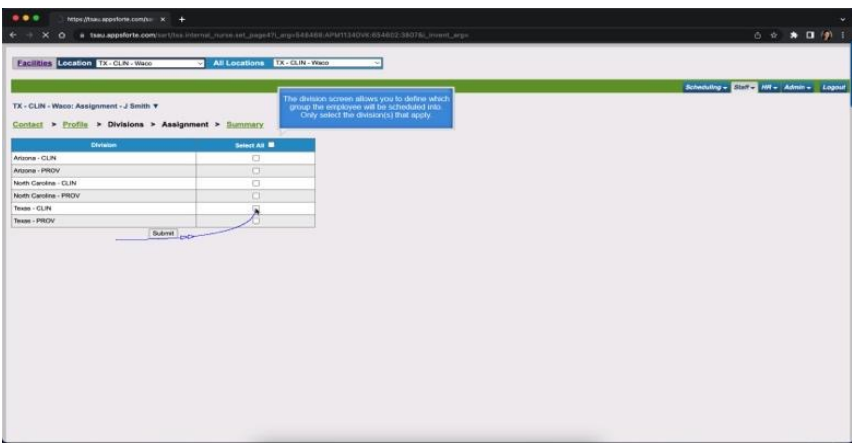
Next you will identify any special scheduling types that the employee is qualified to work.

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

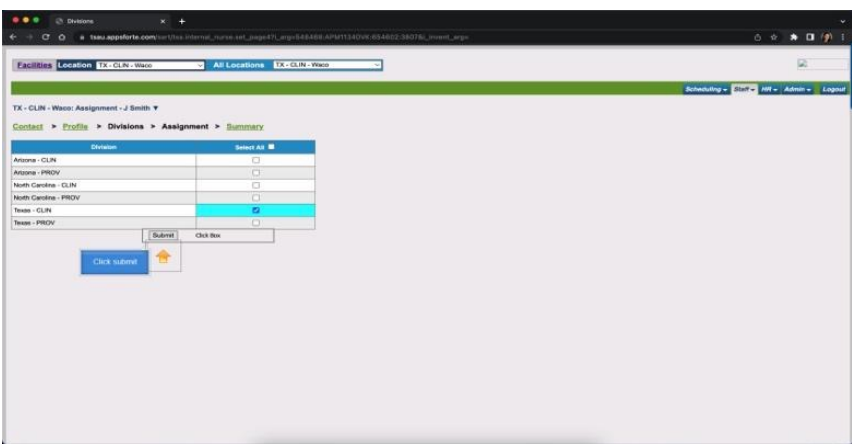
Then add any work hour requirements for tracking. These are utilized to ensure all staff are optimized.



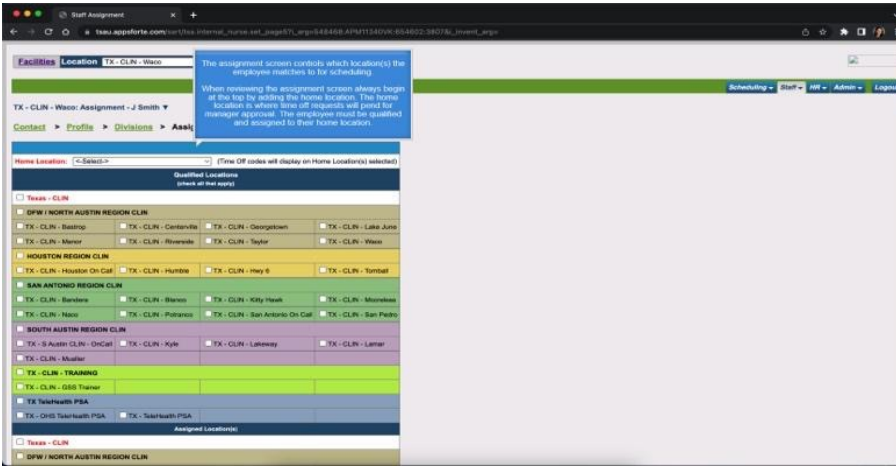
Then click submit



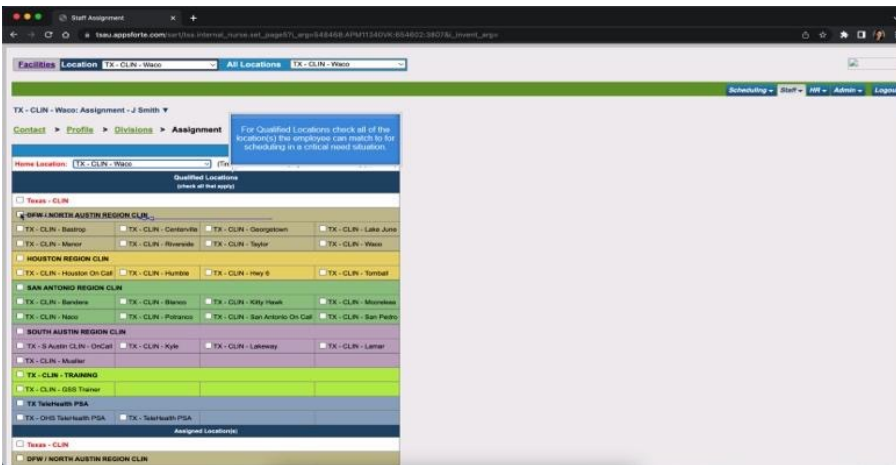
The division screen allows you to define which group the employee will be scheduled into. Only select the divisions that apply.



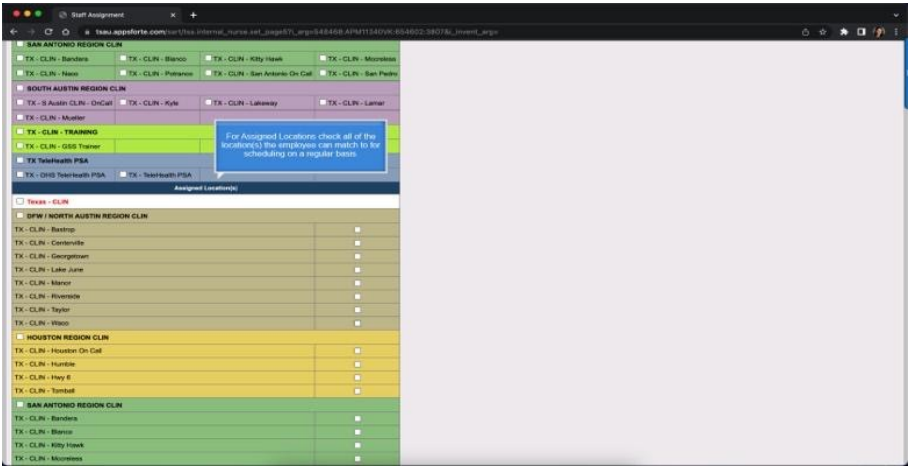
Click submit



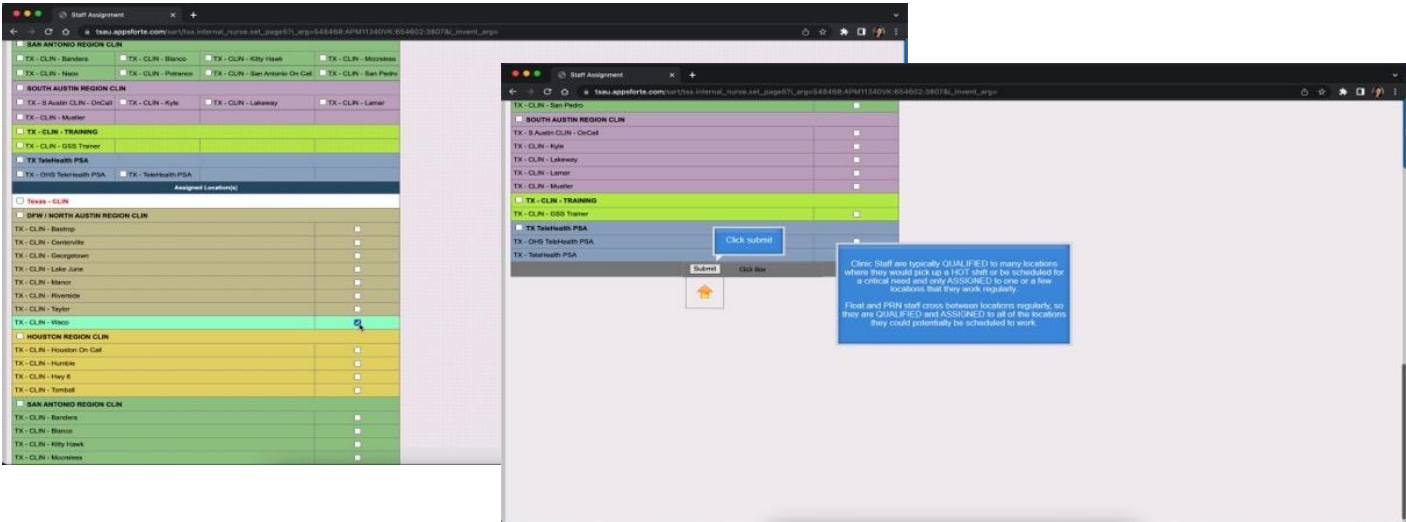
The assignment screen controls which location(s) the employee matches to for scheduling. When reviewing the assignment screen always begin at the top by adding the home location. The home location is where time off requests will pend for manager approval. The employee must be qualified and assigned to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



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



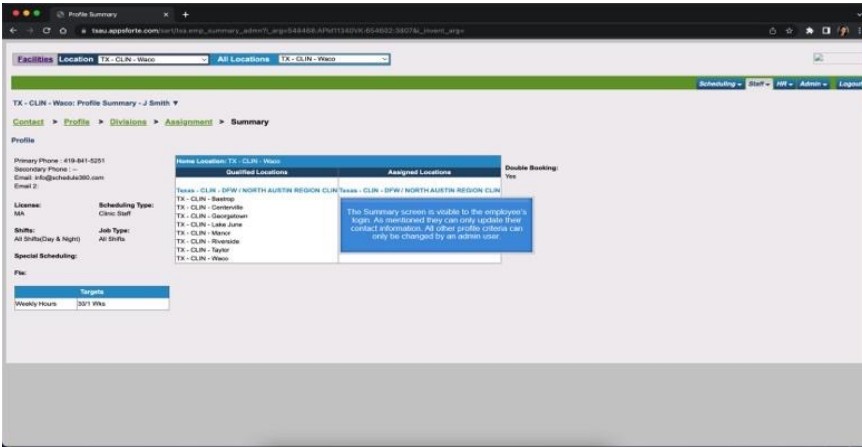
For Assigned Locations check all of the locations the employee can match to for scheduling on a regular basis.



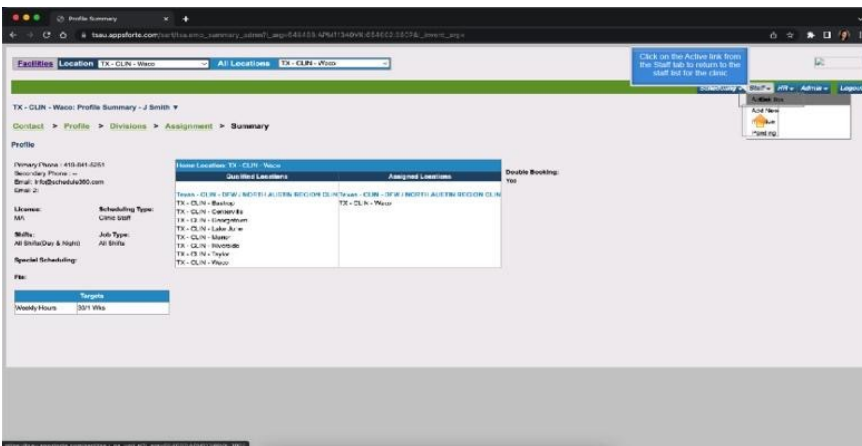
Clinic Staff are typically **QUALIFIED** to many locations where they would pick up a hot shift or be scheduled for a critical need and only **ASSIGNED** to one or a few locations that they work regularly.

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.

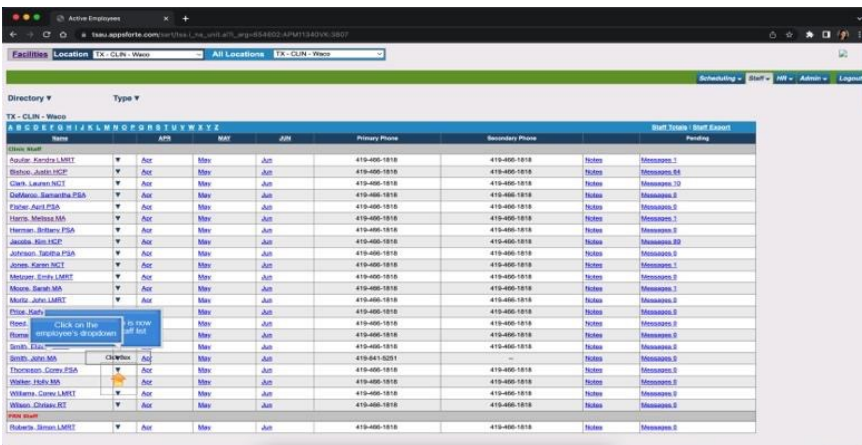
Then click submit



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.



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



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

Name	Title	Position	Start	End	Primary Phone	Secondary Phone	User Account	Priority
Alvin, Karla	LMT		Jun	Jun	419-466-1818	419-466-1818	Notes	Messages 1
Baltes, Justin	SCF		May	Jul	419-466-1818	419-466-1818	Notes	Messages 88
Dash, Lauren	NCT		May	Jul	419-466-1818	419-466-1818	Notes	Messages 10
DeMora, Samantha	PSA		May	Jul	419-466-1818	419-466-1818	Notes	Messages 0
Fisher, Austi	PSA		May	Jul	419-466-1818	419-466-1818	Notes	Messages 0
Harris, Melissa	MM		May	Jul	419-466-1818	419-466-1818	Notes	Messages 0
Herman, Erin	PSA		May	Jul	419-466-1818	419-466-1818	Notes	Messages 0
Jabala, Kim	SCF		Jul	Jul	419-466-1818	419-466-1818	Notes	Messages 88
Johnson, Tamara	PSA		May	Jul	419-466-1818	419-466-1818	Notes	Messages 0
Jones, James	NCT		Jul	Jul	419-466-1818	419-466-1818	Notes	Messages 1
Moore, Emily	LMEC		May	Jul	419-466-1818	419-466-1818	Notes	Messages 0
Moore, Sarah	MA		May	Jul	419-466-1818	419-466-1818	Notes	Messages 1
Murphy, Julia	LMEC		May	Jul	419-466-1818	419-466-1818	Notes	Messages 0
Park, Kelly	PSA		May	Jul	419-466-1818	419-466-1818	Notes	Messages 0
Reed, Anthony	LMEC		May	Jul	419-466-1818	419-466-1818	Notes	Messages 0
Reyes, Jackie	MA		May	Jul	419-466-1818	419-466-1818	Notes	Messages 0
Smith, Elizabeth	MM		May	Jul	419-466-1818	419-466-1818	Notes	Messages 0
Smith, Julia	MA		Jun	Jun	419-841-0251	-	Notes	Messages 0
Thompson, Corey	PSA		Jul	Jul	419-466-1818	419-466-1818	Notes	Messages 0
Walker, Kelly	MM		Jul	Jul	419-466-1818	419-466-1818	Notes	Messages 0
Wolcott, Corey	LMEC		Jun	Jun	419-466-1818	419-466-1818	Notes	Messages 0
Wright, Christy	RT		Jul	Jul	419-466-1818	419-466-1818	Notes	Messages 0

Click on the User Account link

User Account

Web Address: www.FastMailSchedule360.com

Name: Smith, Julia

Email: [Redacted]

Phone: [Redacted]

Original: [Redacted]

Created by: [Redacted]

Click Send credentials to employee via email to send the new user their username and password

Close Change Password Send credentials to employee via email

Click Send credentials to employee via email to send the new user their username and password