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Maximize Your Workforce

How automated scheduling is changing the way organizations manage their most valuable asset - time.

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Workforce Scheduling

Executive Summary

When it comes to scheduling your workforce, the devil is in the details. And oh what a lot of details there are.

Managers for municipalities, retailers, fire and police departments, or universities that hire student workers must balance the demands of each shift with the qualifications and preferences of each worker, all while complying with collective bargaining agreements and minimizing overtime costs. Tracking, managing, and controlling these variables with widely used manual paper-based or spreadsheet systems is difficult and time-consuming at best.

Compounding the challenge is the dynamic nature of schedules. Someone is always calling in sick or asking for a change. With manual scheduling processes, managers find themselves going back to the drawing board whenever a change is necessary, repeatedly reworking and redistributing the entire schedule.

This white paper details the complexities your managers encounter with manual scheduling--and shows you a better way. With an Advanced Scheduling solution, your organization can automate scheduling processes. No longer will your managers tear their hair out making sure shifts are covered with the right staff. Advanced scheduling solutions get schedules right the first time and enable your managers to instantly adapt to changes. Not only do managers become more efficient, they reduce overtime costs and can rest easy knowing that they're in compliance with union agreements and labor laws.

**74% OF POLICE DEPARTMENTS
STILL USE SPREADSHEETS &
MANUAL SCHEDULING FOR
TASKS AS VITAL AS
RESPONDING TO
EMERGENCY CALLS
& PROTECTING
THE PUBLIC. ¹**

1. <https://www.policeone.com/police-products/software/scheduling/articles/481847006-White-paper-How-to-overcome-the-chaos-of-managing-officer-schedules/>

Chances Are, You Rely on Manual Scheduling

If you're like most municipalities, retailers, fire and police departments, or universities that hire student workers, you likely use paper schedules or spreadsheets to schedule your staff. For example, a 2018 survey by PoliceOne found that 49% of police departments rely on spreadsheets and 25% use a paper-based record system to keep track of shift schedules. Even in an emergency, almost 80% of police departments still depend on spreadsheets and other manual methods to staff and deploy officers. These manual processes take up valuable time that could allow the disturbance to further escalate.

The Complexity of Manual Processes

If your organization uses spreadsheets or paper-based scheduling methods, ensuring shifts are fully staffed with the right mix of workers demands significant manual effort. Your managers must manually balance employee skills, credentials, and preferences, then call or email workers one-by-one to see if they'll accept the shift. If someone turns down the shift or calls in sick, the manager must find the right replacement and manually update the spreadsheet again. Continuously republishing and communicating the schedule to ensure everyone is working from the most recent version becomes a major hassle.

Manual processes such as these increase costs by using managers time inefficiently. Managers also have little visibility into anticipated overtime, paving the way to unnecessary expense. Because managers rely on employees to check and correctly interpret weekly schedules, your organization is vulnerable to missed shifts and no-shows.

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Keeping track of worker preferences and details

Who's available? Who's on vacation? Who's sick? What are each individual's work preferences? Managers juggle these details and more whenever they create a schedule. On top of that, they must consider labor laws, such as those that govern how often employees can work and the length of breaks between shifts. Not only is manually tracking all these variables a nightmare, it steals precious time from managers' other responsibilities.

Assigning workers with the right qualifications

Each shift demands workers with specific credentials or training. At the same time, managers must also assign the right mix of workers across the shift. For example, a police department might need at least one female officer on hand at all times to frisk female inmates. Manual systems require managers to refer to a list of each worker and their credentials and require managers to tediously balance each shift.

Filling unplanned absences

If creating the initial schedule is hard, filling an unplanned absence can be even more difficult. Say the individual who drops a shift is the only person on that shift who meets two requirements: they're a female officer who is canine certified. The manager can't simply fill the slot with a male officer or with a female officer who is not canine certified. The manager is left to determine how to re-balance the shift.

Automated scheduling takes employers up to 60% less time compared to manual scheduling.

Distributing overtime equitably

Managers are often tempted to rely on specific employees to do particular tasks or take certain shifts. But if they're not careful, they could send the wrong message. If your organization has an extra shift and the people who work it stand to make overtime, you need to offer the shift in an equitable manner in compliance with your collective bargaining agreements. Some agreements may require you to offer the shift in sequence on a rotating basis, others by who has the least overtime, or you may follow some other policy. Assigning overtime manually requires managers to accurately track these sequences or hours worked—a daunting task.

Controlling overtime costs

It doesn't take much for overtime costs to spiral out of control. If several employees work late on Monday to address an emergency, they'll be up for overtime later in the week. When scheduling swaps, managers also need to make sure pulling in a particular worker doesn't result in overtime or that they're not working a double, triggering a shift premium. Manual scheduling solutions lack visibility into potential overtime implications, increasing overtime costs.

Gaining visibility into swaps and drops

Scheduling complexities mean that many companies don't allow employees to do swaps on their own. The manager must complete all scheduling tasks, taking considerable time away from more productive activities. Moreover, with constant swaps and drops, a schedule printed at the beginning of the week can quickly grow stale. Managers spend precious time continually creating and printing up new schedules.

When companies allow employees to make swaps on their own, employees have no way to easily determine who they can potentially switch with. They must ask around to find someone who isn't scheduled to work the shift. Once they find a replacement, they'll inform the manager. But if the manager is distracted and fails to record the swap properly, the manager may not recall who is supposed to be working the shift. In some circumstances, managers may be required to approve swaps—for example, if a new worker has already met their maximum overtime. It can be difficult and time consuming to manually track these exceptions.

Advanced Scheduling Comes to the Rescue

Automated Advanced Scheduling solutions address challenges managers face with manual processes, making scheduling easier and more intelligent. With these solutions, managers configure policies and business rules that are used to create schedules that meet shift requirements automatically.

For example, a business rule might direct the advanced scheduling system to look for an individual who is EMT-certified, available to work, not close to overtime, and has seniority when offering open shifts. It might then give workers three minutes to respond before offering the open slot to the next person. Once the system populates the shift, it emails the workers, who use an app to accept the offer.

Not only does such an automated process save significant time and effort for managers, it also improves accuracy. Everything that happens in the software is tracked and recorded. No longer must managers manually fill in spreadsheets and adjust them when schedules change. Managers even have the option to offload tasks, such as swaps, through employee self-service, giving them back even more time for value-added activities.

Automatically track employee details and preferences

With an advanced scheduling solution, hunting through paper records or spreadsheets for details necessary to schedule each worker is a thing of the past. The system tracks all employee qualifications, certifications, shift preferences, overtime requirements, and more. Business rules use these details to instantly find the right individual for each slot and create a schedule that meets employee preferences. Managers save time, and your organization improves employee satisfaction.

THE AVERAGE MANAGER SPENDS UP TO 3.5 HOURS PER WEEK MANAGING EMPLOYEE SCHEDULING. NOT ONLY IS MANUAL SCHEDULING INEFFICIENT, BUT IT INTRODUCES THE RISK FOR HUMAN ERROR.



Validate the right person for the job and shift

Automated business rules make it fast and easy to fill each slot with a qualified employee and ensure that each group of shifts has the right mix. The system tags each employee according to the types of jobs they can work (e.g., RN, LVN, shift lead and so on) and the qualifications they hold (e.g., CDL, EMT, and so on). Business rules define the requirements for each slot and each collection of shifts and automatically match them with appropriate workers.

Ensure Equitable Overtime Assignments and Compliance with Labor Laws

Ensuring equitable overtime and compliance with labor laws is now a simple matter of configuring rules. For example, managers can instruct the system to offer extra work based on the number of hours each employee has worked, giving priority to the workers with the fewest hours. Alternatively, they can use a turn-based system that has everyone on the list. When someone is offered or accepts the shift they are moved to the bottom of the list.

Reduce Overtime Costs

Your organization is no longer at risk for excessive overtime with advanced scheduling. Managers build business rules to reassign shifts or avoid offering shifts to employees who might be eligible for overtime, preventing overtime altogether. Managers even have visibility into how much more time any given employee can be scheduled before they go into overtime. Reports and dashboards also give managers insight into trends. Now managers can add shifts or resources based on anticipated needs and improve shift coverage while reducing costs.



Better Visibility for Drops and Swaps

A picture is worth a thousand words. The same is true for scheduling. An advanced scheduling solution gives managers a visual schedule and dashboards to improve visibility. Managers can see real-time snapshots of schedules by any period. With the Manager Dashboard, managers can easily view workers' leave requests, pending swaps, open shifts, tardies, early in/early out, and employees approaching overtime in real time. Exception management capabilities allow managers to view and authorize swaps and drops made by employees, offer open shifts, and see exceptions. For example, the system might bring any potential triple shifts to the manager's attention before adding them to the schedule.

Managers can also empower employees to manage their own shifts by giving them customized dashboards. Employees can use these dashboards to accept shifts online or perform their own swaps and drops with full visibility into the department schedule to see who's available at what times. With the ability to see pending drop requests, pending swaps, hours worked, check messages, save or view links and their personal schedule, employees can answer their own questions without having to take time from a manager.

Conclusion

Advanced Scheduling Software solutions eliminate the hassle of manually putting together a schedule that covers each shift with the right talent, and continually updating it as changes roll in. These solutions accurately track employee qualifications and preferences while ensuring that each shift meets your business demands and union requirements—all while minimizing overtime costs. Now, your managers can shift their focus from manual scheduling processes to adding value to your employees and your organization.

About TimeClock Plus

TimeClock Plus v7 with Advanced Scheduler

TimeClock Plus offers a comprehensive Advanced Scheduler which enables your managers to address your complex scheduling demands quickly and without fuss.

A visual dashboard with customizable widgets gives managers a streamlined look into the most important aspects of their schedules. Managers use a visual Master Schedule to create shifts and define business rules for how shifts should be filled. Managers can also view live snapshots of schedules by any period. A shift board provides a drag-and-drop interface that managers can use to offer open shifts as well as view and approve swaps and drops made by employees in real-time. The system notifies managers about offers and swaps that could result in overtime.

Employees have access to an employee dashboard that managers customize for them based on their role. Rather than constantly going to their manager, employees use their dashboard to answer their own questions by showing them the status of drop requests, pending swaps, hours worked, messages, personal schedules and more. A roster menu shows employees the entire department schedule and who's working at any time of day, enabling them to quickly and easily swap shifts with coworkers.

You need a solution that guarantees accuracy and a partner with the expertise and technology to pay your people correctly and on time. With TimeClock Plus, the entire time and attendance solution, including Advanced Scheduling is fully integrated with your payroll.

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