

Own Employee Scheduling Like an HR Pro

A Blueprint for Success



WorkforceHub.
powered by swipeclock



This eBook is for business owners who want to create effective employee schedules as efficiently as possible. First off, let's outline the goals of employee scheduling. Employee shift planning should;

- Ensure employees can take care of your customers, clients, or patients
- Meet production demands
- Maximize productivity and make the most efficient use of resources
- Maintain employee satisfaction and loyalty
- Comply with all labor laws

Are you constantly putting out scheduling fires? Would you like to improve your labor force planning? Employee scheduling can become a strategic tool for business growth. Instead of a relentless, unpleasant chore that occupies too much time and energy.

First, we will discuss **how to do shift planning using scheduling software**. Then we will discuss **best practices for scheduling hourly workers**. Lastly, we will look at **predictive scheduling laws**.

How to use scheduling software

It doesn't matter what type of business you have—you need the right tool for the job. Unlike spreadsheets, scheduling software is built from the ground up for employee scheduling. As such, it can perform scheduling wizardry far beyond the abilities of paper calendars or spreadsheets.

Scheduling and time and labor

You can't separate scheduling from employee time and attendance—they are two sides of the same coin. Employee scheduling solutions are most powerful when they integrate with or include employee timekeeping functions. As such, they are often created and sold as one product. This means that employee punches, timecards, and accruals all sync with the schedule builder.

The timekeeping/scheduling process:



The employee is scheduled for work



as employees work, hours are tallied and PTO is accrued based on company policies

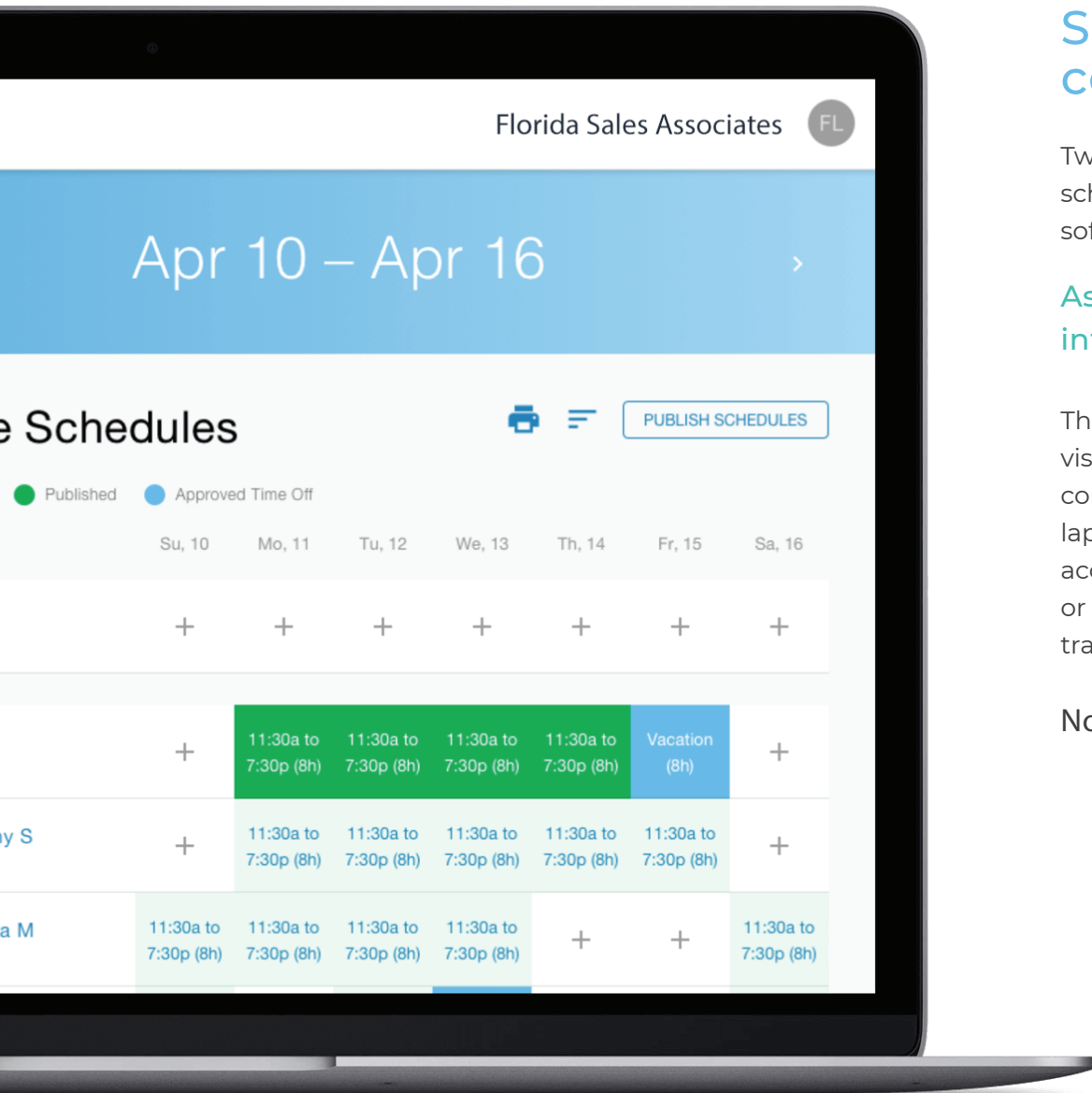


employees can request PTO within the scheduling system



Approved PTO is factored into future schedules and accruals

As we discuss various scheduling tools and functions, keep in mind the important relationship between scheduling, timekeeping and [PTO](#).



Schedule visibility and communication

Two key benefits of specialized scheduling software are schedule visibility and ease of communication. Scheduling software is cloud-based.

As such, users can access the scheduler from any internet-enabled device.

That means managers, employees and admin have real time visibility into scheduling combined with a convenient way to communicate. They can access the scheduler from a desktop or laptop computer. With a companion mobile app, they can access the schedule and communication tools on a smartphone or tablet. Schedule visibility and communication are transformative.

Now, let's discuss how the software works.

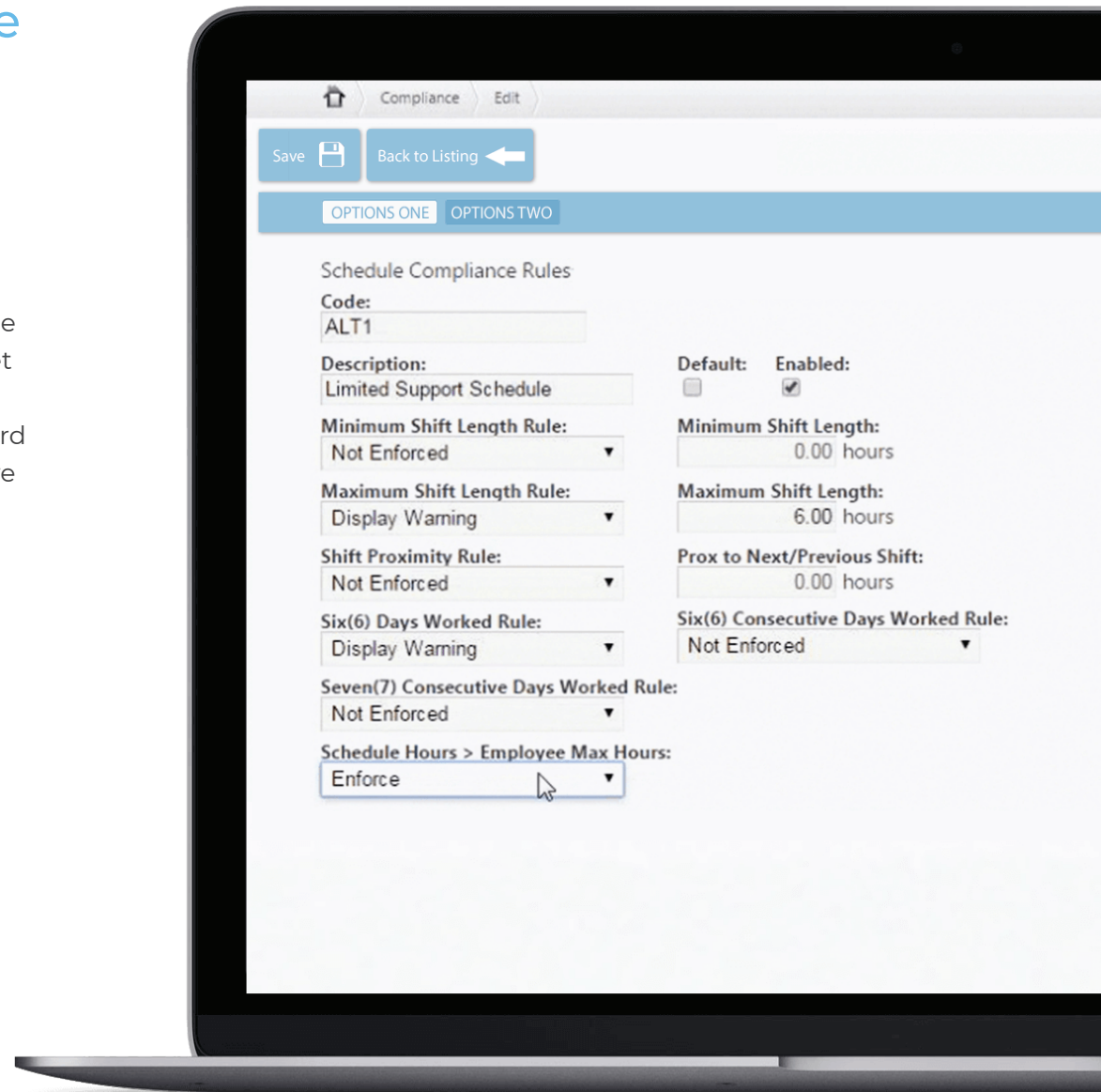
How to use scheduling software

Scheduling products have a graphical interface that allow for a high degree of personalization. **You'll have a dashboard and interactive calendar where you will create your schedules.**

Color code employees, shifts, workgroups, job functions or locations.

Start by pulling employees into shifts on the calendar. Move the cursor to extend or decrease the time of a shift. Once you've set the schedule for a week or pay period, you want to create a template for your master schedule. Then you can copy it forward from week to week. It may need some tweaking, but you'll have the basic framework in place and won't ever have to start from scratch.

You can make as many templates as you need. For example, you may have a template for the busy season and another for the slow season. You may have a template for each business location. Or, you may have templates based on teams or job roles.



Create schedules in advance

Since scheduling involves real people who are responsible for your business success, efficiency can't be the only goal of scheduling. Employers must respect the profound impact scheduling has on employees' lives.

Fortunately, you can balance efficiency with the needs of your employees. It all starts with planning ahead. Create schedules as far in advance as possible. Make sure your employees understand that there may be last-minute changes. Most employees, however, won't be affected.

Studies have shown that there is far less schedule unpredictability than business owners realize.

Schedule faster

By using scheduling software, you can reduce the time it takes to create schedules by 80%!

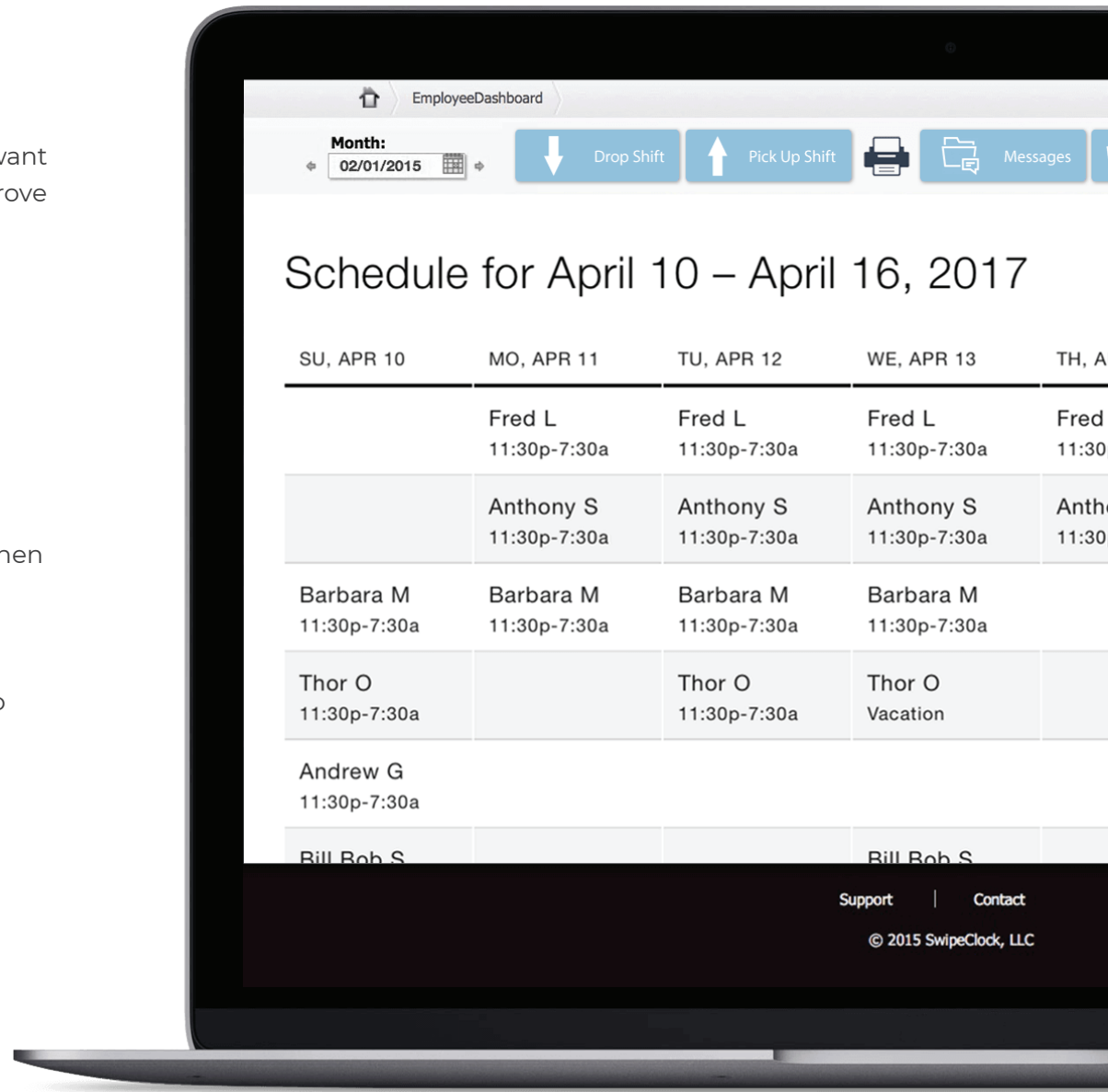
Use templates and repeating shifts to replicate schedules into the future.

Online shift trading

With centrally-managed shift trading, employees can post a shift when they have an unexpected conflict. Workers who want more hours can pick up additional shifts. Managers can approve or reject shift-change requests. Some teams may not need manager approval for shift changes as long as an employee can find a replacement.

Understand employee preferences

Ideally, this should begin with the first interview. Find out when an employee is available and how many hours they want to work. Availability and shift preferences should be important factors in the hiring decisions. Unless there is a severe labor shortage in your area, you should be able to hire people who want a variety of schedules.



Schedule enforcement

Some scheduling solutions, like WorkforceHub from Swipeclock, have clock lockout.

WorkforceHub

Managers can block employees from clocking in too early for their shift or clocking out too late after their shift has ended.

This prevents employees from working before or after their scheduled shift without permission. This is especially helpful for unsupervised teams. Lunch lockout is a related function. Lunch lockout prevents an employee from clocking in before the authorized meal period is over. This helps employers comply with lunch break laws and ensure employees take needed breaks.

The benefits of schedule enforcement:

- Prevent unplanned overtime
- Prevent hours padding
- Managers don't have to be schedule enforcers
- Allows managers to address punctuality problems in the early stages

Tardy notification

Employees who are habitually late create problems that extend beyond their specific job role. If they serve customers directly, their absence can shortchange customers. The lost productivity impacts interdependent job roles. Team members have to cover until the late employee clocks in.

Late punch alerts help managers identify and correct punctuality problems before they cause lasting damage.

This is especially important in the healthcare industry. Hospitals, clinics, and long term care facilities must maintain federally-mandated caregiver-patient ratios. Tardy employees impact patient care and compliance. When scheduling software alerts a manager that a scheduled employee hasn't clocked in, the manager can take the appropriate action.



Best Practices for Scheduling Hourly Workers

1 Formalize and communicate time and attendance policies

Create and document rules surrounding hours and schedules in your employee handbook.

Address the following:

- How to trade a shift
- How to submit [timecards](#)
- How to request PTO
- How requests are prioritized when there is a conflict (first-come first-served, by seniority, etc.)
- Discipline policy for tardies and no-shows

2 Post schedules early

Make schedules available two weeks or more in advance. Your employees can arrange childcare, transportation, and schedule personal activities. You will have less absenteeism and tardiness.

3 Plan ahead for changes in scheduling needs

If you have an operational change coming up—perhaps your facility is closing a department temporarily—let employees know that their schedules will be affected.

4 Cross-train for schedule flexibility

Cross-training is an important labor management tool. It increases productivity. It allows you to operate with a smaller, more nimble staff. It also affects employee scheduling. Make it part of the job description. Build cross-training into your [onboarding](#). New hires will understand that they will learn more than one job role.

5 Allow self-service shift trading

If you hire capable workers, they can [trade shifts responsibly](#). If an employee has an unexpected obligation, make them responsible for finding a replacement. Employees value schedule flexibility as much as competitive pay. Workers are more punctual and less likely to miss a shift if they have some control over when they work.

6 Confirm availability when hiring

When [interviewing candidates](#), find out what shifts they can work. Plus, how many weekly hours they want. This sounds like a no-brainer. But many employers overlook this. Then they are frustrated when everyone wants the same schedule. When evaluating competing candidates with similar qualifications, schedule preferences can tip the scale.

7 Clarify rules for schedulers

If you are not the only one who makes schedules, clarify rules for managers who perform this task. Don't assume the others have the same institutional knowledge. Document schedule rules and other processes you've refined over time.

8 Reward punctuality and attendance

It's more cost-effective to correct problems than fire and hire. Creating an award system for punctuality and good attendance can help. It doesn't have to be expensive. You can reward punctuality with first dibs on shifts. Or inexpensive swag.

9 Track scheduling data

Busy owners and managers don't always notice incremental changes in scheduling needs. But gradual change eventually makes an impact. Review historical data to detect trends. Maybe you need to lengthen some shifts and shorten others. This can be a powerful tool for controlling labor costs and increasing productivity. Analytics also provide insight into your business hours. Pay attention to customer levels right when you open and just before closing. You may benefit by extending your hours.

Predictive scheduling laws

[Predictive scheduling](#) regulations are part of a larger employee rights trend aimed at eliminating destructive scheduling practices for hourly and part-time workers. These laws are known by several different names including fair workweek, secure scheduling, and advance scheduling. Let's look at the employee scheduling methods in question.

Businesses with fluctuating staffing demands often use 'just-in-time' employee scheduling. The instability wreaks havoc on the lives of the lowest paid employees in the workforce. These are the people most likely to be living paycheck to paycheck while juggling two or more part-time jobs. Many argue that the practices are unethical and prohibit upward mobility for the least advantaged.

Employee scheduling practices targeted by predictive scheduling laws include:

- Posting schedules with little or no advance notice
- On-call shifts
- Changing posted schedules with little or no advance notice
- Canceling shifts at the last minute
- Sending employees home before they have worked their full shift
- Failing to give new hires a good faith estimate of the number of hours they will be able to work
- Hiring new employees instead of giving more hours to part-time workers who want additional hours.
- Scheduling workers for 'clopening' shifts: this is when an employee must close an establishment and then come back to re-open it within a short time frame
- Providing little or no rest between shifts

- Failing to reasonably accommodate employees' requests for flexible schedules
- Retaliating against employees who make schedule requests, refuse to work shifts added at the last minute or decline to cover for an employee who calls in sick

Modern employee scheduling software can help you comply with predictive scheduling laws as well as FLSA, OSHA, FMLA, and any other regulations that impact your business. As we have discussed, you can build schedules earlier and be more responsive to change. You can then reap the benefits of lower turnover, better schedule adherence, less unplanned overtime and better shift coverage. In other words, improved compliance is a win-win because it benefits the business as well as the employees.



The benefits of good scheduling

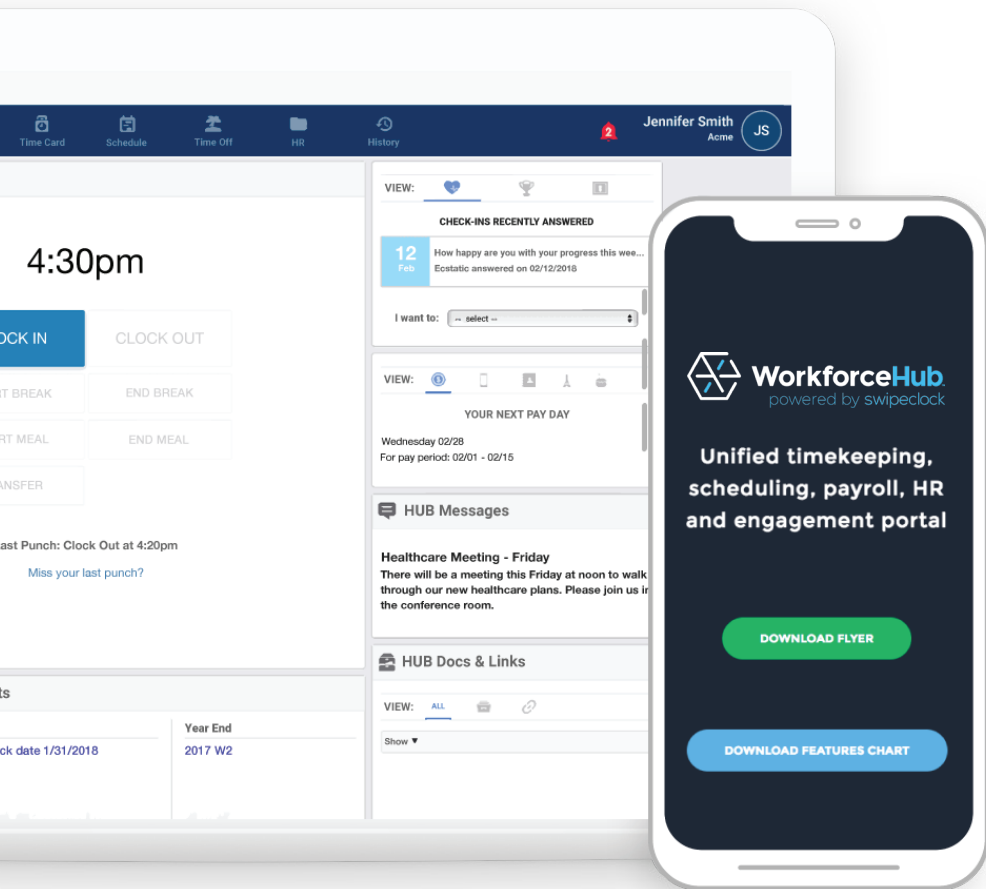
Let's sum up the benefits of effective employee scheduling:

- Increased productivity and profitability
- Increased employee satisfaction and retention
- No more coverage gaps and overstaffing
- Ability to identify budgeted vs. actual hours for tighter project management
- Improved schedule adherence—reduced tardiness and fewer no shows
- Reduced unplanned overtime
- Streamlined compliance and recordkeeping
- Scalable, repeatable scheduling workflows
- Better absence management



Powerful employee scheduling software is now affordable

Employee scheduling software is now affordable for small businesses.



Swipeclock's WorkforceHub includes Employee Scheduling. WorkforceHub is designed for the mission critical time and labor needs of small business employers.

For more information about employee scheduling, visit workforcehub.com.