



# The Most Essential Workers

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The Ultimate Scheduling Guide for Your  
Healthcare Team



## About this Scheduling Guide

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It goes without saying that your team's work is critical to the health of your community. The team showing up day in and day out is the first step in making sure the work gets done. And efficient scheduling helps get them where they need to be. As the one charged with staffing and scheduling, you know the importance of the task.

In addition to creating the schedule, you also need to coordinate its distribution and accessibility. In this guide to scheduling your healthcare team, we walk you through how to create a system for employee scheduling and why it's vital.

By following the guidance laid out here, we are confident that you will minimize stress and maximize productivity. After all, your team should focus on serving those who rely on your care.

## Why is Efficient Scheduling Important?

### Every Shift Covered. Every Day.

A missed shift can have real-life consequences, which makes a schedule more than just a calendar with names on it. A schedule is an agreement between you and your staff that you will cover every shift, every day. With something so important, doesn't it make sense to make the schedule easy to build, disseminate, and update at a moment's notice?

### A Less Stressed Team

Your team takes on a lot. Any time spent thinking about administrative issues is time away from their most important job, tending to those in your care. Your staff may be worried about who's working when, finding coverage for an upcoming shift, and other issues related to their schedule. With an efficient and transparent schedule process, you can take that worry off of their plate and be left with a happier team.

### Eliminate Questions & Confusion



"When am I working next week?"



"Will we be shorthanded if someone calls in sick?"



"How can I find coverage for my upcoming day off?"



"Who am I working with tomorrow?"

## 5 Steps for Effective Employee Scheduling

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### 01. Set a Schedule for Employee Scheduling

Consistency is key when it comes to releasing a new schedule. It should occur on the same day and at the same time every week (or two weeks or month, depending on your operation).

Once you've established the day and time you want to release the new schedule, work backward from there to set deadlines for yourself and your staff. Sticking to a consistent process for schedule creation can keep this daunting task to a minimum level of difficulty. Consistency also helps your team know what to expect. They are aware they have until a certain day to inform you of their personal schedule. And they can rely on the fact that you'll always release the new schedule at the same time.



## 5 Steps for Effective Employee Scheduling

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### 02. Know Your Staffing Needs

Nobody knows your staffing needs better than you. Your hours of operation, your nurse-to-patient ratio (or other ratios), and other operational factors set your staffing needs. And your staffing needs are a vital part of building your schedule. Your staffing needs are likely set by state regulations or by your organization. It's important to know these guidelines.

Your staffing needs will also be unique to your organization, or even your department. For example, your department may require just one RN on duty at a time with CNAs, while other departments might require all RNs. Finally, your staffing needs may vary throughout the week. One example is the need for fewer staff on duty during overnight hours. Once you define your staffing needs over the course of a day, week, or month, you are well on your way to successfully building a schedule.



## 5 Steps for Effective Employee Scheduling

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### 03. Create an Employee Scheduling Template

Your organization may have a system or template for creating schedules, but if they don't, Sling recommends creating a standard, customized template for your team. Why? Because your staff schedule is a reflection of your team's needs. As such, the information on your schedule may be completely different from the information on another organization's—or even another department's—schedule.

You'll need to design a template that reflects that. A custom-made scheduling template also reduces the amount of time you spend preparing before creating your schedule. You'll no longer need to remake the calendar every time.

Instead, your custom template is stored on your

computer or in a filing cabinet so that all you have to do is fill it out. Here are the basic items your schedule template should include:

- Two-weeks or a month's worth of days
- Employee names
- The date of each day displayed
- Hours of operation
- Which positions are required for each shift
- Manager contact information
- A way to show work hours (e.g., a numerical time range, an X in the hours being worked, a bar that spans work time)

It's also important to print the employee names, dates, business hours, and contact information on the periphery of the schedule. That way, the only information on the calendar itself is the work hours.



## 5 Steps for Effective Employee Scheduling

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### 04. Honor Schedule Preferences Whenever Possible

In some cases, you have likely hired someone to work a specific shift, including overnight or weekends. Other times, your employees may rotate through the various shifts. In either case, family or life circumstances may require your staff to request changes to when they work. Honoring preferences and time-off requests builds goodwill, increases employee satisfaction, and helps you retain good workers.

It's an essential part of the scheduling process, but it's also incredibly time-consuming. You can cut down on the time it takes to process all this information by keeping your employees' work preferences and

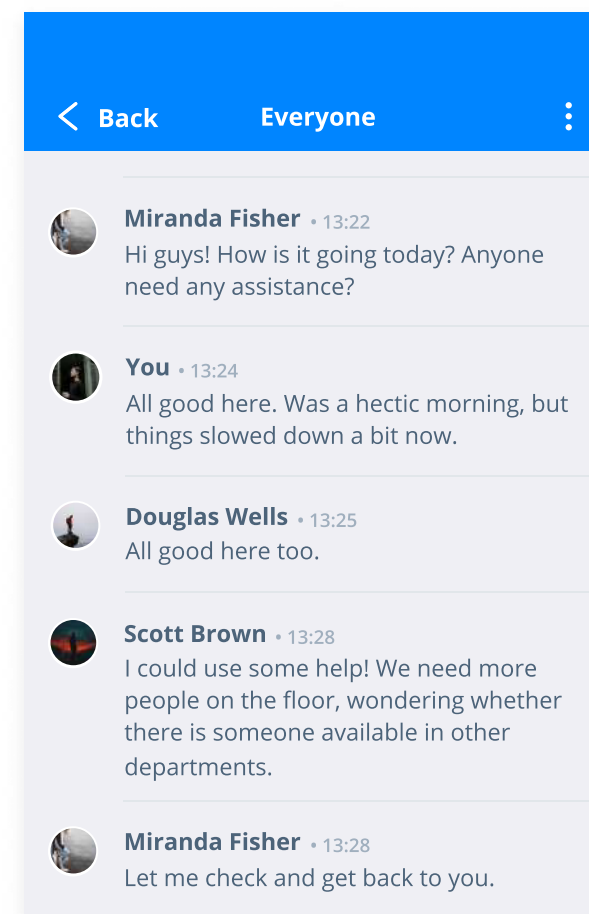
time-off requests in one place. One of the most efficient ways to do this is to use a cloud-based master document. Once that document is set up, give your employees permission to add to it, and then instruct them to submit their requests in this one location. It's like having a time-off request box mounted on the wall in the break room, only this "box" is accessible anytime, anywhere.



## 5 Steps for Effective Employee Scheduling

### 05. Communicate Early and Often Through Defined Channels

Communication is important for any team. In the healthcare world, it can mean the difference being in or out of compliance—or worse. Establishing a team-wide communication method makes it easy for you and your employees to know exactly where to look for your work schedule. No more searching through email, instant message, and texting apps to find the newest work schedule or that time-off request you need. Everyone uses the same tool, so everyone's on the same page. If you haven't already, set up this team-wide communication method right away. Require your staff to use that agreed-upon channel, including to call in sick. You can then communicate to the rest of the team to increase your chances of finding coverage.





## 7 Tips for Successful Scheduling

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### Keep employee strengths in mind.

Strengths differ, and one employee's strengths may nicely complement another's. Consider scheduling them together.

### Make the schedule easy to read.

Don't frustrate your team by giving them a schedule that is difficult to read. A user-friendly schedule will also cut down on questions from your staff.

### Make the schedule easy to access.

However you distribute the schedule, it is a good idea to make it available for all employees to access in real time.

### Allow employees to indicate their availability.

Set up a simple method that employees can use to inform you of what works best for them and when they're unavailable.

### Let employees find their own substitutes.

In addition to reducing your own workload, this also improves communication among your team.

### Ensure all schedule changes go through you.

After empowering your team to find coverage, you still need to approve it. This will help you avoid overtime or other potential issues.

### Have a backup plan.

It is always a good idea to know which employees are available to come in on a moment's notice on a given day. This might be a "standby" or "on-call" list.

## Scheduling & Workforce Management

Workforce management (or WFM for short) is a combined set of interrelated processes that an organization uses to track and improve employee productivity. With the growth of mobile technology and cloud computing, most organizations now use a cloud-based workforce management platform.

### The five essential components of workforce management include:

- ❑ Scheduling
- ❑ Time Tracking
- ❑ Forecasting
- ❑ Real-time management
- ❑ Assistive Intelligence

Employee scheduling is a key element in your overall workforce management plan and process. Your organization likely has a WFM platform in place, and it might have a scheduling component that you're not aware of.

Other scheduling solutions, including Sling, allow you to build a schedule, easily communicate with your team, and let employees clock in and out. Sling creates employee timesheets and sends them to you for approval. You can then add the timesheet data to your payroll platform or send it to the appropriate department.



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**Let's continue  
the conversation**

To learn more about Sling or to further discuss the process of scheduling your team, contact us any time:

| Email address: [sales@getsling.com](mailto:sales@getsling.com)

| Phone number: 888-374-2708

Visit our website for workforce management resources, more information about Sling, to start a free trial of our platform:

| <https://getsling.com/>

From the entire Sling family, we thank you for contributing to the health and wellbeing of your community. We appreciate your work, and we would be honored to be of service to you and your team.