MakeShift

ADMINISTRATOR TRAINING RESOURCES

DEPARTMENT INFORMATION

You can edit all department information by clicking on **Departments** on the top black navigation bar and clicking on the desired department (shown in blue letters). Then click **Profile** on the left black navigation bar to go through the tabs below.

Profile
Click the **Edit Department** button if you would like to change the name of the department or would like to change the employee sort order from Alphabetical to Manual. This will affect how employees show up on the schedule. If you choose to sort employees manually, click **Employees** on the side navigation pane. This will allow you to drag and drop employees and create a preferred order.

Shift Templates
Create all of the shift templates you need for the department to make rotations and schedule shifts for employees. Give each shift template a unique name to identify the shift when addition it to the department schedule. Add a **Start Time** and an **End Time** for your shift type. You can also add an unpaid break to the shift template.

Rotations
If rotations need to be built, your first step will be to create a template for a rotation and then the second step will be adding this rotation template to an employee's schedule. To create a template for a rotation, begin by adding a **Rotation Name**. The rotation name should be short and remind you of the structure of the rotation when you are adding it to an employee. Some healthcare organizations may choose to name the rotation after the individuals(s) that will be working this rotation. Enter the **Rotation Length** and then select either **Days or Weeks**.

Positions
Ensure all of the positions you need within the department are listed. If you edit or remove a position from this list, that position will also be edited or removed from all employees' profiles who have that position.

Fatigue Management
You can add different fatigue management rules to help avoid fatigue situations when day-to-day scheduling. These rules will prompt a notification window to appear, warning managers and schedulers. This is not the same as Overtime Rules and does not affect payroll.

If you need to add a new employee that is not already in your MakeShift account, go to the department weekly schedule and scroll down to the bottom of all employees to find the **Add Employee** button. If you would like to add a new employee that works in multiple departments and not just the one you are scheduling for, click on **Users** on the top navigation bar to add a new employee from here.

OTHER SCHEDULING INFORMATION

EMPLOYEE SCHEDULER

To **Add a Shift** to the department calendar, click and hold on the desired **Shift Template** and drag the box to the desired employee and day. Then release your mouse button. A blue shift will now appear on the calendar. To move between weeks click the **Left** and **Right** arrows. To jump ahead or to select a specific week, click the **Small Calendar** icon button then select your desired week from the drop down tool. You can also filter employees by **Employment Types, Positions, Skills** or **Name** by typing in the desired filter in the field at the top of the department calendar.

POSITION SCHEDULER

This is the view of the schedule that shows how many employees are working in each position for each shift on any given day. You can set your weekly requirements here and then copy and paste these requirements to weeks in the future so that you can always keep track of where you may be understaffed or overstaffed. To view these requirements, click **Positions** on the department calendar in the top left corner next to Employees. The left column of the schedule lists all of the positions that exist within the department. If you have already scheduled shifts for your employees, your Position Schedule will have navy blue squares filling the page. These navy blue squares show shifts that you have already scheduled for employees but have not yet set as one of your requirements.

There are two ways to create new shift requirements.

One way is to drag a shift from the left column of **Shift Templates** and drop it onto the spot on the schedule that corresponds with the correct position and day of the week. You will now see the **New Shift Requirement** box. You can adjust the number of required employees for this shift by typing a number in the box or adding more or less by clicking on the arrows. Then click the **Create Shift Requirement** button.

The second way to create a new shift requirement is useful when you have already scheduled shifts for your employees and they appear as navy blue squares on the schedule. Simply click on one of these navy blue boxes and repeat the above steps to create the requirement with the correct number of employees.

Once you have created a new shift requirement, you will see three different tabs along the top: **Shift Details, Scheduled Employees** and **Unscheduled Employees.** You can assign employees to this shift directly from this screen by clicking the Assign button to the right of the employee's name. This screen allows you to assign shifts to employees based on things like wage, positions and weekly hours worked so you know that you are getting the best person for the job.

Once you have completed setting your weekly requirements, you will able to schedule by switching between your Employee and Position Schedule to make sure that you have enough employees scheduled when you need them. Your requirements will begin to fill up as you schedule which you will be able to visualize as the colors on the schedule change. The legend at the bottom left of the schedule outlines what each color represents.

OTHER SCHEDULING INFORMATION

DOWNLOAD AND PRINT SCHEDULE

The schedule can be downloaded to Excel by clicking on the **Download Schedule** link at the bottom right corner of the Employee Schedule View. This will print the weekly schedule. To print the daily schedule, click on the **Download Schedule** link at the bottom left corner of the daily schedule on the main dashboard.

REMINDER

If you have employees that do not have smartphones, please let them know they can access their schedules online at my.makeshift.ca.

MAKESHIFT LIVE

MakeShift Live brings most of MakeShift's web features - scheduling, approvals, *etc*. - to iOS and Android, enabling managers to be more productive and effective while on the floor and on the go. The app frees managers from their desks, letting them run their staff on the move, while keeping up-to-speed on who's working, who's available, who's late and who's off.

Viewing Multiple Departments or Locations

If you are an Admin that manages multiple departments and/or locations, you can switch between each department to view the daily timesheet as well as the employee directory and employee requests for that department. To switch between departments and/or locations, click on the organizational chart at the top left corner.

Viewing the Employee Directory

The employee directory provides many useful details for each member of your staff. Things like contact information, wage, positions and even a personal schedule can be found here. Click on **Directory** at the bottom of the screen to view the entire employee directory.

Creating a New Shift

You can create a new shift and assign it to an employee using MakeShift Live by clicking the **+** at the top right corner. Fill out all of the information for this shift by clicking on each row and choose what employee you would like to assign this shift to.

Posting an Available Shift

You can create a new available shift using MakeShift Live by clicking on **Approvals** at the bottom of the screen. Under the **Available Shifts** tab, you will see any other available shifts that have been sent out as well as how many people have requested to pick these shifts up. Click the **+** at the top right to send out a new available shift. Fill out all of the information for this available shift by clicking on each row.

Approving Requests

All available shift requests, shift exchange requests and time off requests will appear by clicking on **Approvals** at the bottom of the screen. Under each tab, you will see a list of requests that have been sent to you for approval. You will see the name(s) of the employee(s) involved, as well as the date(s). Click on the request you would like to view.