



## Implementation Survey

### Company Name and Date:

The purpose of this questionnaire is to identify the key requirements of your organization. Please complete the questionnaire as thoroughly as possible as this ensures that we can better understand policies and procedures to assist you in your implementation. This is a critical document in the implementation process.

You may type directly into this form. Feel free to expand on the questionnaire with attachments if needed, but please **respond to each question**. If the question does not apply to you simply respond with “N/A” If you are unsure of a section in this document, please contact your Implementation Coordinator for further explanations or assistance. Please copy & paste tables where more than 1 policy exists.

### Primary Contact

<b>Name</b>	
<b>Phone Number</b>	
<b>Email</b>	

### Secondary Contact

<b>Name</b>	
<b>Phone Number</b>	
<b>Email</b>	

### Company Information

<b>Company Name</b>	
<b>Street Address</b>	
<b>City</b>	
<b>State</b>	
<b>Zip Code</b>	
<b>Company Web Site</b>	



## Schedule Permission Rules

Please complete the following section. For each configuration type indicate if the employee, supervisor, and manager will have access to: Edit (E), Read Only (RO), Hide (H), Show (S), Allow (A), or Not Allow (NA). For additional details on what each configuration allows see below detailed overview.

Configuration	Employee	Supervisor	Manager
Shift (RO, or E)			
Override (A, or NA)			
Comments (A, or NA)			
Post Shift (A, or NA)			
Cancel Approved Shifts (A, or NA)			
Delete Drafts (A, or NA)			
Approve Requests (A, or NA)			
Reject Requests (A, or NA)			
Show Absences (H, or RO)			
Coverage Information (H, or S)			
Team (H, or RO)			

- **Shift:** This option controls the ability for the user type to be able to create or edit a shift.  
 Read Only: This option means the user can see the shifts, but cannot, modify them.  
 Edit: Users can edit shifts if this option is selected.
- **Override:** This permission controls the ability of the user type the ability to override a shift. This permission is only available if the “Shift” permissions are set to “Edit.”  
 Allowed: Users can override a shift.  
 Not Allowed: Users will not be able to override a shift, only select from the pre-populated shift list.
- **Comments:** This option controls the ability for the user type to be able to view or edit shift comments.  
 Read Only: Users can only view comments, but cannot, enter or edit shift comments.  
 Edit: Users can add or edit existing shift comments.  
 Hide: Users will not be able to view or edit shift comments.
- **Copy / Move:** This permission controls the user’s ability to copy or move a shift to a different Day.  
 Allowed  
 Not Allowed

Cont..



- Post Shift: This permission controls the user’s ability to post shifts from Draft/Manual Entry.  
Allowed  
Not Allowed
- Cancel Approved Shifts: This option controls the user’s ability to cancel a shift that is in an “Approved / Posted” state.  
Allowed  
Not Allowed
- Delete Drafts: This permission allows a user the ability to delete a shift that is in a “Drafted” state.  
Allowed  
Not Allowed
- Approve Requests: This permission allows a user to approve a shift request.  
Allowed  
Not Allowed
- Reject Requests: This permission allows a user to reject a shift request.  
Allowed  
Not Allowed
- Show Absences:  
Hide: Employee absences will be hidden from user on the Scheduler.  
Read Only: Employee absences will be shown on the Scheduler.
- Coverage Information:  
Hide  
Show
- Team: This is an employee permission that allows the user to view other team member’s schedules.  
Hide: The user cannot view team member’s schedules.  
Read Only: The user can view team member’s schedules, but not edit them.

**Notifications are sent via Email or Mobile. Null (N), Email Only (EO), Mobile Only (MO), Both (B)**

Notification	Employee	Supervisor	Manager
Shift Requested (N, EO, MO, or B)			
Shift Request Approval (N, EO, MO, or B)			
Shift posted (N, EO, MO, or B)			
Shift Canceled (N, EO, MO, or B)			
Draft Deleted (N, EO, MO, or B)			
Shift Request Requested (N, EO, MO, or B)			
Shift Request Requested (N, EO, MO, or B)			
Coverage Requested (N, EO, MO, or B)			



## Calendar Rules

Please complete the following section. My Calendar is the employee’s view to see their schedule (if schedule is enabled) and their absence request.

Display Option	Employee	Supervisor	Manager
Display Requested Shifts (Y/N)			
Display Rejected Shifts (Y/N)			
Display Canceled Shifts (Y/N)			
Display Deleted Requests (Y/N)			
Allow Shift Requests (Y/N)			
Allow Shift Change Requests (Y/N)			
Delete Requested Shifts (Y/N)			
Request Coverage (Y/N)			
Delete Coverage Requests (Y/N)			
Edit EE Unavailability (Y/N)			
Display EE Unavailability (Y/N)			

- Display Requested Shifts: Enable/disable the display of shifts which are pending approval on My Calendar.
- Display Rejected Shifts: Enable/disable the display of shifts which have been rejected on My Calendar.
- Display Canceled Shifts (“Approved” shifts that were canceled/deleted) : Enable/disable the display of shifts which have been canceled/deleted on My Calendar.
- Display Deleted Requests (“Pending” shifts that were deleted) : Check this box to enable/disable the display of shifts which have been canceled/deleted on My Calendar.
- Allow Shift Requests: Enable/disable the Request Shift button on My Calendar. This also enables/disables the “Request shift change” link on the My Calendar screen when clicking on an existing shift. In order to change a pending shift, users must request new and delete original.
- Allow Shift Change Requests: When enabled, this allows the user to request a shift change that’s in an “Approved” state.
- Delete Requested Shifts: When enabled, this allows the user to delete a shift that’s in a “Pending” state. Request Coverage: Allows the user to request coverage of an existing shift.
- Delete Coverage Requests: Allows user to delete a coverage request.
- Edit EE Unavailability: Allows the employee the ability to enter in times that they are not available for shifts. An employee unavailability will not prevent a manager, supervisor, and client user from scheduling a shift during this marked time.
- Display EE Unavailability: An EE unavailable time will display on the scheduler and employee calendar when this option is selected.



## Shift Eligibility Rules

Eligibility Rules can be added to allow more flexibility to the isolated Attendance module, the purpose of which is to create advanced scheduling qualifications for shifts.

Only employees that have the necessary skills, education, etc., will be allowed to work specific shifts.

Eligibility Rules for Human Resources Items:

- Certification
- Education
- Skills
- Training
- Awards

Please Note any eligibility rule requirements for an employee to be able to work a shift offered for coverage by a peer.