# Employee Scheduling Software Evaluation Checklist

| Evaluation question | Summary of the software requirement | Is this requirement a priority for you? | | Are you satisfied with your current scheduling method? | | Can Visual Staff Scheduler® PRO support &/or improve your method? |
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| **Can I schedule my current number of employees and any number of additional employees I may have?** | First, verify the program supports scheduling for the number of employees you have now. Then, be sure it has the ability to handle more employees, if the number of your employees increases in the future. | Yes | No | Yes | No | Yes |
| **How far in advance can I assign shifts to employees?** | Be sure you can create a schedule as far into the future as needed, such as 6 months or 24 months. Then, you can pre-schedule shifts, rotations, holidays and time-off requests for your employees at any time. | Yes | No | Yes | No | Yes |
| **Can I schedule my employees based on their skills and certifications?** | Look for a program that gives you the ability to schedule your staff based on required attributes, such as skills, training, or certifications. | Yes | No | Yes | No | Yes |
| **What if I need to schedule based on employee seniority?** | Be sure the system allows you to input employees hire date and sort your available staff based on this criteria. | Yes | No | Yes | No | Yes |
| **Can I schedule my employees according to their desired workload?** | Verify the program gives you the ability to enter how many hours your employees wish to work in a week. Then, be sure it compares this number to actual hours scheduled. | Yes | No | Yes | No | Yes |
| **Can I make modifications so the software works specifically for my scheduling needs?** | You want the ability to make adjustments so the software meets your own specific scheduling needs. Be sure you can define your own shifts; including starting/ending times, breaks, and color codes. You may also want the ability to change the information displayed on the screen and in reports, or to set up any day of the week as the beginning of your workweek. | Yes | No | Yes | No | Yes |
| **Can I include additional notes in my schedule?** | Look for features that allow you to add special notes and explanations. For example, you may want the ability to attach location, task, or client notes to a shift, or to explain time-off as vacation or sick days. | Yes | No | Yes | No | Yes |
| **Can I easily see how many employees are assigned shifts, and if I'm under- or over-scheduled for that period?** | You want the ability to indicate how many people or hours you need scheduled, such as by position, shift, department, or location. Then, you want to easily see if you are over-scheduled or under-scheduled based on those requirements. | Yes | No | Yes | No | Yes |
| **Can I see a list of employees who are not scheduled or available to work?** | You want the program to display a list of all employees available to work, which can be very useful when you need to fill for no-shows or other missing assignments in your schedule. Be sure the list updates immediately after you assign a shift to an employee. | Yes | No | Yes | No | Yes |
| **What if I need individual employee schedules, as well as group schedules?** | Be sure you have the ability to create schedules for individual employees, selected groups of employees, or all employees. You want to have the flexibility to create these schedules for specific time frames, such as a day, week, or month. | Yes | No | Yes | No | Yes |
| **When I need to see all scheduled time off, can I view it in a report?** | Look for a program that includes a time-off report. You want the report to display all scheduled time off, as well as days without shift assignments, for all employees within any date range. | Yes | No | Yes | No | Yes |
| **Can I see how many hours my employees have been scheduled?** | You want the ability to view how many total hours each employee is scheduled to work during a period of time that you define. | Yes | No | Yes | No | Yes |
| **Can I see how many employees I have scheduled at a particular time?** | You need the ability to see how many employees you have scheduled for a specific time frame. Be sure you have an instant view of each employee assigned to your various shifts during that time frame. | Yes | No | Yes | No | Yes |

| Question | Description | | | | | | |
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| **How can I estimate labor costs?** | Look for a program that gives you the ability to calculate hours scheduled and provide an estimate of labor costs for a defined work period. | Yes | No | Yes | No | Yes |
| **Can I customize my schedules and reports?** | Be sure you can create schedules and reports based on your specific requirements, including date ranges, employee groups, types of shifts, and other defined information, such as locations or clients. | Yes | No | Yes | No | Yes |
| **How can I reliably distribute schedules and reports to all my employees and managers?** | You want a program that provides the ability to distribute schedules and reports using a variety of methods. Be sure you have options to print, e-mail, or web publish so you have more than one way to get the schedules and reports to those who need them. | Yes | No | Yes | No | Yes |
| **When I need my managers to make changes to the schedule, and my employees to only view their schedules, can I give them access specifically for this purpose?** | You need to allow other managers to have access to your schedule, either for viewing or making changes to it, but you don't want the same permissions extended to employees when they access the program. Look for a program that gives you the flexibility to allow read-only access for your employees, but full access for other managers. | Yes | No | Yes | No | Yes |
| **How can I keep track of the things I need to do, such as schedule required training and distribute employee schedules?** | Find a program that gives you the ability to set up reminders. You can use reminders to notify yourself about things you need to take care of, such as e-mailing schedules, preparing reports, or scheduling training assignments. | Yes | No | Yes | No | Yes |
| **How can I conveniently store and access my employees' information?** | Look for features that allow you to enter and store your employees' personal information, such as e-mail address, phone number, and pager number, with your schedule. Be sure you can access this information easily when you need to contact employees for filling open shifts or other emergencies. | Yes | No | Yes | No | Yes |
| **If I have repeating shift assignments, do I have to schedule them manually?** | Be sure the software allows you to easily copy and assign schedule patterns and rotations. If you schedule repeating shifts, this feature saves you a lot of time. | Yes | No | Yes | No | Yes |
| **Can I assign the same schedule information to a group of employees at once?** | To cut the time needed for assigning the same holidays, shifts, and other assignments to multiple persons, you want the ability to schedule a group of employees at one time. | Yes | No | Yes | No | Yes |
| **Can I use my schedule data with other software programs?** | You want a program that allows you to import data, such as employee names, from other applications. You also want the ability to export schedule data to use with other applications, including time and attendance systems, database applications, spreadsheets, and reports writers. | Yes | No | Yes | No | Yes |
| **Is there a way to keep my scheduling data safe?** | You need a program that has the ability to backup and restore your schedule files. If the original schedules are ever corrupted or lost, these options may be the only way to recover your schedule data. | Yes | No | Yes | No | Yes |
| **Are there any how-to resources provided with the software?** | Be sure the program includes a manual or user's guide, as well as a help file, you can access while working with your schedule. The resources should provide the information you need to get started and information that helps you learn how to use the program and troubleshoot problems you may encounter. | Yes | No | Yes | No | Yes |
| **Can I contact someone if I have any questions?** | You want to have readily available customer assistance you can reach by telephone or e-mail. Be sure to check for costs that may accompany technical support services. | Yes | No | Yes | No | Yes |

*If you have other scheduling needs, please call 1-800-874-880 or e-mail customerservice@abs-usa.com.*