Scheduler Pre-Go Live Checklist

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Here at Procare + Labor Management we are committed to providing excellence in all things, including our training resources. We hope this article will be of assistance to you with your scheduling expertise. Please see article details below and reach out if you have any additional questions to labor@procarehr.com.

Article: Scheduler Pre-Go Live Checklist

This is a general outline. Please reference the training resources for step-by-step instructions, and/or reach out to labor@procarehr.com if you would like additional support ahead of your Community's go-live date.

Process:

Before going live with TeamBridge, Schedulers should confirm:

- All Team Members have been informed of the transition date (try using TeamChat and Bulletin Board to send out announcements and you have the option to print out the welcome flyer and hang it in a common area)
- All Team Members have been sent invites (can be completed by Schedulay upon request), downloaded the app, and completed their initial login (see 'Last active' dates in TeamBridge)
- All Team Members have the "Locations" and "Roles" that they are qualified to work assigned in their profile (review the Team Directory List)
- All Schedule Templates have been added and the shift times/location/role(s)/tags are accurate (accessed from calendar view)
- Scheduling "Needs" are accurate and auto-apply is turned on (Needs and coverage drawer)
- Scheduling "Coverage" is accurate (all Team Members with a repeating schedule are entered) and auto-apply is turned on (Needs and coverage drawer)
- Schedules have been updated to reflect past shift pick-ups/trades/etc.
- All time off has been entered and is visible from the calendar view
- Open Shift counts are accurate (compare to your "Needs")
- No scheduling rules are being broken (look for red/yellow/blue indicators on shifts in calendar view)
- All shifts are published for the timeframe you typically allow Team Members to view (or at

least 1-2 weeks beyond the go-live date)
  - TeamChat broadcast departments have been updated
  - Schedulers are assigned to the "Locations" they need to receive notifications for (this is completed on the location fields)

For any additional questions, please contact us at labor@procarehr.com *and we would be more than happy to assist!*