

Building the Foundation to your Schedule - 3 Building Blocks

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3 Steps to Building Your Schedule

A Step-by-Step Guide to Building an Effective Schedule

Step 1

Schedule Templates

Schedule templates represent your core, regularly recurring shifts

1. Navigate to "Schedule Templates" from the calendar view
2. Click "+" to create new template
3. Add shift name, start/end time, location, and role (all four are required)
4. Add template color, as desired

**Keep templates simple - only create them for recurring shifts, not one-off variations

Step 2

Needs

Needs represent your budgeted staffing targets - how many staff you need on each shift each day.

1. Navigate to the Needs and Coverage drawer
2. Hover over "Needs" and click "view"
3. Validate shift targets, by schedule template.
4. To add new need, select "Add New", select the schedule template, and add in the number of staff required for each day of the week.

*Needs should represent the general and recurring targets. One off changes will happen on the live schedule.

Step 3

Coverage

Coverage is your master/block schedule; who is regularly assigned to which shifts.

1. Navigate to the Needs and Coverage drawer
2. Hover over "Coverage" and click "view"
3. Add each team member and assign their weekly or biweekly rotation
4. Click save

**Coverage should represent the regularly scheduled shifts by team members. Ad hoc changes will be made on the live schedule. This is the underlying foundation.

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For any additional questions, please contact the Labor Management team at labor@procarehr.com and we will be more than happy to assist!
