### **Add Or Manage Staff**

Add or Manage Staff & their information

Written By Ivan Karmer

Updated 21 days ago

## **Add or Manage Staff**

The Staff Info page is where you can manage all your staff and the staff information in a single location. The system maintains the consolidated information of the staff here.

**Navigation**

To navigate to the Staff Info page, click on the Staff menu and then the Staff Info sub-menu.

Security

Only admins and staff can access this page. The security permissions determine which actions users can perform. The security permissions can be updated in Admin > Security Permissions by Business Admin.

Staff Info

The grid on this page displays all the staff that have been added to the system. The franchisee/location is selected by default for franchise accounts. Business account users can filter the list of staff by one or more franchisees/locations.

In order to add new Staff, click on the Add Staff button. In order to edit existing Staff, hover on the row for the Staff you want to edit and click on the Edit icon.

A pop-up opens for Add or Edit action and the following information can be added or updated in the corresponding tabs:

Staff User Setup (Basic Information)

In the Staff User Setup tab, you can specify the basic information of the staff, including their portal access information. A PIN is automatically generated for each Staff that can be used in Kiosk (Mobile app) for Check In/Out.

Details

In the Details tab, you can specify additional details of the staff, such as their contact information, education, employment, and other information.

Skills

In the Skills tab, you can manage the staff's skill set, training, and certificates.

Skill Set: Click on the Add Skill button to enter the skill set information for the staff. The added skill set will be displayed in the grid.

Training: All the assigned training for the staff will be displayed in this tab.

Certificate: You can upload and view any staff certificates in this tab.

Assign Students

In the Assign Students tab, you can view all the students assigned to the staff. You can also un-assign students from the staff.

Attendance

In the Attendance tab, you can view and take attendance for the students assigned to the staff.

Attachments

In the Attachments tab, you can manage any documents that are related to the staff. You can add attachments from your computer, Dropbox, or Google Drive.

Feedback

In the Feedback tab, Instructors can add and manage Feedback for their assigned Students. The Feedback can be viewed that has been given by the Students/Parents.

Set Wages

In the Set Wages tab, you can set wages for the staff. This information will be used to calculate with staff's time tracker.

***Item Name:*** Specify the item name for the wage. This item name can be used for time tracking and sending the information to QuickBooks.

*Apply Wage from:* Select the option to apply the wage.

*Wage Type:* Select the wage type.

*Effective Date:* Specify the date from which the hours will be calculated.

*Wage Rate:* Specify the wage rate.

*Hours:* Specify the fixed hours.

Set Schedules

In the Set Schedules tab, you can add and manage schedules for the staff. You can also add time off for the staff.

Send Email

You can send an email to the staff by clicking on the email icon in the staff popup top bar. This will open a popup to choose an email template and send the email.

Contact us at hello@calimaticedtech.com for any questions.

### **Staff Basic Information**

Manage Staff Basic Information



Written By Ivan Karmer

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## **Manage Staff Basic Information**

To manage the basic information of your staff, follow these steps:

* Go to Staff > Staff Info and click on the staff member in the grid you want to edit.
* A pop-up window will open with the Staff User Setup tab selected.

You can edit the following fields in this tab:

• ***Staff Id:*** This is a unique and read-only identifier for the staff member.

• ***User Name:*** This is the name that the staff member uses to log in to the platform and app.

• ***Email:*** This is the email address that the platform uses to communicate with the staff member.

• ***Password:*** You can create or change the password for the staff member here.

• ***First Name:*** This is the given name of the staff member.

• ***Last Name:*** This is the surname of the staff member.

• ***Join Date:*** This is a read-only field that shows the date when the staff member was added to the platform.

• ***Date of Birth:*** This is the birth date of the staff member.

• ***Status:*** This shows whether the staff member is active or inactive in the system. You can change this status here.

• ***Security Role:*** This is the role that determines the security permissions of the staff member. You can only set this role when you add a new staff member. If you need to change it later, please contact us at hello@calimaticedtech.com.

• ***Staff Roles:*** These are the roles that reflect your institute's staff positions. You can create and assign these roles here.

• ***Department:*** This is the department that the staff member belongs to. You can create and manage departments by going to Admin > System Config > Department Config.

• ***Phone Number:*** This is the phone number of the staff member.

• ***Instructor PIN:*** This is a code that is automatically generated when you add a new staff member. You can update this code here if needed.

• ***Profile Pic:*** You can upload or change the profile picture for the staff member here.

If you have any questions, please contact us at hello@calimaticedtech.com.

### **Time Tracker Setup**

Configure Time Trackers for Staff



Written By Scott Smith

Created 3 years ago

The System provides the ability to set up the Staff to track their time in different ways like Timesheet, Schedules, Time Off, Fixed Hours.

**Navigation:** Click on the Staff menu and Tracker sub-menu and Setup sub-menu to navigate to the Staff info page.

**Security:** Only Admins and certain Staff can access this page and based on the permissions, only certain roles can perform certain actions. Admins and Executives will be able to see all Staff information. Coordinators will be able to see all Instructors and their information. Instructors can only see their information.

All the Staff for the Business or the Franchise/Center are listed in the grid.

For each Staff, you have the ability to set the wages by clicking on the Wages button in the “Wages Settings” column. Clicking on the button will open the Wage popup for the corresponding Staff. The system provides the ability to set wages for the staff that will be used to send the information of the Staff Hours & Wage info to QuickBooks (if integrated) to manage your payments to Staff. The QuickBooks integration can be configured in “Admin > System Config > QuickBooks Config”. You have the ability to set multiple Wages for each Staff. The following information can be set for the wages -

1. **“Item Name”** - Specify the Item Name of the wage and this Item name can be used for Time Tracking & QuickBooks.
2. **“Apply Wage from:”** - There 4 options to which the Wage can be applied which can then be used to send to QuickBooks for Payments.
   1. **Timesheet -** When this option is selected then the hours for this Staff member are pulled from the Timesheet to apply the Wage and send to QuickBooks for payments. The system will not consider other hours even if they are logged for this Item.
   2. **Schedule -** When this option is selected then the hours for this Staff member are pulled from the calculated Schedule Hours to apply the Wage and send to QuickBooks for payments. The system will not consider other hours even if they are logged for this Item.
   3. **Check-In/Out -** When this option is selected then the hours for this Staff member are pulled from the calculated Check-In/Out hours to apply the Wage and send to QuickBooks for payments. The system will not consider other hours even if they are logged for this Item.
   4. **Fixed Hours -** When this option is selected then the hours for this Staff member are pulled from the Fixed Hours that set here to apply the Wage and send to QuickBooks for payments. The system will not consider other hours even if they are logged for this Item.
3. **“Wage Type” -** When the “Apply Wage from” is selected as Timesheet or Schedule or Check-In/Out or Fixed Hours then the Wage Type has the “Hourly” option so that the hours are calculated Hourly. When the “Apply Wage from” is selected as “Fixed Hours” then the Wage Type has Hourly, Daily, Weekly, and Monthly options. The calculation will depend on the setting to choose from here.
4. **“Effective Date” -** Specify the Date from when the hours will be calculated from the specified date.
5. **“Wage Rate” -** Specify the Wage Rate based on the other settings for the item.
6. **“Hours” -** This field will be displayed when the “Fixed hours” option is selected for the “Apply Wage from” field. The specified fixed hours will be used to send to Quickbooks for the payments for the corresponding item.

In the “Approvers” column, you have the ability to set the Approver(s) for the corresponding Staff. The submitted Timesheet, Time Off and Expenses will be sent to the Approver(s) for approving via Email and the Approvals & their information is available in “Staff > Time Tracker > Approvals”. The Approver(s) selection will be saved automatically.

When you hover on the Staff row, you will see the Actions button and clicking on it will show Edit, Set Wages, Set Schedules options. Clicking on any of those options will open the Staff info popup with the corresponding tab opened. When the “Set Schedules” option is selected, you have the ability to add and manage Schedules for the Staff. All the added Schedules for the Staff will be displayed in the grid. Clicking on “Add Schedule” will open a popup to enter the Schedule. You can specify the Schedule details for the range of period and apply a Wage item (using “Apply for Item” field) to the Schedule so that the wage will be applied for the Scheduled hours when sending it to QuickBooks for Staff payments.

Clicking on the “Add TimeOff” button will provide the ability to add Time off for the Staff. In the popup, you have the ability to specify the Time Off duration for the Staff. The added Time off will be added to the grid.

### **Staff Timesheet**

Timesheet entry & submissions for Staff in Time Tracker



Written By Scott Smith

Created 3 years ago

The System provides the ability to enter time in the Timesheet (per day or per hour) for the Staff to track their hours.

**Navigation:** Click on the Staff menu and Tracker sub-menu and Timesheet sub-menu to navigate to the Staff info page.

**Security:** All Staff can access this page to enter their Timesheet.

The Timesheet for the logged-in Staff is displayed on the page for the current week. The staff has the ability to enter the time per day or per hour. By default, the ability to enter hours per day (Timesheet by hours) is selected which allows entering the total number of hours spent per day. Clicking on the “Timesheet by Hours and/or Time” allows the Staff to enter total hours per day or specific times. When you click on the radio button and click on the cell then it will open a popup when you have the ability to enter both Hours by day or enter specific times but you can’t enter both.

After entering the time, the Staff has the ability to Submit the Timesheet. The status of the Timesheet is visible on the left side of the Timesheet page. The submission and the approval emails are sent after submission. You will not be able to modify the Timesheet once it is submitted. However, if the Approver unlocks or rejects then you will be able to modify the Timesheet.

The summary of the Timesheet is shown below the Timesheet grid.

### **Staff Schedules**

Add and Manage Staff Schedules



Written By Scott Smith

Created 3 years ago

The System provides the ability to set up the Schedules for the Staff to track their time and Shifts.

**Navigation:** Click on the Staff menu and Tracker sub-menu and Schedules sub-menu to navigate to the Staff Schedules page.

**Security:** Only Admins and Staff can access this page and based on the permissions, only certain roles can perform certain actions.

All the Staff for the Business or the Franchise/Center are listed in the grid with their schedules. By default, the weekly view is displayed.

You have the ability to add the schedule by hovering on the day for the Staff row and clicking on Add icon which will open a popup. In the popup, specify the schedule and select for which Item the schedule belongs to. Clicking on the Manage button will open a popup to create/update Schedule items.

Once the schedule is added, you have the ability to edit or delete the schedule by hover on the schedule.

Changing the view to Monthly will show the calendar view with the schedule. For each day, you have the ability to add schedules for multiple Staff.

You have the ability to filter by User and by dates.

You have the ability to Publish the schedule to the Staff. Only Admins can Publish the changes. Clicking on the Publish button will open a popup and you have 3 options of Notifications -

1. Notify everyone in the team - Notifications will be sent to all the Staff about the Schedule changes when you select this option and click on Publish
2. Notify team members with changes only - Notifications will be sent to the Staff who had Schedule changes when you select this option and click on Publish
3. Don’t notify anyone - Notifications will not be sent when this option is selected and Publish is clicked.

### **Staff Time Offs**

Add and Manage Time Offs for Staff



Written By Scott Smith

Created 3 years ago

The System provides the ability to request the Time Off for the Staff to track their Time Off.

**Navigation:** Click on the Staff menu and Tracker sub-menu and TimeOff sub-menu to navigate to the Staff info page.

**Security:** All Staff can access this page to enter their Time Off.

All the Staff for the Business or the Franchise/Center are listed in the grid with their Time Offs. By default, the weekly view is displayed.

You have the ability to add the Time Off by hovering on the day for the Staff row and clicking on Add icon which will open a popup. In the popup, specify the Time Off.

Once the Time Off is added, you have the ability to edit or delete the schedule by hover on the schedule. The submission and the approval emails are sent after submission.

Changing the view to Monthly will show the calendar view with the schedule. For each day, you have the ability to add TimeOff for multiple Staff.

You have the ability to filter by User and by dates.

### **Staff Expenses**

Add and Manage Expenses for the Staff



Written By Scott Smith

Created 3 years ago

The System provides the ability to enter Expenses for the Staff.

**Navigation:** Click on the Staff menu and Tracker sub-menu and Expenses sub-menu to navigate to the Staff info page.

**Security:** All Staff can access this page to enter their Expenses.

All the expenses that are added will be displayed on this page. Clicking on the “Add Expense” button will open the popup to enter the expense details. Admins can add expenses for the Staff as well. Once the expense is created then you have the ability to add any attachments like expense receipts. The submission and the approval emails are sent after submission.

### **Staff Approvals**

Manage Time Tracking Approvals for the Staff



Written By Scott Smith

Created 3 years ago

The System provides the ability to manage all the Approvals for the Staff.

**Navigation:** Click on the Staff menu and Tracker sub-menu and Approvals sub-menu to navigate to the Staff info page.

**Security:** Only Approvers can access this page and perform Approvals or Rejections or Unlocks.

All the Approvals (Timesheet, Time Off, Expenses) are displayed on this page. The dropdown list on the right side top of the grid provides the ability to filter the grid based on what needs to be approved. The system provides the ability to select the records displayed and perform the actions (Approve, Reject or Unlock). When approving or rejecting, the system provides the ability to provide any comments. The system provides the ability to view the information of each record by clicking on the view icon.

Any Approval emails received in the email will get you to this page when you click on the link/button in the email.

### **Staff Wages**

Manage Wages for the Staff



Written By Scott Smith

Created 3 years ago

The System provides the ability to manage all the Wages information for the Staff to send the hours to QuickBooks.

**Navigation:** Click on the Staff menu and Tracker sub-menu and Wage Details sub-menu to navigate to the Staff info page.

**Security:** All Staff can access this page to view their corresponding hours entered & wage details.

All the logged hours (from Timesheet, Check-In/Out, Time Off, Fixed Hours) and Expenses that are eligible to be submitted to Quickbooks for all the Staff are displayed on the page for each student separately.

The Hours related information including the Wage details & status are displayed in a separate grid and the Expenses related information and their status are displayed in a separate grid.

Clicking on the “Submit to Quickbooks” will provide the ability to submit the information to QuickBooks if you have the integration configured.

The Configuration can be configured in “Admin > System Config > QuickBooks Config”.

### **Staff Check-In/Out**

Manage Check-In/out for Staff



Written By Scott Smith

Updated 3 years ago

## **Individual Check-In/Out**

The system provides the ability to take attendance of the students who come to the Center through the Check-In/Out process. While the Attendance page provides the ability to take attendance per Class, this page provides the ability to Check-In/Out to/from the Center.

Click on the Students menu and Check-In/Out sub-menu to navigate to the Check-In/Out page.

By default, you will land on the Individual Check-In/Out page. On the right side section, the Kiosk button provides the ability to open the Kiosk Screen. You can open this in the Computer/Tablet/Ipad/Kiosk at your Front desk of the Center so that it provides the ability for the Students to enter the PIN to Check-In or Check-Out. The Mobile app also provides this functionality to directly open in Tablet/Ipad.

Each student is assigned a PIN automatically when they are enrolled or added into the System. When the Student enters their PIN and clicks on the Check-In button then the Student is Checked in. If the Checked In and if the Student enters their PIN and clicks on the Check-Out button then the Student is Checked out.

The Check-In/Out records are displayed in the grid on the page. Click on the Date field to filter for the appropriate records for a particular date.

This page also provides the ability for the Check-In/Out with their corresponding PIN and those records are also added to the grid.

## **Group Check-In/Out**

The system provides the ability to take attendance of the students who attends a Group Class/Event through the Check-In/Out process. While the Attendance page provides the ability to take attendance per Class individually, this page provides the ability to Check-In/Out to/from the Center for a Group Class/Event.

Click on the Students menu and Check-In/Out sub-menu to navigate to the Check-In/Out page. Click on the “Group Check-In/Out” tab in the left side section.

On the right side section, the Kiosk button provides the ability to open the Kiosk Screen. You can open this in the Computer/Tablet/Ipad/Kiosk at your Front desk of the Center so that it provides the ability for the Staff to enter the PIN for the Group Class/Event to Check-In or Check-Out the Students. The Mobile app also provides this functionality to directly open in Tablet/Ipad.

The Class/Event PINs can be created under the Group tab in the “Manage PINs” tab within this page. When the Staff enters the PIN then all the Students that are associated to the Class/Event are displayed. The system provides the ability to select Check-In or Check-Out options to take attendance for the Students.

The Check-In/Out records are displayed in the grid on the page. Click on the Date field to filter for the appropriate records for a particular date for the selected Class/Event.

## **Print Sign-In/Out**

The system provides the ability to print the Sign-In/Out Sheet to take attendance manually.

Click on the Students menu and Check-In/Out sub-menu to navigate to the Check-In/Out page. Click on the “Print Sign-In/Out” tab in the left side section.

Select the Date for which you want the Sign-In/Out Print and Click on the Print button that is above the grid to take the Print.

## **Manage PINs**

The system provides the ability to manage the PINs for the Students, Staff and Group Classes/Events in a centralized location.

Click on the Students menu and Check-In/Out sub-menu to navigate to the Check-In/Out page. Click on the “Manage PINs” tab in the left side section.

In each of the tabs (Students, Groups, and Staff), a list of records are displayed with the PINs information. The system provides the ability to update the PINs by clicking on the Update PINs button.

The page is visible for the users who have appropriate permissions to perform the actions.

### **Staff Details**

Manage additional Staff Details



Written By Ivan Karmer

Created 21 days ago

## **Manage Staff Additional Details**

To add/manage additional details of your staff, follow these steps:

* Go to Staff > Staff Info and click on the staff member in the grid you want to edit.
* A pop-up window will open with the Staff User Setup tab selected. Click on the Details tab.

You can add/update the details in the following fields in the tab:

• ***Address:*** This is the Address of the staff member.

• ***City:*** This is the City of the staff member.

• ***State:*** This is the State of the staff member.

• ***Zip:*** This is the Zip of the staff member.

• ***Primary Phone Number:*** This is the Primary Phone Number of the staff member.

• ***Mobile Number:*** This is the Mobile Number of the staff member.

• ***Emergency Contact Number:*** This is the Emergency Contact Number of the staff member.

• ***Pay Range:*** This is the Pay Range of the staff member.

• ***Education:*** This is the Education of the staff member.

• ***Current Employment:*** This is the Current Employment of the staff member.

• ***Background Information:*** This is the Background Information of the staff member.

If you have any questions, please contact us at hello@calimaticedtech.com.

### **Staff Skills Information**

Manage Staff Skills information



Written By Ivan Karmer

Created 21 days ago

## **Manage Staff Skills**

To add/manage the skills of your staff, follow these steps:

* Go to Staff > Staff Info and click on the staff member in the grid you want to edit.
* A pop-up window will open with the Staff User Setup tab selected. Click on the Skills tab.

In this tab, you can manage the Skills and Certificates of the staff member.

**Skills:**

All the added skills for the staff member are listed in the grid. Clicking on the "Add Skill" opens a pop-up to add/update the Skill in the following fields:

• ***Skill Name:*** This is the Name of the Skill of the staff member.

• ***Years of Experience:*** Specify the years of experience of the staff member for the mentioned Skill.

• ***Skill Rating:*** Specify the Rating of the staff member for the mentioned Skill.

• ***Skill Description:*** Specify the Skill Description for the mentioned Skill.

**Certificates:**

All the Certificates of the Staff can be uploaded and managed here.

If you have any questions, please contact us at hello@calimaticedtech.com.

### **Staff Introduction Information**

Manage Staff Introduction Information



Written By Ivan Karmer

Created 21 days ago

## **Manage Staff Additional Details**

To add/manage the introduction of your staff, follow these steps:

* Go to Staff > Staff Info and click on the staff member in the grid you want to edit.
* A pop-up window will open with the Staff User Setup tab selected. Click on the Staff Intro tab.

A rich-text editor provides the ability to add the Introduction of the staff member.

If you are using the Instructor Slots booking external facing links, this Staff Introduction will be displayed on those pages.

If you have any questions, please contact us at hello@calimaticedtech.com.