

Scheduling with total com  
and holidays for your staff,  
staff member, schedule sta  
and much more.

**TRACK TIME OFF BENEFITS**

- Maintain staff benefits auto  
automatic balance reduction  
for carryover rules.
- Track multiple benefits, con  
• Allowances to be f  
staff levels.
- Track the accumulations  
actuate based on  
benefit balances  
carryover rules dire  
to view time-off r  
in the Scheduled  
history in detail c



## **SIMPLIFY SCHEDULING AND MAXIMIZE STAFF UTILIZATION**

- Manage and schedule staff assignments, such as scheduled phone calls, benefits, meetings, and to-do items. Firms licensed for the Project Management module and the Staff Management module will also benefit from project and task scheduling.
- Define staff qualifications for schedule items and work queues. Staff can view only the items for which they are qualified, and they can request additional work from the queue.
- Use the Schedules tab of the Manage Staff screen to view staff workloads and quickly re-assign schedule items for overbooked staff or assign schedule items to staff that have capacity, view items that have not yet been assigned, and identify items that are behind schedule.
- Enable staff to view their schedules, workloads, and items in the work queue by using the