

STAFF ABSENCE AND SCHEDULES



SuperFox has diaries for each staff member that are used to track the following staff absences:

- **Holidays** Described in the *Staff Holidays* mini guide.
- **Lieu Days** Described in the *Staff Holidays* mini guide.
- **Sickness** Tracks doctors notes, estimated & actual return dates.
- **Planned Absence** Compassionate, unpaid, education, maternity / paternity and 'other' absence.
- **Appointments** Appointments that do, or do not affect availability (e.g. peer observation).
- **Reminders** Simple calendar reminders.
- **Group Events** Multiple staff doing something together (e.g. first aid training, group hug).

It is useful to track this information in its own right, and as the events can affect a staff member's availability to work with children in the setting the information is also useful for staff scheduling.

Not in this Mini Guide

The holiday and lieu day tracking are described in their own **Staff Holidays** mini guide.

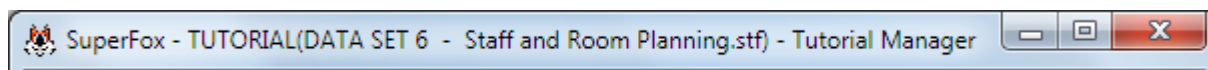
This mini guide covers management of the remaining staff absence types.

Optional - Load Tutorial Dataset 6

If you would like to follow the following absence examples load Tutorial Dataset 6:

Home > Backups & Tutorial Data > Tutorial Manager >

Double click on Tutorial Dataset 6 and check that the window title has changed.



Staff Overview Calendar

These events are conveniently managed from an interactive calendar that can be accessed from the Day Planner and Staff Pay & Diaries sections of the program.

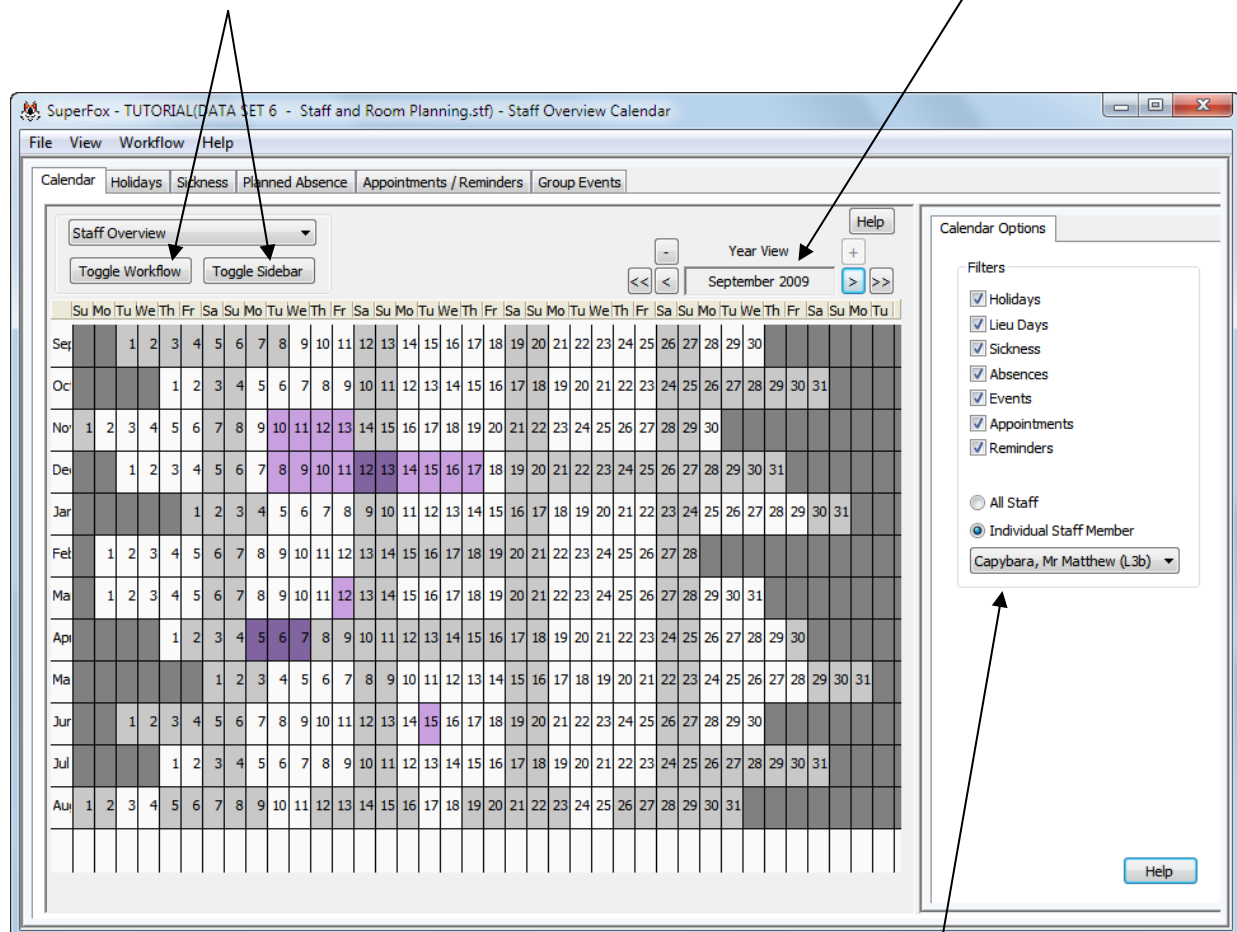
Let's go to the calendar in the Staff Pay & Diaries section:

**Home > Staff Pay & Diaries > Holiday & Diary Details >
Calendar tab > Staff Overview view >**

Our staff member, Matthew Capybara, has some absences in this tutorial dataset.

Use the 'back arrow' buttons to scroll the date back, so the calendar starts in September 2009.

Next show the sidebar as shown below. (You may need to toggle the workflow manager off to free up some screen space.)



From the sidebar choose the individual staff member Matthew Capybara.

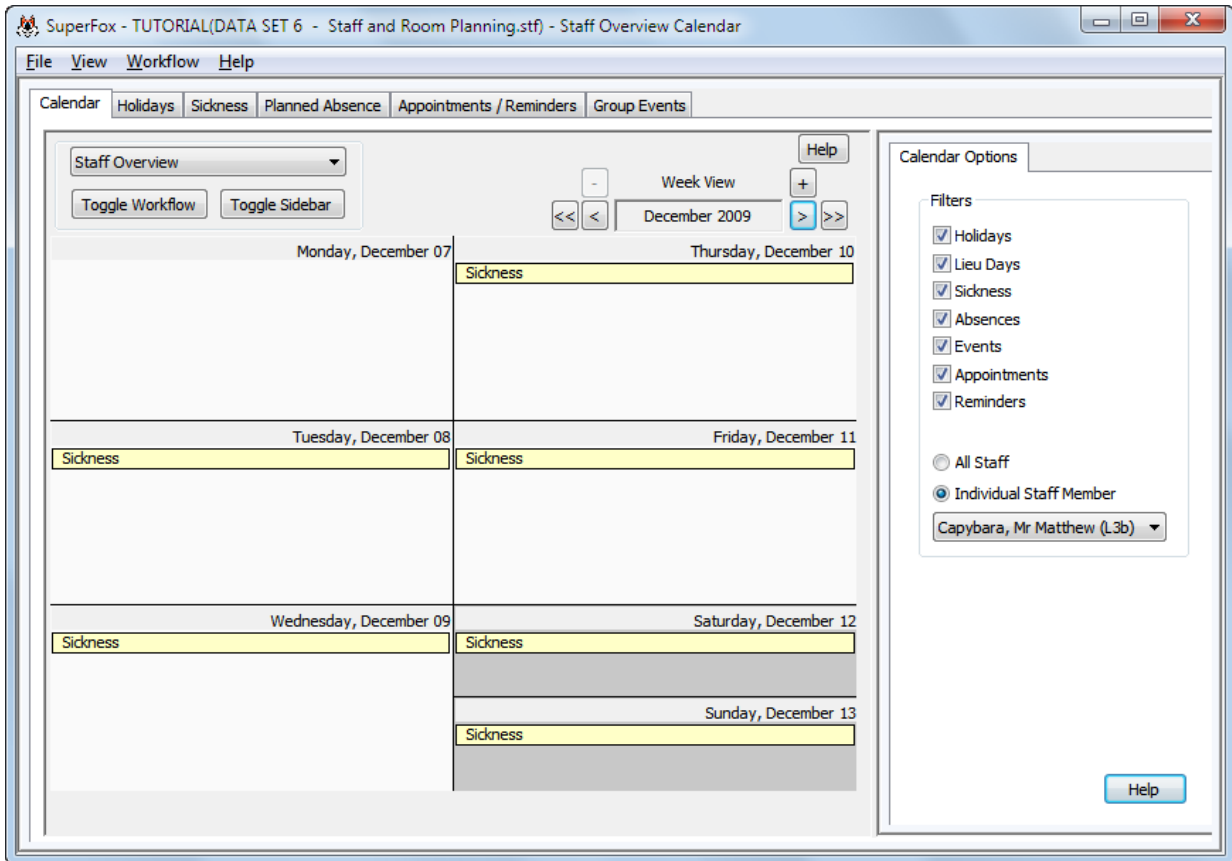
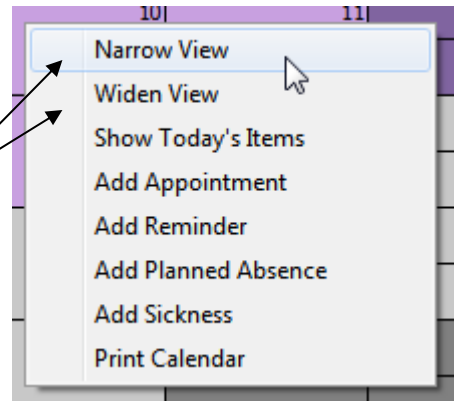
You will see Matthew's absences displayed on the calendar in purple and you can choose which types of absence to show on the calendar by using the ticks at the top of the sidebar.

We can add new absences by using the calendar's right click menu. To do this you must first choose an individual staff member on the sidebar. (The right click menu for 'All Staff' has fewer options.)

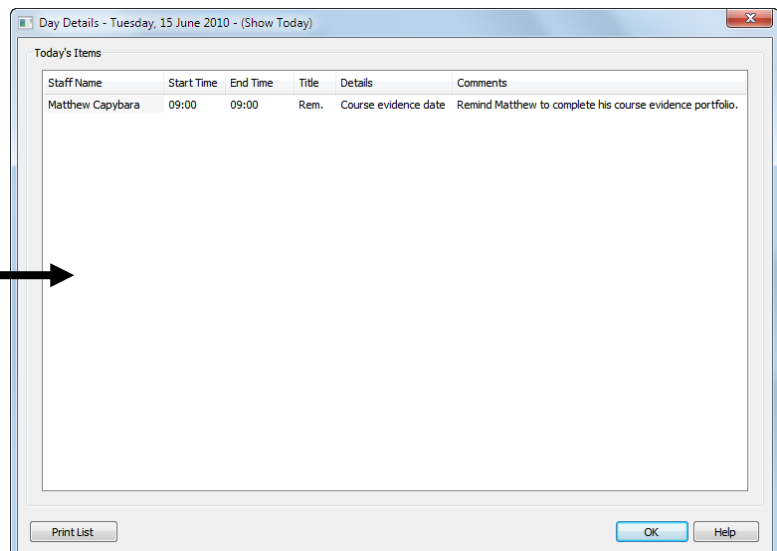
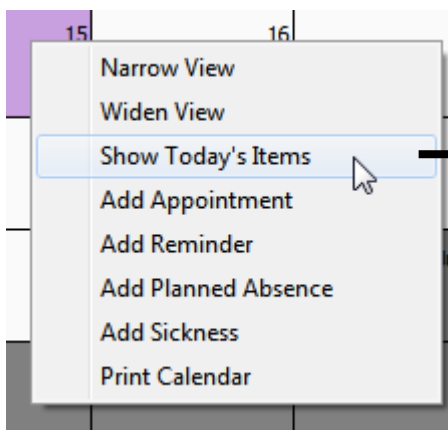
You can zoom between annual, monthly and weekly views of the calendar using the +/- buttons in the top right hand corner.

You can also use the narrow and widen view options on the right click menu for any day. (This is the best way to zoom in and out keeping your chosen day in sight.)

The details of Matthew's diary entries are displayed in the weekly calendar view:

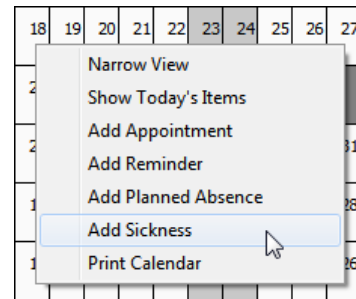


The 'Show Today's Items' right click option will display a printable listing of the days staff diary items.



Sickness

To add a period of sickness to a staff diary choose the staff member in the sidebar and right click on the calendar day concerned. Choose 'Add Sickness' from the pop-up menu.



The 'Edit Sickness' dialog box contains the following fields and options:

- Timings:**
 - Start date: Tue, 08 December 2009
 - Estimated Return: Thu, 17 December 2009
 - Actual Return: Thu, 17 December 2009
- Comments:** Nasty winter cold :-)
- Sickness Reason:** Injury - off duty
- Doctor's Note:**
 - Note received
 - Note received on: Tue, 15 December 2009

Buttons: OK, Cancel, Help

Periods of sickness have start and end dates and possibly review dates if the absence is a long one.

Enter these dates, choose a reason for the absence and add any useful comments.

If you receive a doctor's note edit the sickness from the sickness tab and add the date that the note was received.

As sickness may be work related it is important to record the reason for the sick leave. The choice of possible sickness reasons includes:

The 'Sickness Reason' dropdown menu lists the following categories:

- Injury - off duty
- Cold / Flu / Viral Infections
- General Infections
- Blood, Heart and Blood Vessel Disorders
- Respiratory Disorders
- Neurological Disorders
- Migraines / Severe Headaches
- Nervous Disorders
- Stress Related
- Gastro-Intestinal Disorders
- Muscle or Bone Disorder excluding back pain
- Back Pain
- Repetitive Strain Injury
- Injury - on duty
- Injury - off duty
- Neoplastic Disorders
- Metabolic Disorders
- Urinary Disorders
- Ear, Nose, Throat or Eye Disorders
- Skin Disorders
- Gynaecological Disorders
- Miscellaneous
- Dental

If the reason does not fit well into one of these categories choose 'Miscellaneous' and add an appropriate comment to explain the nature of the illness.

You can work with a complete list of sickness absences for each staff member from the Sickness tab.

This is the place that you would come to edit a sickness record to add the date a doctor's note is received or to post a new review date.

Last Name	First Name	Title
Copybara	Matthew	Mr
Eagle	Ruth	Mrs
Hamster	Michelle	Mrs
Lion	Nina	Mrs
Nightingale	Rebecca	Mrs
Panda	Peter	Mr
Panther	Caroline	Mrs
Salmon	Lisa	Mrs
Swift	Susanne	Mrs

Start Date	Estimated Return	Actual Return	Doctor's Note	Note Received	Reason Code	Comment
08 Dec 2009	17 Dec 2009	17 Dec 2009	<input checked="" type="checkbox"/>	15 Dec 2009	Injury - off duty	Nasty winter cold :-{

In common with the other diary tabs you can filter the absences displayed in the list on the tab. You can show:

- All sickness absence records
- Today's and future sickness absence records
- Sickness absence records in a date range

The sickness, planned absence, and appointments / reminders tabs also allow you to filter by reason or type.

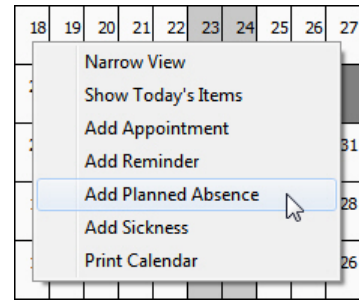
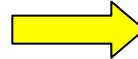
- All
- Cold / Flu / Viral Infections
- General Infections
- Blood, Heart and Blood Vessel Disorders
- Respiratory Disorders
- Neurological Disorders
- Migraines / Severe Headaches
- Nervous Disorders
- Stress Related
- Gastro-Intestinal Disorders
- Muscle or Bone Disorder excluding back pain
- Back Pain

To use these filters click on the drop down list arrow and then tick or un-tick the categories that you wish to see in the list.

In the example above we have just chosen 'Cold / Flu / Viral Infections'. If you have any entries in the 'Injury on duty' category these should obviously be reviewed by the setting manager.

Planned Absence

To add a planned absence to a staff diary choose the staff member in the sidebar and right click on the calendar day concerned. Choose 'Add Sickness' from the pop-up menu.



Add Planned Absence

Timings

Start date: Tue , 10 November 2009

End Date: Fri , 13 November 2009

Review Date: Fri , 13 November 2009

Absence Reason: Education

Notes: Matthew's EYPS study leave.

OK Cancel Help

Planned absences may span many days and, if it is a long absence it may require review.

Enter a start, end and review date if appropriate.

Choose an absence reason and add any notes that you might find helpful.

The reasons for absence that you can choose are:

Absence Reason

Education

Compassionate Grounds

Unpaid Leave

Education

Maternity / Paternity

Other (See Notes)

The planned absences always affect availability to work normally. You can work with a full list of absences for each staff member on the 'Planned Absence tab as shown below.

Calendar Holidays Sickness **Planned Absence** Appointments / Reminders Group Events

Staff

Last Name	First Name	Title
Copybara	Matthew	Mr
Eagle	Ruth	Mrs
Hamster	Michelle	Mrs
Lion	Nina	Mrs
Nightingale	Rebecca	Mrs
Panda	Peter	Mr
Panther	Caroline	Mrs
Salmon	Lisa	Mrs
Swift	Susanne	Mrs

Filter options

Show All

From Today

By Date From: Thu , 30 June 2011 To: Thu , 30 June 2011

By Reason: All

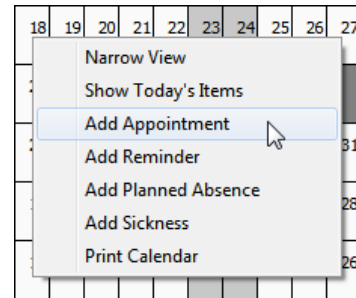
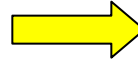
Absence Details

Start Date	End Date	Review Date	Absence Reason	Notes
10 Nov 2009	13 Nov 2009	13 Nov 2009	Education	Matthew's EYPS study leave.

Edit Add Delete Help

Appointments and Reminders

To add an appointment to a staff diary choose the staff member in the sidebar and right click on the calendar day concerned. Choose 'Add Appointment' from the pop-up menu.



Add Appointment

Details

Title: Annual Review

Description: Matthew's annual review and 360 degree feedback.

Affects Availability

Timings

Date: Fri, 12 March 2010

Start time: 17:00

End time: 18:00

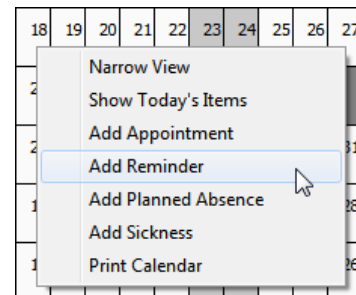
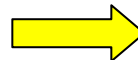
OK Cancel Help

Appointments have durations.

Add a title, description and start and end times for the appointment.

Use the 'Affects Availability' check box to indicate whether or not the staff member can be scheduled to work normally in the setting.

To add a reminder to a staff diary choose the staff member in the sidebar and right click on the calendar day concerned. Choose 'Add Reminder' from the pop-up menu.



Edit Reminder

Details

Title: Course evidence date

Description: Remind Matthew to complete his course evidence portfolio.

Timings

Date: Tue, 15 June 2010

Start time: 09:00

OK Cancel Help

Reminders do not have durations and they do not affect availability.

Just add a title, description and a time for the reminder.

Appointments and reminders are both listed on the Appointments / Reminders tab. You can use the 'By Event Type' filter to show either or both. The 'Impact' column denotes whether the event has an impact on normal availability to work.

The screenshot shows the 'Appointments / Reminders' tab. On the left is a 'Staff' list with columns for Last Name, First Name, and Title. On the right are 'Filter Options' including 'Show All', 'Today Only', 'By Date' (with 'From' and 'To' date pickers), and 'Show Only Entries Affecting Availability'. Below the filters is a 'By Event Type' dropdown menu. At the bottom is a table titled 'Appointment / Reminder Details' with columns: Start Date, End Date, Duration, Impact, Type, Title, and Description. An arrow points from the text above to the 'Impact' column in this table.

Start Date	End Date	Duration	Impact	Type	Title	Description
12 Mar 2010	12 Mar 2010	17:00 - 18:00	<input checked="" type="checkbox"/>	Appointment	Annual Review	Matthew's annual review and 360 degree feedback
15 Jun 2010	15 Jun 2010	09:00	<input type="checkbox"/>	Reminder	Course evidence date	Remind Matthew to complete his course evidence p

Group Events

Group events are a little different to the other diary items as they can have more than one participant. To add a group event, go to the Group Events tab and press the 'Add' button. You cannot do this from the calendar.

Enter an event title and description along with a start and end date / time.

Add staff to the event by selecting their names in the available staff list...

...and using the arrow buttons to move them into the list of attendees.

Press OK when you have finished adding attendees.

Here we have press-ganged everyone into decorating our setting but it might equally well have been a setting first aid course.

The 'Add Event' dialog box contains the following sections:

- Details:** Title: 'Decorate Portacabin', Description: 'Volunteers to decorate the Portacabin during the holidays.', and a checkbox for 'Affects Availability'.
- Timings:** Start date: 'Mon, 05 April 2010', End date: 'Wed, 07 April 2010', Start time: '10:00', End time: '16:00'.
- Available Staff:** A list with columns Last Name, First Name, and Title.
- Attendees:** A list with columns Last Name, First Name, and Title, containing all staff members.

Arrows from the text on the left point to the 'Description' field, the 'Available Staff' list, and the arrow buttons between the lists.

The group events appear on the calendar but are managed entirely on the Group Events tab as shown below.

Click on the group event in the Event Details list to see the staff members who are attending the event.

Group events can affect availability. Ours took place in the holiday closure and so didn't affect staff availability to work normally.

Using Staff Absences

On any day we know which staff members have diary items that prevent them from working normally.

You can quickly switch between the staff overview, staff holidays and the staff planner (scheduling) calendar views. This makes it easy to see if:

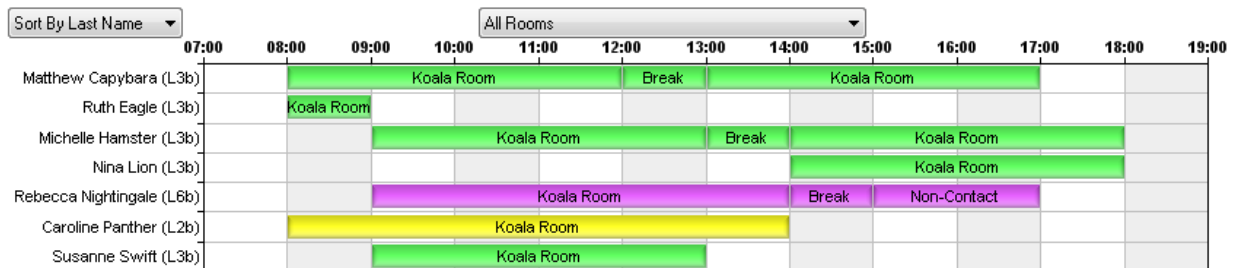
- You schedule a staff member who is unavailable.
- A staff member becomes unavailable who is already scheduled.

Although this is the main purpose of the absence information stored by the Staff Calendar there is considerable merit in tracking these diary events anyway, even if you only have a couple of staff members.

Staff Scheduling

You can schedule staff with or without room planning in place in SuperFox. Staff schedules are simply timelines for staff for a day, they look very similar to the children's timelines but the bars are colour coded by staff qualification.

We schedule the staff using the staff timeline display where we can add bars representing the staff member's working hours. You can clearly see who is working and what they are doing during the day. For example:

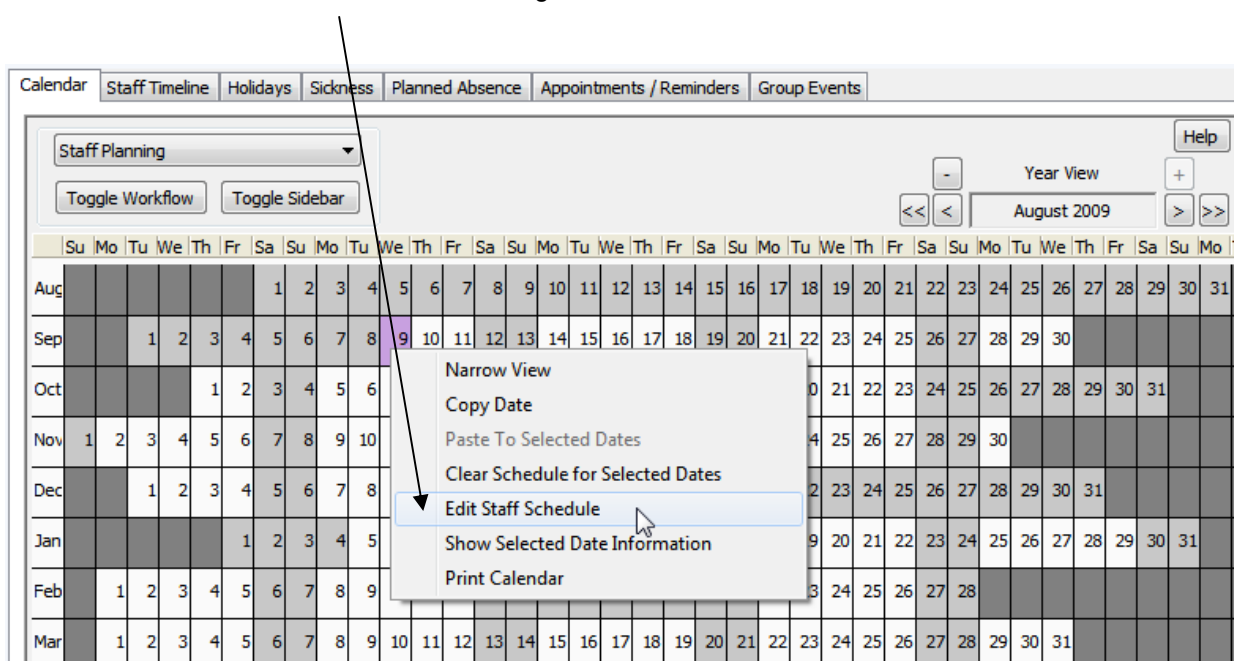


You can see above that there are three 'virtual' rooms available for staff planning purposes:

- Break – allows you to schedule paid breaks
- Non-contact – allows you to schedule paid non-contact time.
- Out of Setting – allows you to schedule time on outings.

Staff schedules are always associated with calendar days. To make a staff schedule:

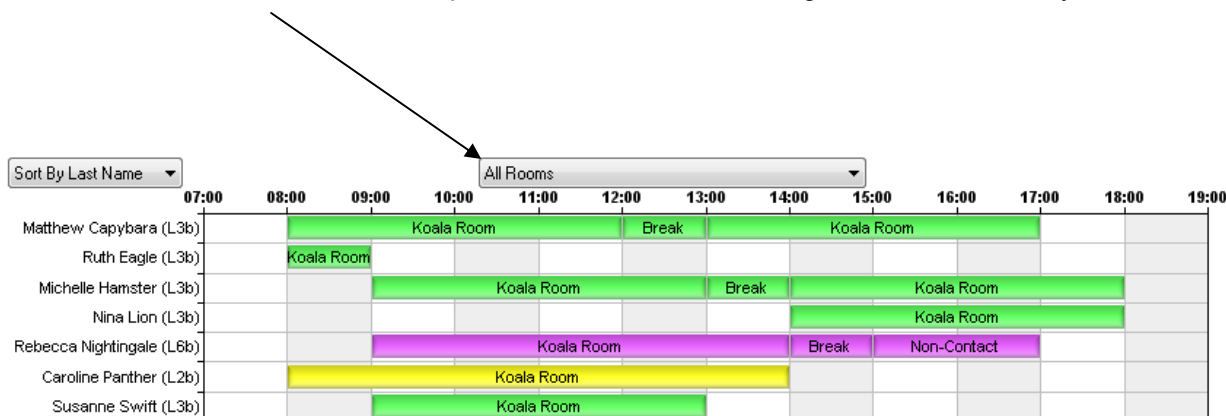
- Right click on a day
- Choose Edit Staff Schedule from the right-click menu.



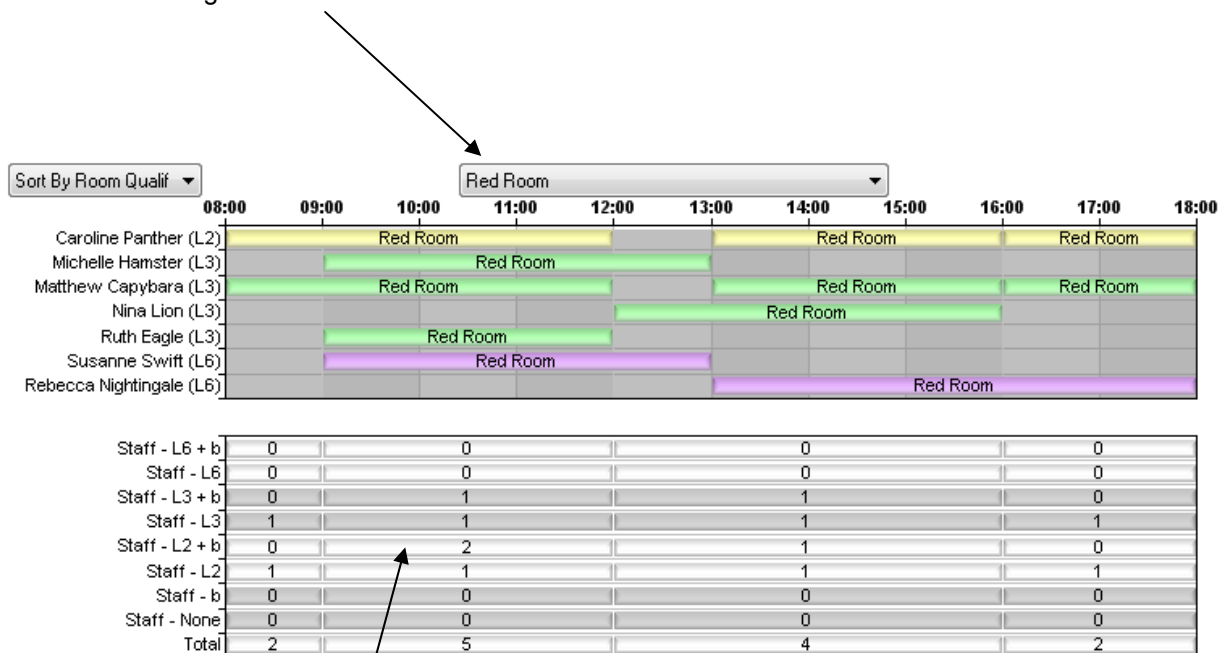
You will be taken straight to the Staff Timeline tab for the day you chose. There are two distinct views of the staff timeline that you can choose from the centre drop down menu and both are useful:

- All Rooms – allows you to work with all staff members for a complete day
- Specific Room – allows you to compare your schedule to any room planning targets.

Here is the All Room View – this also prints to make a useful working document on the day.



And here is a single room view.



If the room has been planned for this day, the target numbers of staff by qualification will be displayed on the bottom set of bars. This view is easiest to use if sorted by qualification.

The qualifications (L6) shown against each staff member are the qualifications set up in:

Staff Details > Staff Details > Qualifications tab > 'Childcare staff only' group

Editing the schedule is very simple and can be done in either All Rooms or an individual room view. Display the sidebar and use the Timeline Options tab to change the timeline be 'Entire width'. (It's optional but the full width display gives the best overview of the entire day.)

Now use the Staff Scheduling tab to schedule the staff into rooms.

You also need to specify the start and end time in the room. (Note these are exact times and are not tied to the room plan zones or quarter hour slots.)

If you have set up provisional staff costs you will be able to see the provisional cost of the scheduled period. (These are set up in Setting Details > Setting Details > Work Period >)

When you press the Add to Schedule button the new bar will be added to the staff timeline.

The total provisional cost of the displayed schedule is also displayed at the bottom of the sidebar.

If you are a small setting you may only have one room so this will be especially easy for you!

If you change your mind (or a staff member becomes sick) removing a scheduled bar is very easy. Simply right click on the bar and chose 'Remove Schedule Item'.

	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00
Caroline Panther (L2)			Red Room					Red Room		Red Room	
Michelle Hamster (L3)			Red Room	Red Room							
Matthew Capybara (L3)			Red Room					Red Room		Red Room	
Nina Lion (L3)							Red Room				
Ruth Eagle (L3)			Red Room								
Susanne Swift (L6)											
Rebecca Nightingale (L6)											

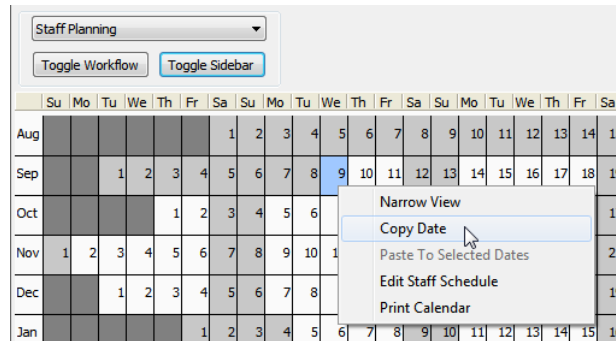
Staff - L6 + b	0		0				0			0	
Staff - L6	0		0				0			0	
Staff - L3 + b	0		1				1			0	
Staff - L3	1		1				1			1	
Staff - L2 + b	0		2				1			0	
Staff - L2	1		1				1			1	
Staff - b	0		0				0			0	
Staff - None	0		0				0			0	
Total	2		5				4			2	

Your schedule will be automatically saved as you adjust it.

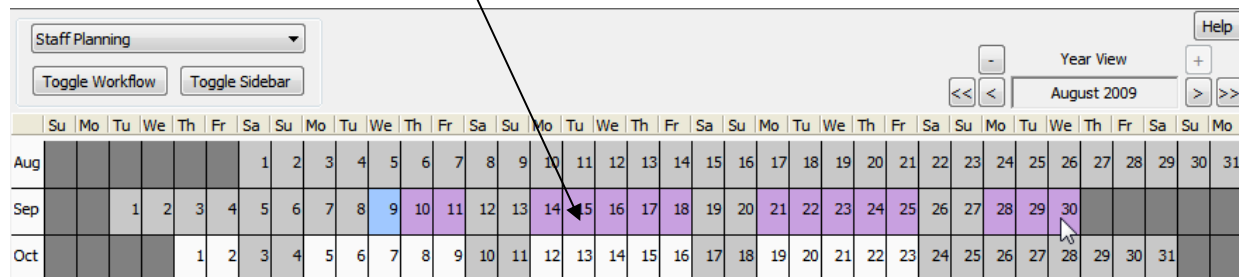
Applying The Staff Schedules

Clearly we do not want to schedule every day individually, it would be very tedious! All we need to do is return to the calendar tab and choose the Staff Planning view: If we want to use our schedule on other days all we need to do is:

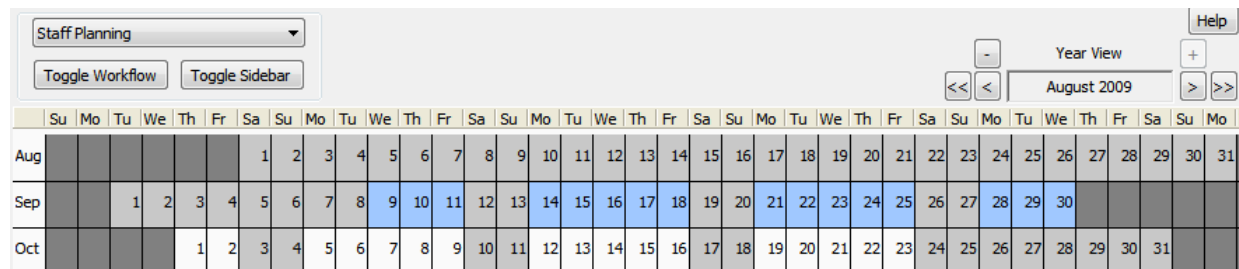
Use the right click menu to copy the day's schedule...



...select the additional days to apply the schedule...



...and use the right click menu to paste the schedule onto the selected days which will turn blue.



Calendar Options

Filters

- Show Holidays
- Show Lieu Days
- Show Sickness
- Show Absences
- Show Events
- Show Appointments
- Show Reminders

All Staff
 Individual Staff Member

Single Staff Mode

If you use the calendar options sidebar to choose an individual member of staff instead of all staff the operations described above will just be applied to the staff member selected. You can also highlight holidays, lieu days, absences and reminders that may clash with the schedule.)

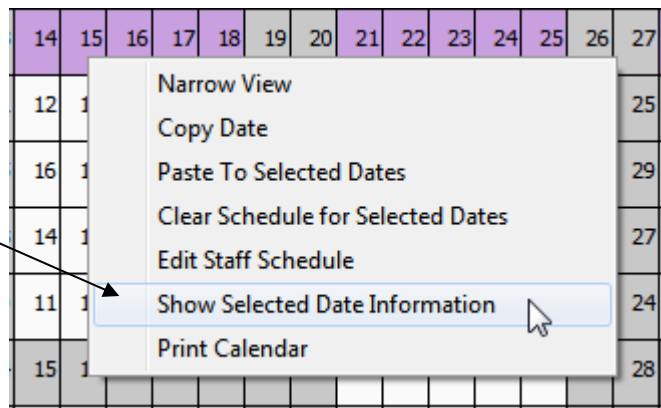
This is very useful for correcting schedules affected by staff absence. You can clear an individual staff member's part of the schedule or paste in a different staff member's schedule who normally works on a different day.

It may be a very good approach to building up a schedule if you are temporarily reliant on agency staff to make up a shortfall in your permanent staff numbers.

Costing The Staff Schedule

We can show the provisional cost of the scheduled days by selecting them and using the right click menu to choose

'Show Selected date Information'



The information shown includes the number of hours and provisional cost of the schedule over the selected days.

Day Information

Total Scheduled Hours:

Total Cost:

Rooms Used (3):

Room Name
Koala Room
Break
Non-Contact

Staff Scheduled

Staff Name	Hours Sche...	Estimated ...	Cont. Type	Cont. Hours
Caroline Panther (L2b)	96.00	£576.00	W	15.00
Susanne Swift (L3b)	64.00	£384.00		0.00
Rebecca Nightingale (...)	128.00	£960.00	M	65.00
Michelle Hamster (L3b)	144.00	£936.00	D	6.00
Matthew Capybara (L3b)	144.00	£864.00	W	30.00

The information also includes the rooms with scheduled staff during the selected period and the provisional cost of each staff member.

Usefully each staff member's information includes a note of their contracted hours, if any, to make them easy to compare with the actual hours used in the period.

Remember that the staffing costs detailed here use the planning hourly rates and they are necessarily approximate if the staff member has differing pay rates or is salaried.

The contracted hours and planning pay rates are set up in

Staff Details > Staff Details > Work Period tab >

Printable Staff Schedules

The All Rooms view of the daily timeline is a good printable report showing who is where on a day.

Sort By Last Name	All Rooms													
	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	
Matthew Capybara (L3b)		Koala Room			Break		Koala Room							
Ruth Eagle (L3b)		Koala Room												
Michelle Hamster (L3b)			Koala Room			Break		Koala Room						
Nina Lion (L3b)								Koala Room						
Rebecca Nightingale (L6b)			Koala Room			Break		Non-Contact						
Caroline Panther (L2b)		Koala Room												
Susanne Swift (L3b)		Koala Room												

The Staff Planning Calendar also prints and makes a good report for each staff member to let them know when they are at work. Use the sidebar to choose the individual staff member.

The monthly view shows the staff member's scheduled working days for the month. A useful printable document to let the staff member know which days they will be at work.

Monday	Tuesday	Wednesday	Thursday	Friday	Sat/Sun
August 31	September 1	2	3	4	5
					6
7	8	9 08:00 -> 17:00 - At Work	10 08:00 -> 17:00 - At Work	11 08:00 -> 17:00 - At Work	12
					13
14 08:00 -> 17:00 - At Work	15 08:00 -> 17:00 - At Work	16 08:00 -> 17:00 - At Work	17 08:00 -> 17:00 - At Work	18 08:00 -> 17:00 - At Work	19
					20
21 08:00 -> 17:00 - At Work	22 08:00 -> 17:00 - At Work	23 08:00 -> 17:00 - At Work	24 08:00 -> 17:00 - At Work	25 08:00 -> 17:00 - At Work	26
					27
28 08:00 -> 17:00 - At Work	29 08:00 -> 17:00 - At Work	30 08:00 -> 17:00 - At Work	October 1	2	3
					4

The weekly view shows exactly how the staff member scheduled for each day. This is also a useful printable document.

Monday, September 14		Thursday, September 17	
08:00AM - 12:00PM Koala Room		08:00AM - 12:00PM Koala Room	
12:00PM - 01:00PM Break		12:00PM - 01:00PM Break	
01:00PM - 05:00PM Koala Room		01:00PM - 05:00PM Koala Room	
Tuesday, September 15		Friday, September 18	
08:00AM - 12:00PM Koala Room		08:00AM - 12:00PM Koala Room	
12:00PM - 01:00PM Break		12:00PM - 01:00PM Break	
01:00PM - 05:00PM Koala Room		01:00PM - 05:00PM Koala Room	
Wednesday, September 16		Saturday, September 19	
08:00AM - 12:00PM Koala Room			
12:00PM - 01:00PM Break			
01:00PM - 05:00PM Koala Room			
Sunday, September 20			

End