

# Service Description

StaffSavvy is a complete staff management software covering HR management, shifts & schedules, time sheets, training management/reporting, online training, communication tools, compliance management, document creation & storage and, optionally, recruitment management too.

It comes in two editions; scheduling and workforce. The schedule edition is designed for organisations with existing HR tools and strips back the system to scheduling and time & attendance (with some other useful elements too).

Our service is designed around operational organisations and businesses such as event spaces, conference halls, theatres, visitor attractions, museums, council services, care settings and more. Anywhere that often has a complex mix of permanent, contracted, casual and volunteer workers within their teams. We support multiple departments, locations and complex organisational hierarchies.

The goal is to reduce admin and management time for organisations of all sizes. StaffSavvy uses intelligent tools, automation, and processes to help achieve more efficient, safer, smarter and compliant workplaces.

## Scheduling Edition Features

The complete edition includes all of the features in the Scheduling Edition plus all those listed below. You can disable features if you don't wish to use them but this won't affect the cost of the service. We've only included highlight features in the list; more features and tools are available to be seen on request.

### Shifts and Scheduling

- Comprehensive rota schedule tools
- Staff availability management by staff members including absences, holidays and preferences of availability during the week
- Budgeting and cost forecasting
- Detailed rule compliance ensuring required rest periods and maximum hours are met
- Automatic rota creation and shift allocation using detailed templates
- Fair rota scheduling options that suit your organisation
- Day, week and month views of shifts with easy editing
- Quick addition of new shifts in bulk or singularly
- Automatic notification to staff of any changes to their shifts
- Create three types of unassigned shifts; manager choice, staff select a shift on first come, first serve basis and offered shifts where staff offer to work and manager makes the final choice
- Regular shift patterns across multiple departments/outlets
- Required staffing ratios and reporting when meeting or missing required staffing levels

- Constant access to their shifts for staff members including email, push notifications and SMS text messages for changes
- Assign shift tasks and checklists to be completed within the shift and report back to the system when complete
- Deployment options per shift, allowing you to schedule the position of each staff member during their shift, including when they have breaks
- Calendar sync available for staff to have their schedules live on their personal devices
- Allow staff to request cover, exchanges shifts and cover each other within rules
- Create and assign shift notes to provide briefing notes and documents for a day
- Create and assign Events so staff and managers know what is happening within a location
- Assign Cost Codes to events and times during the day. Generate cost code reports across any departments and date range
- Full absence policies with automatic payments and partial payments based on length of service
- Full audit trail of all changes and adjustments made
- Comprehensive templates including multi-day, multi-location templates with automatic staff allocation
- Integration with Artifax Event, Yesplan, Momentous Elite and Momentous Enterprise to pull details and information through from their system into your rotas and shift management pages

## Time Sheets

- Clock In Screens using any modern browsers such as Android tablets, till systems and desktops
- Remote clock in via personal devices can be allowed or restricted
- Automatic lateness and overtime calculations
- Detailed break reporting and deductions
- Automatic unsocial hours or overtime adjustments based on your rules
- Easy approval process with common error detection
- Combine time sheets into a single wage sheet for easy exporting to your payroll provider
- Many payroll export formats already supported with a commitment to add any required export format for a payroll system without additional cost
- Full audit trail of all changes and adjustments made

## Communication Tools

- Personal, secure message communication between employees
- News tool allowing you to contact all staff or segments of the workforce with information messages
- Alerts require staff to acknowledge the important message and provide full reporting on who has acknowledged the alert
- Tasks to direct staff to complete particular documents, view documents, complete training or other tasks
- Staff events allow you to schedule optional events that staff can sign up to attend
- Powerful forum tool that allows staff to communicate within a structured environment with general discussions and Q&A formats
- Resource Library allows important documents to be stored and shared with staff

## Connectivity

- Open API for core features
- Built-in export formats for common payroll providers
  - Additional flat-file support for other providers is included with no additional charge
- Integrations with event management platforms
  - ArtifaxEvent
  - Momentum Enterprise
  - Momentous Elite
  - Yesplan
- Integrations with learning management systems
  - Flow MS
  - iHasco
- Integrations with other HR systems
  - Sage People
  - Cascade

## Complete Edition Features

The complete edition includes all of the features in the **Scheduling Edition** plus all those listed below. You can disable features if you don't wish to use them but this won't affect the cost of the service. We've only included highlight features in the list; more features and tools are available to be seen on request.

## HR Management

- Detailed staff records with unlimited fields and data sets
- Detailed tracking of all hours planned and worked
- Less than full time contracts using fewer working days, shorter days or complex shift-based working patterns
- Comprehensive working day management including options for different hours per day or unique schedules with different hours per day over 365 days of the year
- Compress hours contracts that allow for allowances to be adjusted for staff working fewer but longer days
- Fully customisable limits on working hours and practices to ensure staff are within your legal limits and organisation's policies
- Automatic manipulation of working hours based on rules such as working national holidays, organisation closed days, overtime and unsocial hours
- Multiple concurrent contracts allow for calculations between different employment rules for the same employee
- Multiple holiday allowance pots allow for overtime or special leave (such as allowances for charity work or personal development days) to be reported separately
- Directed on-boarding process ensuring staff provide all required documents, read and sign important information and complete necessary training. This can be different processes for different types of staff
- Document storage including upload scanned copies, digital signatures and digital document completion

- Detailed Right to Work compliance process allowing easy decisions on which documents are needed and uploaded. Management of expiry dates to automatically prevent any staff member working without valid documents
- Comprehensive Time Off in Lieu (TOIL) management
- Personnel Records with customisable templates for use for commendations, disciplinarys and performance management
- Workflow triggers allowing for new processes, tasks, emails and actions to be performed automatically when an event takes place
- Detailed access permissions to ensure access to only specific data for the staff they are allowed to view
- Automatic pay rate adjustments based on age or length of service
- Secure and trackable case management for employee issues or disputes
- Hierarchy planning and staff job history
- Easily require signatures on policies, risk assessments and standard procedures. Quickly add new versions which require signatures (including grace periods) and store completed documents within staff document stores
- Pay Scales / Spinal Points within automatic mapping for hourly and salaried employees
- Expenses management with approval flows, tax/VAT collection and proof of purchase
- UK Right to work checks via internal systems or TrustID (additional cost)

## Training Records and Management

- Full LMS ( Learning Management System)
- Detailed Training Programs combining different required certificates
- Independent certificates which can be managed externally or within the system
- Certificate modules can be physical courses with dates, locations and course leaders
- Certificate modules can also be fully online with documents, slide shows and exams
- Exams can be multiple choice with automatic scoring or essay style exams with a marking process and optional auditing process
- Automatic expiry reports and re-certification processes
- Digital certificates for staff who have completed your training
- Upload copies of certificates for external courses
- Add training requirements to a role to ensure staff working in that role have the necessary documents in place at every moment
- Automatically pay time entries for completed training, online exams and booked courses
- Built-in integrations with external course providers:
  - Flow MS
  - iHasco

## Communication Tools

- Tasks to direct staff to complete particular documents, view documents, complete training or other tasks
- Staff events allow you to schedule optional events staff can sign up to attend
- Powerful forum tool that allows staff to communicate within a structured environment with general discussions and Q&A formats

- Resource Library allows important documents to be stored and shared with staff

## Reporting, Data Retention & GDPR

- Detailed standardised reports for common functions
- Unlimited custom reports where you can build up the required information and view/export the details for further analysis
- Dedicated Right to Work console providing access to all employee records and historical documents used to validate right to work
- Digital Right to Work checks via TrustId (additional cost per document)
- Full audit trails and system logs include all views, edits and sensitive data accesses within the system
- Staff have access to all of their personal data and can update the majority of it to ensure it's always accurate
- Automatic data retention policies shred data once it's no longer needed, ensuring your legal compliance
- Custom data retention policies are available too

## Connectivity

- JSON-based reporting API for custom report data
- Open API for extracting and updating data remotely with full permission-based controls
- Single Sign On Via SAML
- SCIM integration options

## Add-on Features

These features are optional extra features that affect the cost of the service. We've only included highlight features in the list; more features and tools are available to be seen on request.

### Recruitment Add-On

- Public portal to display all available positions with applicant login
- Dedicated pages per position to display further information
- Fully customisable application forms with unlimited questions
- Detailed score-based or quick decision shortlisting process with full blinding of any information required
- Any sensitive information can be hidden from hiring managers/decision-makers if required
- Full threaded discussions between hiring managers and decision-makers on whole applications or individual answers
- Dedicated application feedback area so details can be recorded for the applicant
- Online interview booking and management with applicants self-selecting suitable times
- Reinterview as many times as needed
- Indeed integration to amplify your applicant audience and utilise their suite of products
- Draft decisions and public decisions with full audit trail of actions
- Contact applicants directly with updates on the recruitment process

- Easy rejection process with automatic feedback if required
- Quick process for offering position; applicants can accept/reject via the portal
- Successful applicants can have all of their personal information copied over to their staff account instantly and suitable access granted to start on-boarding within moments
- Automatic data retention policies ensure data is removed on schedule
- Easy downloading of critical data for reporting

## Time & Distance Add-On

- Calculate travel distances between multiple locations within your organisation
- Calculate travel times with options to set leeway times each end of travel
- Include travel calculations within scheduling to ensure staff can travel between the required locations on time
- Automatically add mileage claims for staff based on travel distances

## Analytics Dashboards Add-On

- Ability to create your own graphical analytics dashboards
- Control the visibility of dashboards for different access levels and departments
- Visualise any custom report built within StaffSavvy; you have the ability to build your own custom reports
- Easily access the data used to display the dashboard charts for further details

## Service Hours

Access to the system is 24 hours a day, 365 days a year. Anywhere, anytime.

## Support and Documentation

Our support documentation is available in HTML or PDF formats from <https://support.staffsavvy.com>

Our support team is available on a dedicated phone number, email address or via <https://support.staffsavvy.com>  
Our core support hours are 9-5 on normal business days.

Our emergency support phone number is active 24/7 where you can report critical issues preventing your organisation's use of the service.