

SLING – GETTING STARTED

ADDING EMPLOYEES & SETTINGS REVIEW

www.getsling.com

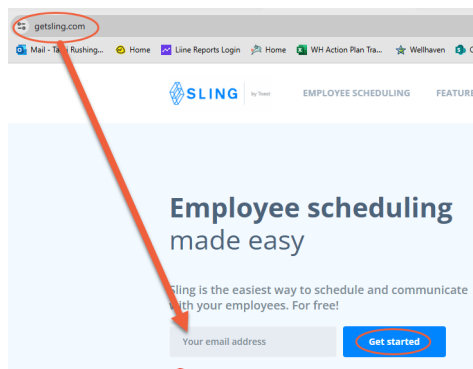
Sling is team scheduling that is easy to manage. Allows drag and drop to schedule staff in minutes. You can create templates to use over again. There is an app employees can use to have their schedules at their fingertips.

When you first create your account, you will be automatically enrolled in the Business version for a 15-day trial. After 15 days you will be moved to the free version.

****Please note that there are some features that will not be available once the free trial ends.**

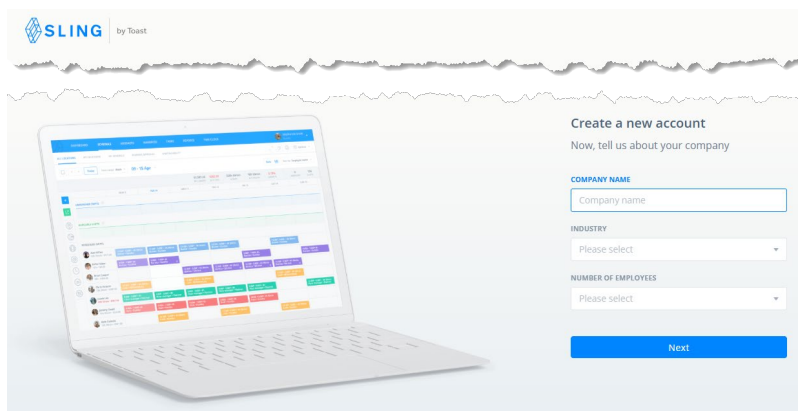
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Create your Sling account using your WellHaven email



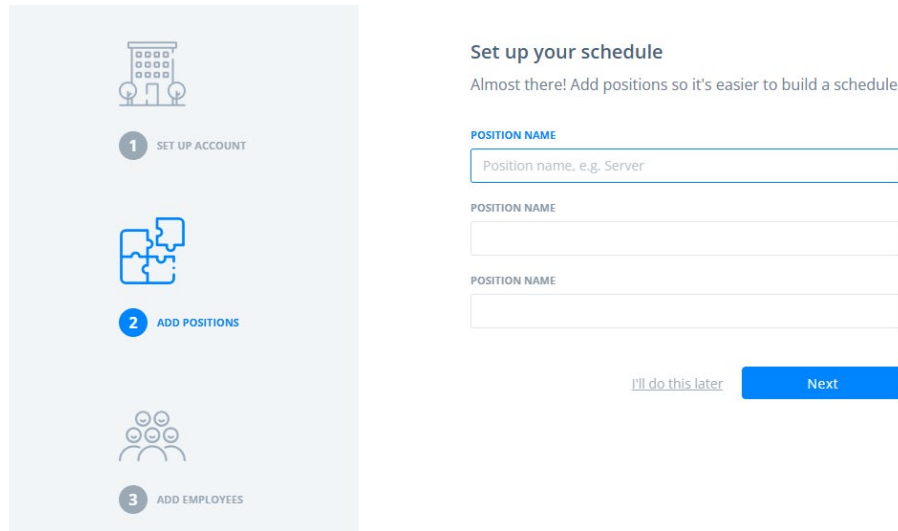
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Fill out the specifics of your clinic then click Next. You will have to verify your email address.



3

Setting up the Positions for your clinic is the next step. It is best to do this from the Dashboard so you can customize colors for the positions. So, at this time, click on I'll do this later.



Set up your schedule

Almost there! Add positions so it's easier to build a schedule.

POSITION NAME

Position name, e.g. Server

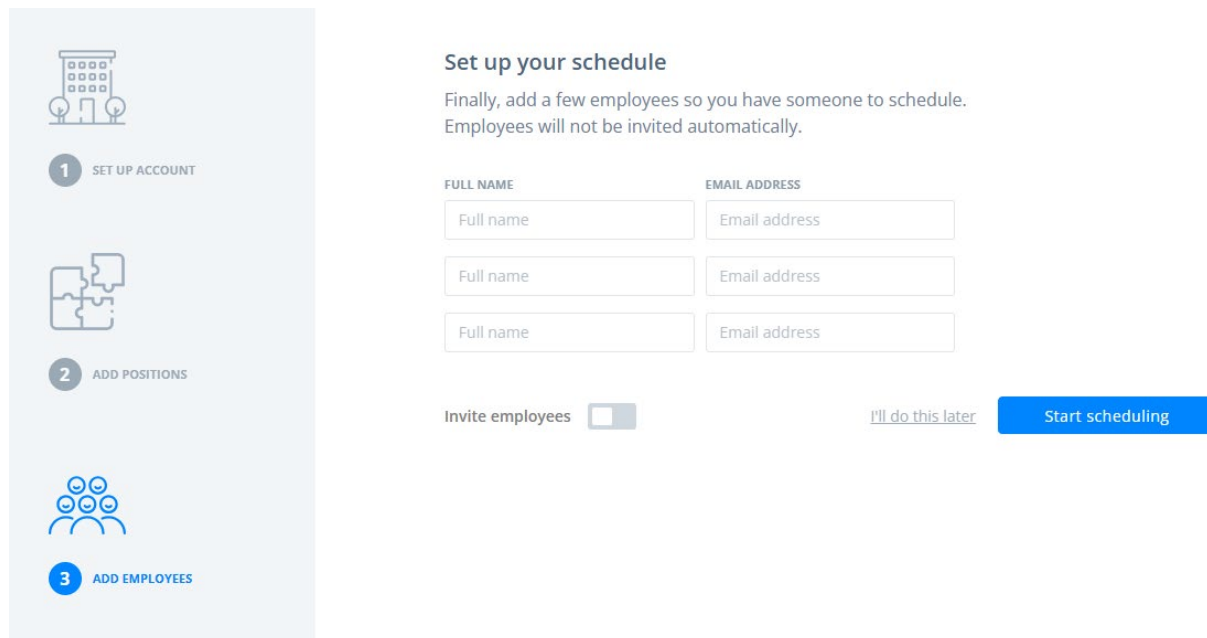
POSITION NAME

POSITION NAME

[I'll do this later](#) **Next**

4

Adding employees is the next step. It is best to customize some settings before you invite your employees to Sling. So, at this time, click on I'll do this later.



Set up your schedule

Finally, add a few employees so you have someone to schedule. Employees will not be invited automatically.

FULL NAME **EMAIL ADDRESS**

Full name Email address

Full name Email address

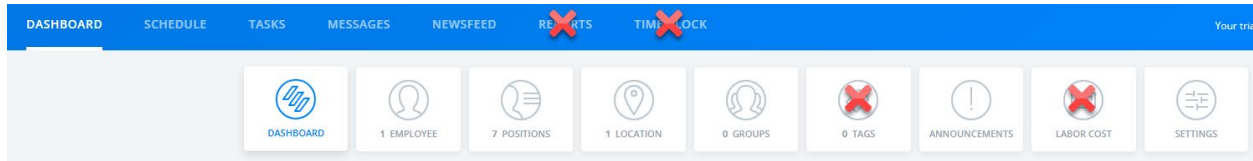
Full name Email address

Invite employees ☐ [I'll do this later](#) **Start scheduling**



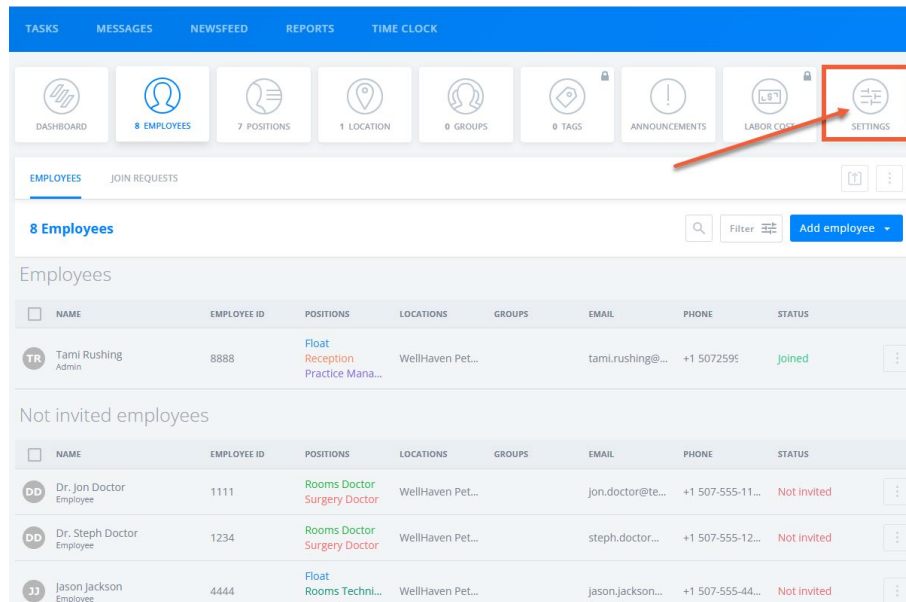
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The areas with red X's are available only during the 15-day trial period and should not be used.



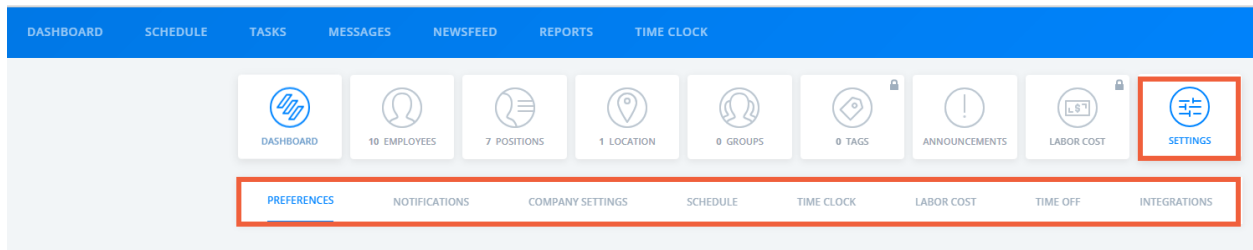
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Before you add your employees there are a few settings you should look at or change



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Keep in mind that many settings may not be available in the free version. If you are making these changes during your 15-day trial period, some settings may appear available.



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Preferences: The only changes to be made here are:

1. Time format: am/pm or 24-hour clock
2. Name format: which comes first (first name or last name)

Shift appearance on calendar is a Premium setting so no changes should be made

The “Other preferences” are on by default and you can decide if you want them on or off

PREFERENCES NOTIFICATIONS COMPANY SETTINGS SCHEDULE TIME CLOCK LABOR COST TIME OFF

Display preferences
Other preferences

Display preferences

Time format 1 1:40 PM

Name format 2 John Appleseed

World clock
Display calendar events and schedule according to your local time (America/Chicago)
When disabled, you see and schedule events according to their location's time zone. ☐

Shift appearance on calendar **PREMIUM**
There are three possible versions for shift display. Day view, week view, and month view. The month view also dictates the appearance of shifts when sorting by start time in week view. Drag elements from the left side onto the desired position on the shift block preview on the right.

TIME DURATION ASSIGNEE POSITION LOCATION

Day Week Month ↺

9:00 AM - 5:00 PM • 8h
SurgeryTechnician/Assistant • WellHaven Pet H

PREVIEW

TR Tami Rushing
8h

9:00 AM - 5:00 PM • 8h
SurgeryTechnician/Assistant • WellHaven Pet Health

Other preferences

Sound effects
Enable sound effects for sent and received messages. ☒

Show others when I am typing
Allow others to see when you are typing a message. ☒



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Notifications: These are your personal notifications, not notifications settings for the team. They are all defaulted to be on except for the Employee activity notification.

The screenshot shows the 'NOTIFICATIONS' settings page. The top navigation bar includes 'PREFERENCES', 'NOTIFICATIONS' (highlighted), 'COMPANY SETTINGS', 'SCHEDULE', 'TIME CLOCK', 'LABOR COST', and 'TIME OFF'. The left sidebar lists 'Shift alarms', 'Dashboard', 'Messages', and 'Newsfeed'. The main content area has four sections, each with a toggle switch:

- Shift alarms:** 'Enable shift alarms, so you get a reminder for upcoming shifts.' (Toggle: ON)
- Dashboard notifications:** 'Dashboard notifications include shift updates, tasks, and announcements relevant to you. By default, these notifications are displayed on your Dashboard.' (Toggle: ON)
- Message notifications:** 'Message notifications inform you of any new messages in conversations you are a part of. By default, these notifications are displayed as badges on the Messages tab.' (Toggle: ON)
- Newsfeed notifications:** 'Newsfeed notifications inform you of any new posts on pages you follow. By default, these notifications are displayed as badges on the Newsfeed tab.' (Toggle: ON)

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Company Settings: These are all toggled on as default. Restrictions and Messages are the only settings available on the free version of Sling.

The screenshot shows the 'COMPANY SETTINGS' page. The top navigation bar includes 'PREFERENCES', 'NOTIFICATIONS', 'COMPANY SETTINGS' (highlighted), 'SCHEDULE', 'TIME CLOCK', 'LABOR COST', and 'TIME OFF'. The left sidebar lists 'Restrictions', 'Messages', 'Newsfeed', and 'Tasks'. The main content area has four sections, each with a toggle switch:

- Restrictions:** 'Contact details: Allow employees to see each other's phone numbers and emails.' (Toggle: ON)
- Messages:** 'Enable messaging for your organization.' (Toggle: ON)
- Newsfeed:** 'Enable content sharing across your organization.' (Toggle: ON)
- Tasks:** 'Enable to assign tasks to shifts and follow their progress.' (Toggle: ON)



Schedule: There are several settings that will not be available on the free version of Sling.

There are three sections that you should be sure to modify or at least look at:

1. First Day of the Week
2. Hours of Operations
3. Shift exchanges and available shifts-Allowing employees to give away shifts through the app

Schedule settings

First day of the week
Affects your schedule layout and labor cost calculation. Monday

Hours of operation
The day view and unavailability will be limited to these hours. From 12:00 AM To 12:00 AM

Cutoff time for overnight hours
When enabled, hours that cross 12:00 AM will be split between days on schedule and payroll. ☐

Visibility of schedules for employees
Allow employees to view other employees' schedules. ☒
Employees can view full schedule for all positions

Visibility of coworkers for employees
Allow employees to check who they're working with on specific shifts. ☒

Visibility of time off and unavailability
Allow employees to view other employees' time off and unavailability. ☒

Visibility of schedules for managers
Allow managers to view other locations' schedules. ☒

Breaks

Enable employees to take breaks during their shifts. ☒

Break type
Specify whether breaks are standard or automated based on rules. Standard

Break category
Specify whether breaks are paid or unpaid. Unpaid

Default break duration
Set the break duration that will populate for new shifts. None

Shift acceptance BUSINESS

Allow employees to confirm or deny their schedules. ☐

Shift exchanges and available shifts

Allow employees to give away their shifts
When disabled, employees are not able to offer their shifts or make them available. ☒

Allow employees to swap shifts PREMIUM
When disabled, employees are not able to swap their shifts with others. ☐

Restrict offers and swaps by location and position
When disabled, employees can offer or swap a shift with anyone even if the recipient is not assigned to the location and position of the shift. ☒

Automatically approve applicants
When enabled, shift applications and offers do not require manager's approval. ☐

Shift feedback BUSINESS

Allow employees to give feedback 5 minutes after clocking out of a shift. ☐

Unavailability PREMIUM

Allow employees to set and edit their unavailability. ☒

Approval PREMIUM

When enabled, unavailability changes require manager's approval. ☐

Labor compliance PREMIUM

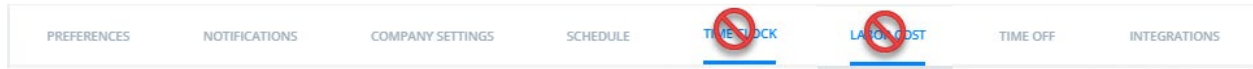
Clopening
Ensure adequate rest time between shifts. ☐

Rest period
Consider a rest day when scheduling employees. ☐



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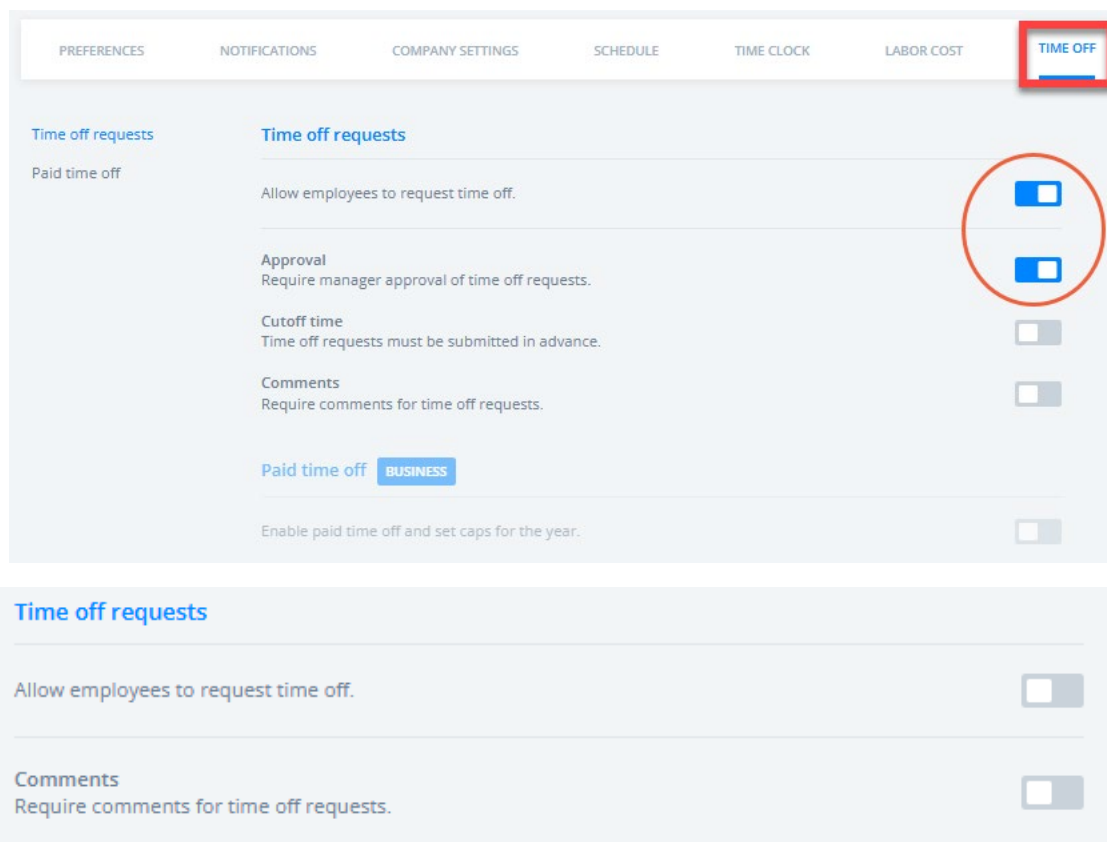
Time Clock and Labor Cost: Both are only available in the paid versions of Sling. Please make sure all options are toggled off.



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Time Off: Time off requests - Allow employees to request time off is defaulted to be on. This should be toggled off and then the Approval toggle will automatically disappear

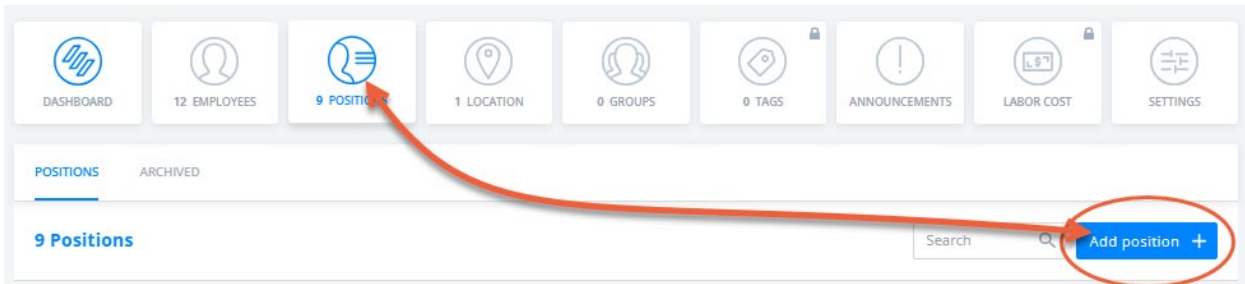
****IMPORTANT: All Time Off requests MUST still be managed through Paycom!**



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After customizing the settings, click on the Positions tab.

Positions: Positions are important in Sling as they will be valuable in helping with assigning shifts. These are “roles” that your employees will work while they are in the clinic. Keep in mind that multiple “positions” can/should be assigned to one person. To create a new position click on Add position+



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Enter the Position details:

1. Position Name: This is a role in which an employee covers at the clinic (i.e. reception, technician, doctor, etc.)
2. Color: Choose a color – this will color code the shift on the schedule when it is assigned
3. Save: click Save once completed



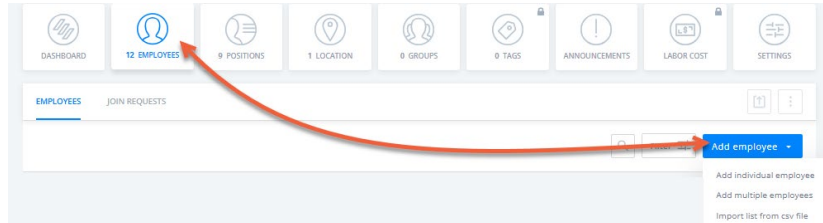
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After the positions are entered you can now add your team

Adding Employees: Employees can be added in multiple ways:

1. One at a time
2. Multiple at a time
3. Via an uploaded spreadsheet
4. Shareable link

****IMPORTANT: Regardless of how you add your employees be sure to add your Operation Regional Manager as an Admin****



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Adding Employees:

1. Name
2. Preferred Name
3. Email
4. Phone – Mobile
5. Time zone – defaults
6. System Role
 - a. Employee for most – basic access
 - b. Manager – can create shifts and edit employees
 - c. Admin – highest level of access (this must be given to PM, PD and Operations Service Manager)
7. Employee ID – use Paycom ID
8. Location – Should default to your location
9. Positions – Add any/all the position/roles this employee will cover (i.e. reception, technician, etc.)

****This becomes important when you are assigning shifts/creating your schedule**
10. Groups – N/A
11. Manager – Add the person that is creating the schedule (usually the PM)
12. Invite employee to this account – you can invite them now or later



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Add Multiple Employees – allows you to key in all of you employees with basic minimum information. After you enter them, you will be able to add additional information, or the employee can edit his/her own profile.

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Upload a spreadsheet of employees – You can add all your employees by uploading an excel or csv file. You don't even need to worry about the order you have the information in as you will be able to map the columns during the process. Again, you will need just basic information. Once all columns are mapped, click on Import employees

	A	B	C	D	E
1	Emp ID	First Name	Last Name	Email	Mobile Phone
2	1111	Smith	Sally	sally.smith@test.com	507-555-5555
3	2222	Steve	Jones	steve.jones@test.com	507-555-6666



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Unless you entered the employees individually you will need to edit each of them and update the Work section.

1. Manager – add the person that edits/publishes the schedules
2. Positions – add all the positions/roles this employee will work in the clinic

****IMPORTANT: Do not add any information to the employee profile other than in the Personal and the Work tabs. It is especially important not to enter any salary information into Sling!!**

Employees > Steve Jones

PERSONAL **WORK** DOCUMENTS UNAVAILABILITY WAGES TIME OFF NOTES

1

Managers

Designate managers who should be notified about this employee's time off, unavailability requests, and shift exchanges. By default, notifications go to locations' managers.

Tami Rushing X

Add managers

Locations

Well-Haven Pet Health X

Add locations

Clear all

2

Positions

Surgery Technician/Assistant X Float X Rooms Technician/Assistant X

Add positions

Clear all | Add all

Groups

