

# SLING – GETTING STARTED ADDING EMPLOYEES & SETTINGS REVIEW

[www.getsling.com](http://www.getsling.com)

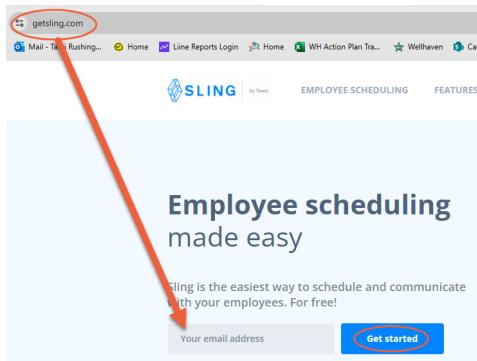
Sling is team scheduling that is easy to manage. Allows drag and drop to schedule staff in minutes. You can create templates to use over again. There is an app employees can use to have their schedules at their fingertips.

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.**

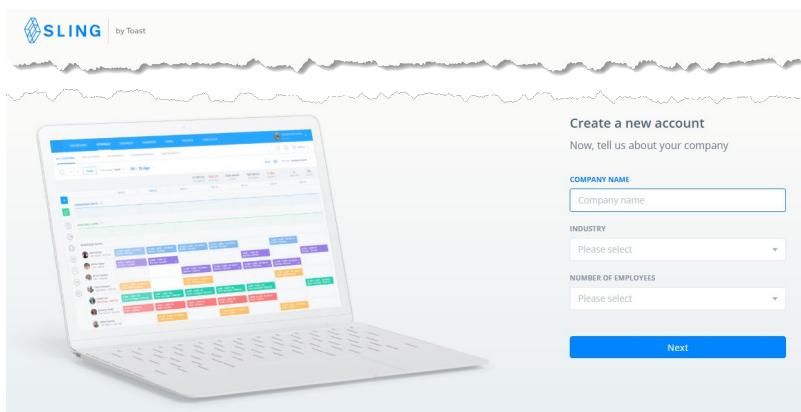
1

Create your Sling account using your WellHaven email



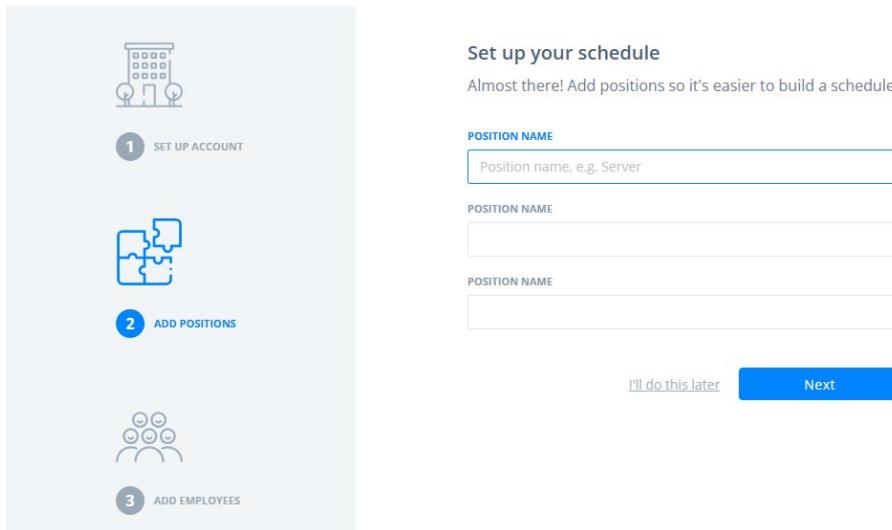
2

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

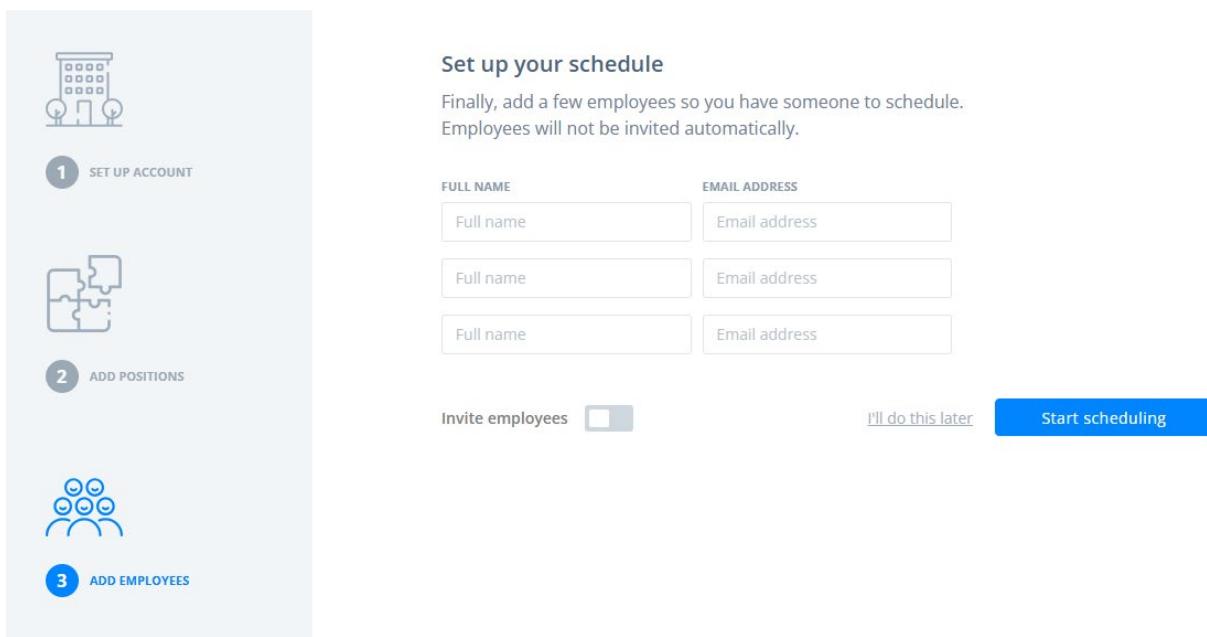
POSITION NAME

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

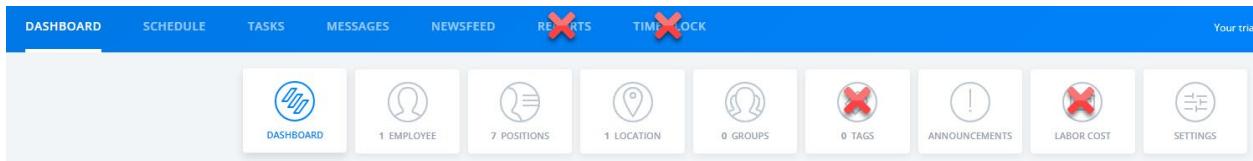
Invite employees

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.

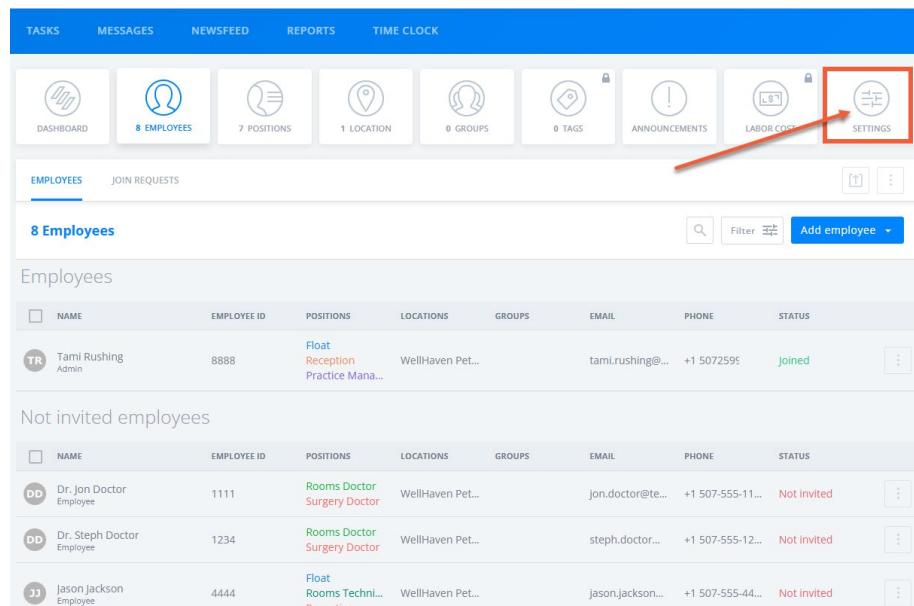


DASHBOARD SCHEDULE TASKS MESSAGES NEWSFEED REPORTS TIME CLOCK Your trial

DASHBOARD 1 EMPLOYEE 7 POSITIONS 1 LOCATION 0 GROUPS 0 TAGS ANNOUNCEMENTS LABOR COST SETTINGS

6

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



TASKS MESSAGES NEWSFEED REPORTS TIME CLOCK

DASHBOARD 8 EMPLOYEES 7 POSITIONS 1 LOCATION 0 GROUPS 0 TAGS ANNOUNCEMENTS LABOR COST SETTINGS

EMPLOYEES JOIN REQUESTS

8 Employees

Employees

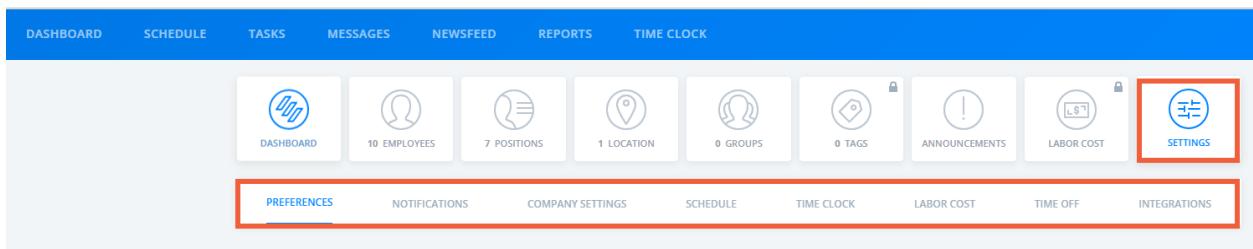
NAME	EMPLOYEE ID	POSITIONS	LOCATIONS	GROUPS	EMAIL	PHONE	STATUS
TR Tami Rushing Admin	8888	Float Reception	WellHaven Pet...	Practice Mana...	tami.rushing@...	+1 5072595	joined

Not invited employees

NAME	EMPLOYEE ID	POSITIONS	LOCATIONS	GROUPS	EMAIL	PHONE	STATUS
DD Dr. Jon Doctor Employee	1111	Rooms Doctor Surgery Doctor	WellHaven Pet...		jon.doctor@te...	+1 507-555-11...	Not invited
DD Dr. Steph Doctor Employee	1234	Rooms Doctor Surgery Doctor	WellHaven Pet...		steph.doctor...	+1 507-555-12...	Not invited
JJ Jason Jackson Employee	4444	Float Rooms Techni... Reception	WellHaven Pet...		jason.jackson...	+1 507-555-44...	Not invited

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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.



DASHBOARD SCHEDULE TASKS MESSAGES NEWSFEED REPORTS TIME CLOCK

DASHBOARD 10 EMPLOYEES 7 POSITIONS 1 LOCATION 0 GROUPS 0 TAGS ANNOUNCEMENTS LABOR COST SETTINGS

PREFERENCES NOTIFICATIONS COMPANY SETTINGS SCHEDULE TIME CLOCK LABOR COST TIME OFF INTEGRATIONS



## 8

**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    Display preferences

Other 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    Day    Week    Month    DURATION    ASSIGNEE    POSITION    LOCATION

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.

**Shift alarms**  
Enable shift alarms, so you get a reminder for upcoming shifts.

Time before shift: 60 Minutes

Send notification via: SMS, Email, Mobile

**Dashboard notifications**  
Dashboard notifications include shift updates, tasks, and announcements relevant to you. By default, these notifications are displayed on your Dashboard.

Send notification via: Email, Mobile

**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.

Send notification via: Email, Mobile

**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.

Send notification via: Email, Mobile

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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.

**Restrictions**

**Messages**

**Newsfeed**

**Tasks**

**Restrictions**

Contact details  
Allow employees to see each other's phone numbers and emails.

**Messages**

Enable messaging for your organization.

**Newsfeed**

Enable content sharing across your organization.

**Tasks** BUSINESS

Enable to assign tasks to shifts and follow their progress.



**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**

**Breaks**

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

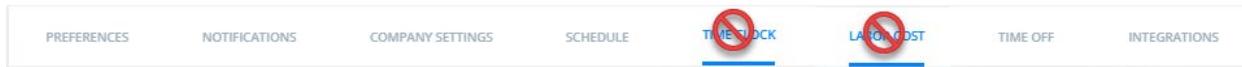
Clopening  
Ensure adequate rest time between shifts.

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!**

Time off requests

Paid time off

Allow employees to request time off.

Approval

Require manager approval of time off requests.

Cutoff time

Time off requests must be submitted in advance.

Comments

Require comments for time off requests.

Paid time off **BUSINESS**

Enable paid time off and set caps for the year.

Time off requests

Allow employees to request time off.

Comments

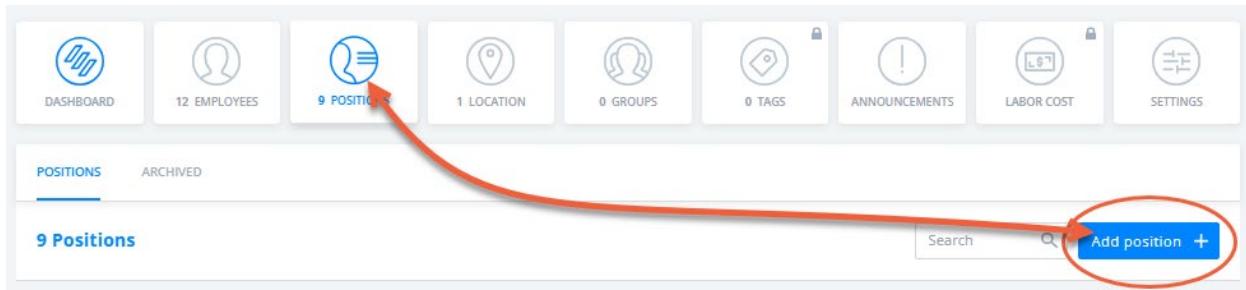
Require comments for time off requests.



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After customizing the settings, click on the Positions tab.

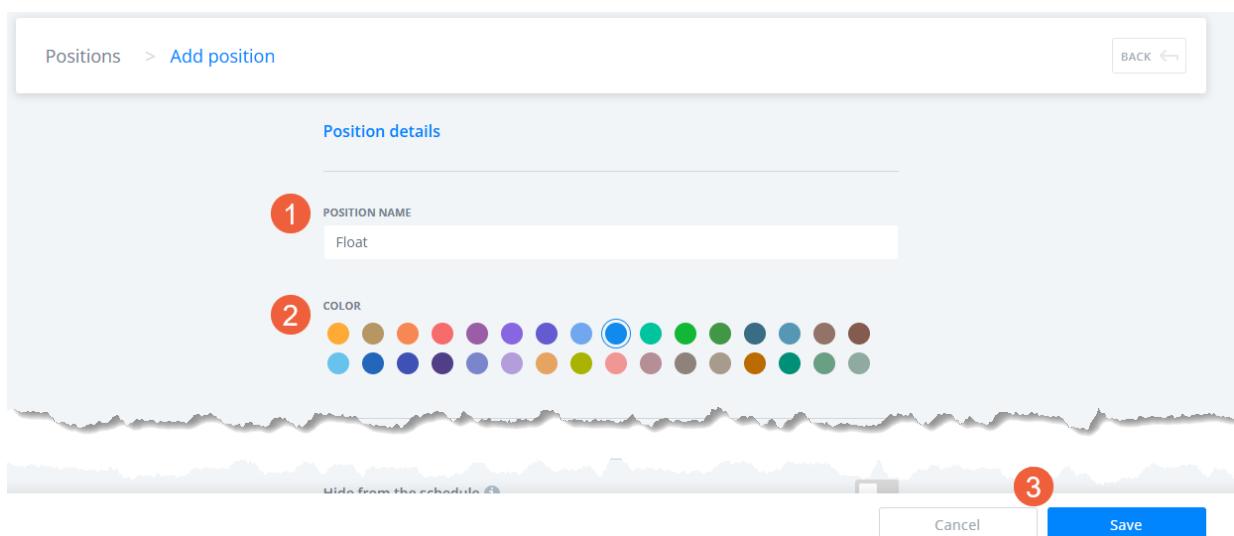
Positions: Positions are important in Sling as they will be valuable in helping with assigning shifts. These are “roles” that your employees will work while they are in the clinic. Keep in mind that multiple “positions” can/should be assigned to one person. To create a new position click on Add position+



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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

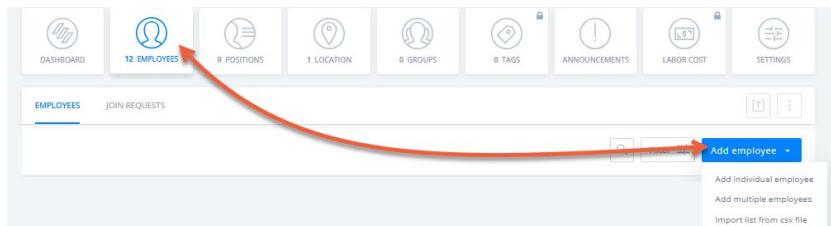


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After the positions are entered you can now add your team  
Adding Employees: Employees can be added in multiple ways:

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 your 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.

Employees > [Add multiple employees](#)

BACK

FIRST NAME	LAST NAME	SYSTEM ROLE	EMAIL	PHONE NUMBER	POSITIONS	LOCATIONS	OPTION
First Name	Last Name	Employee	Optional	Optional	Add to position	WellHaven Pet ...	
First Name	Last Name	Employee	Optional	Optional	Add to position	WellHaven Pet ...	

Add another employee

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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

Import employees

Select the appropriate name for each column in your file.

	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

Employee ID

Emp ID

1111

2222

Assign to a default location    
Add employees with no specified location to a

Invite employees to this account    
Invites are sent via email. Only employees with

[Back](#) [Import employees](#)



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

2 Locations  
WellHaven Pet Health X  
Add locations

Clear all

2 Positions  
SurgeryTechnician/Assistant X, Float X, Rooms Technician/Assistant X  
Add positions

Clear all | Add all

Groups

