SLING – GETTING STARTED
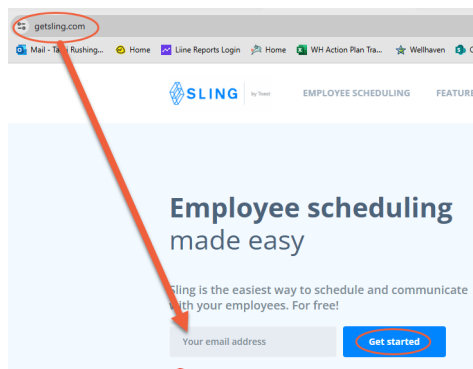# ADDING EMPLOYEES & SETTINGS REVIEW

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.
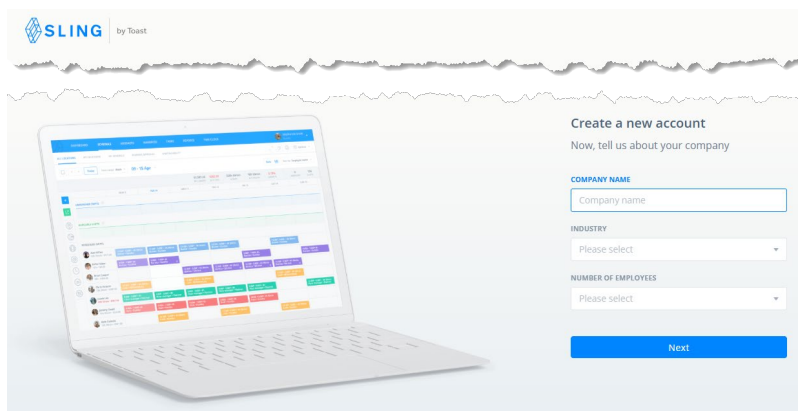
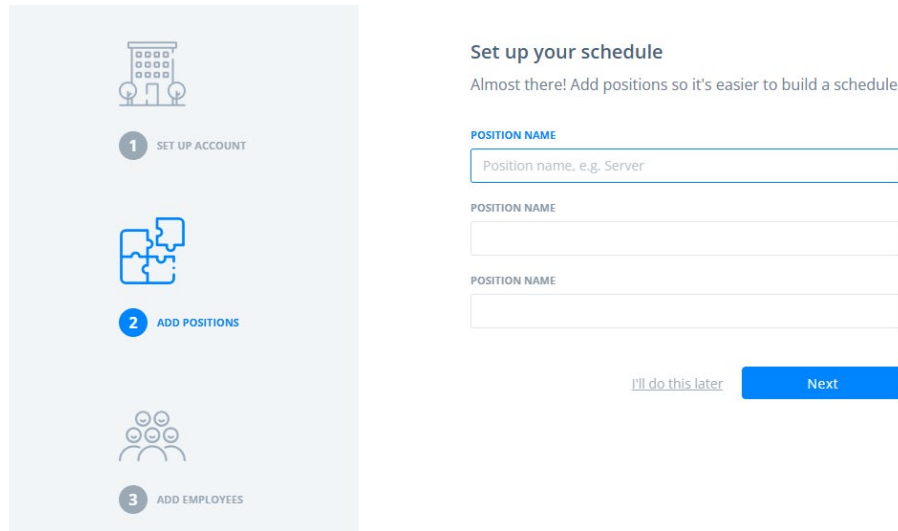**1** Create your Sling account using your WellHaven email

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.

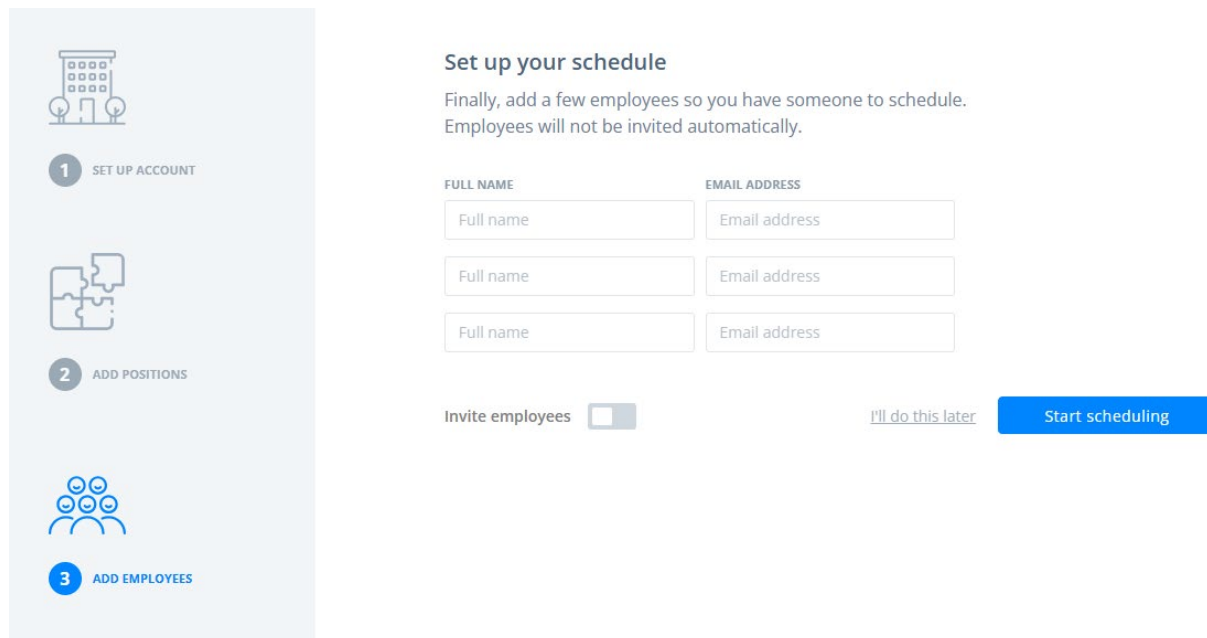**POSITION NAME**
Position name, e.g. Server

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
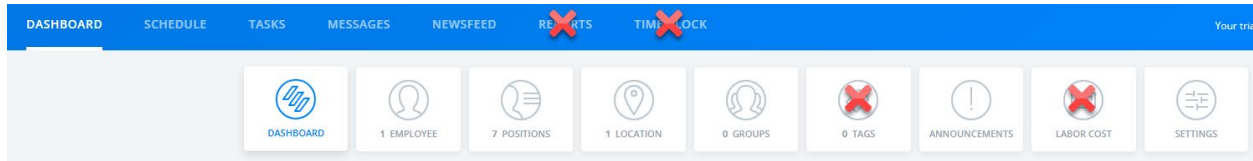
Full name   Email address

Full name   Email address

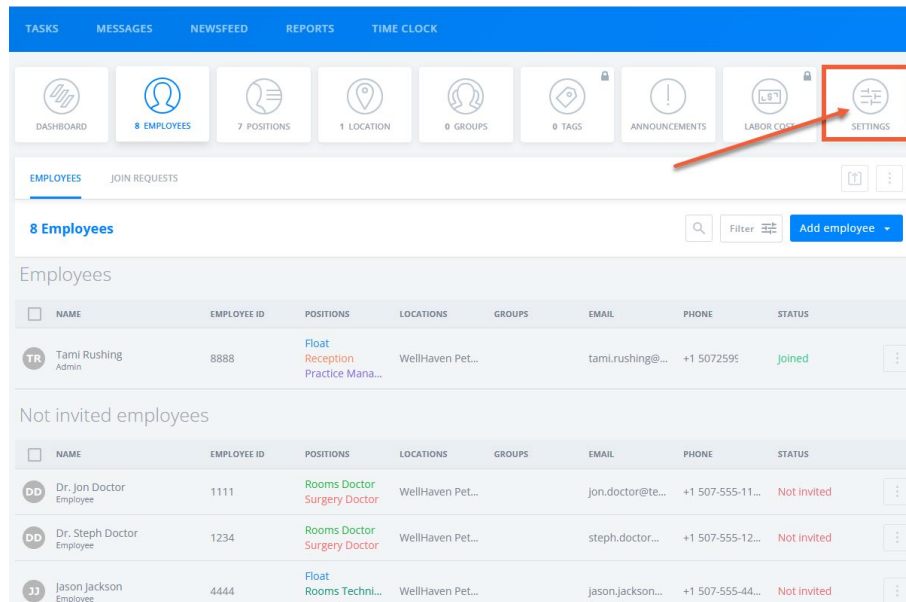Invite employees   I'll do this later   Start scheduling

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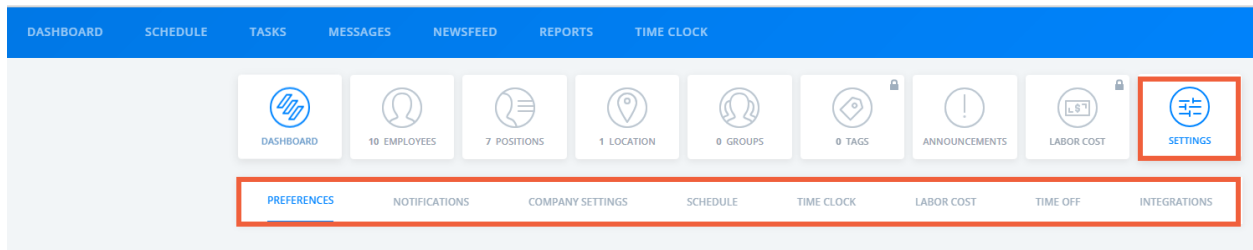

6 Before you add your employees there are a few settings you should look at or change

7 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.

(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

9 **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.

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

(11) **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

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

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

13 **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!

PREFERENCES	NOTIFICATIONS	COMPANY SETTINGS	SCHEDULE	TIME CLOCK	LABOR COST	TIME OFF

Time off requests

Paid time off

Time off requests

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.

14 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+

15 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

16 After the positions are entered you can now add your team
Adding Employees: Employees can be added in multiple ways:
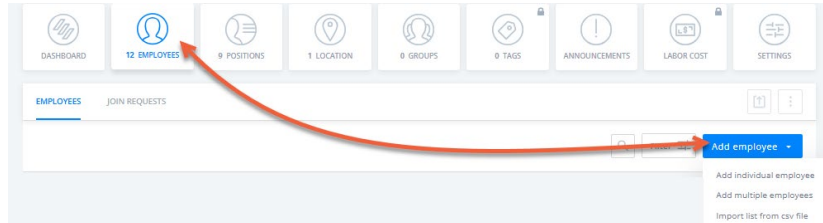1. One at a time
2. Multiple at a time
3. Via an uploaded spreadsheet
4. Shareable link

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

17 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

18 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.

19 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

20 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!!