Schedule360 Captivate Training
Profile Cleanup

Click on the employee's name to view their profile

Click submit to confirm all changes made to the contact screen.

The employee's contact screen is shown. The employee will be prompted to update their contact info on their first log in. The employee can ONLY update their contact info. All other fields of the profile must be edited by an admin user.

The employee's profile screen will display the employee's profile specifications.

Verify that the primary, secondary, and tertiary license/roles are accurate. The primary license/role dropdown is required.

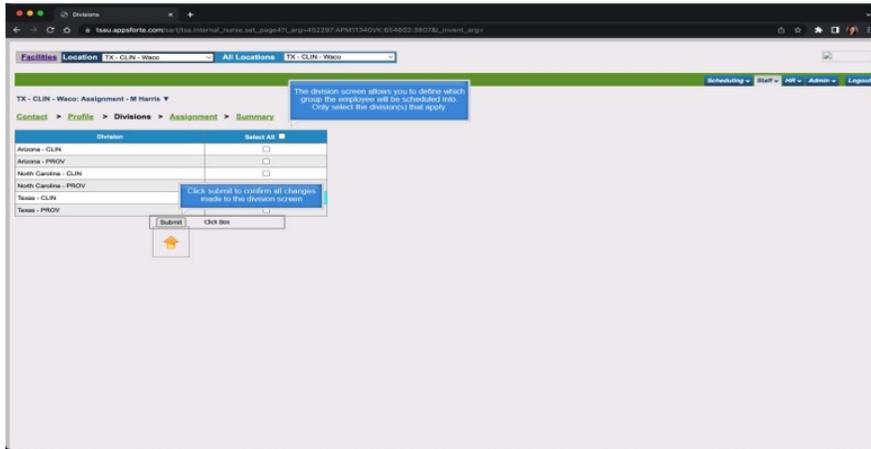When reviewing profiles always begin at the top of the screen

The Scheduling Type will identify which bucket the employee belongs to and define their privileges for features such as post & exchange and entering availability.

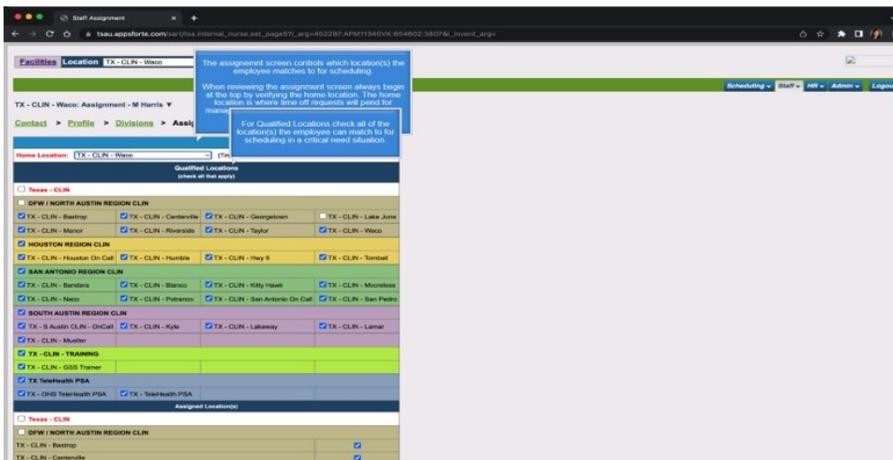Next you will identify any special scheduling types that the employee is qualified to work.

For example, if OnCall is not checked the employee will not match to OnCall shifts on the schedule.

Then verify or add any work hour requirements for tracking. These are utilized to ensure all staff are optimized.

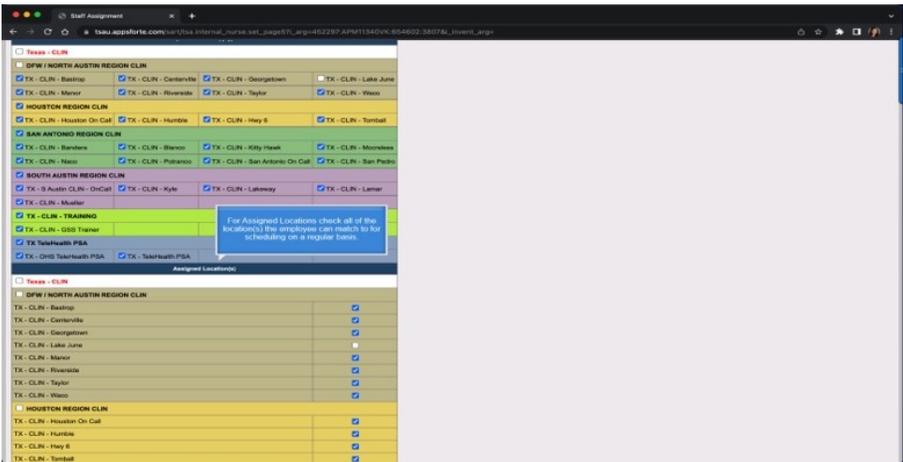Click submit to confirm all changes made to the profile screen

The division screen allows you to define which group the employee will be scheduled into. Only select the divisions that apply. Click submit to confirm all changes made to the division screen.
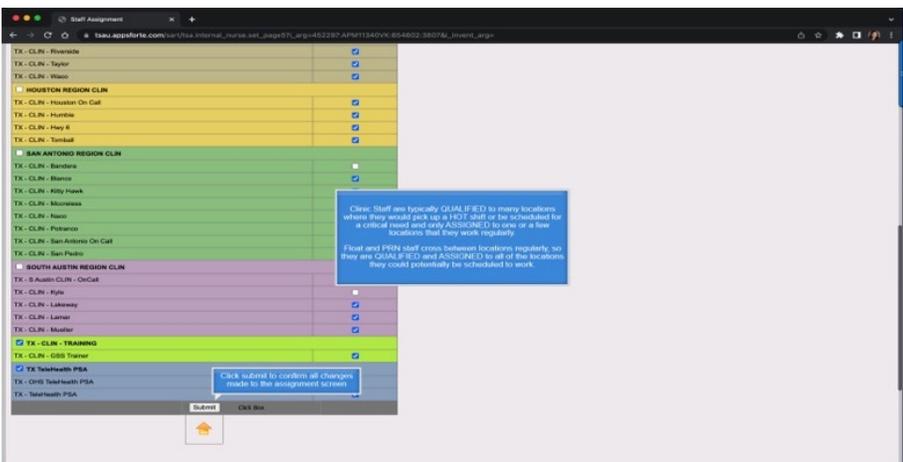

The assignemnt screen controls which locations the employee matches to for scheduling.

When reviewing the assignment screen always begin at the top by verifying the home location. The home location is where time off requests will pend for manager approval. The employee must be qualified and assigned to their home location.

For Qualified Locations check all of the locations the employee can match to for scheduling in a critical need situation.
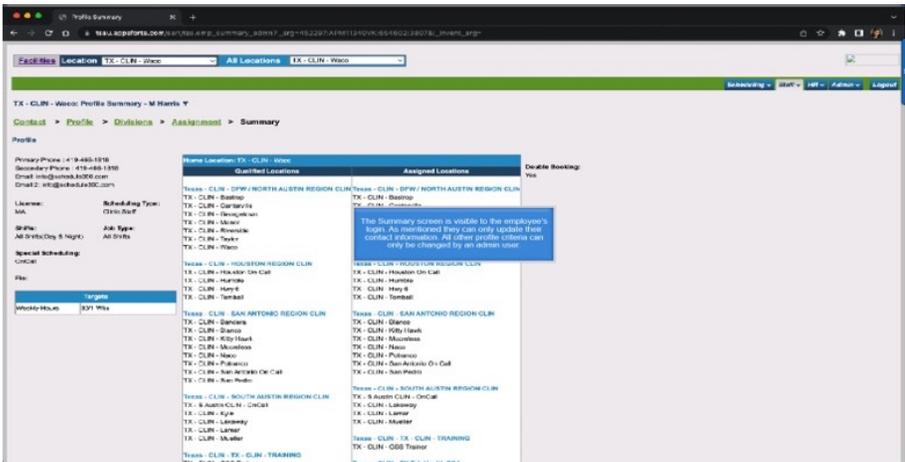
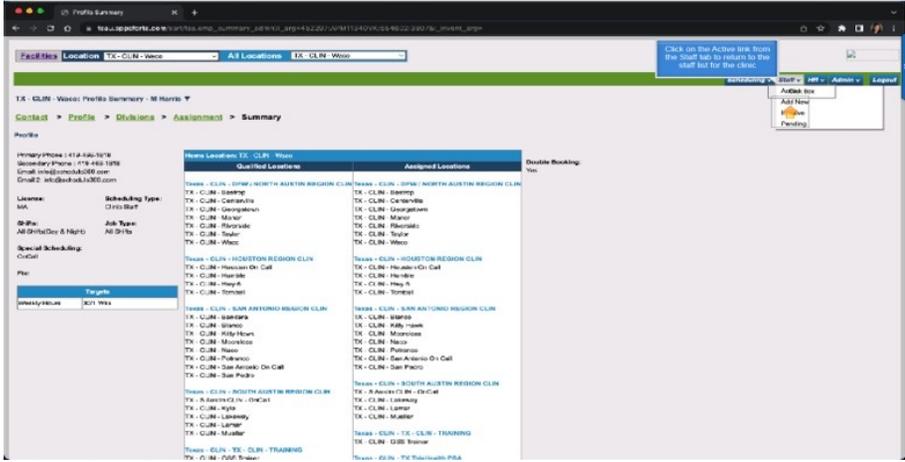**For Assigned Locations check all of the locations the employee can match to for scheduling on a regular basis.**

Clinic Staff are typically QUALIFIED to many locations where they would pick up a hot shift or be scheduled for a critical need and only ASSIGNED to one or a few locations that they work regularly.

Float and PRN staff cross between locations regularly, so they are QUALIFIED and ASSIGNED to all of the locations they could potentially be scheduled to work.
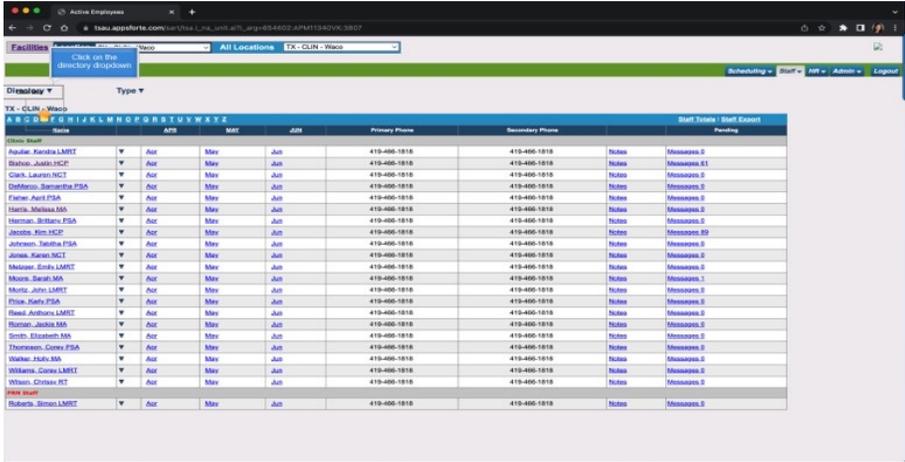
Click submit to confirm all changes made to the assignment screen

The Summary screen is visible to the employee's login. As mentioned they can only update their contact information. All other profile criteria can only be changed by an admin user.
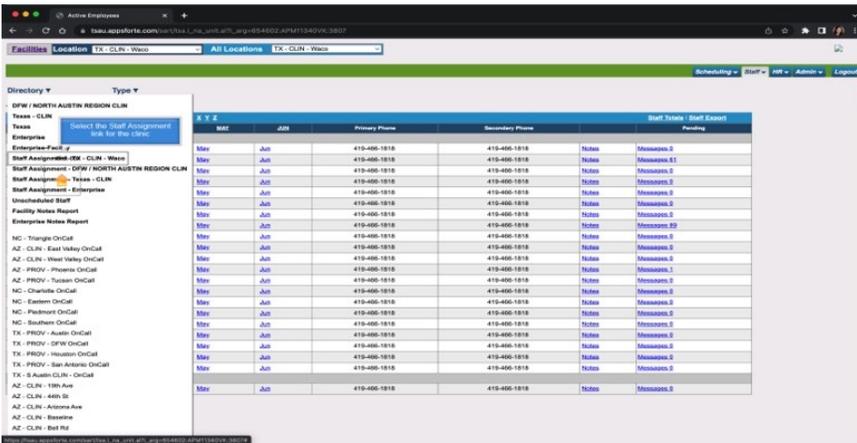

Click on the Active link from the Staff tab to return to the staff list for the clinic
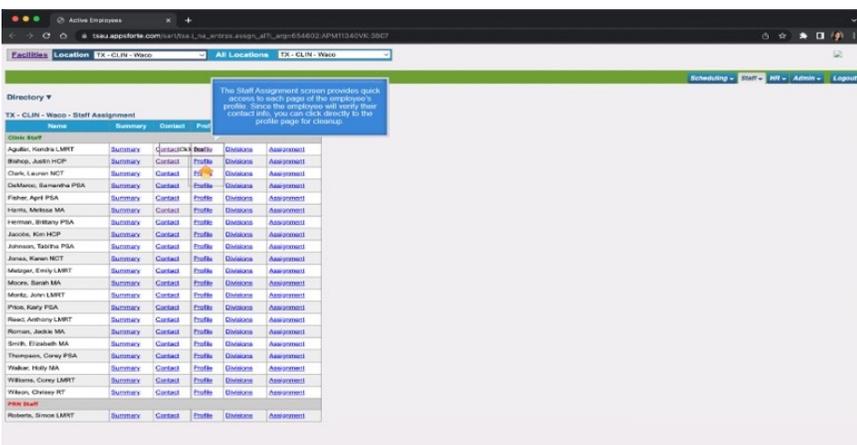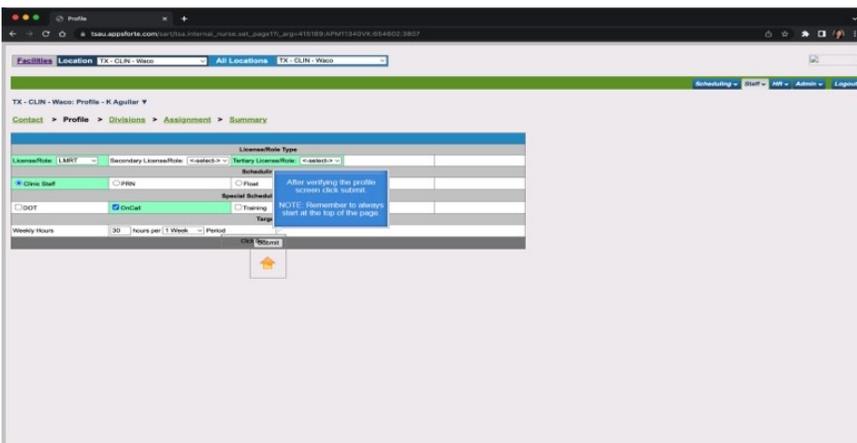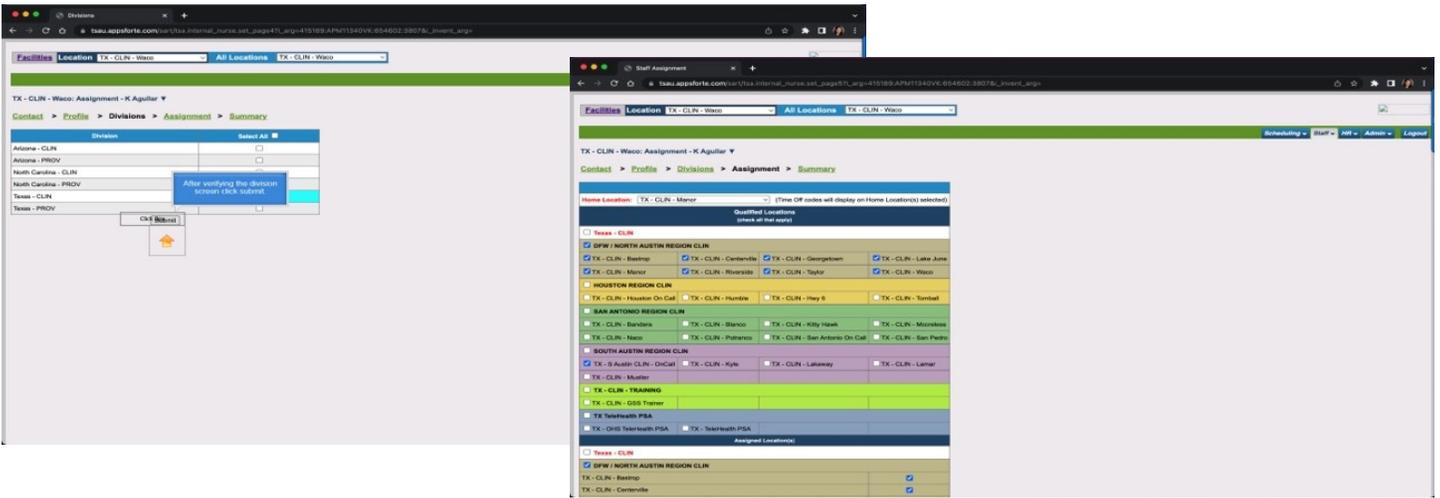

Click on the directory dropdown

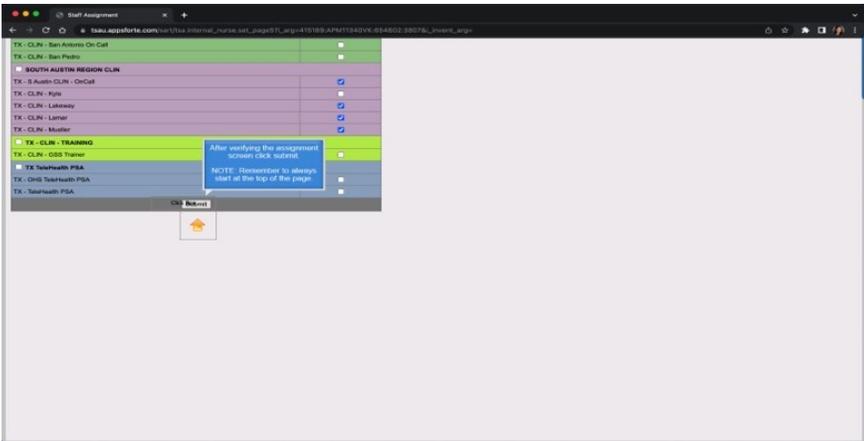**Select the Staff Assignment link for the clinic**

The Staff Assignment screen provides quick access to each page of the employee's profile. Since the employee will verify their contact info, you can click directly to the profile page for cleanup.
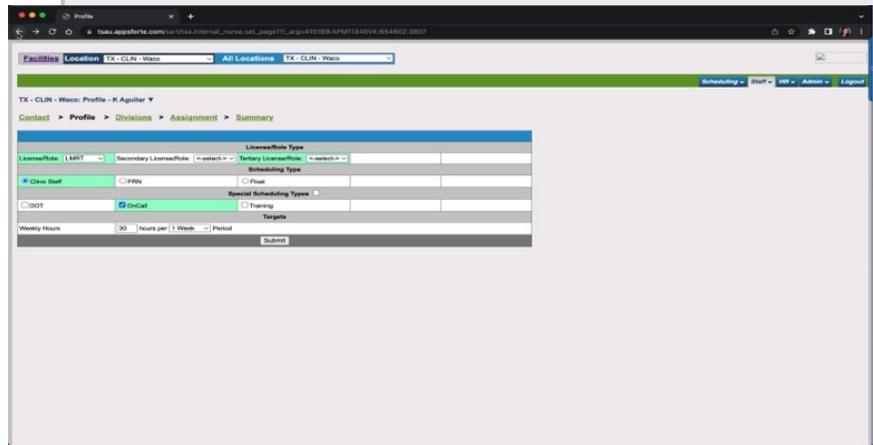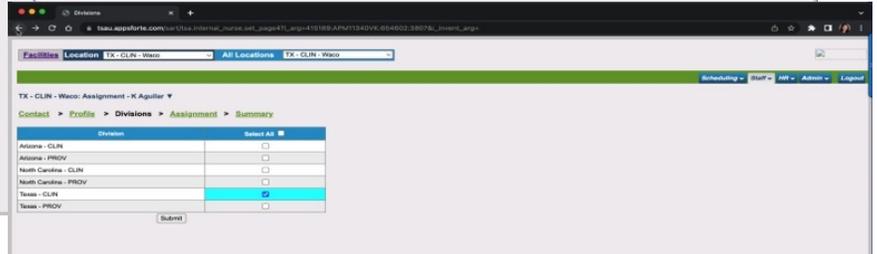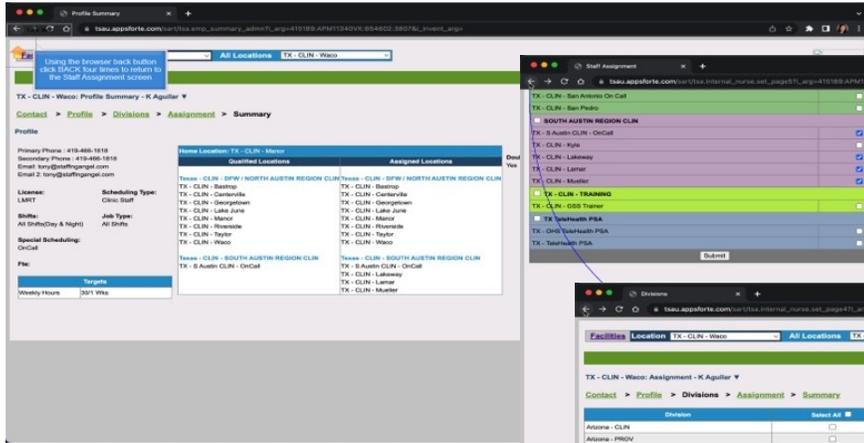

After verifying the profile screen click submit.
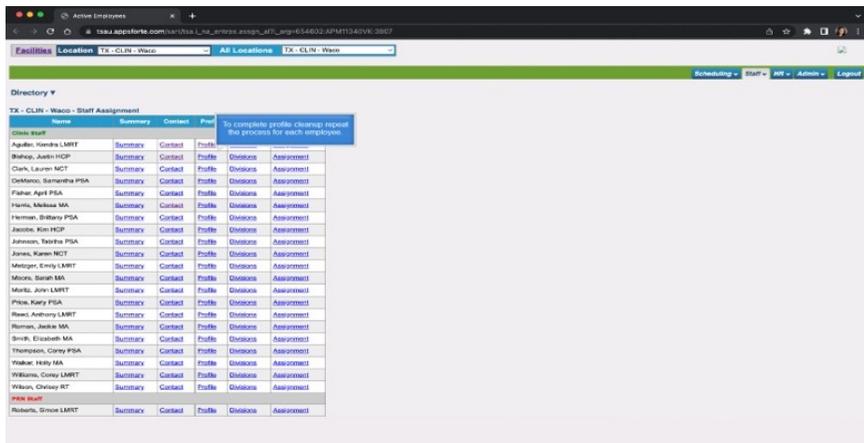**NOTE: Remember to always start at the top of the page.**

After verifying the division screen click submit.

After verifying the assignment screen click submit.
NOTE: Remember to always start at the top of the page

Using the browser back button click BACK four times to return to the Staff Assignment screen

To complete profile cleanup repeat the process for each employee.