

Lesson #3 - Staff Management

Review (Optional)

The third lesson in this Learning Series, Staff Management, is designed to get you familiar with working with staff in Jackrabbit. You may wish to review the articles listed below before beginning.



The review articles in the bullet list below will open the Help article in a new tab. When you are finished reviewing the material, close the tab and return to this page to access the next article using the links below.

- [Tasks on the Dashboard](#)
- [Coaches/Instructors and Staff Category](#)

The Staff Record

The Staff record provides a centralized location to keep all information related to staff members. Each record has its own tabs, buttons, and links.

The screenshot shows the 'Staff: Heather Barnhardt' record page. At the top, there are three buttons: '← RETURN', 'SAVE CHANGES', and 'DELETE'. Below these are several tabs: 'Instructor Schedule (PDF)', 'Add Time Entry', 'Instructor Calendar', 'Weekly Schedule', 'Email', and 'Text'. A yellow callout box labeled 'Buttons' points to the top buttons, and a blue callout box labeled 'Tabs' points to the tab bar. The main content area contains a form with the following fields:

First Name	Heather	Middle Initial		Last Name	Barnhardt	
Status	Active	Staff ID	454828	Salaried		
Instructor	Yes	Type	Full-Time			
Public Nickname	Miss Heather					
Position	Ballet Instructor	Pos2	Tap Instructor	Pos3		
Home Phone	(704) 999-8861	Work Phone		Cell Phone	(704) 777-3914	
Birth Date	3/16/1960					
Address 1					Address 2	
City		State		Zip		
Email	Hbarnhardt@email.com					
Emergency Contact	Erma Barnhardt					

Expand/Collapse
All

Staff Record Tabs

Staff Record Buttons

Add Staff / Instructors

Once you have added staff/instructors, you'll be able to assign instructors to classes and allow staff to use Jackrabbit's *Time Clock* feature with the *Staff Portal* (based on their User ID permissions and the Staff Portal Settings).

Add a Staff Member

Follow these steps to add a staff/instructor record:

1. Go to the **Staff** (menu) > **Add Staff**.
2. Enter the staff member's **first & last** name and **email address** in the *Add Staff* pop-up window.
3. Select one of the following options that match the scenario:

Existing Staff Member with a User ID

- If this staff member has a Jackrabbit User ID in your system and will also be using the **Staff Portal** you can opt to match them to their User ID. This allows them to use only one ID and password to access both your system and the Staff Portal.
- Select their name from the *Match to User ID* drop-down. See Staff Portal: **Match Staff to User ID** for more information.

Staff Member <u>without</u> a User ID	<ul style="list-style-type: none">○ If this staff member will be using the Staff Portal and they do not have a Jackrabbit User ID you can opt to Auto-assign Staff Portal Login ID (will be in the format of first initial and last name). <p><i>Note: With the Staff Portal Login ID the staff member will be able to log into the Staff Portal but they will not have access to your main system.</i></p>
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4. Check **Send Staff Portal Login Email** if this staff member will be using the Staff Portal. This will send an email with their Staff Portal Login ID and a link for them to set their password. *Note: If using their Jackrabbit User ID to log into the portal they will not need to reset their password and the email will inform them to log in with their existing password and User ID.*
5. Click **Save**.
 - You'll immediately be directed to the *Staff Summary* page where you can enter additional information for this staff member. See our article [The Staff Record](#) to learn more.
6. Click **Save Changes**.

▢ Staff Portal Login Email - Matched to User ID

▢ Staff Portal Login Email - Auto-Assigned

Assign Staff / Instructors to Classes

To assign an Instructor to a class, they must first be added using *Staff > Add Staff*. See [Add a Staff Member / Instructor](#) for more information.

1. Go to **Classes** (menu) > **All Classes** and select the correct class.
2. Click the **Instructor** tab.
3. Add up to four instructors in the appropriate fields using the drop-down list.
4. Click **Save Changes**.

Class: Cheer Essentials

SAVE CHANGES DELETE

Class Roll | Enroll Student | Email/Text Class | Enter Absences | Absence/Attendance | Post Class Transactions | Copy Class | Mass Drop | Sizes/Measurements | Archive Class

Summary | Enroll List | Drop List | Absences | Makeups | Wait List | **Instructors** | Lesson Plan | Skills/Levels | Misc | Costumes | Notes (0) | Resources (0)

Instructor 1	Stephanie Andrews	View
Instructor 2	Livy Wallace	View
Instructor 3		View
Instructor 4		View

Click the View button to go to the instructor's staff information.



Click the **View** button next to an Instructor's name to go to their Staff record.

Remove (Unassign) Staff / Instructors from a Class

1. Be sure you are viewing the correct class.
2. Click the **Instructor** tab.
3. Click the drop-down arrow to view a list of instructors.
4. Select the **blank** choice.
5. Click **Save Changes**.

Class: Cheer Essentials

← RETURN SAVE CHANGES DELETE

Class Roll | Enroll Student | Email/Text Class | Enter Absences | Absence/Attendance | Post Class Transactions | Copy Class | Mass Drop

Summary | Enroll List | Drop List | Absences | Makeups | Wait List | **Instructors** | Lesson Plan | Sk

Instructor 1	Stephanie Andrews	View
Instructor 2		View
Instructor 3		View
Instructor 4		View

Click the drop-down arrow to display the staff list. Select the blank choice.

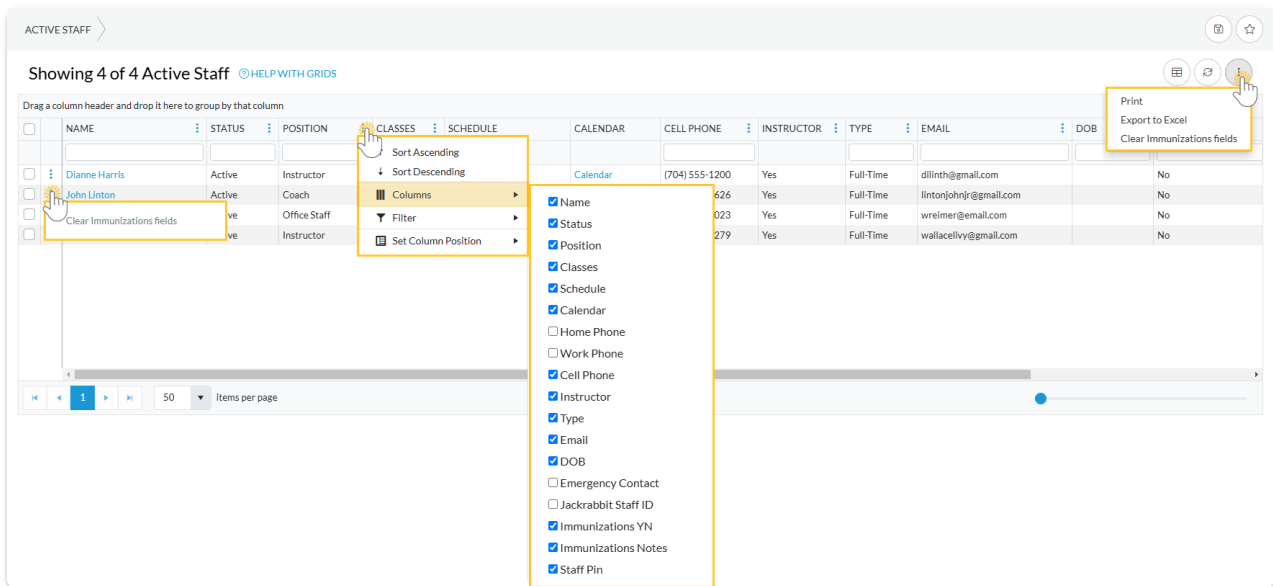
This only deletes the instructor from the class. To delete the instructor's staff information, see [Delete a Staff Member / Instructor](#).

Active Staff

Active Staff, located under the *Staff* menu, is a quick way to see a list of your organization's active staff, their classes, weekly schedule, and monthly calendar. The data for this report is pulled from individual Staff records.

Go to the *Staff (menu) > Active Staff* and your active staff will populate into the grid.

- Click the staff member's name to open their Staff record.
- Click the number link in the Classes column to open the *Staff record > Classes (tab)*.
- Schedule and Calendar links open the staff member's weekly schedule and monthly calendar.
- Select and adjust the columns you would like to display in the grid.





The *Active Staff* grid offers column searching, just enter a staff member's name in the search field of the **Name** column, the grid will search for that name, and the information will populate in the grid. Refer to [Work with Reports - Grid Style](#) for more details on sorting and how to use a grid.

Take Action in the Grid

This grid has the following built-in functionality:

	<p>Use the Column Menu to sort columns in ascending/descending order, select the columns to view in the grid, filter data, and lock the column position (Set Column Position).</p>
	<p>Click Adjust Columns > Squeeze grid to see all the columns in the grid on a single page.</p>

	Use the Refresh Grid icon to reload the data in the grid after making changes.
	Use the More icon to select either Print or Export to Excel . Check out this short video tutorial Print from Grids in Jackrabbit for some helpful printing tips.



Save time and effort each time you open a grid page to view your data! After you have edited column settings and set the column widths, you can save the grid as a **Favorite**.

Delete a Staff Member / Instructor

1. Go to the **Staff** (menu) > **Active Staff**.
2. Click the **Name** of the staff member you want to delete.
3. Click the **Delete** button.

Staff: Livy Wallace

← RETURN
SAVE CHANGES
DELETE

Instructor Schedule (PDF)
Add Time Entry
Instructor Calendar
Weekly Schedule
Email

Summary	Classes	Compensation	Time Card	Portal Settings	Feedback	Skills	Certifications	Availability
First Name	<input type="text" value="Livy"/>	Middle Initial	<input type="text"/>	Last Name	<input type="text" value="Wallace"/>			
Status	<input type="text" value="Active"/>	Staff ID	<input type="text" value="71698"/>	Salaried	<input type="text" value="No"/>			
Instructor	<input type="text" value="Yes"/>	Type	<input type="text" value="Full-Time"/>					
Public Nickname	<input type="text" value="Livy Wallace"/>							
Position	<input type="text" value="Instructor"/>	Pos2	<input type="text"/>	Pos3	<input type="text"/>			
Home Phone	<input type="text" value="(704) 555-2598"/>	Work Phone	<input type="text"/>	Cell Phone	<input type="text"/>			

4. Click **Yes** in the *Delete Staff* pop-up window. **Tip: It is a Jackrabbit Best Practice to set a staff member's status to inactive instead of deleting them. This preserves time entries and class assignments instead of permanently deleting the information.**
5. The staff member's record is permanently deleted, click **OK**.



Deleting a Staff record does NOT delete the staff member from the Instructor tab of any classes they were assigned to. Deleting an Instructor from a specific class must be done from the Class Instructor tab.

Search for Staff Members

The **Search** option, under the Staff menu, is a customizable report of your staff members. It allows you to search through all of your staff and find only those who meet your criteria.

- ★ Create a list of employees who have been with you for 5+ years for service awards.
- ★ Find all staff with a specific certification.
- ★ Generate a list of your staff with birthdays in the coming month and email them a birthday greeting.

**Expand/Collapse
All**

- ☐ [Select Search Criteria](#)
- ☐ [Define Instructors' Classes](#)
- ☐ [Choose Display Settings](#)
- ☐ [Work with Report Results](#)

Instructor Schedules

There are several ways to view **Instructor Schedules**.

- Staff menu > Staff Reports > Instructor Schedules
 - Enter your **Search Criteria** and **Submit** to send the report to one of six output formats (PDF, Excel, HTML, Word, Text, Tiff).
- Staff record
 - Use the **Weekly Schedule** button to open the **Activity Calendar** filtered for that staff person for the current week.
 - Select the **Instructor Calendar** button to open the **Classic Class Calendar - Monthly Schedule** filtered for that staff person for the current month.
- Staff menu > Active Staff
 - Use the **Weekly Schedule** link on an instructor's row to open the Activity Calendar filtered for that staff person for the current week.

- Select the **Calendar link** on an instructor's row to open the Classic Class Calendar - Monthly Schedule filtered for that staff person for the current month.
- Staff menu > Search
 - Enter your **Search Criteria** and **Submit**.
 - Use the **Weekly Schedule** link on an instructor's row to open the Activity Calendar filtered for that staff person for the current week.
 - Select the **Calendar link** on an instructor's row to open the Classic Class Calendar - Monthly Schedule filtered for that staff person for the current month.



A staff person with the *Instructor* field set to No in their Staff record will not have a schedule.

Manage Substitute Instructors for Classes

Get rid of your manual tracking system for substitutes! Use the **Substitutes** feature to assign substitutes for absent instructors. Easily record, view, and manage substitutes for all of your classes.

Save even more time by also utilizing the **Staff Availability** feature. It's the perfect pairing! Substitute records are added, updated, and deleted whenever Staff Time Off is added, updated, and deleted either from within Jackrabbit or the Staff Portal.

And, to make the Substitutes feature even better, you control settings that can:

- allow instructors to view and manage the classes they are going to substitute in the **Staff Portal**.
- advise parents when a substitute has been assigned to a class in the **Parent Portal**.
- notify parents and students at **Self Check-in** when a regular instructor is away and a substitute has been assigned.

**Expand/Collapse
All**

- ▢ [Get Set Up to Use Substitutes](#)
- ▢ [How the Substitutes Feature Works](#)
- ▢ [Tracking and Reporting for Substitutes](#)

Staff / Instructor Certifications



Permissions control the ability of your Users to see certain data and take specific actions. Before moving forward review [User Permissions for Certifications](#).

Jackrabbit understands that keeping staff certification records up to date plays an important role in your business. The Staff Certifications feature streamlines this process for you.

- ★ Ensure students are protected by keeping staff certifications current.
- ★ Maintain historical reporting; expired certifications are not overwritten and remain in the staff record.
- ★ Monitor certification alerts from the Executive Dashboard.



The first step for Staff Certifications is to [add new certification drop-down values](#).

[Expand/Collapse All](#)

- ▢ [Create and Manage Certification Drop-down Values](#)
- ▢ [Work with Staff Certifications](#)
- ▢ [Executive Dashboard Certification Alerts](#)



When a staff member re-certifies, **DO NOT** delete or edit their outdated certificate, instead, add a new certificate with the new **Certified On** date; the status of the old certificate will show as **Expired**. This allows you to retain the history.

Staff Pay Rate Report

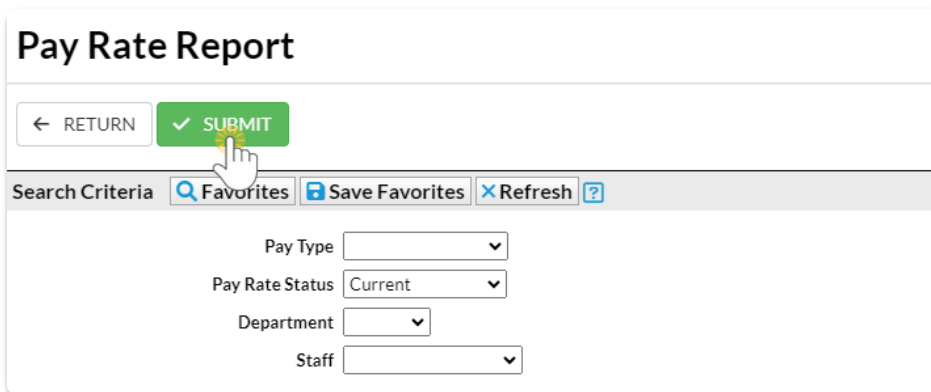
The **Pay Rate** report provides you with a list of staff pay rates based on filters (Search Criteria) you select.

Get to this report from the **Staff** menu > **Staff Reports** > **Pay Rate Report**.

- ★ Customize your report to list employee pay rates based on Pay Type, Pay Rate Status (Current/Future), and Department.
- ★ Review your employee's current pay rate and the effective dates.
- ★ Review pay rates to determine if you can increase the rates for your employees.

Search Criteria

You can filter your list of staff pay rates using any or all of the Search Criteria and Jackrabbit will compile the report to meet ALL of the criteria chosen.

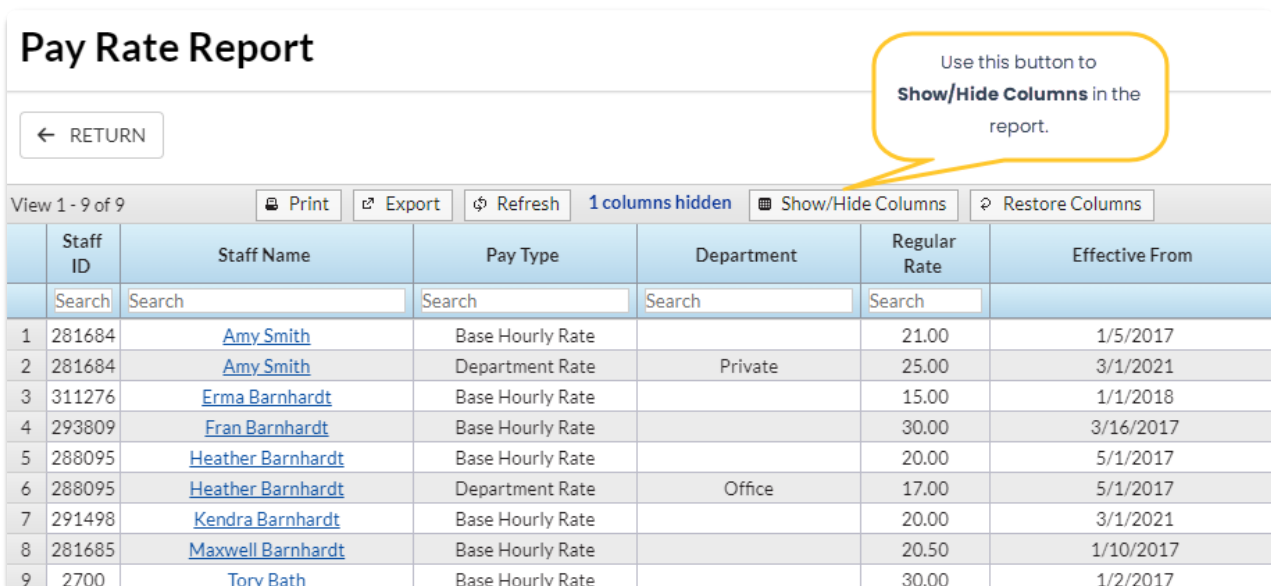


The screenshot shows the 'Pay Rate Report' search criteria form. At the top, there are two buttons: 'RETURN' and 'SUBMIT'. Below these are four search criteria: 'Pay Type', 'Pay Rate Status' (set to 'Current'), 'Department', and 'Staff'. There are also buttons for 'Favorites', 'Save Favorites', 'Refresh', and a help icon.

Report Results

The report results can be further customized with the ability to show or hide columns of information, sort columns, or modify column widths.

- Click the **Show/Hide Columns** button, to select which columns of information you want displayed.
- Click a staff member's name to open their **Staff** record > **Compensation** tab.



The screenshot shows the 'Pay Rate Report' results table. A callout box points to the 'Show/Hide Columns' button in the toolbar, with the text: 'Use this button to Show/Hide Columns in the report.' The table has 7 columns: Staff ID, Staff Name, Pay Type, Department, Regular Rate, and Effective From. There are 9 rows of data.

	Staff ID	Staff Name	Pay Type	Department	Regular Rate	Effective From
	Search	Search	Search	Search	Search	
1	281684	Amy Smith	Base Hourly Rate		21.00	1/5/2017
2	281684	Amy Smith	Department Rate	Private	25.00	3/1/2021
3	311276	Erma Barnhardt	Base Hourly Rate		15.00	1/1/2018
4	293809	Fran Barnhardt	Base Hourly Rate		30.00	3/16/2017
5	288095	Heather Barnhardt	Base Hourly Rate		20.00	5/1/2017
6	288095	Heather Barnhardt	Department Rate	Office	17.00	5/1/2017
7	291498	Kendra Barnhardt	Base Hourly Rate		20.00	3/1/2021
8	281685	Maxwell Barnhardt	Base Hourly Rate		20.50	1/10/2017
9	2700	Tory Bath	Base Hourly Rate		30.00	1/2/2017

Instructor Scheduled Time Report

The **Instructor Scheduled Time** report, found under the *Staff (menu) > Staff Reports*, displays a summary of classes for each instructor.

- ★ Ensure a balance of teaching hours for each instructor.
- ★ Use as class rolls for private lessons.

Search Criteria

Use Search Criteria to narrow down results to the classes you want to work with.

Instructor Scheduled Time Report

Note: At a minimum, Classes must have the following: a Start Date, "Meets on Days" set, and an Instructor assigned.

Location:	All
Instructor:	Stephanie Andrews
Class Category 1:	All
Class Category 2:	All
Class Category 3:	All
Private Lessons Only:	No
Include Empty Classes:	No
From Date:	8/27/2020
Through Date:	9/1/2020

The criteria selected will return all classes assigned to Stephanie Andrews for the date range selected.



The Instructor Scheduled Time Report is intended for viewing current enrollment. Future enrollments will not be displayed. To view future enrollments, see our Help article [Report/Track Future Enrollments](#).

Report Results

Instructor Time Report

[Return to Search Criteria](#)

Page-break after each Instructor when printed?

[Print](#)

Instructor Time Report

8/27/2020 - 9/1/2020

Stephanie Andrews

Date	Start-End Times	Duration	Class	Current Size	(First Student) Student	(Private Lessons only) Elig. MakeupName
8/27/2020	6:30pm-7:30pm	1:00	Cheer Essentials	3	Madison Harris	
8/28/2020	6:00pm-6:45pm	0:45	Cheer Ready - Fri 6pm	2	Cindy Zackmann	
8/31/2020	6:00pm-6:45pm	0:45	Tumbling L2 - Mon 6pm	7	Ashlee Owers	
Total classes: 3		2:30				



A staff person with the *Instructor* field set to **No** on their [Staff record](#) will not have any scheduled time.

The Staff Portal





Permissions control the ability of your Users to see certain data and take specific actions. Before moving forward, review [Staff Portal User Permissions](#).



The Staff Portal provides a secure place for your staff to: view their class and events schedules, record time worked in the time clock, enter their availability, record student attendance or skills/levels, view Lesson Plans, and create and view Resources.

- ★ **Be Secure** -The Staff Portal is isolated from your Jackrabbit system, allowing your staff to manage their classes and time outside of Jackrabbit without needing access to sensitive data such as contact and financial information.
- ★ **Be In Touch** - The Staff Portal is a great way to communicate with your staff. Use the *Staff* and *Department News* to broadcast messages in the Staff Portal. A login message can be entered into an individual staff member's record, and it will display on their News tab in *My News*.
- ★ **Be Mobile** - Jackrabbit's Staff Portal is 'responsive', which detects the size of the device being used and will adjust to fit the screen size. This makes using the Portal much easier on a smart device!

Set Up and Explore the Staff Portal

Why should you use the Staff Portal for your organization? Let's have a look at the setup, functionality, and reporting options available to you with the Staff Portal.

	<h3>Set Up Your Staff Portal</h3>	<p>Ready to get started? Use the Guided Staff Portal Setup to get going in 5 easy steps!</p> <p>Staff can access the Staff Portal in multiple ways:</p> <ul style="list-style-type: none">• Use a Link to Launch the Staff Portal Remotely• Launch the Staff Portal from Within Jackrabbit• Launch the Staff Portal for Multi-Locations• Save and Launch the Remote Access Staff Portal as an App on a Mobile Device <p>If a staff member forgets their password, they can click the Forgot Your Password? link at any time to generate a new one. See Reset a Staff Portal Password for more details.</p>
	<h3>Staff Portal Settings</h3>	<p>Once you have gone through the <i>Guided Staff Portal Setup</i> (above), there are additional settings that control staff access and features they can use in the portal:</p> <ul style="list-style-type: none">• General Staff Portal Settings• Settings for Staff Portal Attendance• Settings for Staff Portal Skills/Levels• Settings for the Staff Portal Time Clock <p>Need to make some updates to individual settings for multiple staff members? Check out these additional articles:</p> <ul style="list-style-type: none">• Edit All Staff Portal Settings• Edit All Staff Portal Login IDs

	<p>Staff Portal Features</p>	<p>These are the features (tabs) included in the Staff Portal.</p> <ul style="list-style-type: none"> • News - create announcements for specific staff members, all staff, and by departments. See Staff Portal News for more info. • My Schedule - Instructors can view their schedule of classes and events. No need to send your instructors their schedules - they can view and print their schedules from here, including any classes they are substituting for! Increase efficiency and allow staff to enter their own availability and time off through their Staff Portal. • My Time Card - Staff can use the Time Clock to enter their worked hours. Refer to the Enter Time in the Staff Portal Time Clock section for more details on different time entries. • Manage Classes - Staff members can take attendance, update skills/levels, view lesson plans, email students, and add resources. Refer to Manage Classes in the Staff Portal - The Main Page for additional information.
	<p>Reports</p>	<p>Staff Portal reports are an excellent way to keep track of staff members and their required tasks. These reports include:</p> <ul style="list-style-type: none"> • Incomplete Portal Attendance Report • Staff Portal Login ID Report • Staff Portal Log

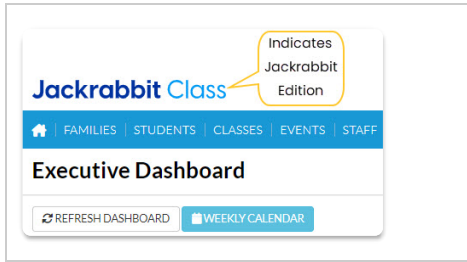


Share our video tutorial, [Use Our Staff Portal](#), with your staff to get them familiar with using their Staff Portals.

Practice - Add Staff and Assign Them to a Class

Want to practice what you've just learned? Great! Go to <https://app.jackrabbitclass.com/jr4.0/Login> and log in with the credentials below for your

Jackrabbit edition.



Edition	User ID	Password
Cheer	LMSCheer	Training1
Class	LMSCClass	Training1
Dance	LMSDance	Training1
Music	LMSMusic	Training1
Swim	LMSSwim	Training1



The Practice Database is refreshed each day at approximately 5:00 am Eastern Standard Time. Anything you enter will be erased at that time.

Add a staff member and assign them to a class.



Use fake names, addresses, etc. as any information you add could be viewed by others outside of your organization.

- Make up your own fake names or click [here](#) to open a website that generates fake names.
 - Make up your own fake addresses or click [here](#) to open a website that generates fake addresses.
1. Add a staff member with a fake name and address by going to Staff on the menu bar and clicking on Add Staff.
 2. Open a class by going to Classes > List Active Classes and select a class (link) in the Class column.
 3. Click on the Instructors tab and select the staff member from the drop-down list. If the staff member isn't listed, check your staff member has the Instructor field set to "Yes" on their Staff Record (page).

QUIZ - Lesson #3 - Staff Management

When you have worked through all of the articles outlined in the lesson, select the Take the Quiz button to be taken to the Lesson #3 Quiz where you can test your understanding of the concepts in this lesson. You will be asked to enter an email address for quiz results to be sent. The quiz includes Review questions.

Quiz #3 - Staff Management

TAKE THE QUIZ

Number of Questions	Total Possible Points	Points Needed for an "A"	Points Needed for a "B"	Points Needed for a "C"
9	9	8	7	6

[Return to Supervisors and Managers Menu to continue to next lesson](#)

[Click here to provide feedback for this lesson](#)
