

MicroStaffer User Manual

MicroStaffer User Manual

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I. Introduction

A. Overview

MicroStaffer serves as a complete system solution for Medical Staffing Agencies. It manages all aspects of staffing, scheduling and availability tracking as well as payroll and billing.

MicroStaffer features include:

- **Calendar Staffing Windows:** Here, employees are scheduled at facilities.
- **Real-Time/Date scheduling:** No need to remember codes. Use real time clock entries from a user-friendly drop down.
- **Employee Profile Tracking:** Track all aspects of your Medical Staff including Licenses, Insurance Policies, Health Certifications, Skills, Certifications and much, much more...
- **Ticklers and Alerts:** Your staffers are automatically notified during scheduling when important dates (Licenses, Physicals, Insurance Policies) have or are about to expire, when errors such as double bookings occur, when orientations have not been performed or when employee/facility incompatibilities exist.
- **Tax Withholding Payroll Processing:** Fully integrated payroll processing including Tax withholding for Federal, FICA, Medicare, State, Deductions etc. (for Tax Library subscribers)
- **Dropdown list navigation throughout:** No need to navigate using tedious dialog windows. Each dropdown has built-in context sensitive search capability.
- **Customizable Invoice forms:** Move, resize or otherwise customize for your individual needs. We can even custom program your invoices for you!
- **Multi-tiered rate and shift schedules for both clients and employees:** Allows for entry of commonly worked shifts and rates based on those shifts.
- **Payroll and Billing adjustments:** Ability to deduct and add amounts to invoices and payroll.
- **Check advances collections processing:** Allows you to deduct non-worked hours from future payroll checks.
- **Multi-company enabled:** Run several companies with the same software installation.
- **Multi-User:** Fully multi user network capable with built in record locking.
- **State of the Art Reports & Query Manager:** Multitude of instantly accessible on-line reports including staffing, payroll and invoicing. Every report has print and export capabilities allowing for export to Excel, Text etc.
- **Advanced Technology:** Open architecture allows for easy customization and is highly scalable.
- **Customizable:** Ability to create your own data entry fields for both employees and customers and also run reports based on the data in those fields.
- **Security Interface:** Allows for different access types for different users.
- **Optional Web Module:** Allows your customers and employees to enter orders & availabilities, view schedules etc. using a standard Web Browser such as Internet Explorer or Netscape Navigator.
- **Email and Phone-Dial Enabled:** Instantly send emails from within MicroStaffer. Create email lists from reports. Mail schedules, confirmations, profiles, documents and much, much more with the click of a button. Instantly dial phone numbers with the click of the mouse and correctly enabled phones.

B. System Requirements

1. Client Workstations

- IBM Compatible PC running Windows XP Professional, 2000 or NT 4.0
- Min. 800x600 256 Color Display.
- At least 50 MB Free Disk Space.
- Min. 128 MB Ram.

2. Network Server

- Windows 2000, 2003 Server Operating System
- Microsoft SQL Server 2000
- Min. 1 GB Ram

Please contact us to discuss Multi-User installations in more detail.

3. Running on Windows 2003 Terminal Server

Dedicated Windows 2003 Terminal Server
1 GB Ram
Windows 2003 Terminal Server Access Licenses
Internet connection with port forwarding to Port 3389

C. Manual Use

The MicroStaffer User Manual is intended as a basic guide for the MicroStaffer Medical Staffing software. All attempts have been made to clearly explain the use of MicroStaffer. For ease of use, employees/nurses are defined as "Employee" and facilities where they work are defined as "Client". MicroStaffer allows you to define these however you wish, but for consistency, the manual refers to them as "Employee" and "Client".

The MicroStaffer User Manual is separated into types of use. The first sections deal with first time setup of MicroStaffer and explanations of all of the important codes used within the system:

Introduction
Connection Settings
System Setup and Administration

The next sections deal with the everyday use of MicroStaffer:

Using MicroStaffer – Staffing & Availability Tracking
Using MicroStaffer – Invoicing & Payroll Processing
Using MicroStaffer – Reports & Queries
Using MicroStaffer – Mail Merge
Using MicroStaffer – Document Manager
Using MicroStaffer – Web Access Module

The concluding sections are basic information:

Import/Export
Troubleshooting & FAQ's

II. Connection Settings

The following instructions detail the proper connection settings for MicroStaffer client workstations accessing Microsoft SQL Server based systems.

- 1) Run the MicroStaffer Connect program by clicking Start->Programs->MicroStaffer->MicroStaffer Connect from the Windows Start button.
- 2) When the MicroStaffer Connection Settings Window appears, select Microsoft SQL Server 7.0 (Driver) from the dropdown next to Connection Type.
- 3) Click on the Configure button.
- 4) The SQL Server Client Network Utility window will open.
- 5) Select the General Tab and Click on Add.
- 6) The Add Network Library Configuration window will open.
- 7) Check the TCP/IP radio button under 'Network Libraries'.
- 8) Under 'Server Alias', enter the name of the 2000/2003 server. This is the machine where the Microsoft SQL Database Server is running.

If you do not know the name of the 2000/2003 Server you can obtain the name by right clicking on the Network Neighborhood Icon on the 2000/2003 Server's desktop and Selecting the 'Identification' tab. The 2000/2003 Server's name is listed next to 'Computer Name'.

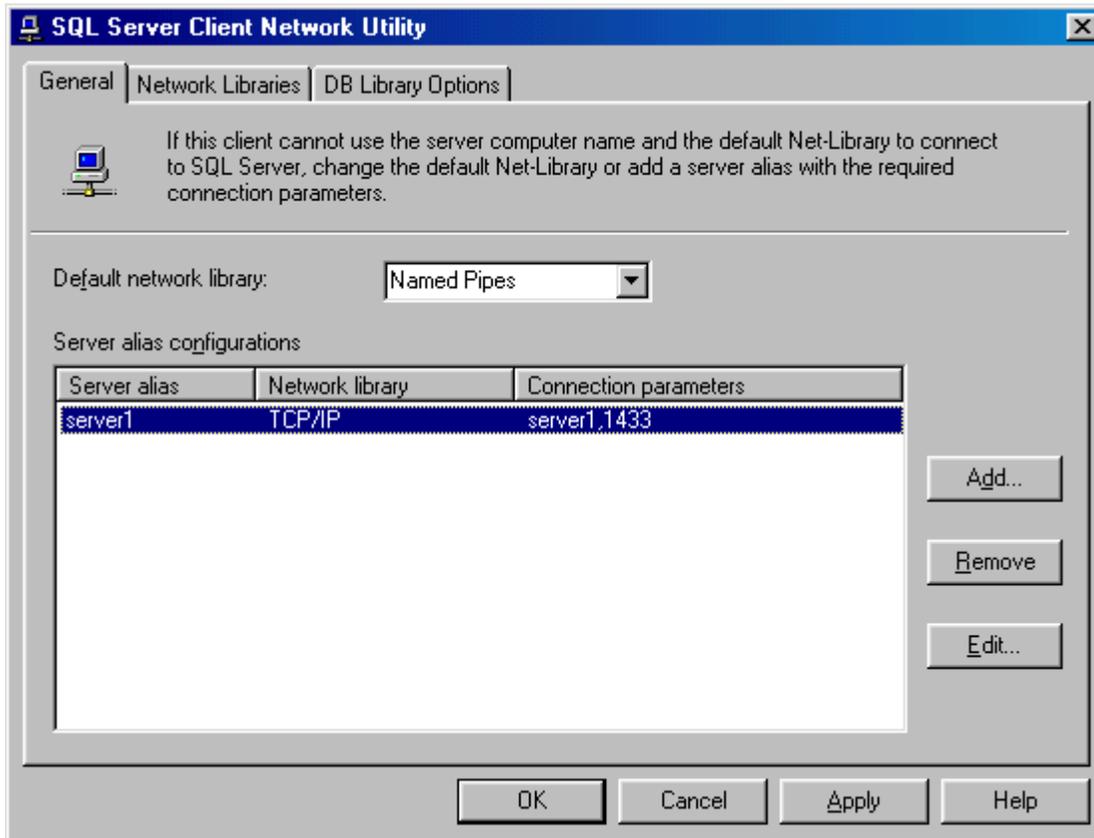
- 9) As you type into the 'Server Alias' field you will note that the 'Computer Name' field under 'Connection Parameters' will also be filled in with the same name. The reason for this is as follows: The 'Server Alias' field is merely a description of the connection whereas the 'Computer Name' field is the actual name of the 2000/2003 Server (or the 2000/2003 Server's IP address).

Note: You can also add only the Server's IP address into Computer Name field. Use the IP address if you are having problems connecting with the Server's name.

- 10) Leave the default Port Number at 1433

Click on OK.

12) SQL Server Client Network Utility window should now contain the new Server Alias



configuration and settings may look similar to this:

13) Click OK again. You will be returned to the MicroStaffer Connection Settings window.

14) In the 'Server Name' field enter the name of the 2000/2003 Server that you used for the 'Server Alias' on the SQL Server Client Network Utility window. In the above example it would be 'server1'.

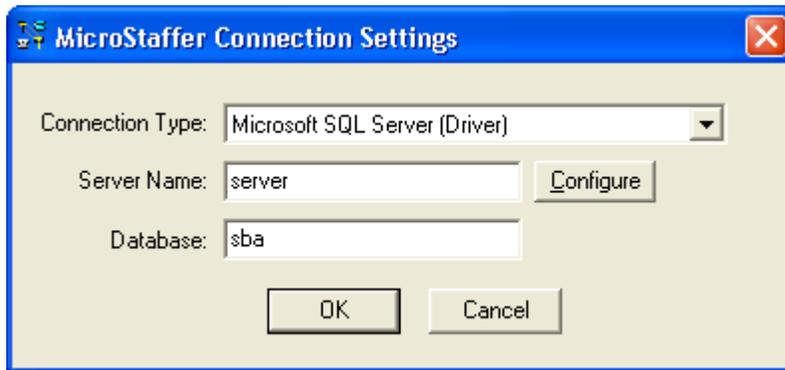
The 'Server Name' on the MicroStaffer Connection Settings window **MUST** match their 'Server Alias' on the SQL Server Client Network Utility window.

15) In the 'Database' field, enter the name of the MicroStaffer database (usually this is SBA).

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a) Production Database: **sba**



The window should look similar to this:
Click OK.

III. System Setup & Administration

A. Starting MicroStaffer for the First Time

When **MicroStaffer** starts up for the first time after installation you will be asked to log in. Please refer to Logging In on what User ID and Password to use the first time you access the system. (Next section).

After logging in, you will then be prompted to create a New Company Profile.

Click on OK and the Company Setup Window will open and allow you to enter company data.

Once you have finished entering your New Company data, closing and saving the Company Setup Window will open the main **MicroStaffer** Interface.

You will be able to edit all Company data should you need to make any changes later.

B. Logging Onto MicroStaffer

When **MicroStaffer** first starts up you will be asked to log in. The Login Window will open and ask you for the following:

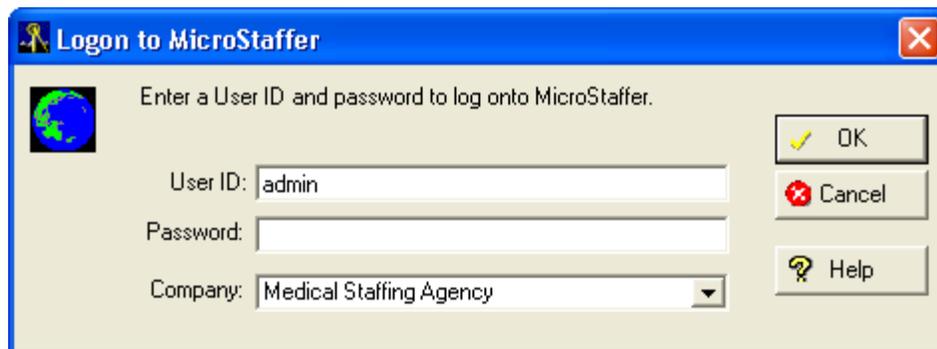
User ID: Enter a user id that was assigned to you by the Systems Administrator. The Administrator's user id is ADMIN. Use this id to access the system for the first time. The initial password for the ADMIN user is USER.

MicroStaffer Tip:

The ADMIN user id password should be guarded and/or changed frequently. This user id has complete and unrestricted access to all functions of the system and cannot be deleted or renamed.

I. **Password:** Enter the password.

II. **Select Company:** When there is more than one Company defined in the system, the company dropdown will appear and allow you to select the desired company you wish to access.



Logon to MicroStaffer

Enter a User ID and password to log onto MicroStaffer.

User ID: admin

Password:

Company: Medical Staffing Agency

OK

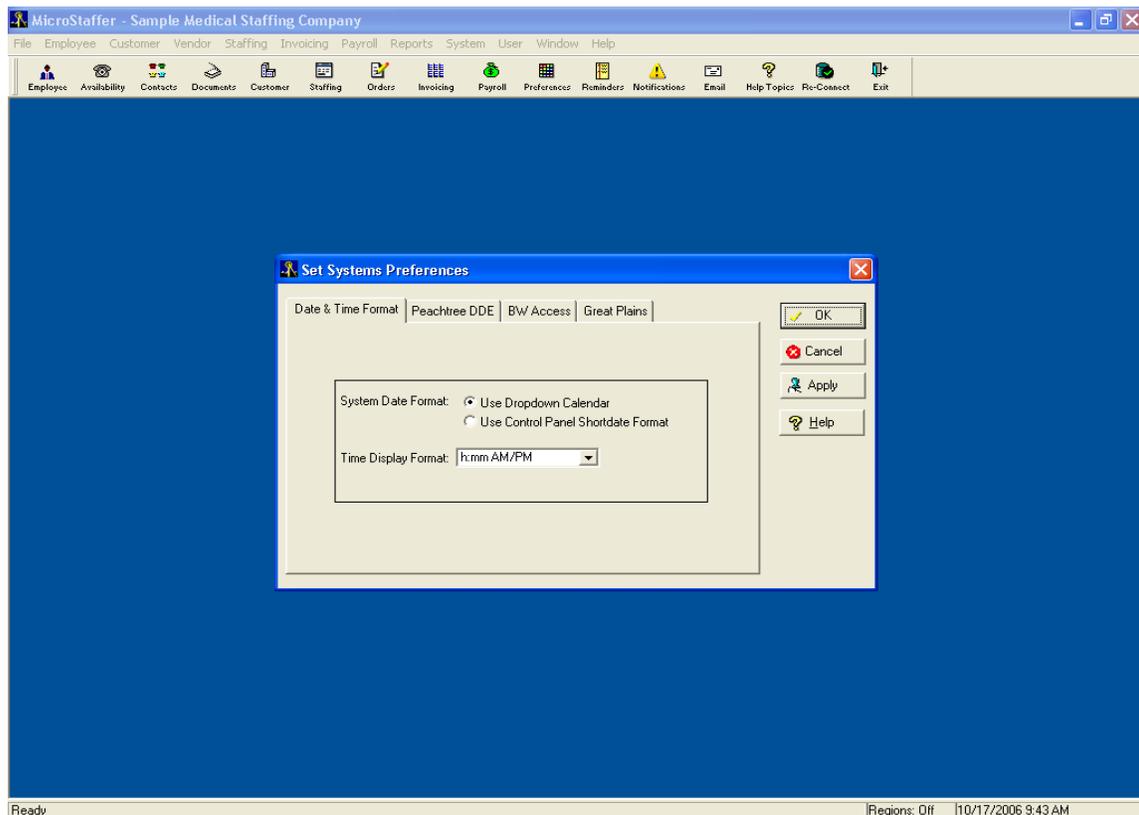
Cancel

Help

C. Setting User Preferences in MicroStaffer

The MicroStaffer user preferences window sets system wide preferences for each individual user. This window can be accessed from anywhere in the system by clicking on the User menu item located on the Standard Windows menu within MicroStaffer or by clicking the Preferences button on the tool bar.

- 1. Date & Time Format:** Allows you to switch between a drop-down calendar date format or a standard keyboard sensitive date format. This affects the date field throughout MicroStaffer. The time format allows you to switch between an AM/PM format and a 24 hour format (military time).
- 2. Peachtree DDE:** Defines settings for Automatic data synchronization with Peachtree Accounting.
- 3. BW Access:** Defines settings for Automatic data synchronization with Business Works Accounting system.
- 4. Great Plains:** Defines settings for automatic data synchronization with Great Plains.

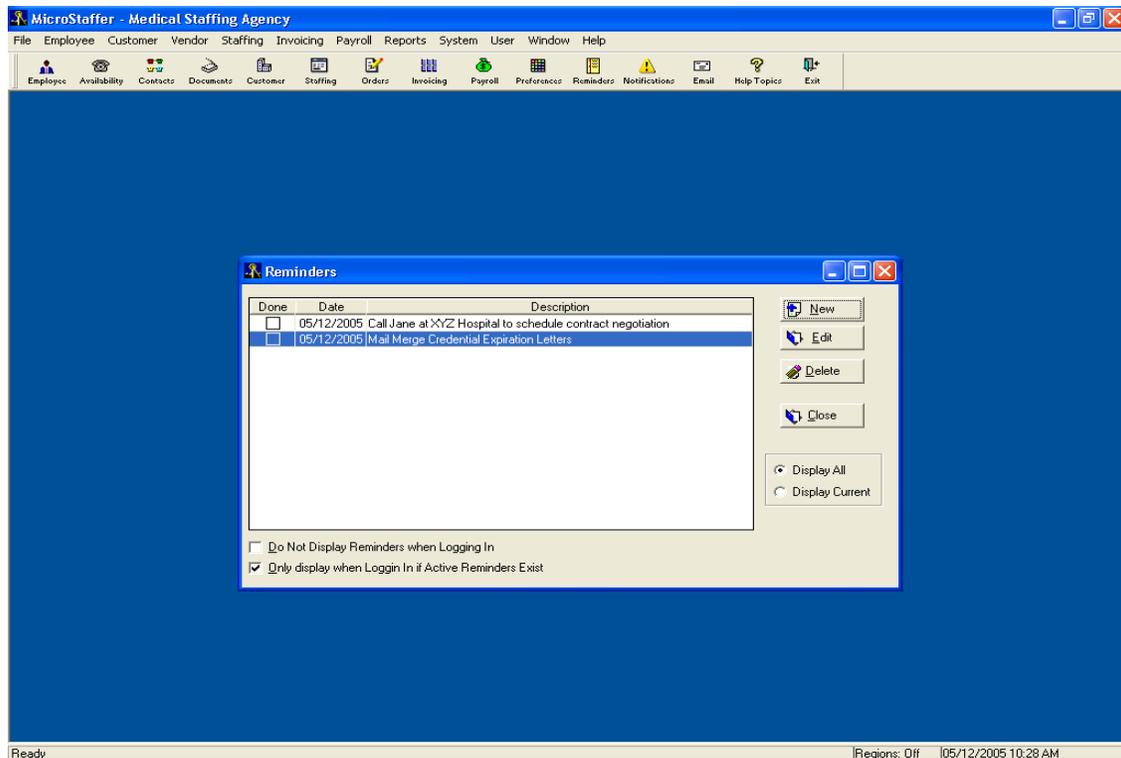


D. Using the MicroStaffer Reminders Window

MicroStaffer allows you to enter Reminders which can be displayed either by opening the Reminders window directly from the Standard Windows menu within MicroStaffer or by checking the box on the Reminders window to display Reminders upon log in to MicroStaffer.

Note that you can date your Reminders to only be displayed when they become current.

1. You can turn off display of reminders by checking the 'Do not Display Reminders when logging in' checkbox.
2. If you only wish to display reminders when current reminders exists, check the box labeled 'Only display when Active Reminders Exist'.
3. Reminders can also be marked as completed ('Done') or Inactive. You may, of course, also delete any reminders.

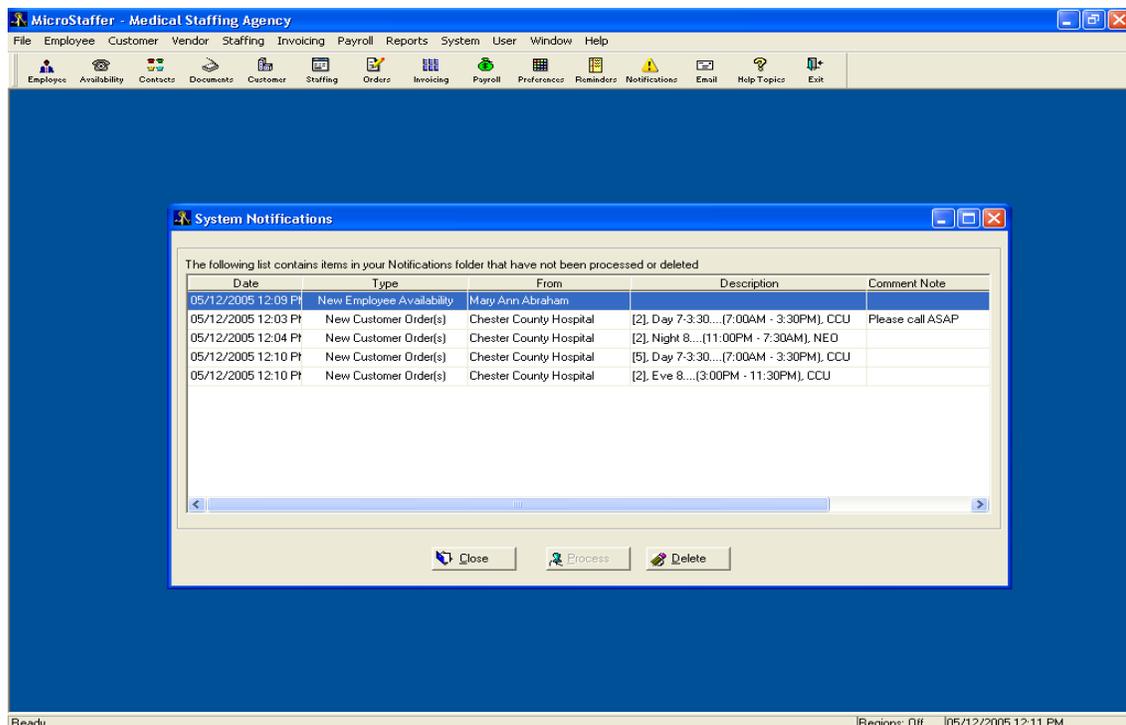


E. The System “User” Notifications Window

The MicroStaffer System User Notifications window alerts users of both Internal (Non-Web) and External (Web Access Module) data flow events. For Client Orders and On-Line Applications submitted via the optional Web Access module, the User Notification Window acts as a gatekeeper for MicroStaffer which allows the user to process the item into MicroStaffer or delete any unapplicable or duplicate information before it reaches MicroStaffer. The display mode and colors of system notification types may be changed within “System Settings & Utilities” and selecting the “Notification Settings” tab (see manual section). This allows for quick visual recognition of different types of system notifications.

The notifications may include:

- 1. Customer Orders:** (External) Orders submitted from customers via the Web Access Module. Users must be assigned as Account Reps to the facility submitting the order in order to be notified about the order. (Account reps are created in the Customer Setup facility on the Web tab). Orders may be deleted or processed into MicroStaffer.
- 2. Employee Availability:** (External) New Availabilities and changes to existing availabilities from the Web Access Module. Users must be assigned as Employee Reps to the submitting employee to be notified of the changes in availability. (Account reps are created in the Employee Setup facility on the Web tab). Availabilities flow directly into the Employee Availability of the submitting Employee.
- 3. On-Line Applications:** (External) Applicant data submitted via the Web Access Module. Users may delete the submission or process/transfer it into the Employee Leads window.
- 4. Employee Sign-On Bonus or Referral Bonus ticklers:** (Internal) If any sign-on bonus or referral tickler has been met. These bonuses and the employee to notify are set up on the Employee Setup window. Entries are for informational purposes only, they can only be deleted.
- 5. Follow Ups:** (Internal) There are a variety of Follow Up categories that may be entered in MicroStaffer. There are Follow Ups for Employees; Employee Leads; Customers; and Customer Leads. Check the user to notify in the Follow Up tab. Entries are for informational purposes only, they can only be deleted.



F. Company Setup

The Company setup is the name of the company that will be using MicroStaffer. A variety of information is maintained for the company created here.

NOTE: MicroStaffer allows for the creation of more than one company but certain important information is not shared between companies. The most important is the employee data and billing/payroll information. An example of a multiple company set up would be if there are separate companies for temporary staffing and home health care.

1. Creating a New Company

To Add a New Company profile:

1. Select System from the Main Menu button and Select 'Company Setup'.
2. The Company Setup window opens with the information of the current Company.
3. Click the 'New' button.
4. Proceed to enter the information.

MicroStaffer - Medical Staffing Agency

File Employee Customer Vendor Staffing Invoicing Payroll Reports System User Window Help

Employees Availability Contacts Documents Customer Staffing Orders Invoicing Payroll Preferences Reminders Notifications Email Help Topics Exit

Company Detail - New

Company: [Dropdown]

General Invoice Setup Custom Info Setup Default Taxes Other

Name: [Text Box]

Tax ID#: [Text Box] Enable Tax Withholding for this Company
 Use YTD Gross for FICA Wagebase

Address: [Text Box]

City, St., Zip: [Text Box] [Dropdown]

Phone: [Text Box] Fax: [Text Box]

Define a Customer as: [Customer] Def. Type: [Facility (Hospital, Nursi]

Define an Employee as: [Employee]

OT Accrual Method: [By Shift Date]

Hourly Charge Bonus
Pay: [00] Bill: [0.00]

Hourly Same-Day Booking Bonus
Pay: [00] Bill: [0.00]

Last Modified on: [Text Box] By: [Text Box]

Close Save New

Ready Regions: Off 05/12/2005 12:18 PM

2. Editing Company Info

a) Company General Info

The General Tab on the Company Setup window captures the following information:

1. **Name:** Enter the name of the company (Required).
2. **Tax Id:** The Tax ID Number for the company. (Required).
3. **Enable Tax Withholding Checkbox:** (Payroll Tax Library Subscribers Only) Check this box to enable tax withholding during Payroll Generation. If this box is NOT checked, no taxes or deductions will be applied to any payroll checks. **Note:** You must subscribe to and have the MicroStaffer Tax Library installed on your PC for any tax withholding to be applied.
4. **Use YTD Gross for FICA Wagebase:** (Payroll Tax Library Subscribers Only) Check this box if you wish to use the YTD Gross earnings as FICA wagebase. The MicroStaffer tax library will normally use the YTD FICA in determining when the FICA Wagebase has been reached. Checking this box will indicate that the YTD FICA Wagebase will be calculated from the YTD Gross. This is used mainly for systems that start during the payroll year and have incomplete FICA YTD values.
5. **Address:** Stores the street, city, zip, state, phone and fax numbers.
6. **'Define Customer as' Field:** Allows you to define the customer field throughout MicroStaffer. For the sake of consistency, this manual will refer to customers as clients. This field name will be changed to whatever you define here throughout the MicroStaffer system.
7. **'Define Employee as' Field:** Allows you to define the employee field throughout MicroStaffer. For the sake of consistency, this manual will refer to employees as employees.
8. **Define Type of Client:** Sets a default value in the client type selection on the client set up screen. The default value may be overridden within the client set up screen. Select from the dropdown: Facility, Patient or Billing Entity.
9. **OT Accrual Method:** OT can be accrued using Shift Date or Date Shift was booked. This allows you to modify the order in which Overtime sums up its hours.
10. **Charge and Same Day Booking Bonuses:** These fields allow you to assign company wide default pay and bill bonuses for both charge pay and same day bookings.

Whenever you designate a specific shift as 'Charge' or 'Same-Day Booking' on the Shift detail window, the hourly rates entered into these fields will be added to the regular rates applied to the shift. This holds true for both Pay and Billing rates.

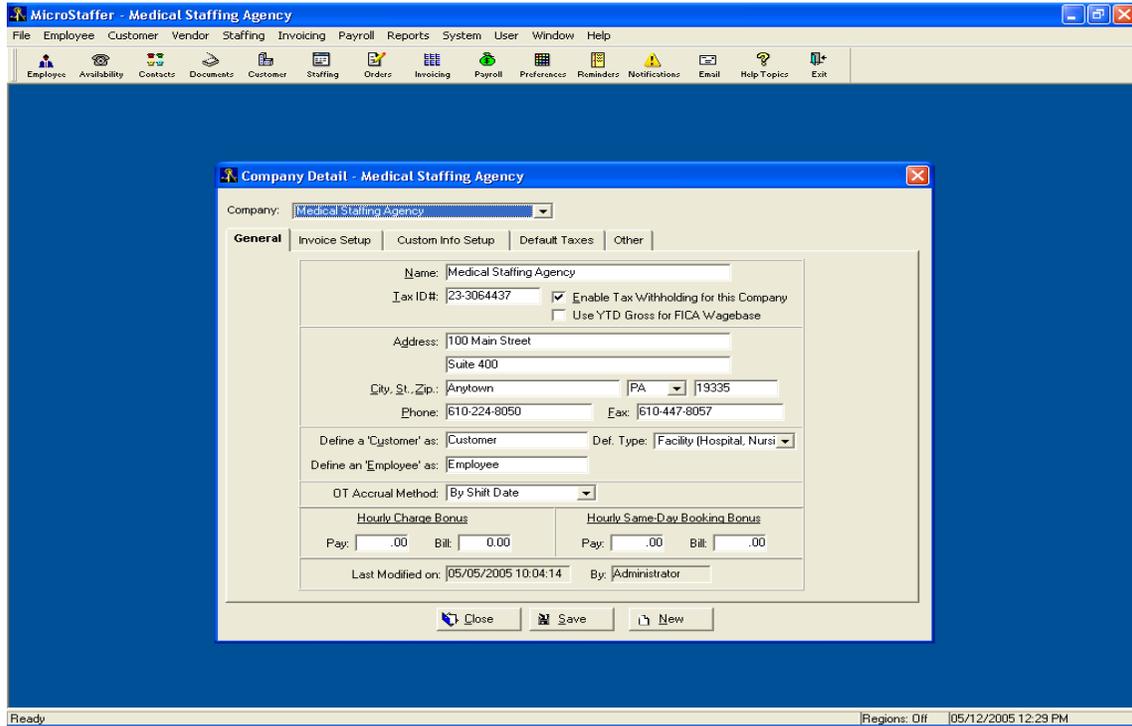
These bonus rates will also be included in overtime and holiday pay calculations.

Note that you may also specify employee specific Charge and Same-Day Booking bonus rates on the Employee Setup window's payroll tab. The employee specific rates will be added/subtracted from the company rates shown here. They do NOT override them.

You must check the 'Charge' and/or 'Same-Day Booking' checkboxes on the Shift Detail window for these bonuses to be applied.

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b) Invoice Setup

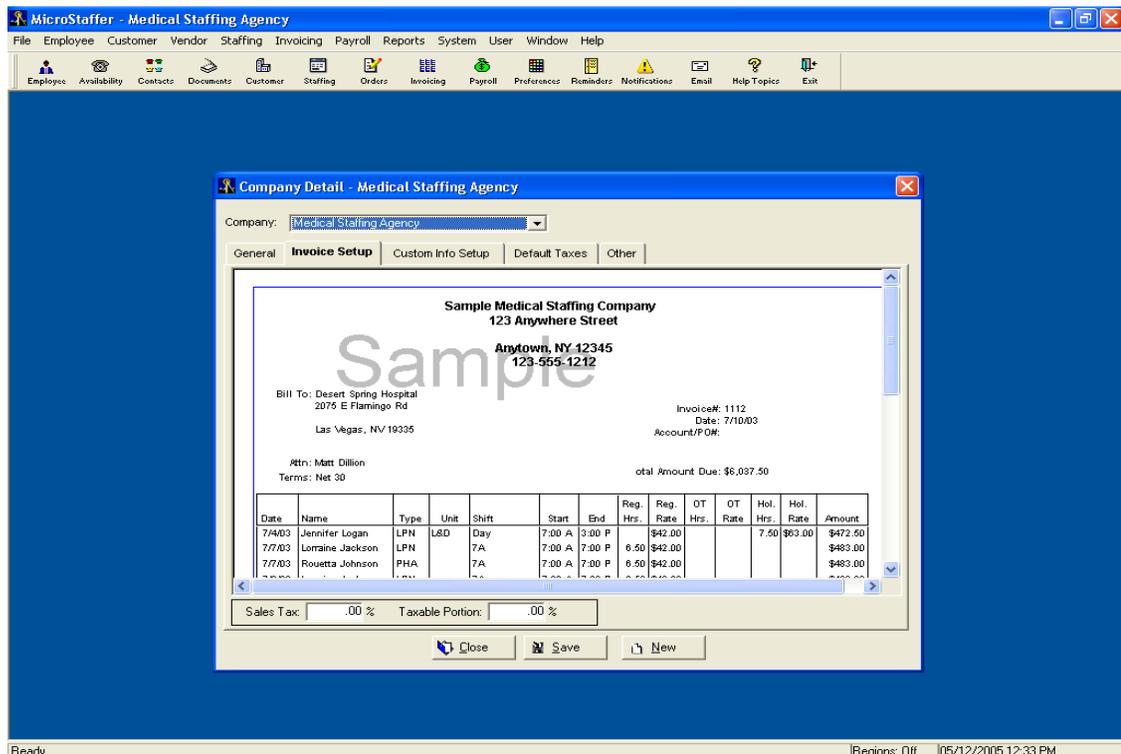
The Invoice Setup Tab on the Company Setup window allows you to customize the appearance of your invoices. Since many companies use pre-printed forms or do not wish to display all the information on our standard default invoice, we have created this tab to allow you to change the way your invoices will display and print. Please contact MicroStaffer for a quotation if additional customization of invoices is desired.

Displayed is a sample of an invoice that can be modified in this way:

1. Moving objects: Move objects into their desired location by clicking on them and dragging them into a new location. When you are finished moving them, release the mouse button.

Change Object Attributes: Change the attributes of objects by clicking the right mouse button on them. A popup menu will appear with the following items:

- **Reload Default:** Reset all the original default settings for invoice display.
- **Remove:** Removes the selected object from the invoice.
- **Align:** Set the alignment of the text to align to the left, center or right. (Text and Data Columns only)
- **Font Bold:** Toggle from regular font to bold font. (Text and Data Columns only)
- **Font Size:** Changes the size of the text. (Text and Data Columns only)
- **Zoom:** Zoom in and out of the invoice display. This is used for editing purposes only and will not be saved.
- **Print:** Prints a sample of the invoice.



2. Sales Tax: Enter any desired Sales Tax percentage. Sales tax is used on Custom Invoices and Invoice Export.

3. Taxable Portion: Enter the percentage of gross revenue subject to sales tax. Used primarily on Custom Invoices and Invoice Export.

c) Company Custom Info Setup

The Company Custom Info Setup tab on the Company Setup window allows for maintaining custom data entry fields for both Employees and Customers. The fields that are created here will be available for data entry on both the Employee Setup and Customer Setup windows respectively.

Custom data fields are intended to allow you to enter data that is not otherwise tracked in the system. For example, you could create fields for contract expiration dates, who obtained the contract, etc. Employee custom data can include tickler enabled date fields. The fields created here are later available on reports and queries.

There is a limit of 40 custom fields for Employee data and 25 custom data fields for Customer data.

The following is entered:

- **Description:** Enter the description for the data field. (Required)
- **Type:** The data type of the fields. Valid types are: (Required)
 - Date - Will permit an "Alert on Staffing Sheet" tickler to be created when on the employee custom info tab.
 - Whole Number
 - Currency
 - Decimal
 - Text



MicroStaffer Warning

When you remove a custom info field from the list on this window, the field and all its associated data is also removed from each employee or customer depending from which list it was removed

The screenshot shows the 'Company Detail - Medical Staffing Agency' window with the 'Custom Info Setup' tab selected. The window title bar includes 'MicroStaffer - Medical Staffing Agency' and a menu bar with options like File, Employee, Customer, Vendor, Staffing, Invoicing, Payroll, Reports, System, User, Window, and Help. A toolbar contains icons for various functions. The main area is divided into two sections:

Define labels and data types for Employee Custom Info fields

Item Label	Data Type
Contractor Company	Whole Number
US Citizen?	Text
Green Card/Work Permit #	Text
Shift Preference	Text

Define labels and data types for Customer Custom Info fields

Item Label	Data Type
Contract Date	Date
Obtained By	Text

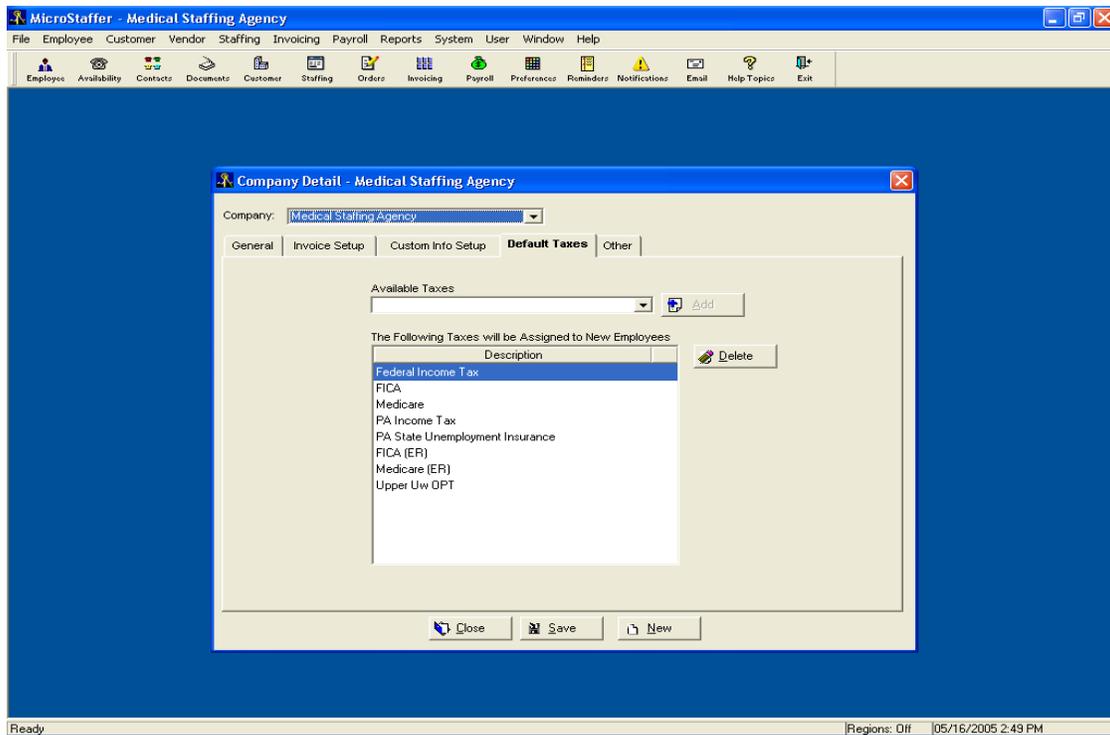
Buttons for 'Add' and 'Delete' are present next to each table. At the bottom of the window are 'Close', 'Save', and 'New' buttons. The status bar at the bottom shows 'Ready' and 'Regions: Off 05/16/2005 2:48 PM'.

d) Default Taxes (Payroll Tax Library Subscribers only)

The Default Taxes tab on the Company Setup window allows you to indicate which Tax types or Deductions will be added to an employee's list of Taxes and Deductions on the Employee Setup Window's payroll tab when creating a New Employee. (Subscription to the MicroStaffer Tax Library is required for processing tax withheld payroll using MicroStaffer).

Simply select an item from the dropdown list and click on the Add button. This will add the selected Tax or Deduction to the list of default Taxes and Deductions.

Each time a new employee is added into the system, this list will be used to indicate which taxes and deductions are automatically assigned to the new employee. Of course, you will be able to add and delete these default taxes and deductions for any individual employee.

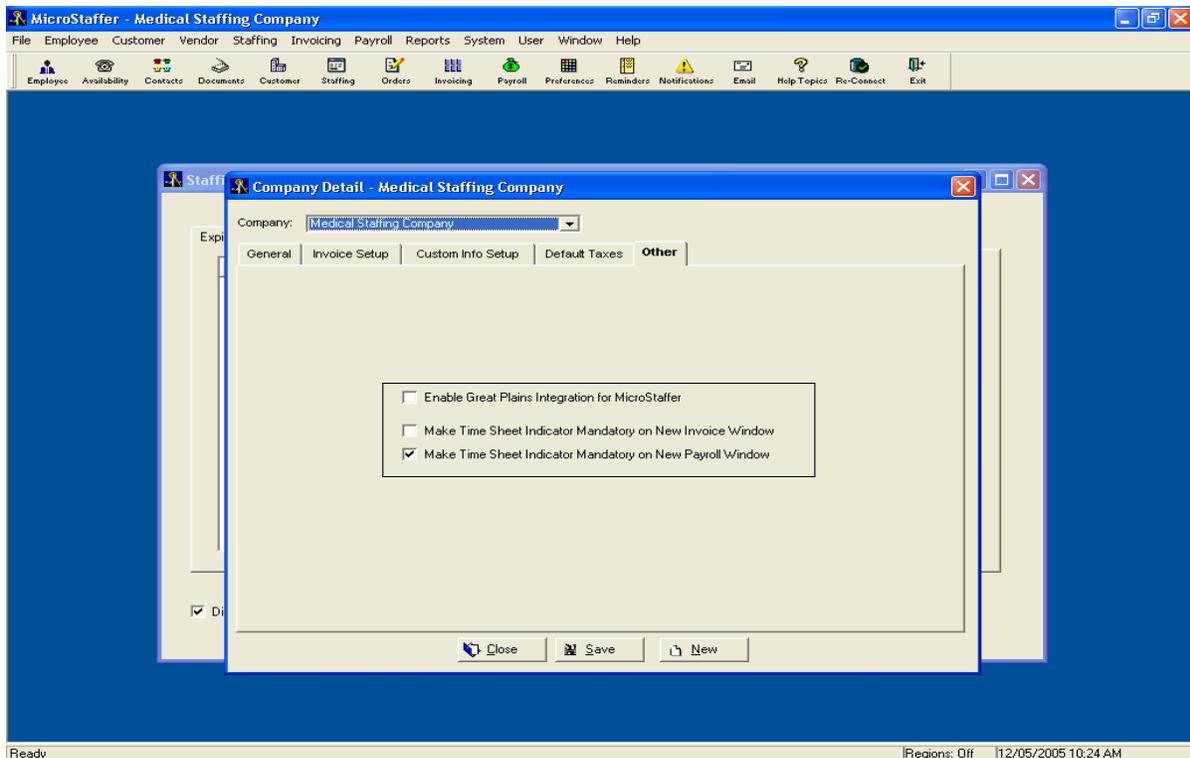


e) Other

Enable Great Plains Integration for MicroStaffer - Check this box to enable the MicroStaffer Integration with MicroSoft Great Plains.

Make Time Sheet Indicator Mandatory on New Invoice Window - Check this box to make it mandatory to have the timesheet checked for a shift to be included on a new invoice. Checking this box places a check in the timesheet option on the invoice window and disallows the box to be unchecked.

Make Time Sheet Indicator Mandatory on New Payroll Window - Check this box to make it mandatory to have the timesheet checked for a shift to be included on a new payroll check. Checking this box places a check in the timesheet option on the payroll window and disallows the box to be unchecked.



G. User Setup & Security

1. Access Tab

The User Setup window allows you to create and manage users and their respective access levels within MicroStaffer.

Each company created in MicroStaffer has its own users, each with his/her different access levels.

The only user that cannot be modified or changed in any way other than to modify the password, is the 'admin' user. This is the administrator login with access to all areas of the system.

1. To create a New user, click on the **New button**.
2. Enter a user id (Max. 8 Characters).
3. Enter user name and password. These are required.

Below is a list of the different items on the User Setup window:

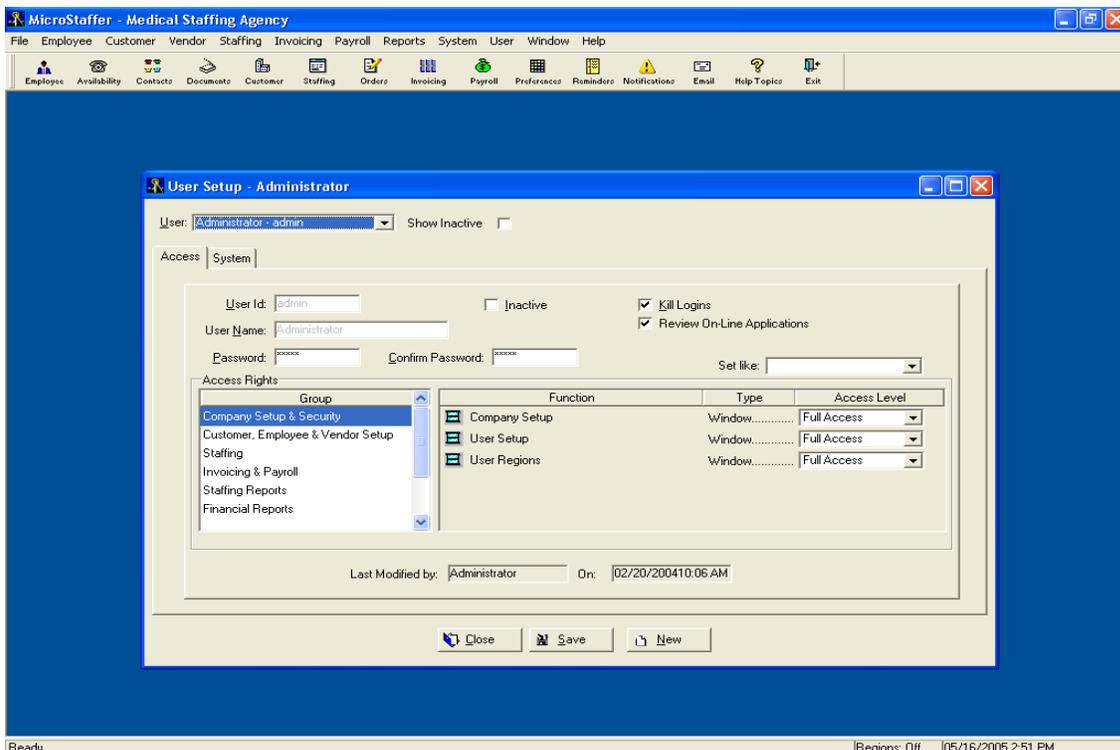
- A. Access Rights:** This section lists the different function groups within MicroStaffer under the Groups list. Each time you select a different group, the list of specific functions on its right changes and lists each item that security levels can be set for.

The security levels are:

1. No Access/Hidden - User cannot see the control in any way.
2. Read-Only - User has access and can view data but cannot save it.
3. Full Access - User has complete viewing and editing access.

- B. Kill Logins:** This checkbox is only available on Network systems running Microsoft SQL Server. When this box is checked, the user can Kill any process using the Systems Settings window's Login tab.

- C. Set Like:** This option lets you set the current users access rights to the same settings as the one you select from this dropdown. Does not carry over user information set on the System Tab.



D. Review On-Line Applications: When this checkbox is checked, the selected user will be able to view New Internet submitted on-line applications in the System Notifications window (Web Module enabled systems only).

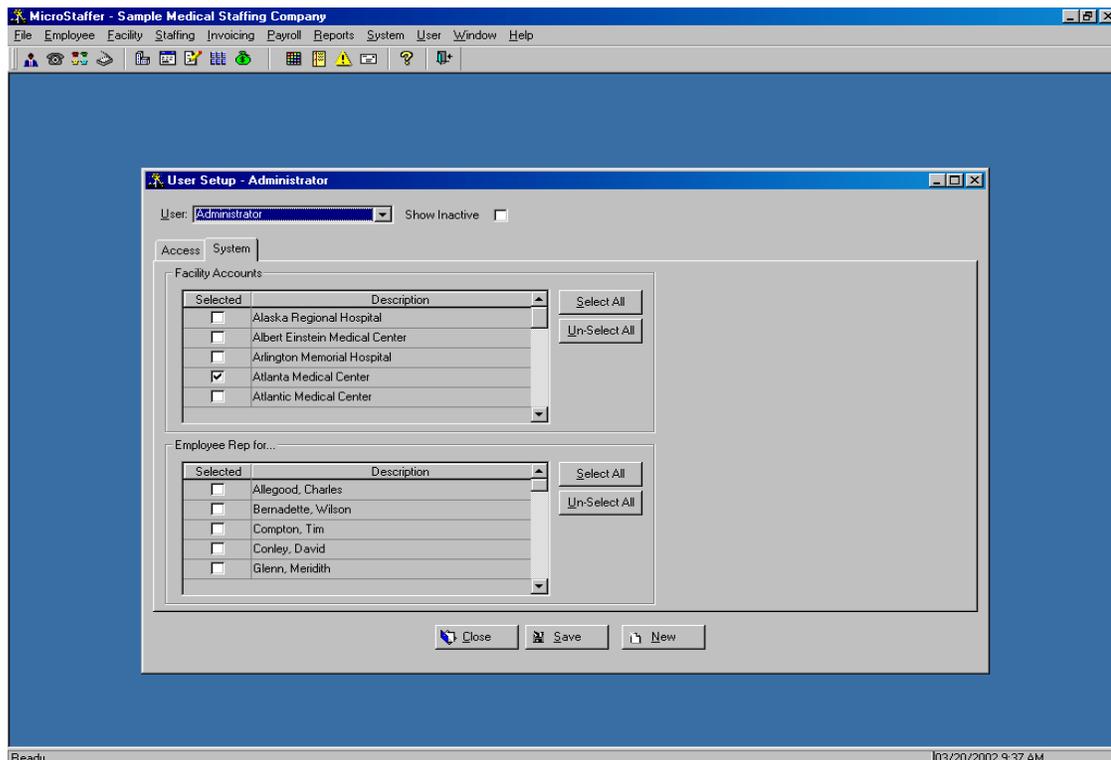
2. System Tab

The System Tab on the User Setup window allows you to designate Account Reps and Employee Reps for any user in the system.

Account Reps will be notified of any new Orders and other Web Based information received from Clients via the optional MicroStaffer Web Access Module. These will appear in the System Notifications window for the marked user.

Employee Reps will be notified of any new Employee Availabilities and other Web Based information received from employees via the optional MicroStaffer Web Access Module.

Using the 'Set like:' feature does not carry over information on the System Tab. Therefore, it must be set for each new user, if applicable.



3. User Regions

The MicroStaffer application allows you to assign one or more Regions to users, if necessary. User Regions are especially useful when dealing with Staffing companies that have several offices but wish to use one integrated MicroStaffer system. Here, Regions could be assigned as offices. Users would only see information relating to their Region or Office. Global users, such as Managers or System Administrators, however, would be able to see all activity and get the complete picture. Users can also mix and match Regions to view data in many different ways. The only user who may not have regions assigned is the 'admin' user. This user will always be a Global user.

The use of User Regions is optional. If you do not wish to use the Regions capability, do not enter regions codes in the List Manager facility.

To assign Regions to users, you must access the User Regions window. This window is accessible by selecting System->User Regions from the Main Menu.

Selected	Region
<input checked="" type="checkbox"/>	BRONX - BRONX
<input checked="" type="checkbox"/>	BUF - BUFFALO
<input checked="" type="checkbox"/>	NASS - NASSAU & SUFFOLK
<input type="checkbox"/>	NENJ - NORTHEAST NJ
<input type="checkbox"/>	NYC - NEW YORK CITY
<input checked="" type="checkbox"/>	OFF1 - OFFICE 1
<input checked="" type="checkbox"/>	OFF2 - OFFICE 2
<input type="checkbox"/>	OFF3 - OFFICE 3
<input type="checkbox"/>	QB - QUEENS & BROOKLYN
<input type="checkbox"/>	SI - STATEN ISLAND
<input type="checkbox"/>	WC - WESTCHESTER

Assigning Regions to users will result in Region Filtered access. You must check the 'Activate Region Filters for this User' Radio button for any Regions filters to be applied.

Once you have selected to apply Region filters, you must then also check one or more Regions from the Regions list.

The following is a list of guidelines and recommendations that relate to User Regions and their impact on the way MicroStaffer's functionality changes.

1. Users who are assigned to Specific regions and have the Regions Filter enabled will see only information that pertains to Employees and/or Customers that fall within those regions. Also, if an employee or Customer does not have any regions assigned, they are considered Global. All users see any Global Employee or Customer records.
2. A user who does not have the Regions filter enabled will be considered a Global user. Global users see all Employee and Customer records as well as all users.
3. If the 'Default Selected Regions when Creating New Employee and Customer records' checkbox is checked, every time a user Adds a new Employee or Customer, the regions from that user will be automatically assigned to the new Employee or Customer record. Of course, the user may modify the default regions.
4. All areas of the MicroStaffer system will be filtered. This includes Employee and Customer maintenance, Staffing and Scheduling, Availability entry and matching, Invoicing and Payroll and all Reports.
5. You may use Regions to enable multi-office capabilities within MicroStaffer. For example, say you have 3 different regional offices. To enable users from each office to see only information that pertains to their office, you may want to access the List Manager and create the following three regions:

OFF1 Office 1
OFF2 Office 2
OFF3 Office 3

Once these regions have been created, you would assign all users to their appropriate region. Then, these users could assign Employees and Customers to each office also.

With this in place, users from Office 1 would only see Employee and Customer data for those records with regions in Office 1. Of course, you may add additional regions to further define users within Office 1 through 3.

Users who do not have the Regions filter enabled would see activity from all the above offices.

6. The status bar at the bottom of the MicroStaffer system indicates whether the Regions filter is enable for a user.
7. When a region is deleted, the assignment of the deleted region is removed from all Users, Employees and Customers.
8. Payroll and Invoice generation are also region enabled. Only entries that fall within the Regions list of the user will be included in processing payroll and billing. Users must ensure the proper sequence of check numbers and invoice numbers. We recommend that you assign specific ranges of numbers if you are planning a regional office configuration.
9. The 'admin' user cannot have the Regions filter set. This user will always be a Global user.

H. System Settings & Utilities

1. Status Code Maintenance

Status Codes are used on the Staffing Sheet Shift Detail window to specify what status a given shift currently has. Status Codes are not company specific and will be used by all companies set up within MicroStaffer. Status Codes are maintained within the System Settings & Utilities menu selection from the System menu item.

Several default status codes are installed with MicroStaffer. These include: Scheduled/Firm; Tentative; Customer Cancelled; Employee Cancelled; No-Show; Customer Sent Home; Scheduling Error.

This tab allows you delete a status (unless it is the Scheduled/Firm or Tentative status or if it has been used in the system). You may deactivate a code if you no longer wish to use a code that has been previously used.

You may add your own statuses in addition to the standard status codes. Display letters and colors allow for quick visual recognition of certain status types on the Staffing Sheet/Calendar.

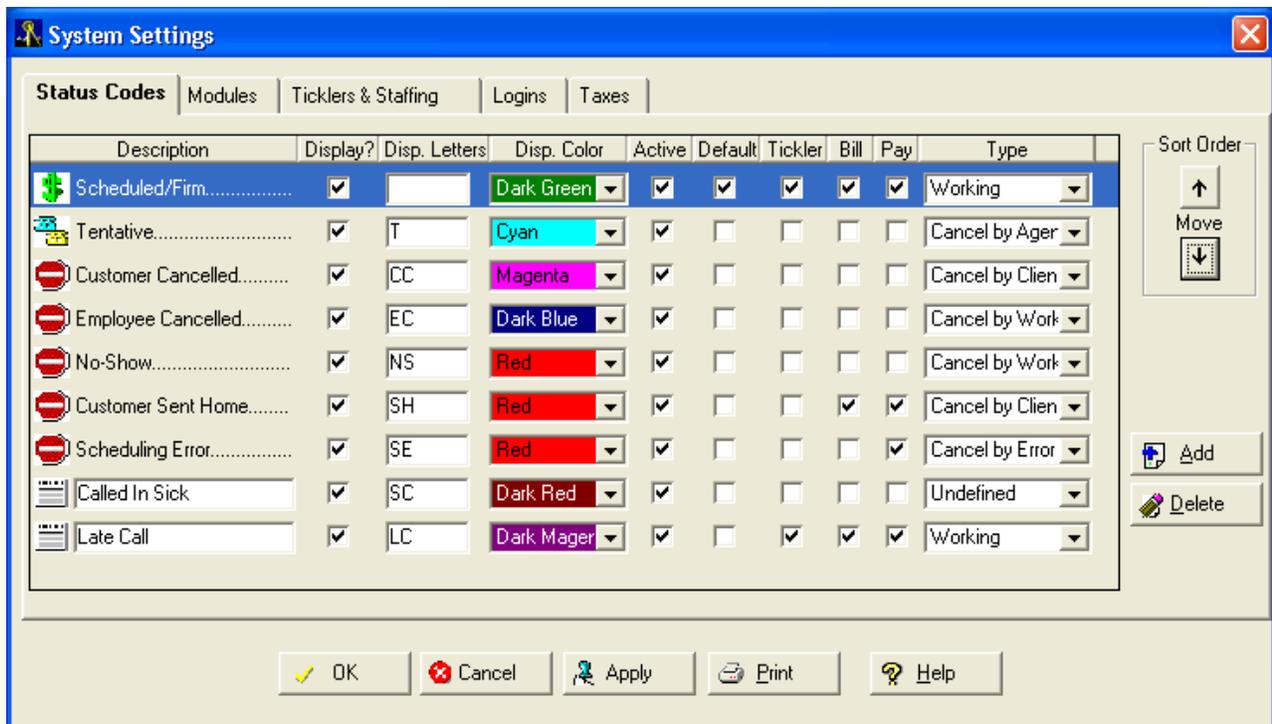
If a status code is not checked as active it no longer appears in the system.

There can only be one default status code and it is the status that is assigned automatically for each new shift upon entry into MicroStaffer.

Status codes can also be set to billable and payable which indicates whether shifts of their type are pulled in during payroll and/or invoice generation.

The Tickler Checkbox indicates that any shift with a Status that has this checkbox checked will test for Double-Booking or other Staffing enabled ticklers (these are the ticklers on the Ticklers & Staffing tab of the System Settings & Utilities menu selection).

The Type definition for the Status Codes are used by various Management Reports and Queries within MicroStaffer. Select a Type for the Status Code from the dropdown. Types are: Undefined, Working and various Cancellation Types.



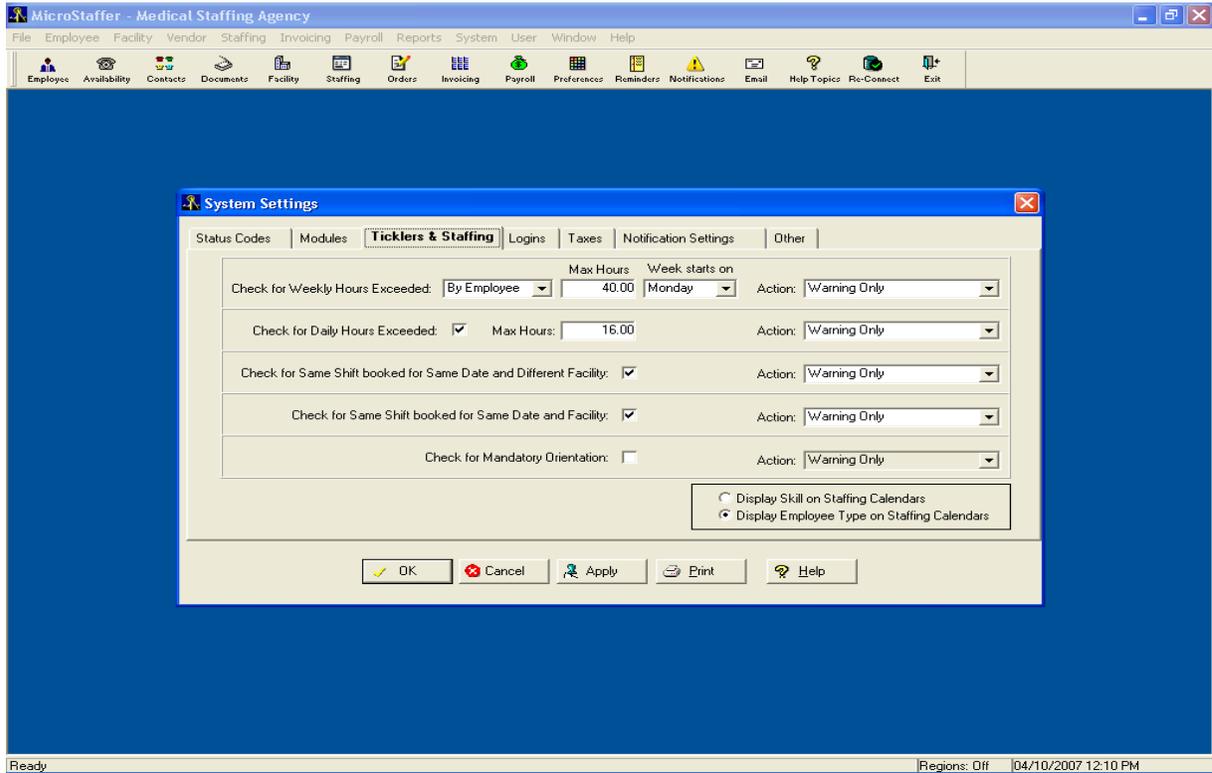
2. Ticklers and Staffing

Ticklers are used during the Staffing Process to allow you to prevent certain types of staffing conflicts such as excessive hours worked, double-bookings etc.

Here is a list of each tickler and it's specifications:

1. **Check for Weekly Hours Exceeded:** This is a basic Overtime tickler. When a shift is booked (i.e. Status is Firm and double confirmed) this tickler will sum all the hours worked for the given week and alert the user if the number of hours specified has been exceeded.
 - A. **Disabled, by Employee, by Employee and Customer:** This dropdown lets you either disable the tickler or specify on what basis to summarize the hours.
 1. **By Employee:** This will summarize the employee's hours regardless of which Customer or Facility he or she worked at.
 2. **By Employee and Customer:** This setting will summarize the employee's hours only for the Customer at which the current shift is being booked.
 - B. **Max Hours:** This specifies the threshold that will set off the tickler. Any hours worked in excess of this number will set off the tickler.
 - C. **Week starts on:** This specifies the day of the week from which to begin the hours-worked calculation. For example, if we specify Monday, it will add up all hours worked beginning on the previous Monday and ending on the following Sunday.
 - D. **Action:** This dropdown lets you set a warning only or disallow booking when the tickler fires. Warning Only results in a window that warns the user of the tickler. Disallow booking results in not allowing the booking.
 **MicroStaffer Warning**
This tickler calculates hours at the job and (for performance reasons) does not take into consideration any breaks, dinner or lunch periods.
2. **Daily Hours Exceeded:** This tickler will display a message during scheduling if the number of hours specified has been exceeded on the day that the shift is being booked. For example, if an employee works 24 hours in one day and the number of hours specified in this tickler is 16, as soon as a shift is being booked that exceeds the 16 hour limit, the tickler will fire. The Action dropdown allows a warning or a disallow booking flag for the tickler.
3. **Check for Same Shift Different Customer:** This tickler will test to see if a shift has been scheduled for the same time period at a different customer. For example, if you are trying to schedule an employee at Customer A for a 7a-7p and that same employee has already been put down for a 3p-11p elsewhere, the tickler will fire. MicroStaffer will only fire this tickler if there is an overlap in shifts.
4. **Check for Same Shift for Same Date and Customer:** This tickler checks to see if the same person was booked for the same customer in exactly the same shift.
5. **Check for Mandatory Orientation:** This tickler first checks the mandatory orientation status box of the client facility to see if an orientation is mandatory. Then it cross checks against the employee to see if an orientation for the client has been completed.

- 6. **Displaying Skill or Employee Type on Staffing Windows:** This setting allows you to choose if you want the Skill or Employee Type to be displayed on Staffing Sheets and Calendars.



3. Logins (Networked Systems Only)

The Logins Tab is only visible on Network Systems running under Microsoft SQL Server 7.0/2000.

This tab displays the current active connections to the database.

Among the fields on the list are:

- **SPID:** Unique process ID number
- **Network User Name:** This is the Windows NT/2000 user id who is using this SQL Server connection. It is NOT the MicroStaffer login.
- **Login Time:** Shows the time the user first logged into MicroStaffer.
- **Inactive Since:** Displays the last time a command or action was initiated by the user.
- **Minutes Inactive:** Displays the minute the user has been inactive on the system.

This tab also allows a user to Kill an active process. Killing a process disconnects the user from the SQL Server. Only users with 'Kill Process' authority as defined on the [User Setup and Security Window Link](#) are allowed to kill another user's process. A user can always kill his/her own Orphaned processes (See below).

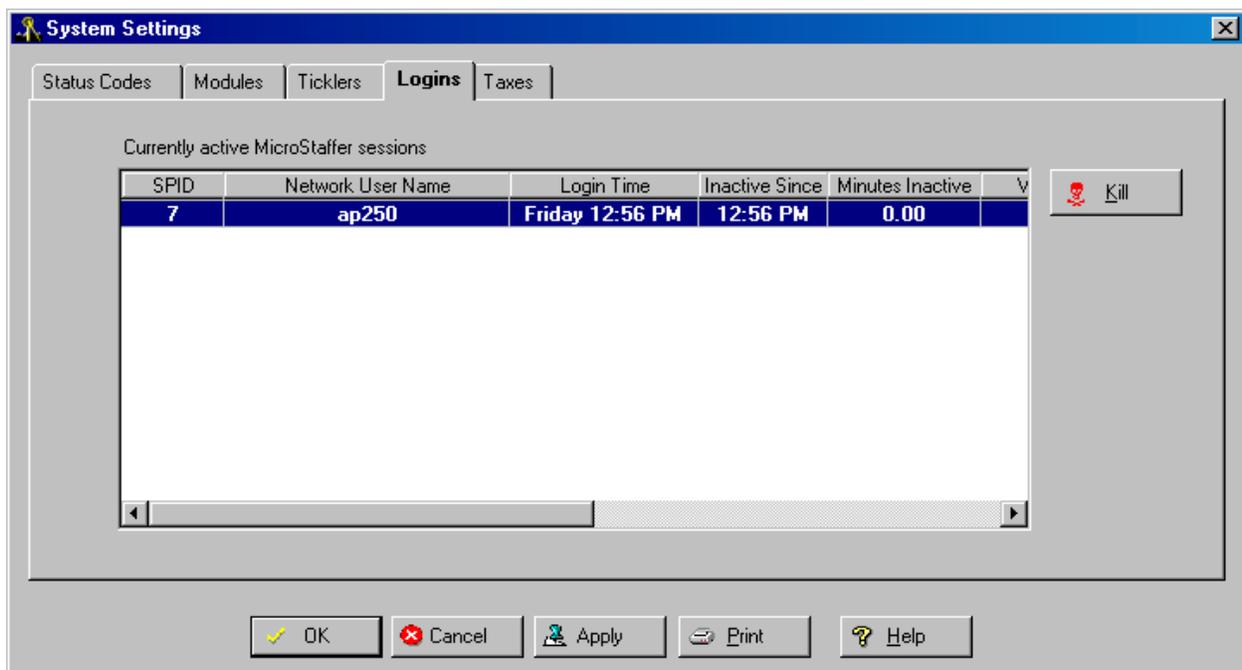


MicroStaffer Tip

Occasionally, a user may have his/her connection abruptly severed from the server such that the client process is unable to tell the network to close the connection properly. This is what is often referred to as an 'Orphaned Process'.

One common cause of orphaned sessions arises when a client computer loses power unexpectedly, or is powered off without performing a proper shut down. Orphaned sessions can also occur due to a 'hung' application that never completely terminates, resulting in a dead connection. When this occurs, MicroStaffer will allow the user to clear this connection by clicking on the Kill button.

Note that MicroStaffer will always allow the owner of a process to kill any of his or her own processes thereby freeing up the connection. It will never allow the user to kill their own Current Process, however.



4. Taxes List Setup (Payroll Tax Library Subscribers only)

The Taxes Tab located on the System Settings and Utilities window allow you to both view System Defined Tax and Deduction Types as well as create new Custom Defined Tax and Deduction Types.

System Defined Tax and Deduction types cannot be renamed.

To create a New Custom Tax or Deduction you must click on the Add button. To modify an existing Tax or Deduction, select the desired Tax/Deduction from the list and click on the Properties button.

The Tax Properties window will allow you to enter settings for both Employee and Employer specific taxes and deductions.

1. **Type:** Select whether this is an employee or employer specific tax.
2. **Name:** Enter a descriptive name for the new Tax or Deduction. For example, 401K or Vacation Fund.
3. **Calculation Type:** This field indicates how the tax or deduction will be calculated. The three choices are:
 - A. **Fixed Amount:** The system will deduct a Fixed Dollar Amount for each check.
 - B. **% of Gross:** The system will deduct a percentage of the gross pay for each check.
 - C. **Hourly Rate:** The system will multiply the hours worked by the amount of the deduction.
 - D. **% of Net:** The system will deduct a percentage based upon the net pay of each check.
4. **Annual Limit Using:** You may select whether the deduction has an annual limit at which to stop. The choices are as follows:
 - A. **No Limit:** The deduction will be taken indefinitely.
 - B. **Annual Amount:** The deduction will stop once the total amount deducted for an employee has reached this amount.
 - C. **Annual Wagebase:** The deduction will stop once the employees total gross pay for the year has reached this amount.
 - D. **Default Amount:** Enter the default amount you wish to set for this item every time this deduction is added to an employee record.
 - E. **Deduct Last:** Check this box to deduct this item last after all other calculations
5. **Default Rate:** Enter the default amount or percentage for this deduction. This will be the amount entered into the deduction field each time it is added to an employee record. You may also indicate whether to deduct this amount only once per payroll year.
6. **Maximum % of Net:** This field indicates the maximum percentage of the net for the deduction.
7. **Remove from all Employees:** When this is checked, the deduction will be removed from all employee records.
8. **Deduct taxes from corporations:** Check this box to deduct taxes from employees marked as corporations.

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Tax/Deduction Properties

General | Taxes

ID: 1001

Type: Employee

Name: Child Support

Calculation Type: Fixed Amount

Annual Limit Using: No Limit -> Default: 500.00

Default Amount: 100.00 Deduct only Once a Year

Cannot Exceed .00 % of Net Earnings

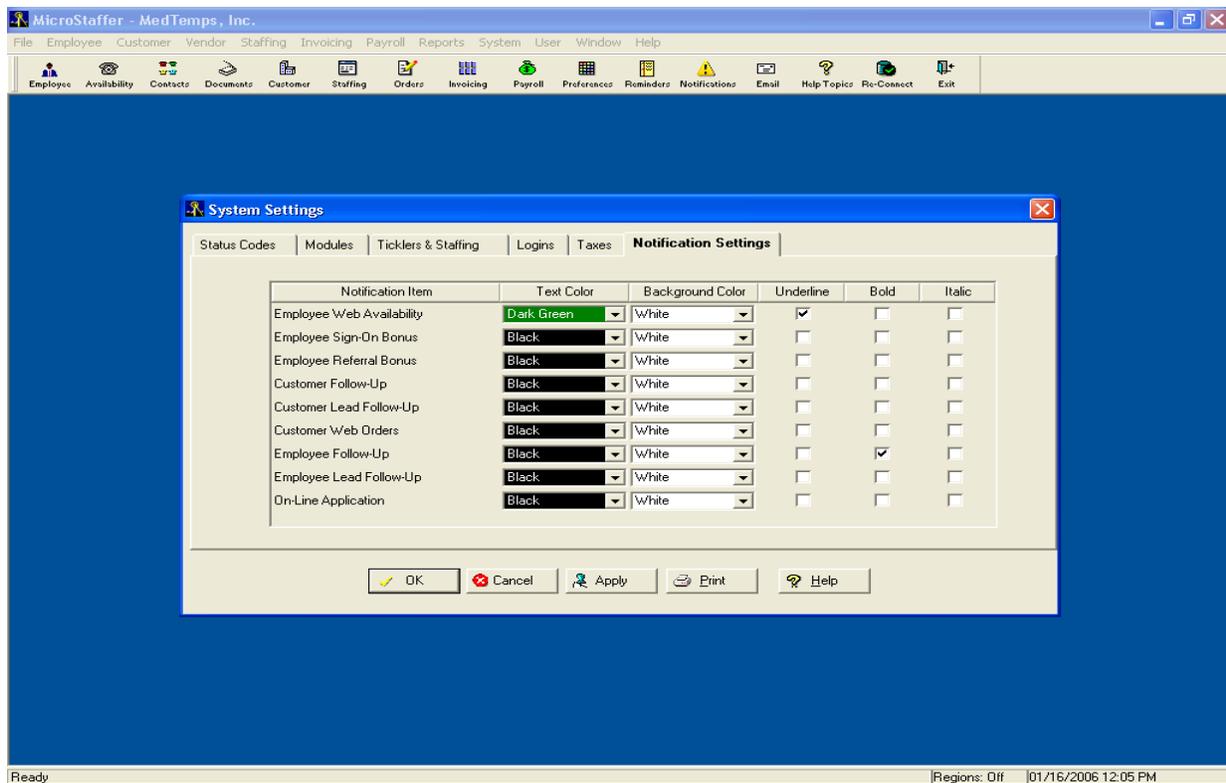
Remove from All Employees Deduct Last

OK
Cancel
Print
Help

5. Notification Settings

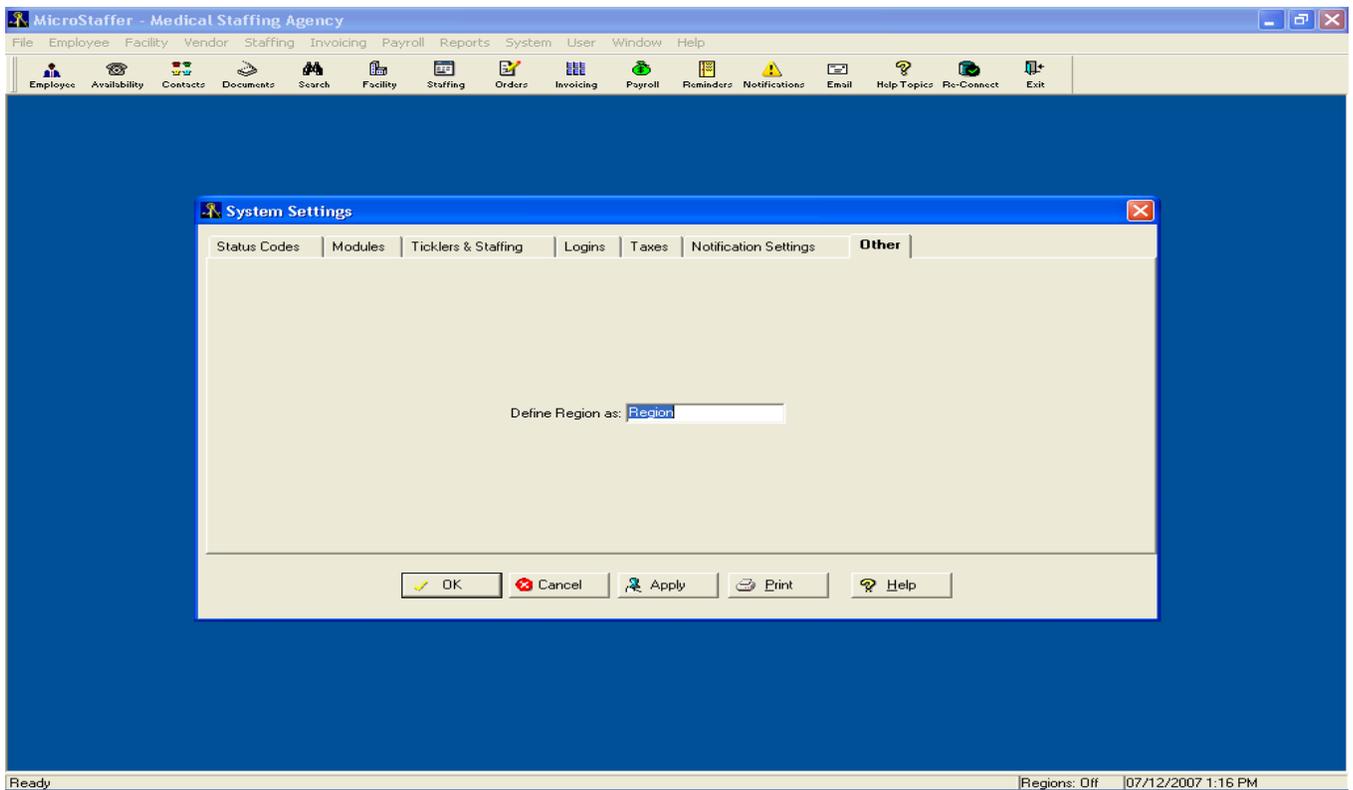
The Notification Settings tab allows for definition of viewing criteria for the System/User Notifications window. It allows the user to define specific display formats for different types of System Notifications for quick visual recognition of important System Notifications such as Customer Orders received via the optional MicroStaffer Web Module.

For each notification item type you may define a text display color, background color (from the dropdown) and text formats (bold, underline, italic - place a check in the box to select).



6. Other

You may change the definition of the Region field title using this option.

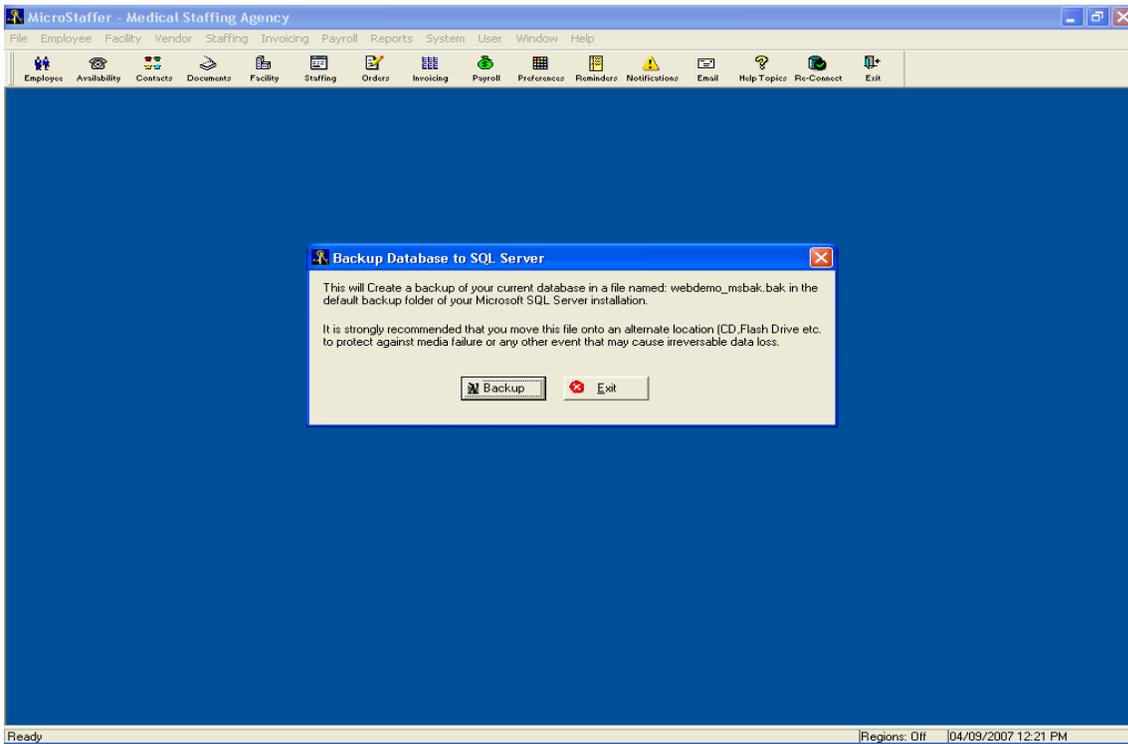


I. Online Backup

1. Backup

This feature allows the manual creation of a backup file as listed on the screen.

To access this feature, select Backup under the main menu's System Button.



J. List Manager

The List Manager window found under the System tab maintains lookup codes and descriptions for various items tracked within MicroStaffer. The following items can be managed:

1. Skills List

The skill codes and descriptions that flow throughout the system to both employee and shift records. Whenever a code is assigned here, it will be available for selection on the employee skill tab, when staffing and on reports.

2. Work Areas/Units

Allows specification of work areas. Work areas can be used to define both payroll and billing rates specific to a certain work area.

3. Employee Types

The system wide Employee types such as RN, LPN, CNA etc. These can then be assigned to each employee. Employee types can be used to define both payroll and billing rates specific to a certain employee type. Employee type matching is used for "Who's Available" matching criteria as well.

4. License Types

The License Types that are used on the Employee profile tab on the Employee Setup window. Examples here are DL - Drivers Licenses, NL - Nursing License etc.

5. Insurance Policy Types

The Insurance Policy Types that are used on the Employee profile tab on the Employee Setup window. For example, MI - Malpractice or LI - Liability Insurance.

6. Certification Types

The Certification Types that are used on the Employee profile tab on the Employee Setup window.

7. Health Screening Types

The Health Screening Types that are used on the Employee profile tab on the Employee Setup window. Examples here are TB - TB Test etc.

8. Background Check Types

Background check type codes are used in the Employee Profile area to define different types of background checks.

9. Skills Checklist Types

Skills checklist types are used in the Employee Profile area to define different skill checklists maintained for an employee. NOTE: Skills checklist documents may be attached to the employee profile for licensed users of the Scanning & Imaging module.

10. Skills Rankings

Skills Rankings are used when assigning skills to specific employees. Once created here you can specify the degree of competency in a give skill on the employees skills profile.

11. Contact Types

Specify Employee, Customer and Vendor contact types. Each type should have Reason and Result codes (a Reason for the contact and the subsequent Result of the contact). These codes become available when entering contact records for Employees, Customers and Vendors.

12. Referral Source Types

Referral sources are used when entering Employee and Customer leads to identify the source of the Employee or Customer. For example, you could enter such sources as Magazine AD, Web Site etc.

13. Annual Review Types

These are used on the Employee profile to specify what type of annual reviews may be entered.

14. Region Type Codes

Region Type codes identify and allow groupings of Customers and Employees.

15. Work Codes & Rates

Work Codes & Rates allows for creation of a work code and rate if needed for assignment of a Work Code to a shift. This is particularly helpful in calculating worker's compensation rates when the rate changes based upon the type of work performed. After a work code is created here, it can be set as the default work code for a shift as defined in the customer set up shift tab. Default work codes can be overridden in the shift detail window.

16. Test Types

These codes are used on the Employee Profile to maintain tests taken.

17. Training Types

These codes are used on the Employee Profile to define and maintain trainings taken by the employee.

18. Favorite Client Ranking

This allows for the definition of a ranking system for client preferences by employee.

19. Employee Checklist

Define a checklist of items for an employee. A preloaded employee checklist comes with MicroStaffer. If you wish not to use all of the preloaded checklist items, you may select a code and delete it. The employee checklist is maintained for each employee in the checklist selection under the Employee tab. Items on the checklist may be marked as mandatory which will cause a tickler during scheduling if the mandatory item is not complete. When a checklist item is added, there will be an option to add the item to all employees. Select Yes to automatically add to the employee checklist or No to add the items to the available code list to maintain for each specific employee.

20. Customer Checklist

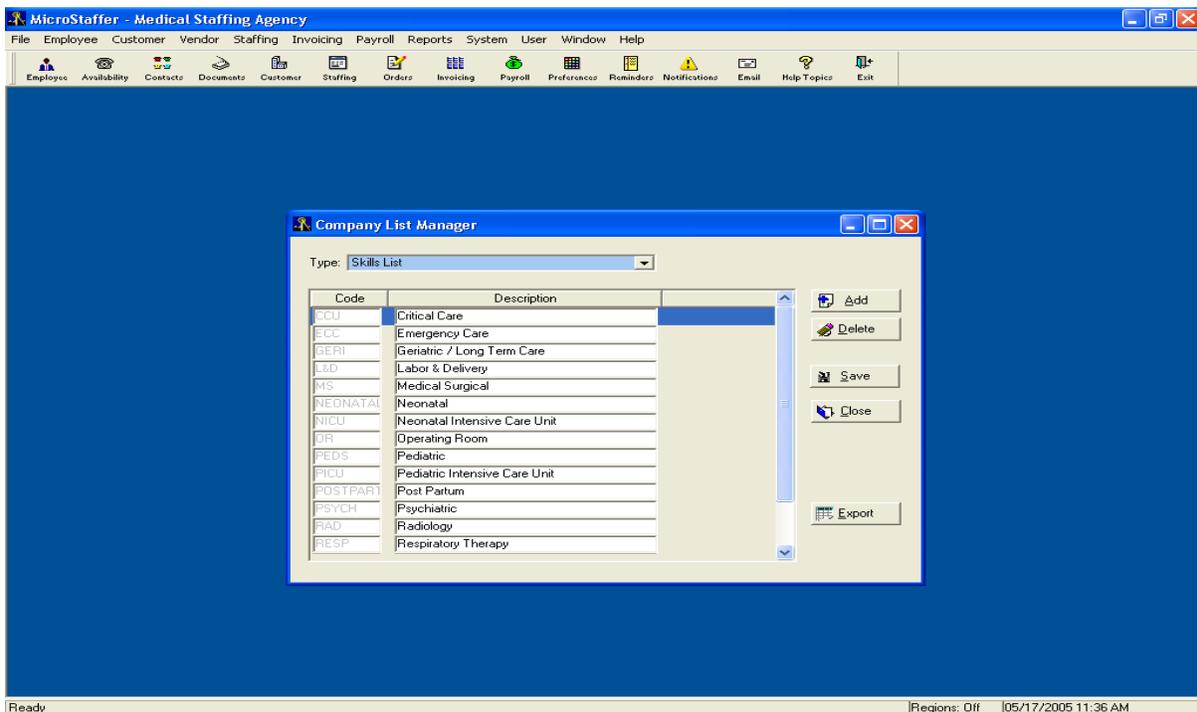
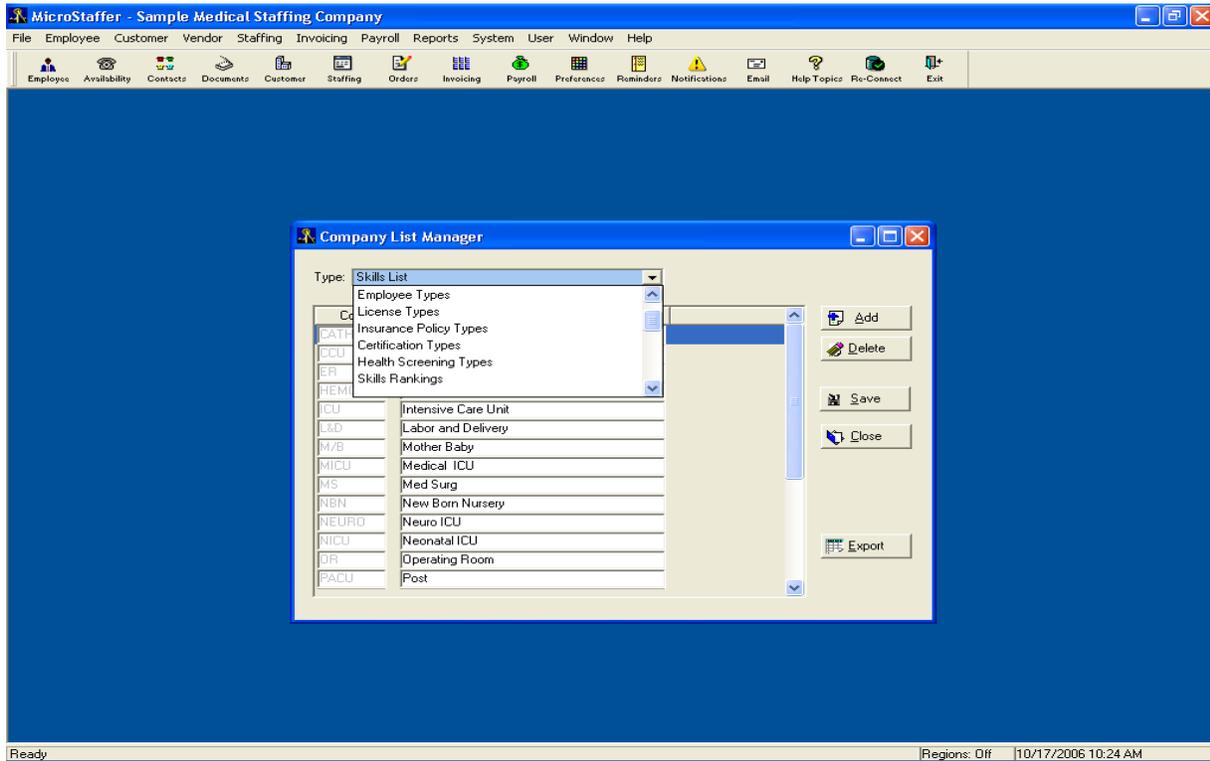
Define a checklist of items for each client/facility. Examples of checklist items may include an executed contract or receipt of client/facility policies. To add a code, click the Add button. You will be asked if you wish to add this checklist item to all clients. If you answer Yes, the item will be added to all clients. If No, it will be added to the available code list to maintain for each specific client. Type in the code, a description of the item and click the mandatory box if you wish completion of this item to be mandatory. The client checklist is maintained for each client in the checklist selection under the Client tab.

21. Vendor Checklist

Define a checklist of items for each vendor. The vendor checklist is maintained for each vendor in the checklist selection under the Vendor tab. The Vendor checklist works in the same manner as the Employee and Client checklist items above.

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K. System Options

The System Options area of MicroStaffer allows the creation of system wide default values for a variety of items. This allows you to configure MicroStaffer to meet your needs.

1. Employee & Client Setup

Allow editing of Client Comments – Allows the author of any comment on the Client Setup window to modify the comment even after it has been saved. Option Value is On or Off.

Allow editing of Employee Comments – Allows the author of any comment on the Employee Setup window to modify the comment even after it has been saved. Option value is On or Off.

Default Expiration Days on Employee Profile Items – Allows a system wide default of expiration days on Employee Profile Items. Note that the default value may be overridden in the Employee Profile area if necessary. Option value is the default number of days before or after expiration date.

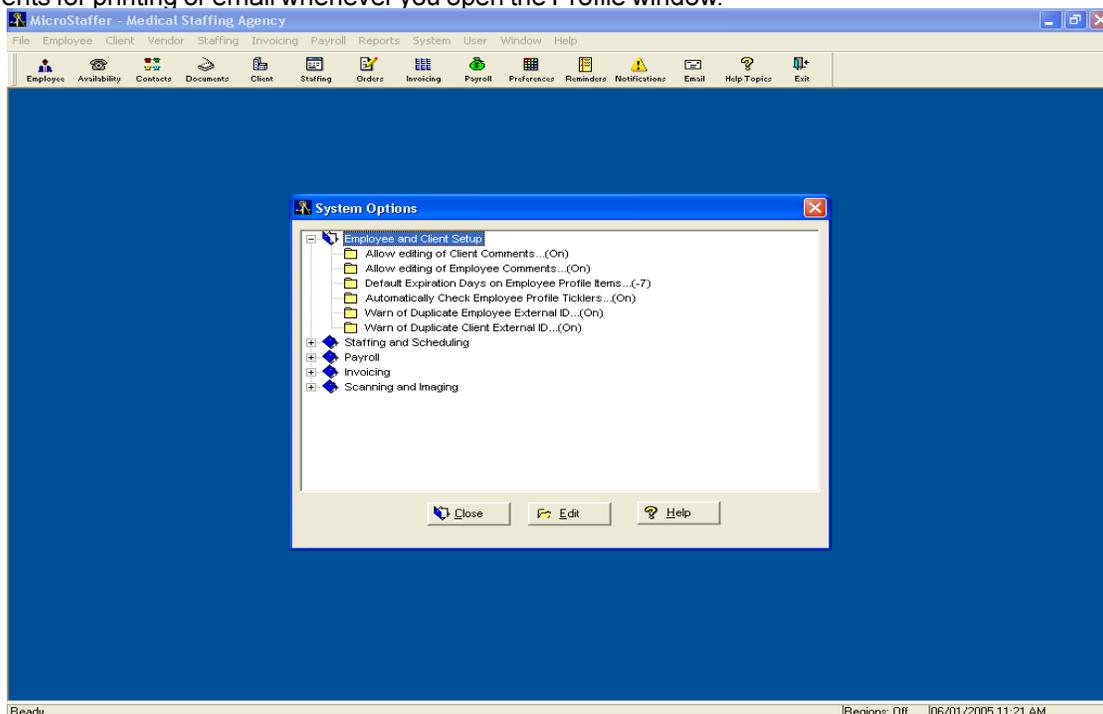
Automatically Check Employee Profile Ticklers – Allows a system wide default to automatically check the tickler box when setting up new Employee Profile Items. Note that the tickler box may be manually overridden if necessary. Option value is On or Off.

Warn of Duplicate Employee External Id – When turned on, this option will warn you if a duplicate External Id exists for an employee. (External Id's may be used to synchronize with other packages ie. QuickBooks etc.)

Warn of Duplicate Client External Id – When turned on, this option will warn you if a duplicate External Id exists for a client. (External Id's may be used to synchronize with other packages ie. QuickBooks etc.)

Allow Duplicate Social Security Numbers - When turned on, this option will allow for entry of duplicate social security numbers entered into the system. When turned off, any duplicate social security numbers will not be allowed.

Automatically Check all Profile Documents for Printing - This option, when thurned on, will automatically check all Profile documents for printing or email whenever you open the Profile window.



2. Staffing & Scheduling

Disallow Scheduling Employee with Expired License(s) – Option value On or Off. If turned On, this option will prevent the scheduling of any employee with one or more expired licenses.

Disallow Scheduling Employee with Expired Insurance Policy(s) – Option value On or Off. If turned On, this option will prevent the scheduling of any employee with one or more expired insurance policies.

Disallow Scheduling Employee with Expired Certification(s) – Option value On or Off. If turned On, this option will prevent the scheduling of any employee with one or more expired credential items.

Disallow Scheduling Employee with Expired Health Screening(s) – Option value On or Off. If turned On, this option will prevent the scheduling of any employee with one or more expired health screenings.

Disallow Scheduling Employee with Expired Test(s) – Option value On or Off. If turned On, this option will prevent the scheduling of any employee with one or more expired tests.

Disallow Scheduling Employee with Expired Training(s) – Option value On or Off. If turned on, this option will prevent the scheduling of any employee with one or more expired trainings.

Disallow Scheduling Employee with Expired Annual Review(s) – Option value On or Off. If turned on, this option will prevent the scheduling of any employee with one or more expired annual review items.

Display Mileage for Availability Searches – Option value On or Off. If turned on, this option will display the distance in miles between the location of the employee and the client on the Who's Available window.

Display Margin for Availability Searches – Option value On or Off. If turned on, this option will display the potential shift profit margins on the Who's Available window.

Disallow Scheduling Employee with Missing Mandatory Checklist Items – Option value On or Off. If turned on, this option will prevent scheduling of any employee who has one or more missing mandatory checklist items.

Disallow Scheduling Employee with Expired Background Checks - Option value On or Off. If turned on, this option will prevent the scheduling of an employee with one or more expired background checks.

Display Gross Hours and Shift Count in Staffing Calendar Window Headers - Option Value On or Off. If turned on, this option will display gross hours and shift count in the staffing sheet window header.

Allow Dropdown Edit of Work Area on Shift Detail - This option will allow users to manually type in a work area when editing a Shift Detail Record. Quick Edit feature.

3. Payroll

Adjust Open Advance Checks when Shift is Modified – Option value On or Off. If turned on, when users make a change to a shift and the shift has been paid on an open advance, this option will modify the advance to reflect the changes in the job.

Utilize Contractor/Employee Pay Type Logic – Option value On or Off. If turned on, MicroStaffer allows you to create two Employee Type definitions (C=Contractor; E=Employee) and then create pay rates based upon these. MicroStaffer will then apply a C rate to Contractors and an E rate to Employees.

Payroll Benefit Validation – Option value On or Off. If turned on, this will enable the Payroll Benefit 8 hour validation.

Ignore Trailing Partial Shift Holiday Pay – Option value On or Off. If turned on, this will ignore the partial overlap into Holiday pay when a shift ends just before the holiday starts.

Select Pay Stub Rate Display – Option values: Regular Rate, Average Rate or Blank. This sets the option for the printing of the pay rate on the payroll check stub.

Use Parent for Payroll O.T. – Option value On or Off. If turned on, when calculating O.T., the hours worked will be totaled by all locations for the Parent facility.

Pay both Daily and Weekly O.T. – Option value On or Off. If turned on, when calculating O.T. and an overlap between weekly and daily occurs, both will be paid. If turned off, only weekly O.T. will be paid.

Use First Pay Date as Hire Date – Option value On or Off. If turned on, when an employee is paid for the first time MicroStaffer will use the first worked date as the hire date.

Remove Daily O.T. Hours while calculating Weekly O.T. – Option value On or Off. If turned on, any daily O.T. hours will be removed from the calculation of weekly O.T.

Adjust Regular Pay Rate Downward to Offset O.T. – Option value On or Off.

Ignore Leading Partial Shift Holiday Pay – Option value On or Off. If turned on, MicroStaffer ignores the partial overlap from holiday pay when a shift starts just before the holiday ends.

Partial Holiday Overlap Minutes – Option value is selected from dropdown.

Enable Burden Margin Adjustment Logic – Option value On or Off. If turned on, this option will adjust the display of profit margins by incorporating employee burdens as entered in the Employee Detail window found on the Payroll tab.

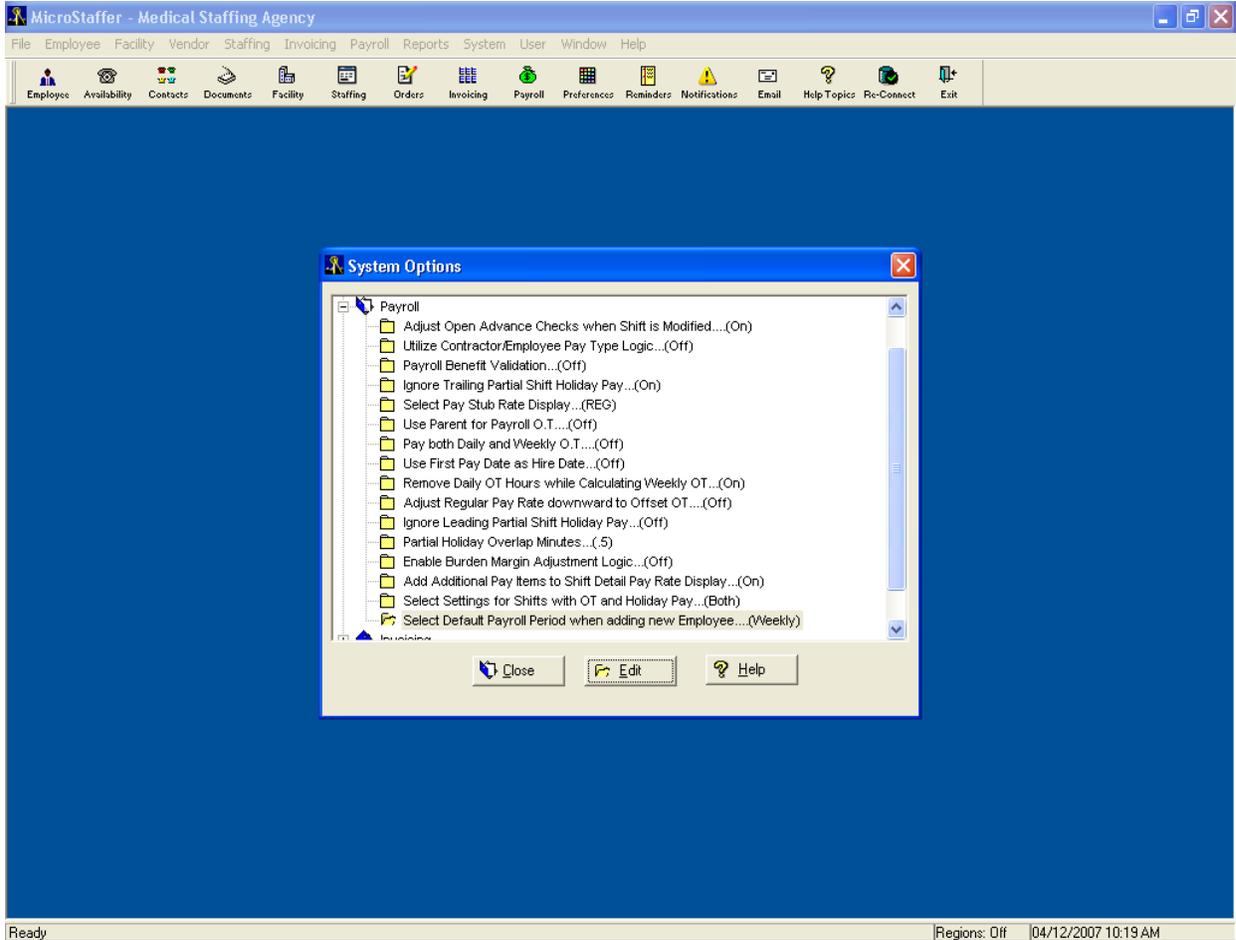
Add Additional Pay Items to Shift Detail Pay rate Display – Option value On or Off. If turned on, this option will adjust the display of pay rate on the Shift Detail by including the Additional Pay Item amounts.

Select Settings for Shifts with OT and Holiday Pay - Option value is selected from dropdown. This option will allow you to select how the payroll system will handle shifts that qualify for both OT and Holiday Pay.

Select default Payroll Period when adding a new Employee - Option value is selected from dropdown. This options sets the default payroll period (eg. Weekly, Bi-Weekly etc.) when adding a new Employee into the system.

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4. Invoicing

Use Control Panel Short Date for Invoice Date on all Invoice Exports – Option value On or Off. With this option on, the export file for all invoice exports will format all dates in the same way as the Windows Control Panel short date. With this option off, it will use the MM/DD/YY format.

Ignore Trailing Partial Shift Holiday Amount – Option value On or Off. When turned on, MicroStaffer ignores the partial overlap into Holiday amount when a shift ends just before a holiday starts.

Use Parent for Billing O.T. – Option value On or Off. If turned on, when calculating O.T. the hours worked will be totaled by all locations for the Parent facility.

Bill both Daily and Weekly O.T. – Option value On or Off. If turned on, when calculating O.T. and an overlap between weekly and daily O.T. occurs, both will be billed. If turned off, only weekly O.T. will be billed.

Enable Billing Entity Parent Logic – Option value On or Off. If turned on, the Invoice generation process will bill shifts assigned to Billing Entities on the Shift Detail window.

Generate Separate Invoices for Siblings – Option value On or Off. If turned on, you can generate separate invoices for Sibling Facilities.

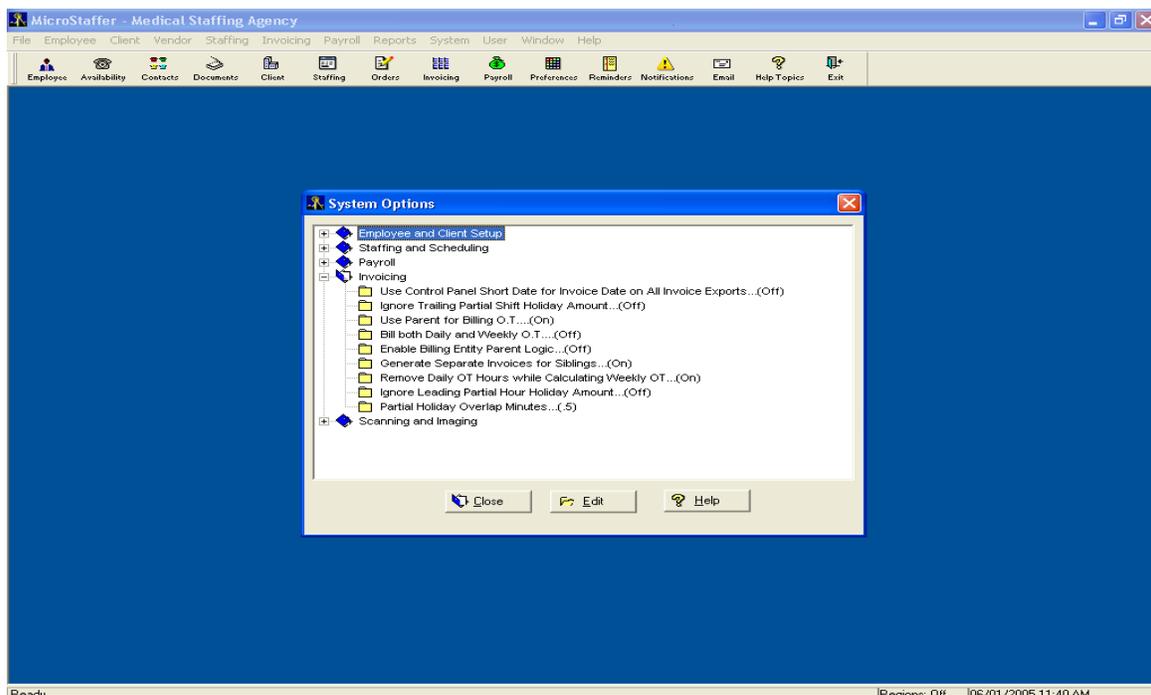
Remove Daily O.T. Hours while calculating Weekly O.T. – Option value On or Off. If turned on, MicroStaffer will remove daily O.T. hours when calculating weekly O.T.

Ignore Leading Partial Holiday Amount – Option value On or Off. If turned on, it ignores the partial overlap from holiday amount when a shift starts just before the holiday ends.

Partial Holiday Overlap Minutes – Option value is selected from dropdown.

Add additional Bill Items to Shift Detail Bill Rate Display - Option value On or Off.

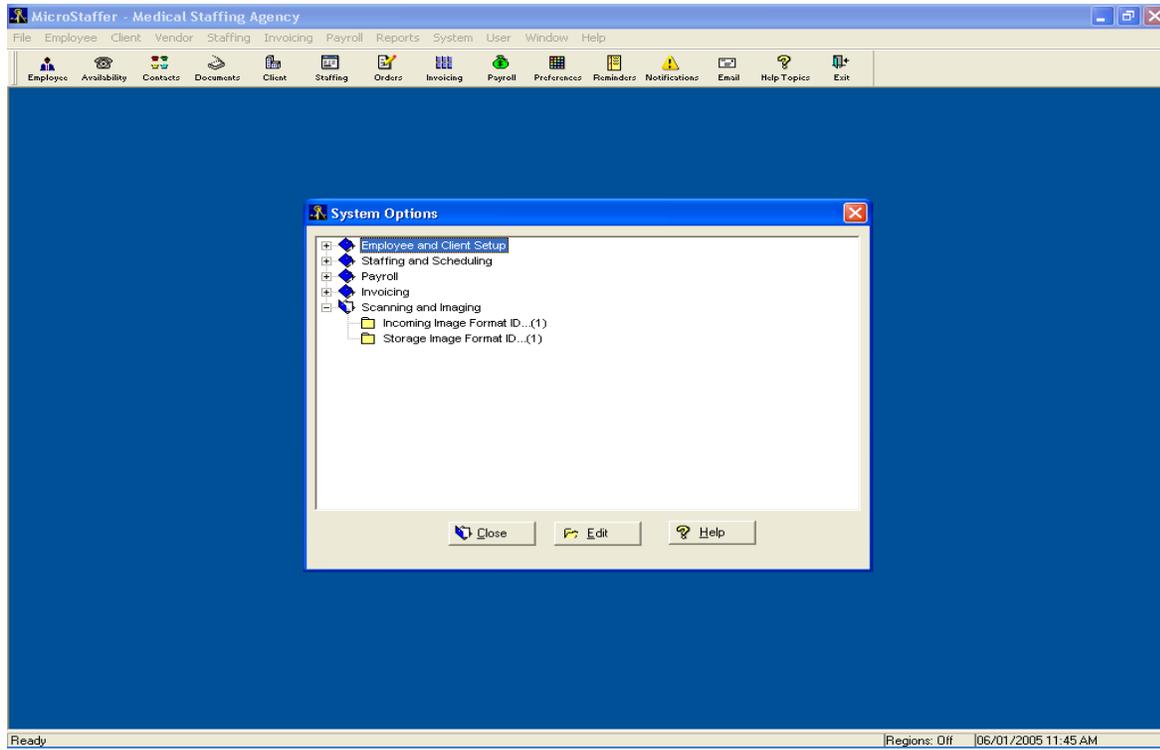
Select settings for Shifts with OT and Holiday Billing Pay - Option value is selected from dropdown. This option will allow you to select how the Invoice Generation System will handle shifts that qualify for both OT and Holiday Pay.



5. Scanning & Imaging

Incoming Image Format Id – Option value selected from dropdown. Defines the storage file type code for scanned in images.

Storage Image Format Id – Option value selected from dropdown. Defines the storage file type code for images.



L. Email Functions in MicroStaffer

1. Email Overview

MicroStaffer features a variety of Email enabled functions which can be used to Email reports, schedules and profiles to one or more recipients.

The following is an overview of these functions:

1. **Send To...:** This can be both a Button or Right-Click menu item depending on the Report or Window. Selecting this option will send the contents of the report, schedule or profile(s) to the MicroStaffer Email window as an Adobe Acrobat .PDF file.

Note: You must have the Adobe Acrobat PDF writer installed on your PC for this function to be enabled. For more information on the Adobe Acrobat writer please go to the Adobe website at: <http://www.adobe.com>

Accessible from:

- A. **Reports** - Employee Listing, Customer Listing, Work Summary, Shift Status, Check & Invoice Registers
 - B. **Schedules** - Staffing Sheet, Employee Availability and Schedule window...
 - C. **Employee Profile Window**
 - D. **Document Manager**
2. **Copying Employees and/or Customers to the Recipient List...:** This function allows you to copy the selected employees and customers to the Microstaffer Email window thereby allowing you to send emails to a number of your Employees and Customers.

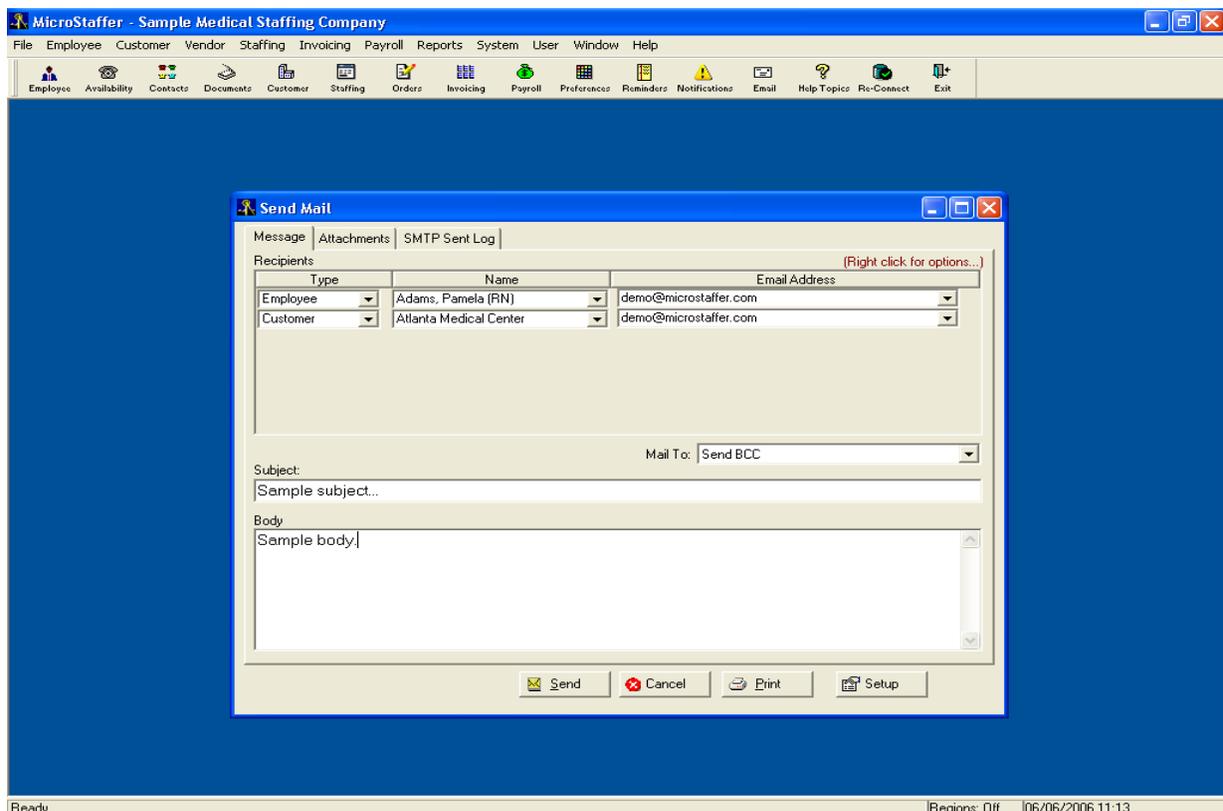
2. MicroStaffer Email Window

The MicroStaffer Email window can be accessed and called from various areas in the system. For example:

1. By clicking on the Email Menu item under the Window menu item on the MicroStaffer Main menu.
2. Right clicking on various reports throughout the system including most Standard reports under the Reports menu and Employee Profiles

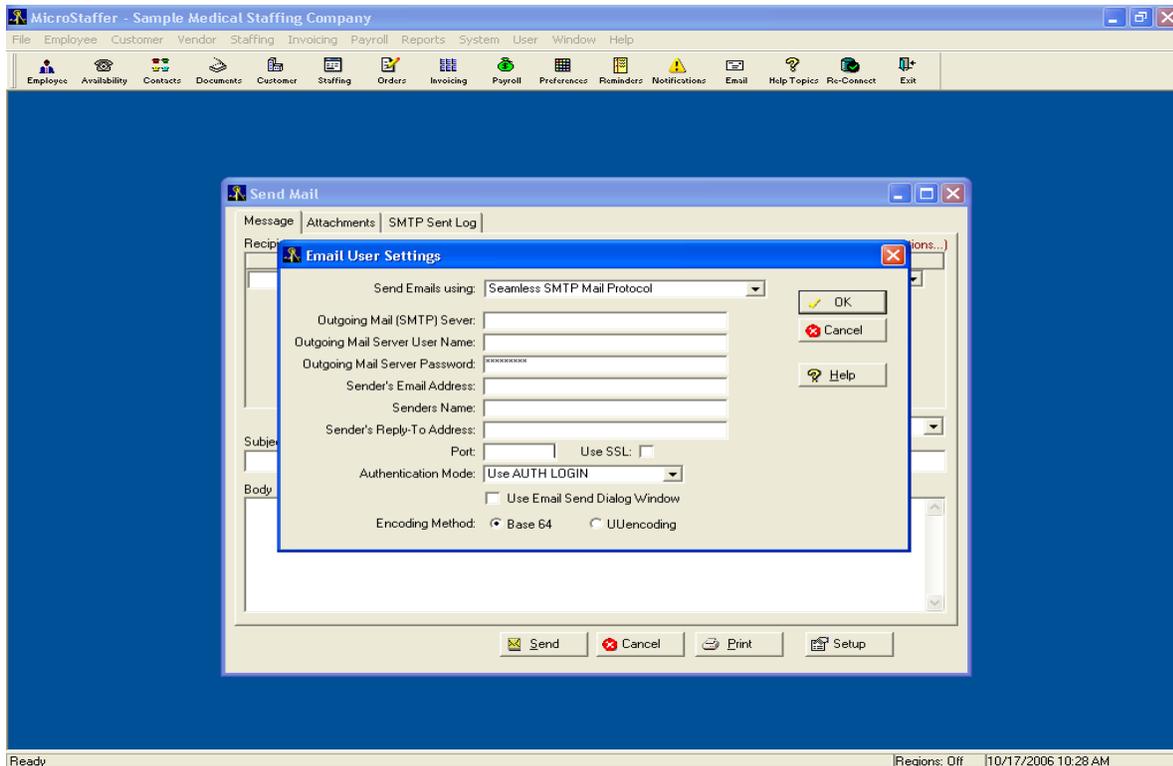
The Email window consists of the following areas:

- A. Recipients:** This area lets you specify to whom you wish to send the message. To add recipients right click on the list and access the dropdown menu:
1. **Add** - Adds a recipient to the list.
 2. **Delete** - Deletes a recipient from the list.
 3. **Paste Recipient** - Pastes the recipient from the recipient clipboard. The recipient clipboard can be filled from various reports (Employee Listing, Facility Listing, Shift Status etc) and the Employee Profile by right clicking and Selecting 'Copy Selected ... to the Recipient List...'.
4. **Export List to Messenger** - Opens the default Email Client Application window with all the addresses in the list.
- B. Send Separate Message...** Checking this box will result in separate Email messages sent to each recipient in the list. Note that unless this box is checked the message will be sent to a group of recipients.
- C. Subject:** Standard message subject
- D. Body:** Standard message body.
- E. Attachments Tab:** Lists any attachment .PDF files that will be sent. Note that you can rename the files. Only attachments created within MicroStaffer can be sent.



3. Email Setup

To fully utilize the attachment capabilities for the email function, it is recommended that emails be sent directly from within MicroStaffer. Email setup is accessed by selecting the Setup button on the Email screen. Please contact your IT staff for site specific assistance in setting up email or contact MicroStaffer technical support for the most up to date information.



M. Client Setup

1. Creating a New Client

To Add a New Client:

1. Select Client->Setup from the Main Menu or click on the Client Setup Toolbar.
2. The Client Setup window opens in New Mode.

OR Click the **New** button located on the Client Setup window.

The screenshot displays the 'MicroStaffer - Medical Staffing Agency' application window. The main menu bar includes: File, Employee, Customer, Vendor, Staffing, Invoicing, Payroll, Reports, System, Utilities, User, Window, Help. The toolbar contains icons for Employee, Availability, Contacts, Documents, Customer, Staffing, Orders, Invoicing, Payroll, Preferences, Reminders, Notifications, Email, Help Topics, and Exit. The 'Customer Setup - New' dialog box is open, showing the following fields and options:

- Customer: [Dropdown]
- Display Inactive
- Display Billing Ent.
- General | Contacts & Directions | Areas | Shifts | Custom Info | Holidays | Comments | Documents | O.T. | Contacts | Web
- Name: [Text Field]
- Inactive
- ID: [Text Field]
- Address: [Text Field]
- Orientation Mandatory
- Type: Facility (Hospital, Nursing Home...)
- City, St., Zip: [Text Fields]
- Region(s): [Text Field]
- Modify... [Button]
- Billing Address: Same as above
- Parent: [Dropdown]
- Bill to: [Text Field]
- Make Invoice 'Attn. to:': [Text Field]
- Address: [Text Field]
- Invoice Payment Terms: [Text Field]
- City, St., Zip: [Text Fields]
- Acct./PO#: [Text Field]
- Taxable
- Custom Invoice: [Text Field]
- External ID: [Text Field]
- Last Modified by: [Text Field]
- On: [Text Field]
- Close [Button] | New [Button] | Delete [Button] | Save [Button] | Save As... [Button]

Ready | Regions: Off | 05/17/2005 11:39 AM

2. Editing Client Info

a) Accessing Client Data

To view and modify Client data, select Client->Setup from the Main Menu or Click the Client Toolbar item. When the Client Setup window opens, select a Client from the Client Dropdown in the top left corner of the window.

The screenshot displays the MicroStaffer - Medical Staffing Agency application window. The main menu includes File, Employee, Customer, Vendor, Staffing, Invoicing, Payroll, Reports, System, Utilities, User, Window, and Help. A toolbar below the menu contains icons for Employee, Availability, Contacts, Documents, Customer, Staffing, Orders, Invoicing, Payroll, Preferences, Reminders, Notifications, Email, Help Topics, and Exit.

The 'Customer Setup - Chester County Hospital' window is open, showing the following details:

- Customer:** Chester County Hospital (selected in dropdown)
- Display Inactive
- Display Billing Ent.
- General** (selected tab):
 - Name: Chester County Hospital
 - Address: 9209 Ridge Pike
 - City, St., Zip: West Chester, PA, 19128
 - Region(s): NJ-S - South Jersey
 - ID: 123
 - Inactive
 - Orientation Mandatory
 - Type: Facility (Hospital, Nursing Home...)
 - Parent: Chester County Hospital
 - Make Invoice 'Attr. to':
 - Invoice Payment Terms: 30
 - Acct./PO #: 40007
 - Taxable
 - Custom Invoice:
 - External ID: 111567
 - Last Modified by: Administrator
 - On: 05/10/2005 9:15 AM
- Billing Address:**
 - Same as above
 - Bill to: Chester County Hospital
 - Address: 9209 Ridge Pike
 - City, St., Zip: West Chester, PA, 19128

Buttons at the bottom of the window include Close, New, Delete, Save, and Save As... The status bar at the bottom shows 'Ready' and 'Regions: Off 05/17/2005 11:40 AM'.

b) Client General Info

The Client General Info tab on the Client Setup Window tracks basic information about the client.

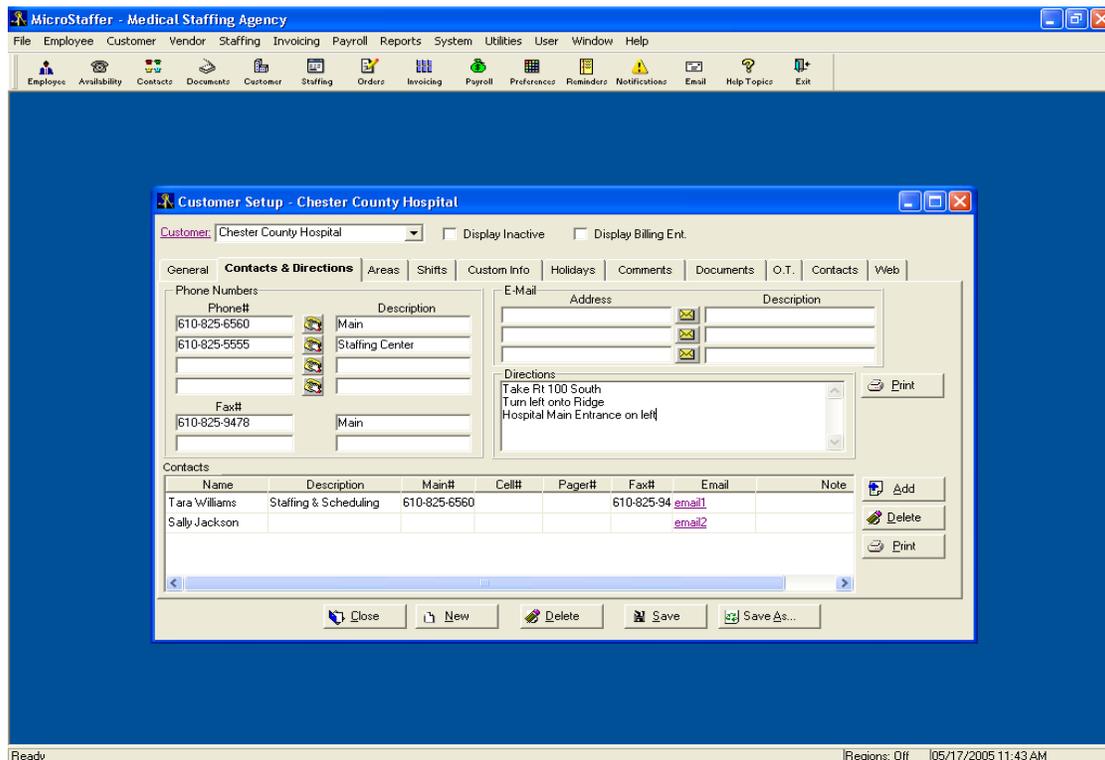
1. **Name:** The name of the client. (Required)
2. **Address:** Enter the Street, City, State and Zip of the client (Required).
3. **Inactive:** Check to make a client inactive. NOTE: To display clients marked as Inactive, check the Display Inactive box at the top of the screen.
4. **Orientation Mandatory:** Check this box if orientation at the client site is mandatory. The 'Check for Mandatory Orientation' box on the Ticklers & Staffing tab of Status Code Maintenance must be checked if you wish a tickler or disallow function for orientation at this client.
5. **Type:** Define the type of client from the pulldown menu. You may override the default type using the dropdown. Note: the system defaults to the default type set up on the Company General info tab.
6. **Billing Address:** You can enter a separate billing address. Use the 'Same as above' checkbox to use the regular mailing address as the billing address.
7. **Invoice Fields:** These fields appear on the default invoice form. See Company Invoice Setup for more details on how and where these fields appear. (Billing enabled systems only.)
8. **Custom Invoice:** Allows you to assign a custom invoice programmed to your specifications to be assigned to this client. Custom invoices are created by the MicroStaffer technical staff. Please contact MicroStaffer for more information regarding custom invoices.
9. **Parent:** This dropdown allows you to assign a parent client. If you assign a parent client that is different from the selected client, all billable entries will be billed on invoices for the parent client. However, all rate and shift information will be drawn from the current client. Please refer to various options regarding the billing of Parents and Siblings in the System Options area of MicroStaffer.
10. **External ID:** This is a field, which can be entered by you as you wish. It will allow you to synchronize your clients with any other systems that contain client data.
11. **Region:** Enter one or more Regions for this Client. Regions are defined on the List Manager window and can be used during scheduling and availability matching. Regions are optional.
12. **Display Inactive:** Checking this box allows for display of Clients marked inactive.
13. **Display Billing Ent.:** Checking this box allows for display of Clients marked as Billing Entities.

c) Client Contacts and Directions

The Client contacts tab on the Client Setup window allows you to view and modify Phone and Contact information for the selected Client. (For Web Module enables systems - the direction information entered here will be accessible to employees via the web module.)

 Clicking on the **Phone Icon** next to each phone number will open the Windows Phone Dialer application with the selected number and allow you to automatically dial using your PC. Note that your phone system must be TAPI configured for this function to be enabled.

 Clicking on the **Email Icon** next to each email address will open your Default Email Client Application with the selected email address. You must fill in the email address for this function to be enabled.



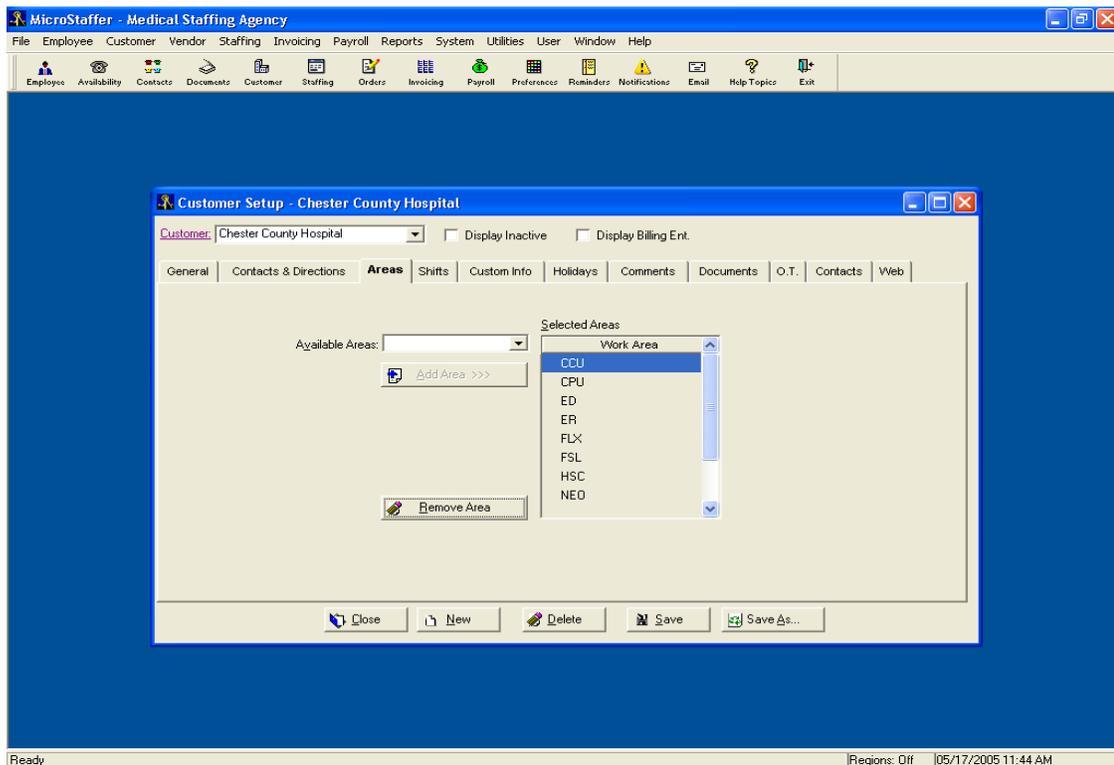
d1) Work Areas/Units

When the Client type code found on the general info tab is defined as a Facility, the heading for this tab is Areas. Work Areas define the areas where shifts are being worked. For example, if the customer is a Hospital, then you could enter the various Units and Departments at the hospital.

Work Areas will be used on the Staffing Sheet to further specify the exact location of the shift. Many customers require shifts or place orders by a specific area only.

The Available Areas dropdown lists all areas for all Customers in this Company

You can either create a New Area by typing in its description or select an area from the list. If you add a New Area, it will become part of the global area's list. All areas assigned to this Customer will be available on the Staffing Sheet.

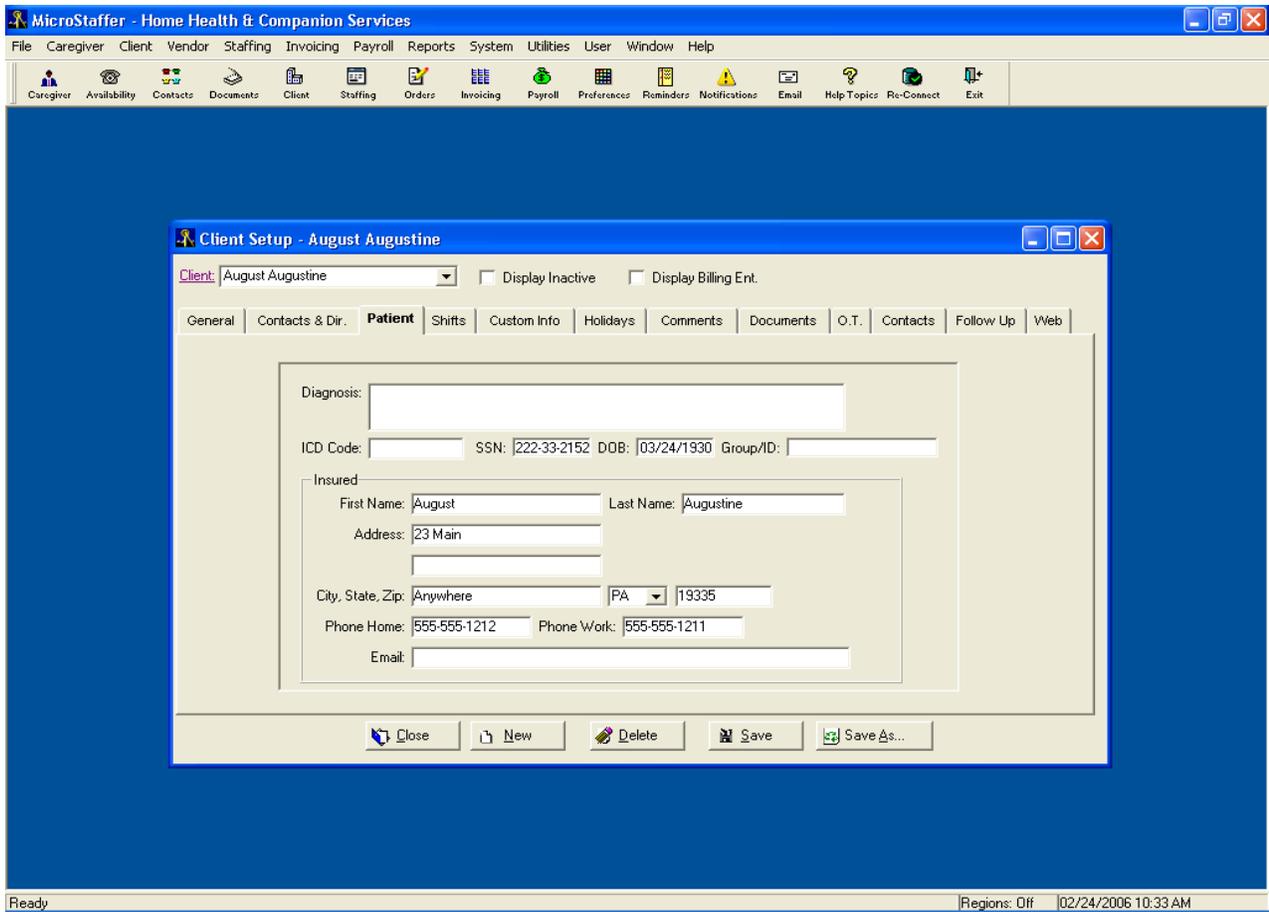


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d2) Patient

When the client type is defined as Patient on the general info tab, the tab is titled Patient. Here, you may enter information pertinent to the patient and their care.



e) Setting up Shifts

The Shifts tab on the Customer Setup Window is one of the Key areas within **MicroStaffer**. It is the place where shifts are defined for use on the Staffing Sheet and upon which both pay and billing rates will be based.

At least one shift type is required for each Customer!

Navigation

1. **Add:** Create a new shift by Clicking the Add button.
2. **Move:** Reorder the shifts by selecting a shift row and clicking the up and down arrows. The order of the shifts on this tab will be reflected on the Staffing Sheet.
3. **Delete:** Deletes the selected shift.



MicroStaffer Warning

- ▶ Once you delete a shift, it will be permanently removed. The staffing sheet will still display any booked shifts for this shift type, but you will no longer be able to add any new shifts of this type.

Data Entry Fields

1. **Shift Name:** Enter a Description for the Shift. For example, Day 8 or Day 12 Hour Shift. (Required)
2. **Shift Duration:** Select the Start and End Time of the Shift (Required).
3. **Type:** Select the type of Shift (Required). Types are used for Availability Matching.
4. **Color:** This dropdown allows you to select the color to use for the shift header banner on the staffing sheet. This is a useful visual recognition tool to differentiate between shifts.
5. **Inactive:** If you check this box the shift will no longer be visible on the Staffing Sheet (unless there are existing shifts for the selected period).
6. **Work Code:** Enter an optional work code for the shift. Work codes are defined in the List Manager window and are used for a variety of reporting purposes. When you assign a work code to a shift, this work code will automatically be used as the default work code when you enter a new shift on the Shift Detail window (it may overridden).
7. **Display of Shift name and Shift Start and End times on Staffing Sheet:** These two check boxes located at the bottom of this tab allow you to choose whether you wish to display the Name of the Shift or Shift Start and End times on the staffing sheet



MicroStaffer Tip

If you decide not to schedule using the shift based methodology, you could simply enter one shift for a given customer and check these two boxes. This would be akin to non-shift based staffing.

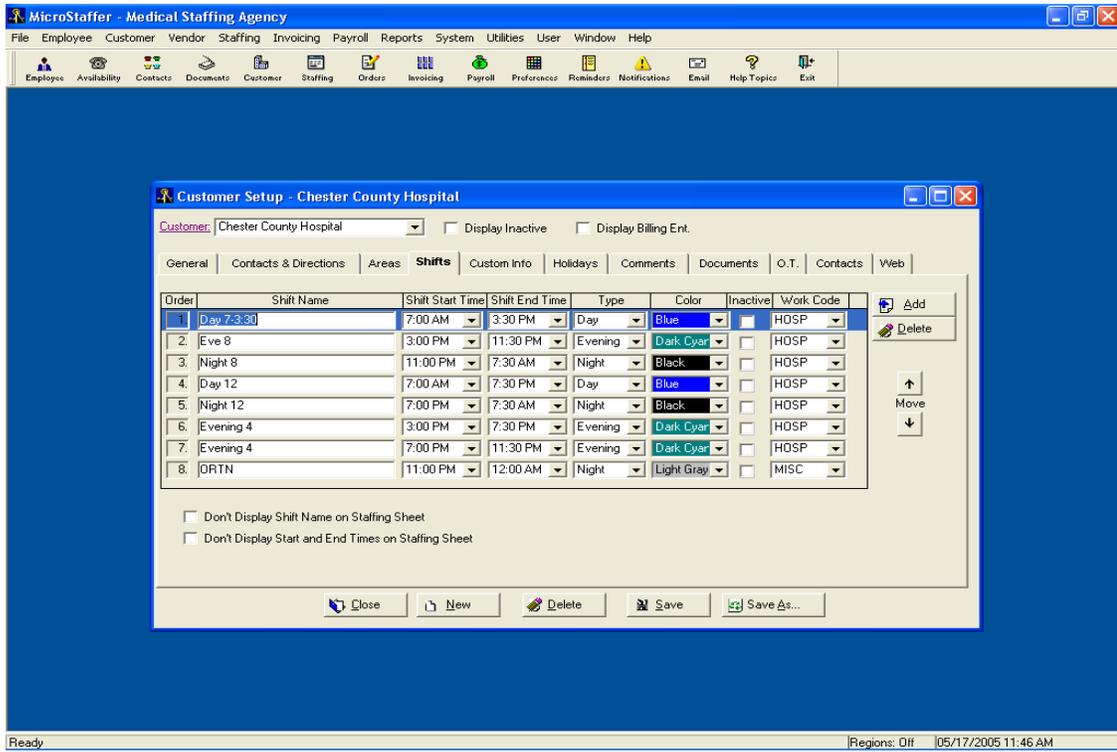


MicroStaffer Tip

If you have many clients with the same shifts, create a “master client” to be used as a template for adding new clients. Then simply access the Client information and use the Save As button. Please refer to the Client Save-As section for more information.

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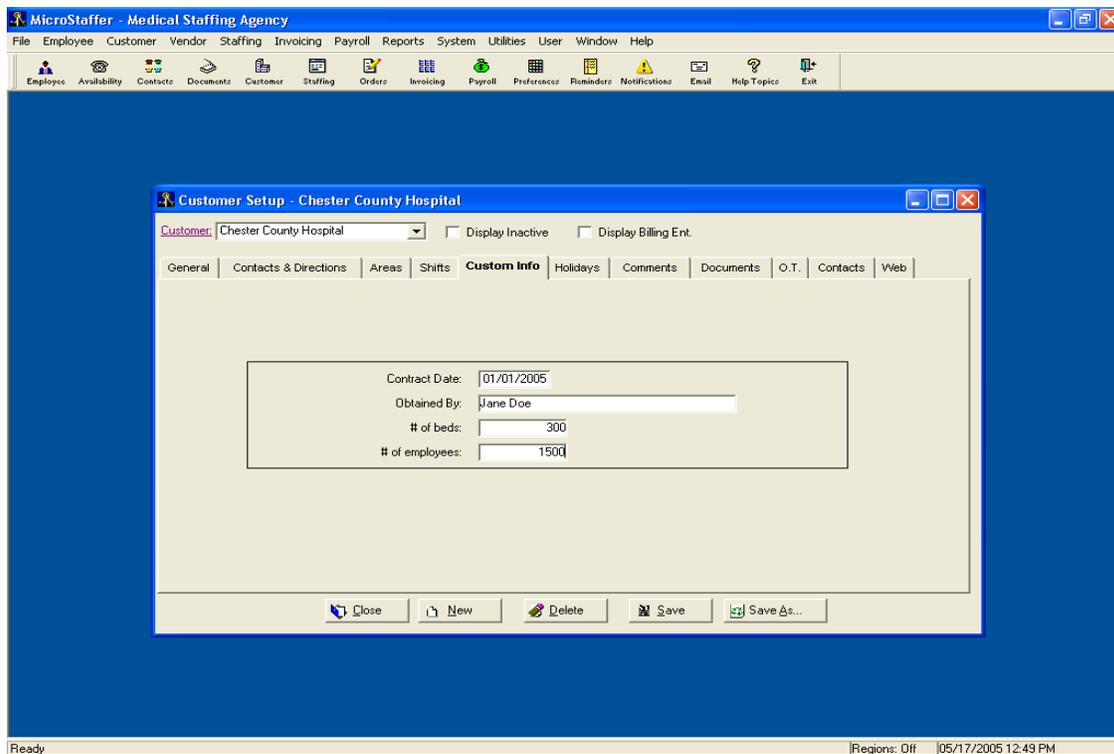


f) Client Custom Info

The Client Custom info Tab on the Client Setup window allows for viewing and modifying Custom Data as was defined in the Company Setup window-> Custom Info Tab.

The fields created on Company Setup flow into this tab. There is a limit of 25 custom information fields.

The custom information may be queried or reported on using the Client List Report.



g) Client Holiday Schedule

The Client Holidays tab on the Client Setup window allows for viewing and modifying both one-time and recurring holidays.

In order to pay and bill additional amounts for holidays, you should enter the holiday periods for each client here.

Navigation

1. **Add:** Create a new Holiday by clicking the Add button.
2. **Delete:** Deletes the selected Holiday.

Data Entry Fields

1. **Holiday Name:** Select the desired Holiday from the list or type in a New Holiday Name. (Required)
2. **Start Date:** Select the Start date for this Holiday (Required).
3. **Start Time:** Select the time of day at which the Holiday rates take effect for the above Start Date. (Required).
4. **End Date:** Select the End date for this Holiday.(Required)
5. **End Time:** Select the time of day at which the Holiday rates end for the above End Date.(Required).



MicroStaffer Warning

The Start Date and Time must precede the End Date and Time. MicroStaffer will not allow you to save the data if any row has a Start Date and Time that comes after the End Date and Time. Also, if the holiday duration is greater than one day, there will be a warning message. You may, however make the holiday duration as long as you wish.

6. **Recurring Holiday:** If this check box is checked, the Holiday will be in effect for every Year based on the Start and End Date Month and Day.



MicroStaffer Warning

Do not enter the same recurring Holiday more than once. **MicroStaffer** will not validate the entries for duplicates and Holiday pay may be more than intended.

7. **Bill@,Pay@:** Indicates at what multiple the regular billing and payroll rates should be calculated.



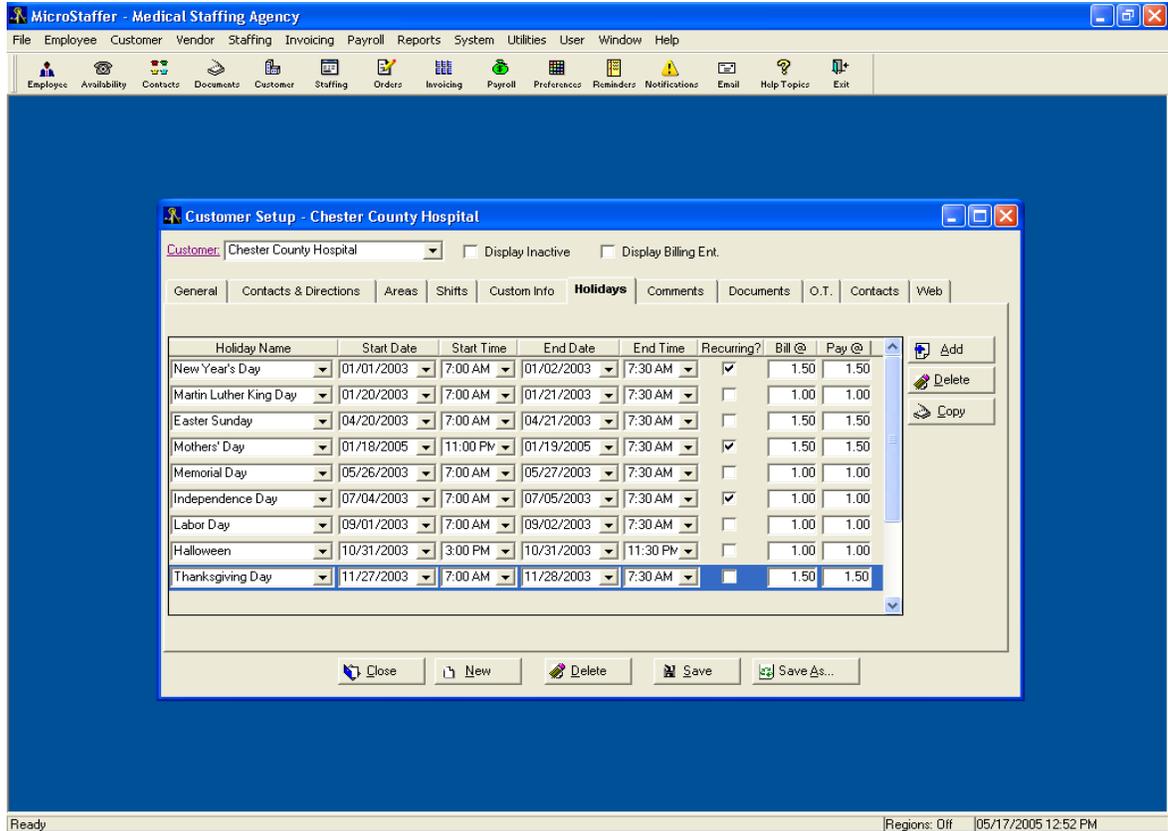
MicroStaffer Tip

Holiday pay is usually calculated at Time and One Half. Therefore, you would enter 1.5 here. Also, if you do not wish to bill at holiday rates but only pay, then enter 0 and 1.5 respectively.

8. **Holiday Shift Copy Feature:** Basic holidays may be copied from one facility to another using the copy button. **NOTE:** The holiday shifts will be deleted and replaced with the current schedule of any customers you select.

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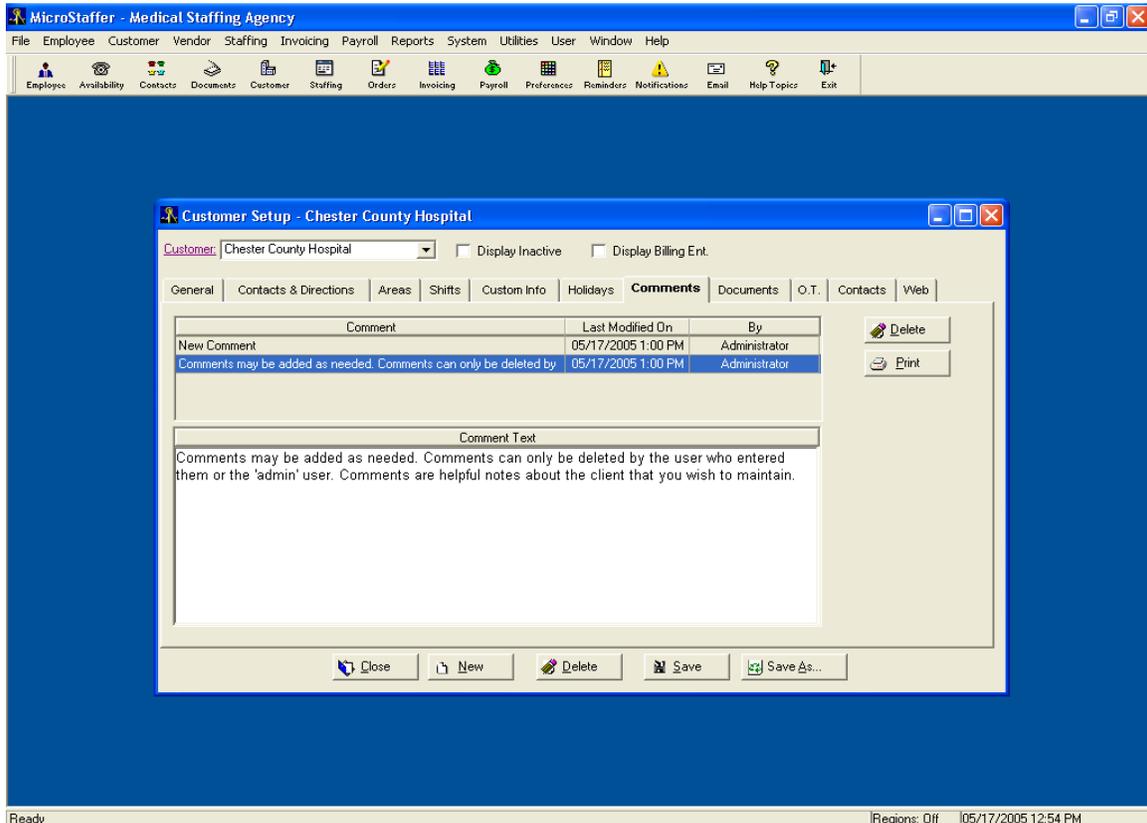
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h) Client Comments

The Comments Tab on the Client Setup window allows you to enter ongoing comments for the selected client.

- ◆ Any user can view the list of comments.
- ◆ Only the user who created the comment can delete his/her own comments.
- ◆ The 'admin' user can delete any comments.

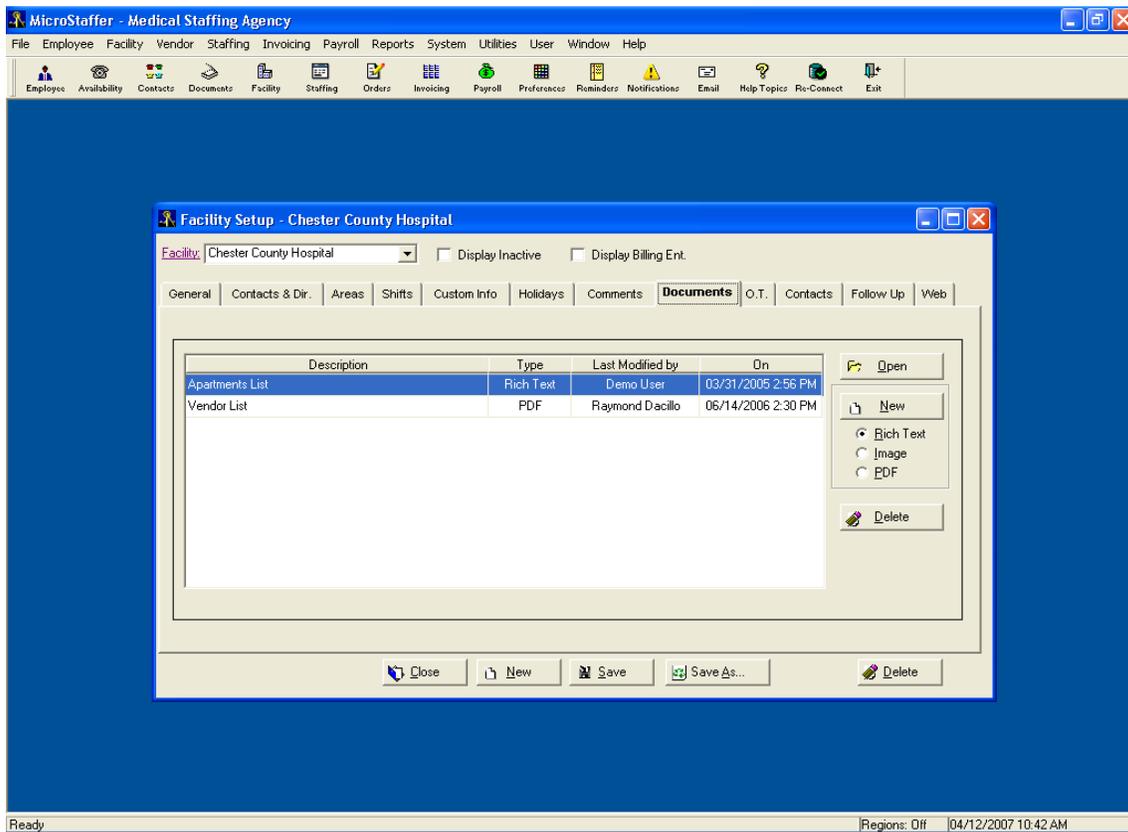


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i) Client Documents

The Client Documents tab on the Client Setup window allows you manage images, Rich Text format documents and .pdf files created with the MicroStaffer Document Manager module.



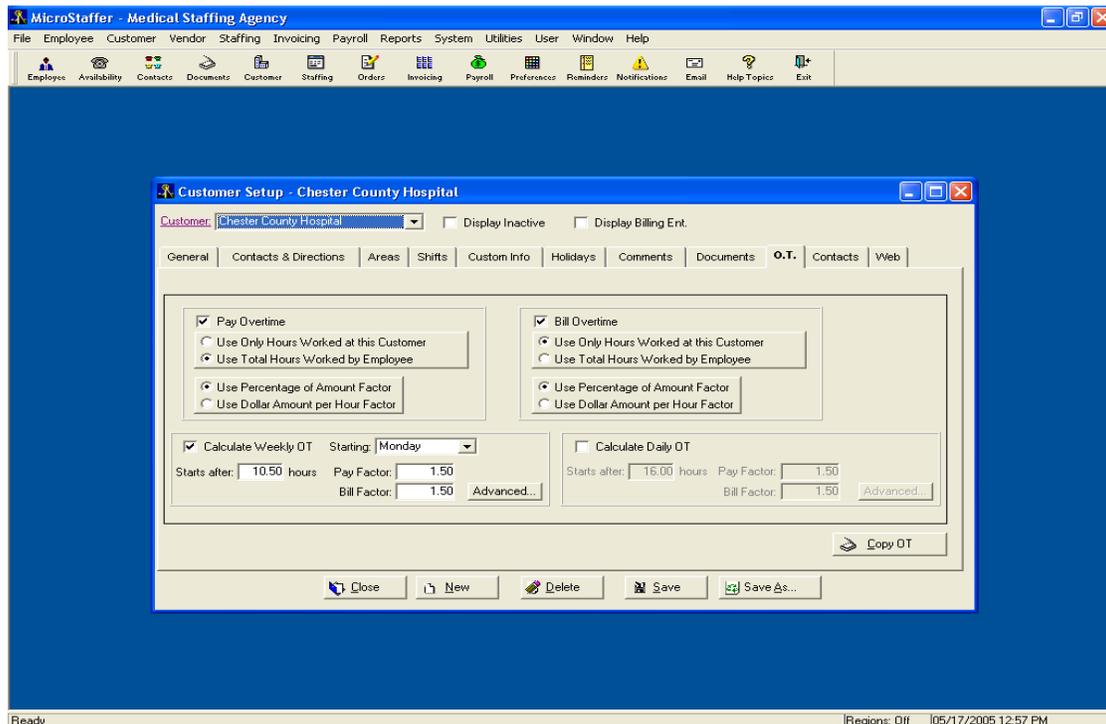
j) Overtime (Payroll and Billing Systems Only)

The Overtime Tab on the Client Setup window allows you to enter settings for calculating overtime for payroll and/or invoicing.

To enable the overtime calculations you must check the Pay Overtime and Bill Overtime checkboxes for Payroll and Billing respectively.

You can calculate both weekly OT and/or daily OT.

- 1. Pay Overtime / Bill Overtime:** Indicates whether you wish to pay and/or bill overtime based on the following settings.
- 2. Hours Used to Calculate Overtime:** Use these settings to select whether to sum the total hours used in deciding when overtime starts. For example, you may add up an employees total hours for the week or just those hours worked at this specific Client.
- 3. Percentage vs. Dollar amount factor:** You may set the type of overtime that is given. If you choose to select percentage then, the Pay Factor and Bill Factor fields will hold percentages. If you choose to select Dollar amount then, the Pay Factor and Bill Factor fields will hold dollar amount values such as \$2.00 per hour.
- 4. Weekly and Daily OT:** These settings allow you to enable whether to pay and/or bill weekly and/or daily OT.
- 5. Advanced settings:** Use the Advanced settings to set Blended overtime settings.



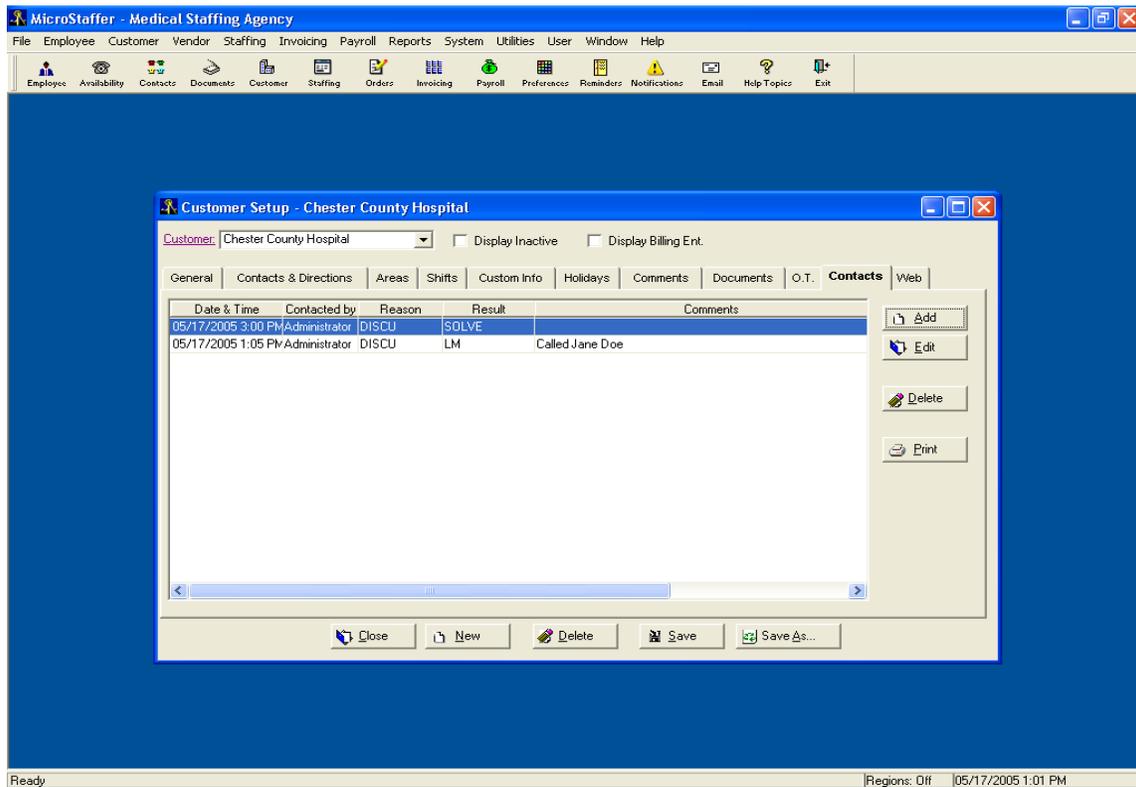
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k) Contacts

The Client Contacts Tab allows you to view and enter contacts between you and your client such as requests for orders, cancellations, sent profile information etc.

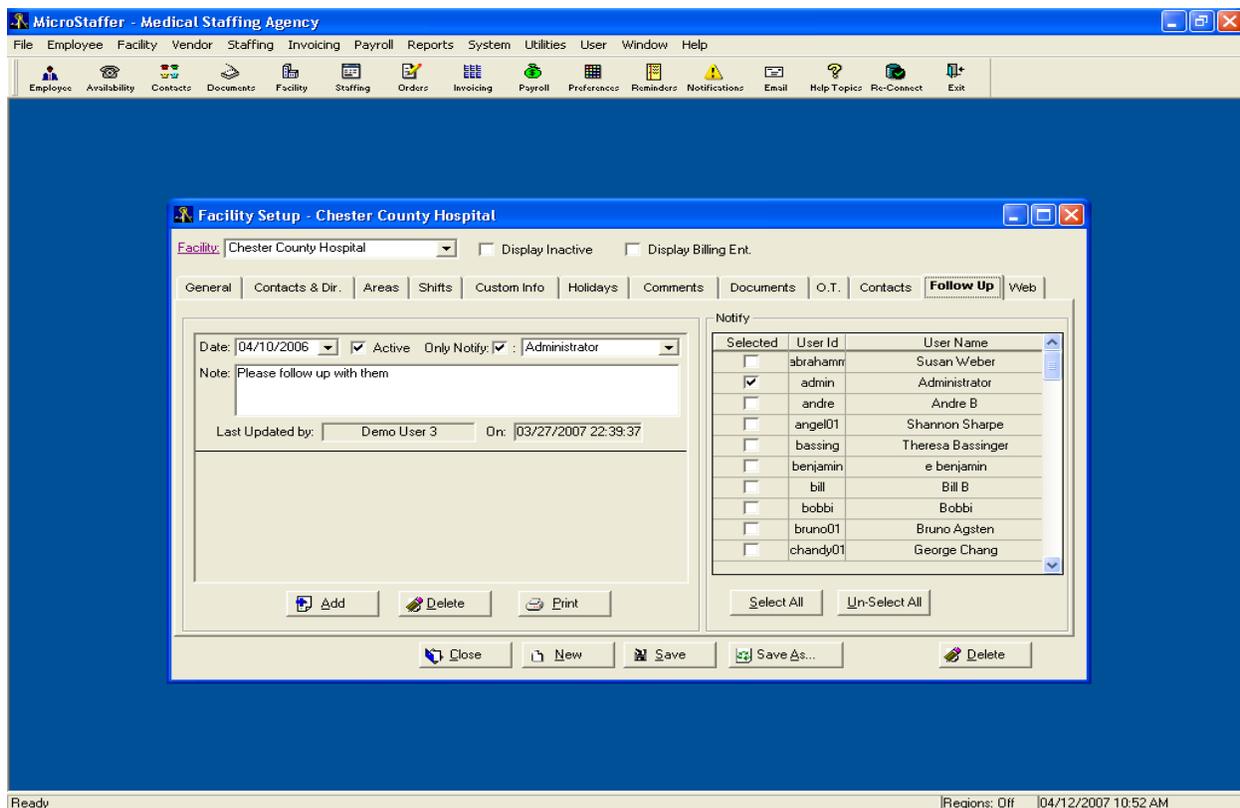
Note that you must define Contact Reasons and Contact Results in the List Manager window.



I) Follow Ups

The Follow Up Tab within Client Records allows for the entry of reminders or information that needs some sort of follow up action. Follow Ups may be entered for users other than the user entering the initial Follow Up. Follow Ups appear on the System User Notifications window for the assigned user(s).

Simply click Add, type in a date for the Follow Up and the information. Click the users to be notified with the follow up and save. Use Only Notify field to select a single user.

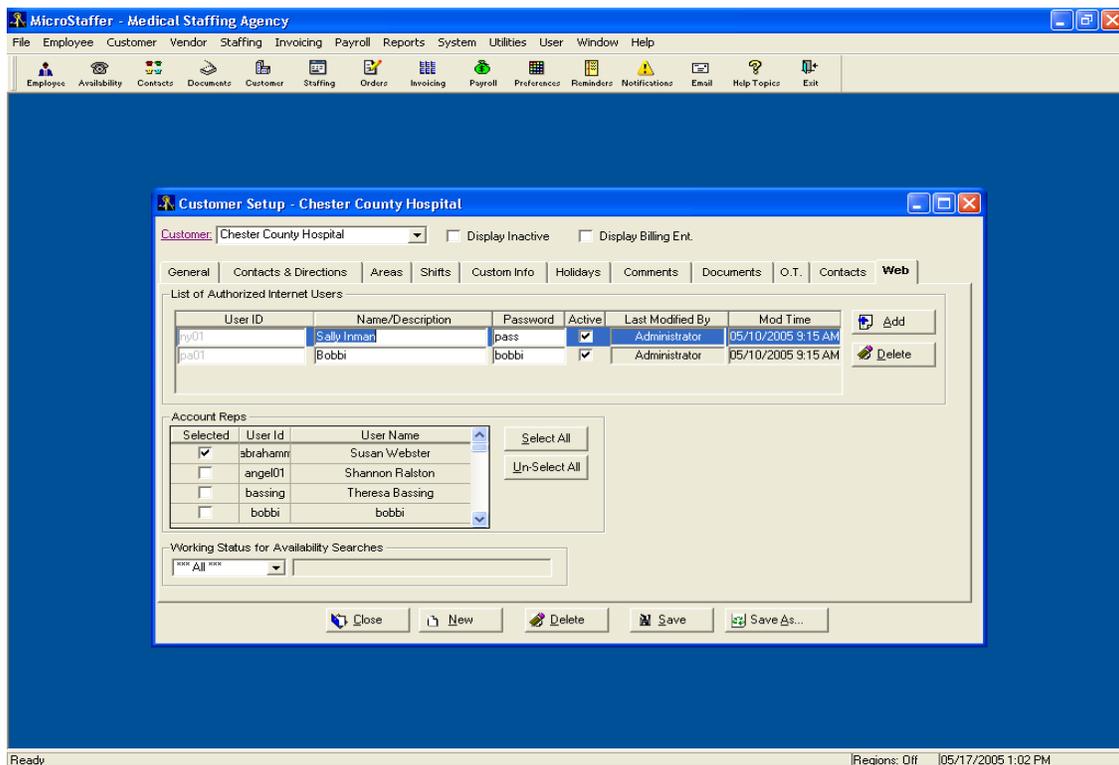


m) Web

The Web tab is used for setting Internet access properties that allow your customers access to your MicroStaffer system using the Optional MicroStaffer Web Access module.

The Web Access Module allows selected customers to view Schedules, Enter Order, View Availabilities etc.

- 1. List of Authorized Users:** Enter the User Names and Password that allow selected Customers access to your MicroStaffer system via the Web.
- 2. Account Reps:** Indicate which MicroStaffer internal users are designated as account reps for the selected Customer. Account reps will receive notifications when the Customer enters new orders and will be responsible for processing these new orders for entry into MicroStaffer's staffing sheets.
- 3. Working Status for Availability Searches:** One of the functions available to Customers via the Web Access Module is to perform availability searches. The status(s) you indicate here will decide what is deemed to be a working shift so as to remove any available Employees from availability searches should they be booked with a status as set here.



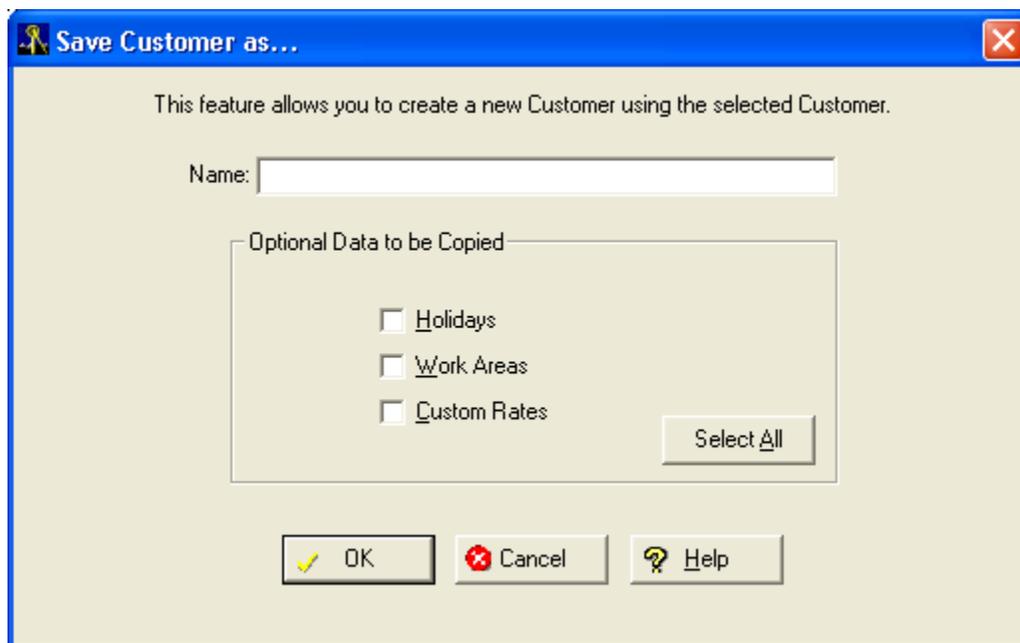
n) Client Save-As

The Save As button on the client setup window allows you to clone one client from another.

This feature is a time saving device that allows you to create a new customer from an existing client and inherit such time consuming data entry items as Holidays, Areas, Shifts and Billing and Pay Rates.

This function is used in the following way:

1. Open an Existing client. This will be the client that will serve as the template for the new client.
2. Click on the Save-As button. The 'Save Client as...' window will open.
3. Enter the name of the New client. Also select which items to copy. Note that Shift definitions and standard rates are automatically copied over.
4. Click OK and you will be returned to the Client Setup window with the New client record already selected.



N. Client Rates Setup

1. Client Pay Rates

The Client Pay Rates Setup window allows you to view, modify and delete Pay Rates for a Specific Client and Shift.

Note that every Client has at least one Shift Type and each Shift Type has at least one Payroll Rate. This rate is called the Standard Rate and its properties, other than the rate amounts, cannot be modified.

The Standard Rate is applied whenever no other rate applies to the Shift in question.

If you wish to create unpaid breaks you must have at least 3 rate rows. The middle row will represent the break. For example:

Row 1 7am - 12pm
Row 2 12pm - 12:30pm (Break)
Row 3 12:30pm to End of shift

MicroStaffer also allows you to create a wide array of Custom Rates through its Rate Wizard Window.

The Rate Wizard Window lets you create Rates using Various Criteria such as Employee Type and Work Area.

To Create or Modify a Custom Rate for any specific Shift, open the Pay Rates Setup Window and Select both the Customer and Shift for which the Custom Rate will be applied to.

To Create a New Rate, click the New button. To Modify the Properties of an existing Custom Rate, select the rate and then click the Properties button. Both actions will open the Rate Wizard Window which will guide you through the Rate Setup process.

1. After the window opens, click the Next button and enter a descriptive name for this Custom Rate.
2. Click Next and select whether to use one or more employee types for this rate.
3. If you choose Employee Types, you may select Specific Employee Types on the following Tab. To select more than one Type, hold down the CTRL key while clicking on each Employee Type.
4. You may also skip the Employee Type criteria.
5. On the next tab you may specify Work Areas to use for this rate. Again, to select more than one Area, hold down the CTRL key while clicking on each Work Area.
6. Note, you must select at least some type of criteria to complete the process. Also, the selected criteria may not overlap with any other rate's criteria.
7. Once you have selected the criteria, you may enter rates for each day of the week.
8. If you wish to create split shift rates, click on 'Add Rate Period' and enter the next period's start time and rates.
9. You may create an unlimited amount of splits within each shift.
10. Click on 'Finish' and you will return to the Pay Rates Setup window.

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The screenshot displays the MicroStaffer - Medical Staffing Agency application window. The main menu includes File, Employee, Customer, Vendor, Staffing, Invoicing, Payroll, Reports, System, Edit, User, Window, and Help. A toolbar contains icons for Employee, Availability, Contacts, Documents, Customer, Staffing, Orders, Invoicing, Payroll, Preferences, Reminders, Notifications, Email, Help Topics, and Exit.

The **Pay Rates Setup** dialog box is open, showing the following details:

- Customer:** Chester County Hospital
- Display Inactive:**
- Shifts and Rates:** A tree view showing various shift and rate categories, with (5879) - RN-C-NH-7A-3P selected.
- Description:**
 - Rate ID: 5879
 - Description: RN-C-NH-7A-3P
 - Last Modified On: 07/26/2003
 - Last Modified By: Jackie James
- Employee Type Criteria:** RN - RN

The **Rate Grid** shows the following data for Shift Period: (7:00 AM - 3:30 PM):

	Rate Starts at...	Ends at...	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Unpaid Break?
1.	7:00 AM	11:00 AM	37.00	37.00	37.00	37.00	37.00	39.00	39.00	<input type="checkbox"/>
2.	11:00 AM	11:30 AM	37.00	37.00	37.00	37.00	37.00	39.00	39.00	<input checked="" type="checkbox"/>
3.	11:30 AM	3:30 PM	37.00	37.00	37.00	37.00	37.00	39.00	39.00	<input type="checkbox"/>
4.	3:30 PM	End of Shift	38.00	38.00	38.00	38.00	40.00	40.00	40.00	<input type="checkbox"/>

Additional controls include buttons for Close, Save, New, Properties, Delete, Copy..., Add Rate Period, Delete Rate Period, Export Item Code, and Print. A date range selector is also present at the bottom.

The status bar at the bottom shows: Ready | Regions: Off | 05/23/2005 10:29 AM

2. Client Bill Rates Setup

The Bill Rates Setup window allows you to view, modify and delete Bill Rates for a Specific Customer and Shift.

Note that every Customer has at least one Shift Type and each Shift Type has at least one Billing Rate. This rate is called the Standard Rate and its properties, other than the rate amounts, cannot be modified.

The Standard Rate is applied whenever no other rate applies to a given shift.

MicroStaffer also allows you to create a wide array of Custom Rates through its Rate Wizard Window.

The Rate Wizard Window lets you create Rates using Various Criteria such as Employee Type, Work Areas and Specific Employees.

To Create or Modify a Custom Rate for any specific Shift, open the Bill Rates Setup Window and Select both the Customer and Shift for which the Custom Rate will be applied to.

To Create a New Rate, click the New button. To Modify the Properties of an existing Custom Rate, select the rate and then click the Properties button. Both actions will open the Rate Wizard Window which will guide you through the Rate Setup process.

1. After the window opens, click the Next button and enter a descriptive name for this Custom Rate.
2. Click Next and select whether to use one or more employee types for this rate.
3. If you choose Employee Types, you may select Specific Employee Types on the following Tab.
To select more than one Type, hold down the CTRL key while clicking on each Employee Type.
4. You may also skip the Employee Type criteria.
5. On the next tab you may specify Work Areas to use for this rate. Again, to select more than one Area, hold down the CTRL key while clicking on each Work Area.
6. Note, you must select at least some type of criteria to complete the process. Also, the selected criteria may not overlap with any other rate's criteria.
7. Once you have selected the criteria, you may enter rates for each day of the week.
8. If you wish to create split shift rates, click on 'Add Rate Period' and enter the next period's start time and rates.
9. You may create an unlimited amount of splits within each shift.
10. Click on 'Finish' and you will return to the Bill Rates Setup window.

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MicroStaffer - Medical Staffing Agency

File Employee Customer Vendor Staffing Invoicing Payroll Reports System Edit User Window Help

Employee Availability Contacts Documents Customer Staffing Orders Invoicing Payroll Preferences Reminders Notifications Email Help Topics Exit

Bill Rates Setup

Customer: Chester County Hospital Display Inactive

Shifts and Rates

- Day 7-3:30.....(7:00 am - 3:30 pm)
 - (3963) - Standard Rate
 - (3977) - RN-NH-7A-3P
 - (3982) - LPN-NH-7A-3P
 - (3983) - CNA-NH-7A-3P
 - (3984) - CRT-NH-7A-3P
- Eve 8.....(3:00 pm - 11:30 pm)
- Night 8.....(11:00 pm - 7:30 am)
- Day 12.....(7:00 am - 7:30 pm)
- Night 12.....(7:00 pm - 7:30 am)

Description

Rate ID: 3977
 Description: RN-NH-7A-3P
 Last Modified On: 07/26/2003
 Last Modified By: Jackie James

Employee Type Criteria

Employee Type: RN - RN

Shift Period: (7:00 AM - 3:30 PM)

Rate Starts at...	Ends at...	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Unpaid Break?
1. 7:00 AM	11:00 AM	53.00	53.00	53.00	53.00	53.00	60.00	60.00	<input type="checkbox"/>
2. 11:00 AM	11:30 AM	53.00	53.00	53.00	53.00	53.00	60.00	60.00	<input checked="" type="checkbox"/>
3. 11:30 AM	3:30 PM	53.00	53.00	53.00	53.00	53.00	60.00	60.00	<input type="checkbox"/>
4. 3:30 PM	End of Shift	53.00	53.00	53.00	53.00	60.00	60.00	60.00	<input type="checkbox"/>

(Right Click to Copy Rate Rows or Rate Grid)

Date Range: Start: End:

Buttons: Close, Save, New, Properties, Delete, Copy..., Add Rate Period, Delete Rate Period, Export Item Code, Print

Ready Regions: Off 05/23/2005 10:35 AM

3. Customer Pay and Bill Rate Copying

It is possible to copy entire sets of rates for one shift and customer to another set of shifts for other customers.

For example, say you have 12 customers all with the same shift types (e.g. 7a-3p, 3p-11p etc.) Now, you wish to update all the rates for all of them and they all have the same rate setups.

In this case, you can highlight the shift in the Rate Treeview and click on the Copy Button.

This will open the Copy Rates window. Once the window opens, it will display a list of Shifts that are eligible for copy operation given the shift that is being used as the source of the copy.

In order for a shift to be eligible, it MUST have the same start and end times as the source shift.

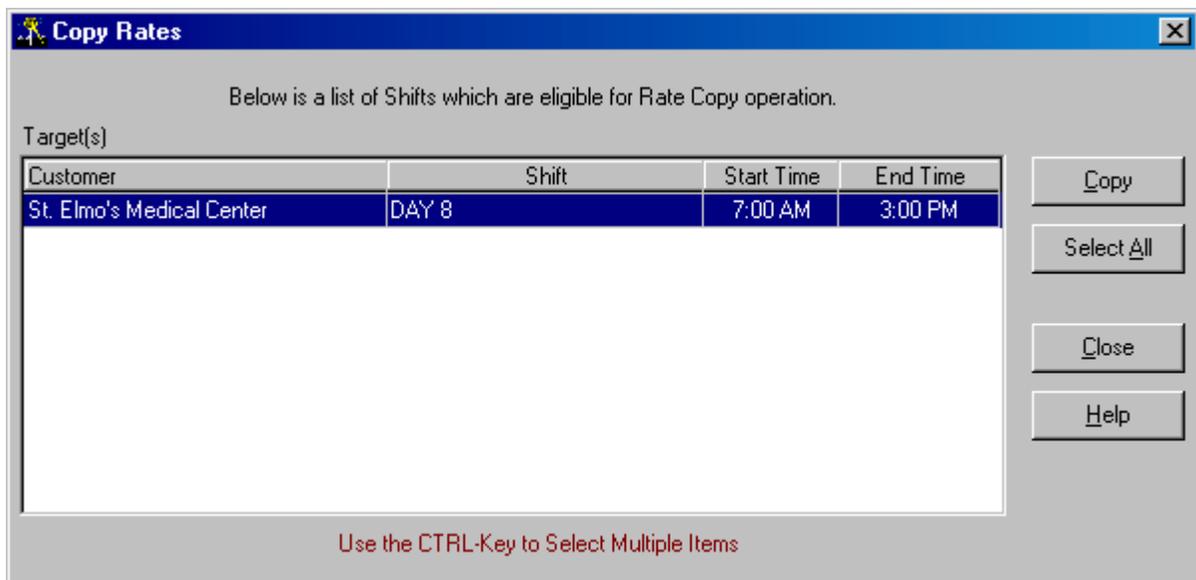
So, you can copy all the rates from the 7a-3p shift at Customer A to any other 7a-3p shift in the system.

 **MicroStaffer Warning** When you copy rates from one shift to another, it will remove ALL existing rates from the target shift and replace them with rates from the source shift. This action CANNOT be undone.

You can also copy rows of rates.

Simply select the rate row then go to the Regular Windows menu located at the very top of the MicroStaffer application and select Edit->Copy.

Then, to paste the copied rate row, simply select Edit->Paste while on the target rate row.



O. Client Checklist

1. Maintenance of Client Checklist Items

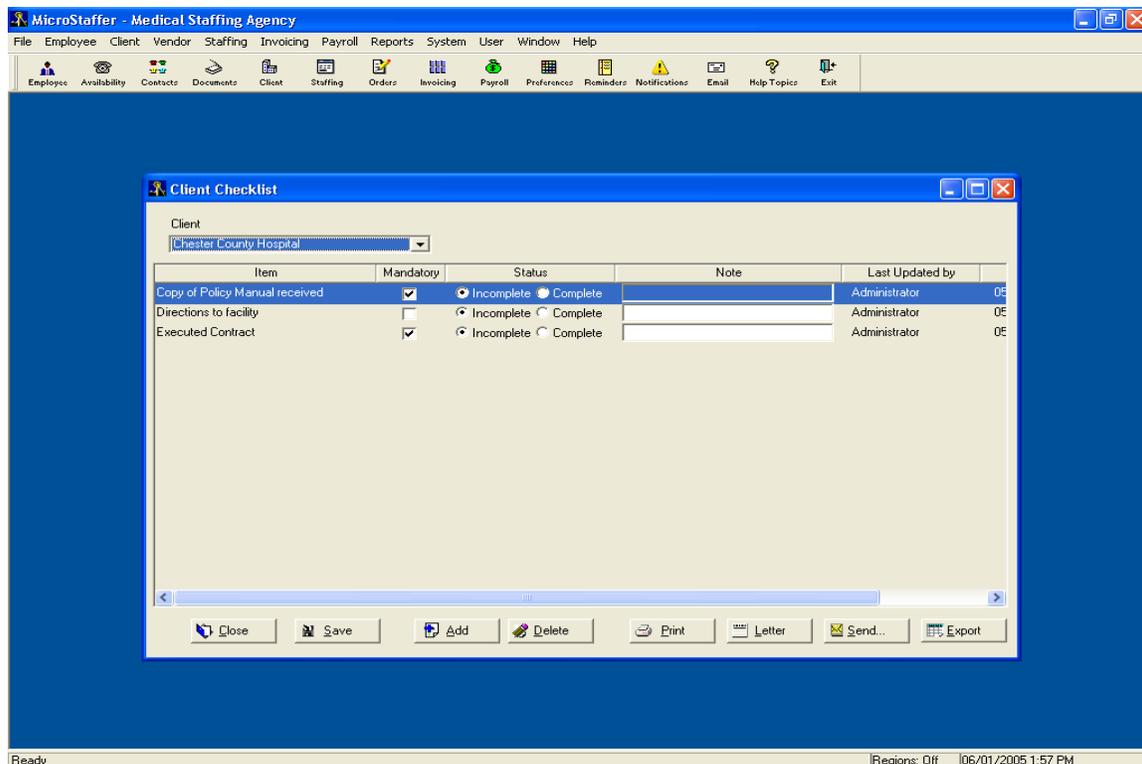
The purpose of the Client Checklist is to provide the MicroStaffer user with a means to track and maintain pertinent and/or mandatory information for each client. Rather than digging through piles of paperwork, the necessary information is maintained and accessible right at your fingertips.

The Client Checklist Codes are created in List Manager found under the System tab. Codes which are added to all at the time of setup will be displayed when you select Checklist under the Client tab. See screen below

If you wish to add more Client Checklist items that may not have been applicable to all clients, click Add.

To quickly mark all items complete, incomplete or to delete all, simply right click an item to access the shortcut.

Please refer to the Mail Merge (Letter), Email (Send) and Export sections of this user manual for use of each function.



P. Client Leads

Client Lead information is the foundation of recruiting new business. MicroStaffer provides the ability to easily track and maintain this information so that you may continue to develop your company's relationships. Client Lead information is easily transferred to active client status. Client Lead information may be reported, used for email or mail merge purposes.

1. Creating a New Client Lead

Select Leads from the Client menu.

General Info

The required general information for the client lead is the name. All of the other fields are optional.

Contacts & Directions

Comments

Documents

Contacts

The screenshot displays the MicroStaffer - Medical Staffing Agency application window. The main menu bar includes File, Employee, Client, Vendor, Staffing, Invoicing, Payroll, Reports, System, User, Window, and Help. The toolbar contains icons for Employee, Availability, Contacts, Documents, Client, Staffing, Orders, Invoicing, Payroll, Preferences, Reminders, Notifications, Email, Help Topics, and Exit. The 'Client Lead Setup - New' dialog box is open, showing a 'Client Lead' dropdown menu. Below it are tabs for 'General', 'Contacts & Directions', 'Comments', 'Documents', and 'Contacts'. The 'General' tab is active, containing the following fields: 'Name' (text input), 'Orientation Mandatory' (checkbox), 'ID' (text input), 'Address' (text input), 'Type' (dropdown menu with 'Facility (Hospital, Nursing Home...)' selected), 'City, St., Zip' (text input with a dropdown for state), 'Region(s)' (text input), and a 'Modify...' button. At the bottom of the dialog are 'Last Modified by' and 'On' (date) fields. The dialog has 'Close', 'New', 'Delete', 'Save', and 'Transfer' buttons at the bottom. The status bar at the bottom of the application window shows 'Ready' on the left and 'Regions: Dlf [06/01/2005 2:02 PM]' on the right.

2. Editing Client Lead Information

To edit an existing Client Lead information, simply select the Client Lead from the dropdown, make any changes and Save.

3. Transfer Client

To transfer a Client Lead to an active client, select the Client Lead from the dropdown and click Transfer. This will open up the Client Setup window with the transferred information. You must save the information within the client setup window for the transfer to be complete.

4. Client Lead Documents

The Document Manager for Client Leads. Please refer to the Document Manager section of the user manual for detailed instruction.

5. Client Lead Checklist

MicroStaffer allows you to create and maintain a Client Lead Checklist similar in function to the Client Checklist. The Client Lead Checklist is transferred along with the other data when transferring to active status.

Q. Patient Setup

The Patient Setup facility is found under the Client tab. Patients may be created to track private duty scheduling within a client facility. This patient information may then be tied to a shift at a facility on the Shift Detail window. In most general staffing, this facility will not be needed.

1. General Information

The required information to add a new patient:

ID – Must be unique (MicroStaffer will disallow duplicate id's)

First Name

Last Name

D.O.B. – Date of Birth

Gender – Select from dropdown

Extra general Patient information:

Address

Phone

Frequency of Service

Client – Select client where patient is located from dropdown

Region(s) – If applicable

2. Primary Care Provider Information

This tab is currently for informational purposes only. Select the type of Primary care Provider from the dropdown and enter any applicable information.

3. Medical History

This tab is currently for informational purposes only. Check the box to select which item to enter information within.

The screenshot displays the 'MicroStaffer - Medical Staffing Agency' application window. The main menu includes File, Employee, Client, Vendor, Staffing, Invoicing, Payroll, Reports, System, Utilities, User, Window, and Help. A toolbar contains icons for Employee, Availability, Contacts, Documents, Client, Staffing, Orders, Invoicing, Payroll, Preferences, Reminders, Notifications, Email, Help Topics, and Exit. The 'Patient Setup - New Patient' dialog box is open, showing a 'Patient:' dropdown menu. Below it are three tabs: 'General', 'Primary Care Provider', and 'Medical History'. The 'General' tab is active, containing the following fields: ID (text box), First Name (text box), Last Name (text box), MI (text box), D.O.B.: (00/00/0000) (text box), Gender: (dropdown menu), SSN: (text box), Address1: (text box), Address2: (text box), City, State, Zip: (text box, dropdown menu, text box), Home Phone #: (text box), Frequency of Service: (text box), Client: (dropdown menu), and Region(s): (text box) with a 'Modify...' button. At the bottom of the dialog are 'Last Modified On:', 'Last Modified By:', and 'System ID: 38' fields. The dialog has 'Close', 'Save', 'Delete', 'Search', and 'New' buttons. The status bar at the bottom shows 'Ready', 'Regions: Off', and '06/01/2005 2:09 PM'.

R. Employee Setup

1. Creating a New Employee

To Add a New Employee:

1. Select Employee->Setup from the Main Menu or click the Employee Toolbar.
2. The Employee Setup window opens in New Mode.

OR Click the **New** button located on the Employee Setup window.

MicroStaffer Note: Employee information can also be transferred to the Employee Setup window by using the Transfer button found on the Employee Lead window. Also, the optional MicroStaffer Web Module has an on-line application function which allows the on-line application to be processed into the Employee Leads area for continued recruitment. From there, transfer to active employee status is as simple as clicking the Transfer button.

The screenshot displays the MicroStaffer - Medical Staffing Agency software interface. The main window is titled "Employee Setup - New" and features a menu bar with options: File, Employee, Customer, Vendor, Staffing, Invoicing, Payroll, Reports, System, View, Utilities, User, Window, and Help. Below the menu bar is a toolbar with icons for Employee, Availability, Contacts, Documents, Customer, Staffing, Orders, Invoicing, Payroll, Preferences, Reminders, Notifications, Email, Help Topics, and Exit.

The "Employee Setup - New" window has a tabbed interface with the following tabs: General, Profile, Skills, Custom Info, Comments, Documents, Payroll, Contacts, Follow Up, and Web. The "General" tab is active, showing the following fields and options:

- Employee: [Dropdown menu]
- Show Inactive:
- Show Terminated:
- Sub-Contractor:
- First Name: [Text field]
- Last Name: [Text field]
- Address: [Text field]
- City: [Text field]
- St. Zip.: [Dropdown menu]
- SS No.: [Text field]
- Type: [Dropdown menu]
- Sex: [Dropdown menu]
- Date of Birth: [Text field] (00/00/0000)
- Notify: 7 Days Before
- Date Hired: [Text field] (00/00/0000)
- Inactive:
- File: [Text field]
- Region(s): [Text field]
- Modify...: [Button]
- ID: [Text field]
- External ID: [Text field]
- Last Modified by: [Text field]
- On: [Text field]
- Total Number Entered to Date: 199
- Ticklers: Sign-On Bonus Referral Bonus
- Phone: [Table with columns Number and Description]
- E-Mail: [Text field]
- Pager E-Mail: [Text field]
- Cell E-Mail: [Text field]
- Referral Type: [Dropdown menu]
- Referred by: [Text field]
- Terminated:
- Date: [Text field] (00/00/0000)
- Reason: [Text field]

At the bottom of the window are buttons for Close, New, Delete, Save, and Profile. The status bar at the bottom of the screen shows "Ready" and "Regions: Off 05/17/2005 1:05 PM".

2. Editing Employee Information

a) Accessing Employee Data

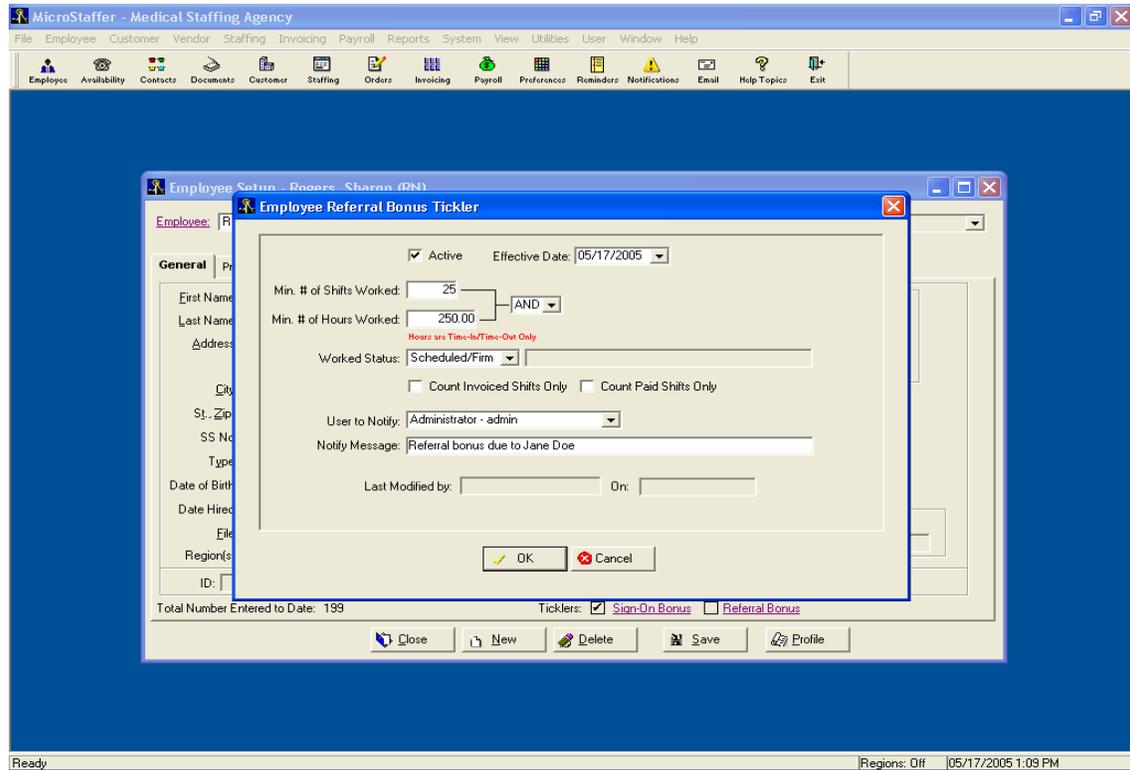
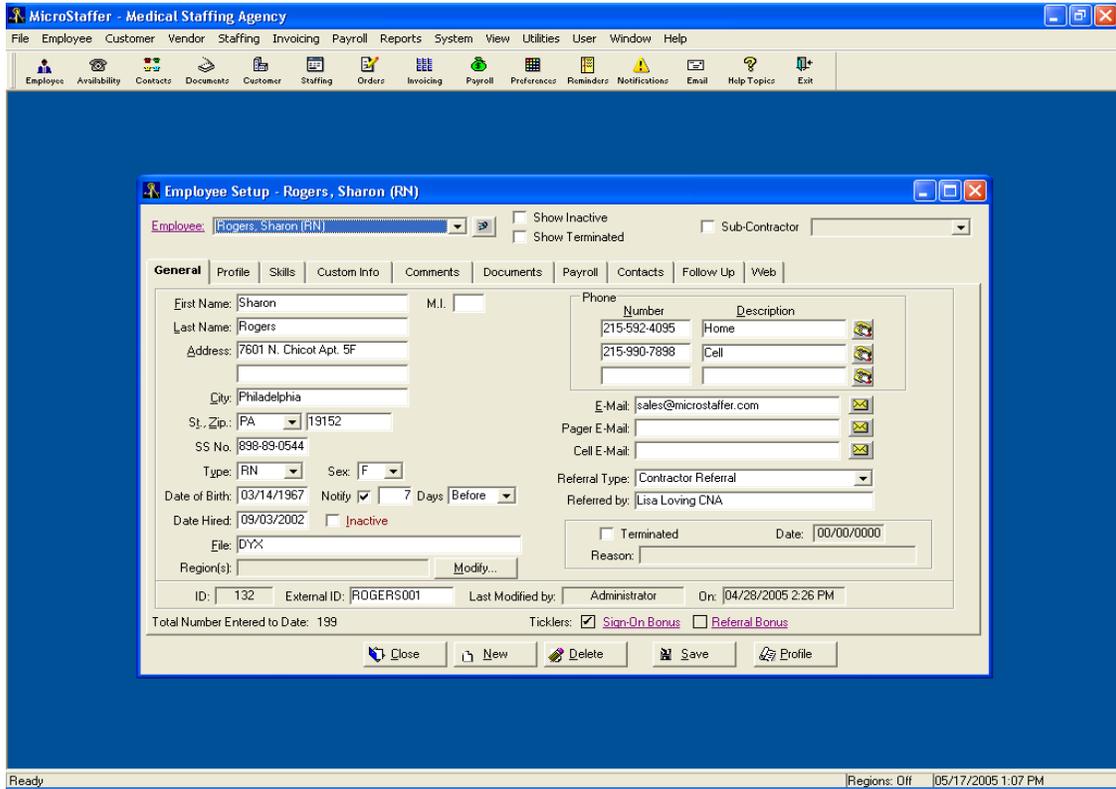
To view and modify Employee data, select Employee->Setup from the Main menu or click on the Employee Toolbar Item. When the Employee Setup window opens, select an Employee from the Employee Dropdown in the top left corner of the window.

b) Employee General Info

1. **Name:** Enter the first name and last name of the Employee.(Required) Middle initial is not required.
2. **Address:** Enter the Street, City, State and Zip (Required).
3. **SS#:** Enter the Social Security Number of the employee (Required). Must be unique.
4. **Type:** Select an employee type from the dropdown. Employee types are created in the List Manager area.
5. **Sex:** Select from dropdown.
6. **Date of Birth:** Enter date of birth. Click notify box and set tickler if you wish to be notified in Staffing Center of approaching birthday.
7. **Date Hired:** Date of hire. Check inactive box if the employee is inactive.
8. **File:** A reference field. Optional.
9. **Region(s):** Users may assign one or more regions for any Employee. Regions can assist with matching Employees and Customers for Orders, Availabilities and other scheduling functions. Regions and region codes are created and managed in the List Manager window.
10. **External ID:** This is a field that can be entered per user needs. It will allow you to synchronize your employees with any other systems that contain employee data. For example, if you are using another software package for accounting purposes, just enter the ID from that package for the given employee here.
11. **Phone:** MicroStaffer provides the ability to maintain multiple phone numbers for each employee. If your system is enabled with the appropriate telephone software and hardware, you may dial an employee directly by using the phone icon next to the phone number field. Please contact MicroStaffer technical support for more specifications.
12. **Email:** Enter multiple email addresses for employee if applicable. MicroStaffer will populate email address within email composer window when applicable. Click on the icon next to the email address to open a blank composer window.
13. **Referral Type/Referred By:** If applicable, select the referral type from the dropdown and type in the name of the referring employee.
14. **Terminated:** Check box if employee has been terminated. Reason is optional. Please note, you will need to search separately for terminated employees by clicking Show Terminated box at the top of the screen.
15. **Sign-On Bonus, Referral Bonus:** MicroStaffer allows you to create Ticklers that notify you when certain Employees have met Sign-Up and Referral bonus conditions. These bonuses are typically met by an employee working a certain number of shifts after they are signed up, or, if they recommend another employee, once that employee has met the bonus requirement, the referring employee gets a referral bonus. The ticklers created here are displayed in the System User Notifications Window.

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c) Employee Profile

The employee profile tab on the Employee Setup window allows you to enter detailed information for each employee such as licenses, certifications, skills etc. The employee profile may be quickly generated to email or print with copies of supporting scanned in documentation (if applicable).

Please note that you must create types for most of these in the List Manager window.

To add a new item, click an existing item in the tree or header item and then click the New button. To edit an item, select it and click Edit or double click. You can also expand and collapse all items in the tree by right clicking on the tree.

Items that are tickler enabled allow for an alert to be enabled for a user defined number of days before (or after) the expiration date of the profile item. Please note: a default number of days may be set in the System Options menu - Employee and Client setup - Default Expiration Days on employee Profile Items.

Tickler enabled items may also be defined so that an employee may not be staffed until a specific expired profile item is taken care of. The options are set on the System Options menu.

Documents may be attached to profile items by selecting the document in the documents tab and then dragging and dropping the document to the applicable employee profile item. Alternatively, right click on the profile item to view a list of options for attachment. This will allow for attachment of documents when generating an employee profile using the Profile button.

NOTE: To remove a document from being attached to the Employee Profile, right click on the document within the Profile and select "Remove Attached Document". This will remove the document from the profile but retain the document on the Employee Documents tab. (Be careful, the delete selection will delete the entire document).

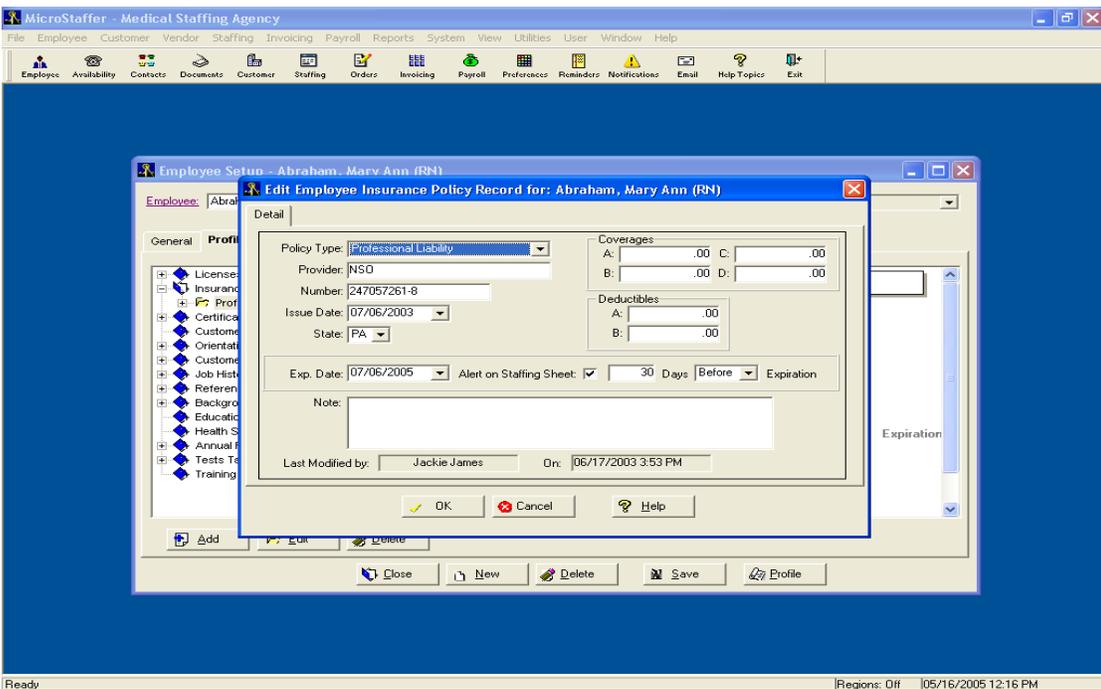
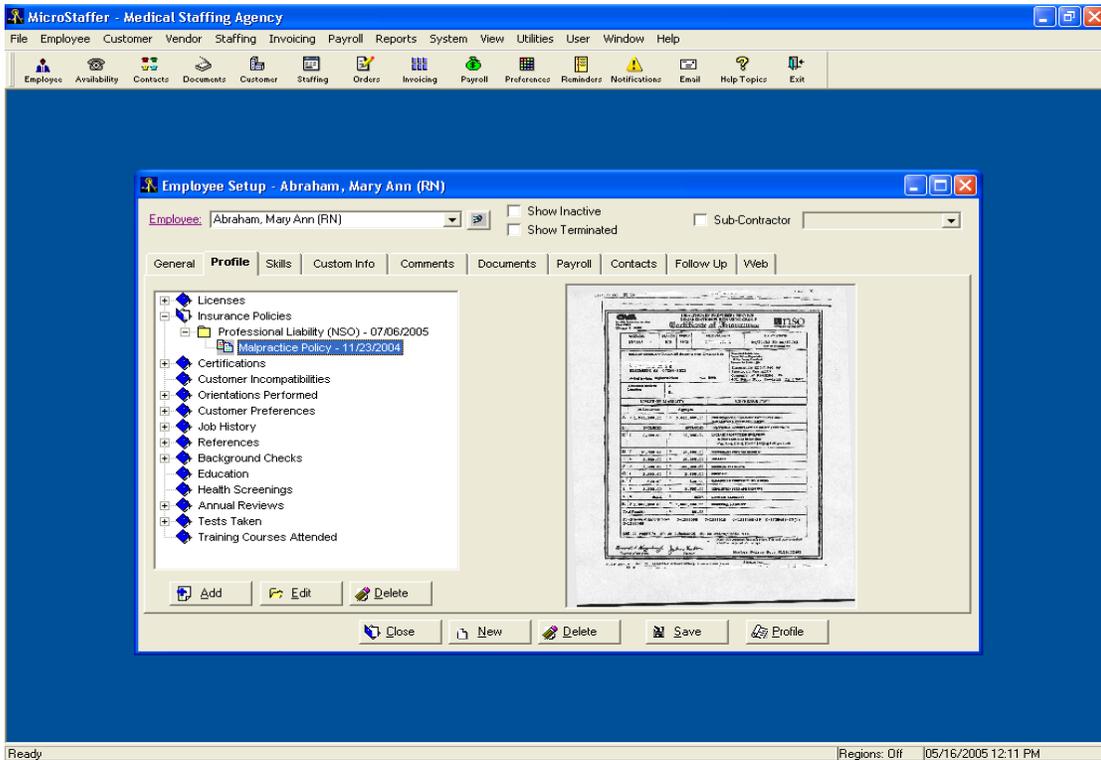
The following items can be added and edited using the employee profile tab:

1. Licenses (tickler enabled)
2. Insurance Policies (tickler enabled)
3. Certifications (tickler enabled)
4. Customer Incompatibilities
5. Orientations Performed
6. Customer Preferences
7. Job History
8. References
9. Background Checks (tickler enabled)
10. Education
11. Health Screenings (tickler enabled)
12. Annual Reviews (tickler enabled)
13. Tests Taken (tickler enabled)
14. Training Courses Attended
15. Skills Checklist (tickler enabled)

Click the Profile button to quickly generate an employee profile for the active employee. Format the displayed Profile using the Format tab. Profile may be printed (including or excluding supporting documentation) or emailed. Attached profile documents may require the use of a licensed version of the Scanning & Imaging module.

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d) Employee Skills

The Skills tab on the Employee Setup Window allows you to assign or remove a skill from an employee's profile. You may either select a Company wide skill from the dropdown or type in a new skill and add it to the selected list.

New skills added on this tab will become part of the Company global skills list.

Skills are used to describe the abilities of Employees. They are used in identifying and grouping employees for staffing purposes. The skills list will be available on the Employee Setup window and the Employee List query window. Skills and rankings are an option on the Employee Profile report.

Navigation

1. **Add:** Add a skill to the Selected Skills list by choosing a skill from the dropdown or typing in a new skill and clicking the Add button.
2. **Delete:** Deletes the skill from the selected list.

Data Entry Fields

1. **Skill Code:** An abbreviation for the skill.



MicroStaffer Tip

Try to make the skill code descriptive. It acts more as a short name than just a code and will appear on report and query windows.

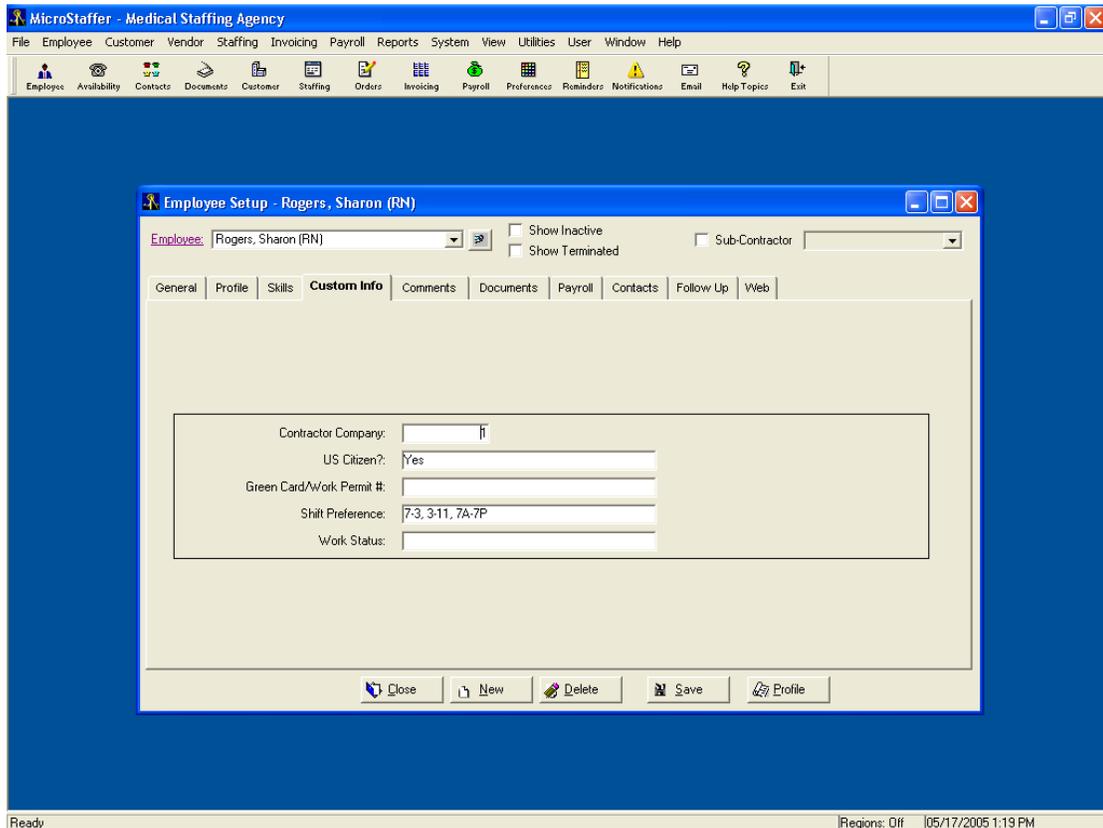
2. **Skill Description:** The description of the skill.
3. **Skill Ranking & As of Date:** Rankings are maintained on the List Manager Window.

Skill Code	Description	Rank	As of...
CCU	Critical Care		05/06/2005
L&D	Labor & Delivery		05/02/2005

e) Employee Custom Info

The Employee Custom info Tab on the Employee Setup window allows for viewing and modifying Custom Data as was defined in the Company Setup window's Custom Info Tab.

Date fields can be Tickler enabled. This means that when a date for a custom info field falls within the parameters of the tickler, a message will appear when the employee is being scheduled on any of the Staffing Windows.

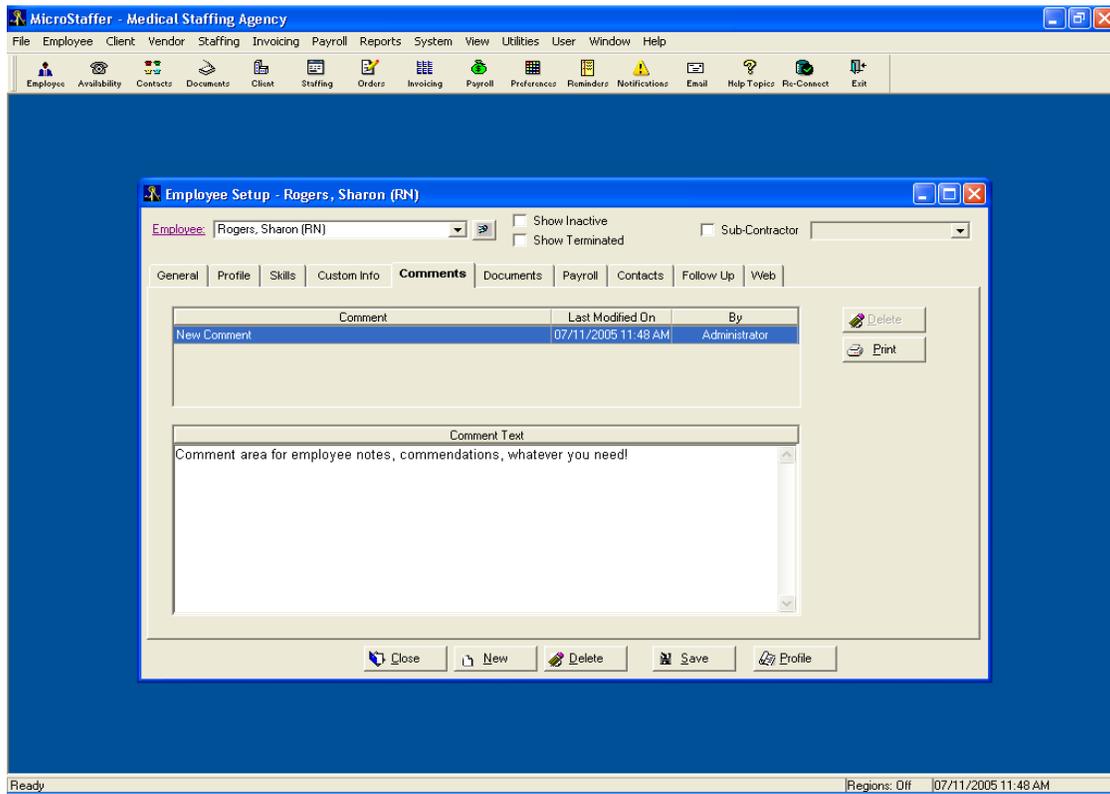


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f) Comments

The Comments tab allows for entry of comments regarding the employee. Simply type in the Comment and save.



g) Employee Documents

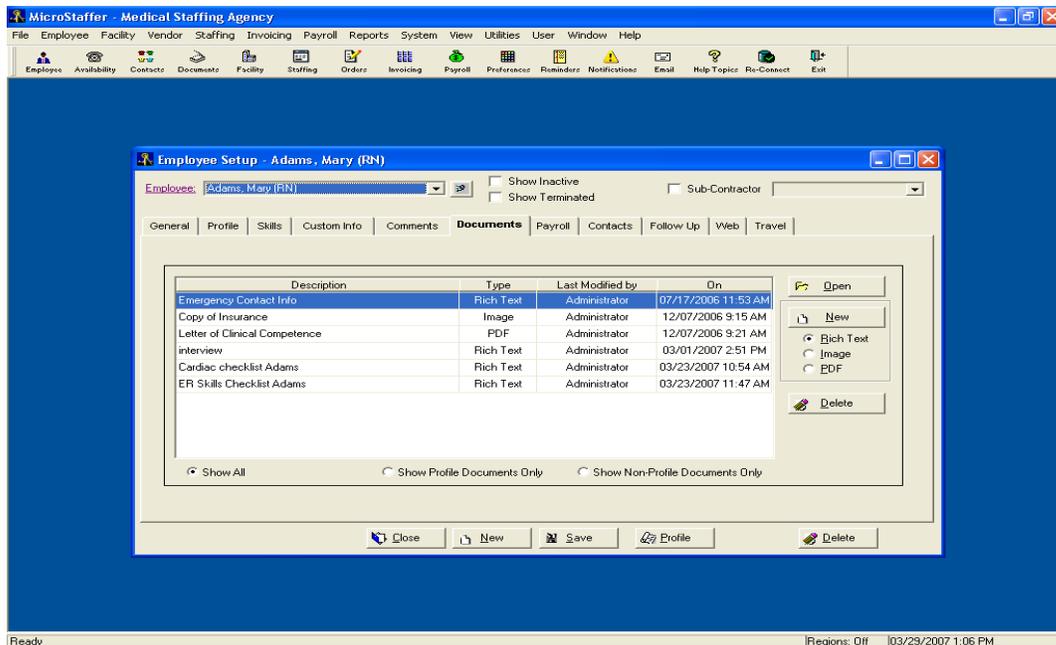
The Employee Documents tab on the Employee Setup window allows you to manage images and Rich Text format documents created with the MicroStaffer Document Manager module.

Please refer to the Document Manager section of this manual for specific instruction on the use of the options.

Documents may be attached to corresponding Employee Profile items by opening the profile item, moving to the document tab, right click the document and drag and drop to the profile tab. Alternatively, a document may be attached directly to the profile item by selecting the profile item on the profile tab and right clicking to access the options. Refer to the generated Employee Profile for further options regarding emailing or printing documents attached to an Employee Profile.

Display options are selected by clicking the appropriate radio button. The choices are:

- Show All
- Show Profile Documents Only
- Show Non-Profile Documents Only



h) Employee Payroll Info

The Employee payroll tab on the Employee Setup window allows you to view and modify withholding and year-to-date gross earnings information. This information can be used for exporting payroll data to any external payroll system.

Data Entry Fields

- 1. Pay Period:** Select the desired pay period for this Employee. This field is critical when used to calculate withholding. It will also allow you to filter which employees to pay on the New Payroll window. Among other filter criteria, the New Payroll window allows payroll to be run for employees that fall under all pay periods or just one specific period. See the New Payroll for more detailed information on this setting.
- 2. Corporation:** Check this box if you wish to pay this employee as a corporation. If this box is checked, the Tax ID and Corporate Name fields become enabled. No taxes will be withheld.
- 3. Tax ID & Corporate Name:** Enter the Tax ID and Corporate name if you have checked the Corporation checkbox.(Required)
- 4. Federal Tax Fields:**
 - A. Marital Status:** Select the desired federal tax marital status.
 - B. Allowances:** Enter the number of allowances up to 10.
 - C. Additional Tax:** Enter any additional federal tax to withhold from each paycheck.
 - D. Exempt:** Check this box if the employee is exempt from federal taxes as indicated on form W4.
- 5. Direct Deposit Checkbox:** Select whether this employee will be paid via Direct Deposit.
- 6. Charge and Same-Day Booking bonuses:** See Company Setup for more information on these fields.

MicroStaffer - Medical Staffing Agency

File Employee Customer Vendor Staffing Invoicing Payroll Reports System View Utilities User Window Help

Employees Availability Contacts Documents Customer Staffing Orders Invoicing Payroll Preferences Reminders Notifications Email Help Topics Exit

Employee Setup - Rogers, Sharon (RN)

Employee: Rogers, Sharon (RN) Show Inactive Show Terminated Sub-Contractor

General Profile Skills Custom Info Comments Documents **Payroll** Contacts Follow Up Web

Federal Tax Marital Status: Single Pay Period: Weekly Direct Deposit: OT Eligible:

Allowances: 0 Hourly Charge Bonus: Pay: .00 Bit: .00 Hourly Same-Day Booking Bonus: Pay: .00 Bit: .00

Additional Fed. Tax: .00 Exempt:

Taxes income may be subject to:

Description
Federal Income Tax
FICA
Medicare
PA Income Tax
FICA (ER)
Medicare (ER)

Add Delete

Calculating Advances: Use Payroll Window Method Use this Percentage: .00% Use this Amount: .00

Corporation? Tax ID: Corp. Name:

YTD Gross Pay: 16,553.13 Burden Benefits

Close New Delete Save Profile

Ready Regions: Dif 05/17/2005 1:32 PM

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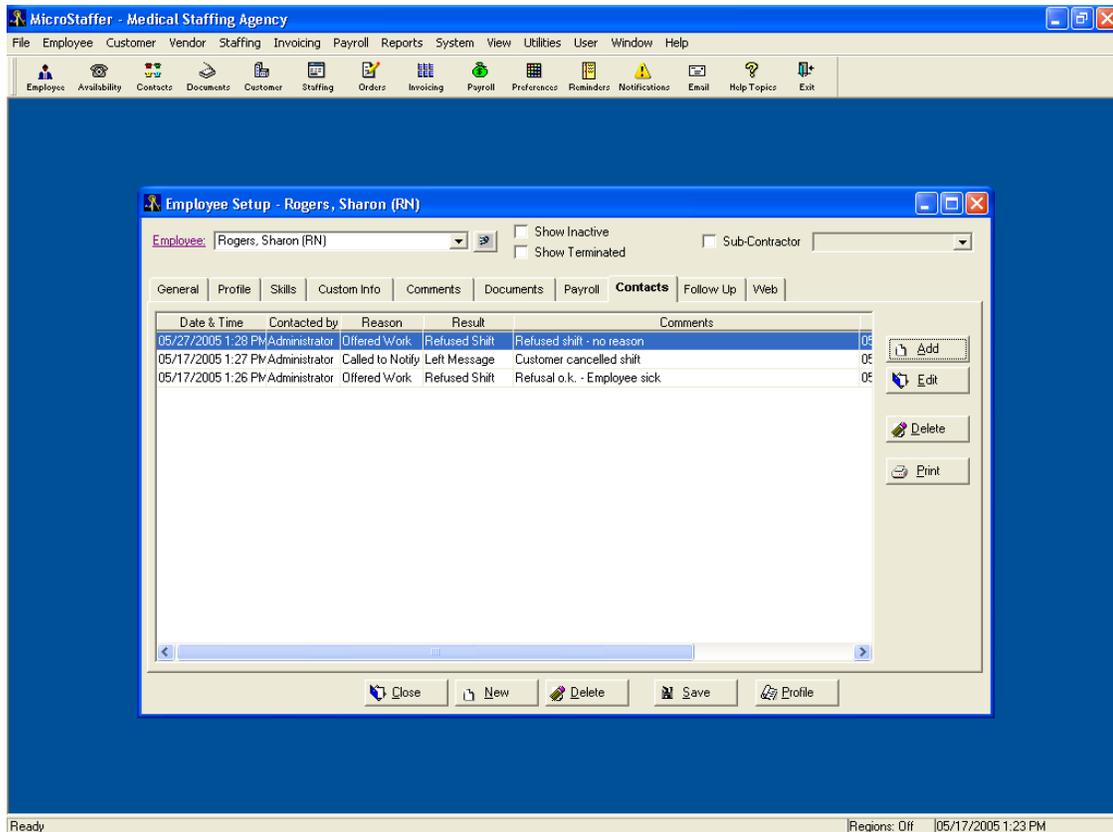
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i) Contacts

The Employee Contacts Tab allows you to view and enter contacts between your company and your employees. Contacts may include offering work, request for paperwork, etc. There is a contact report on the report tab.

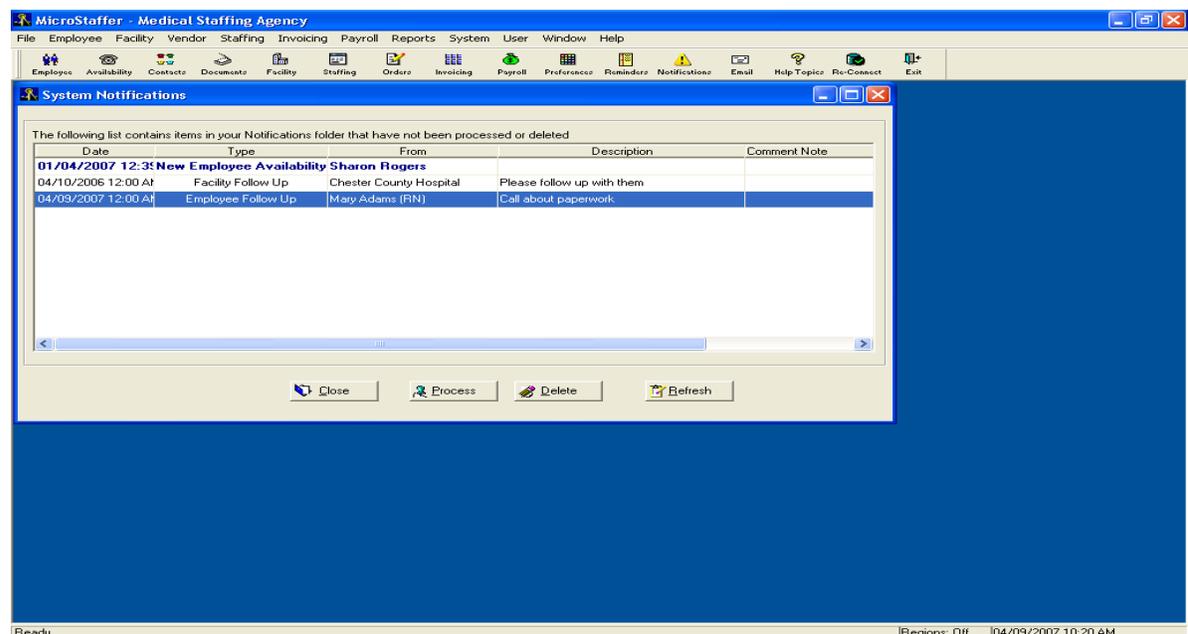
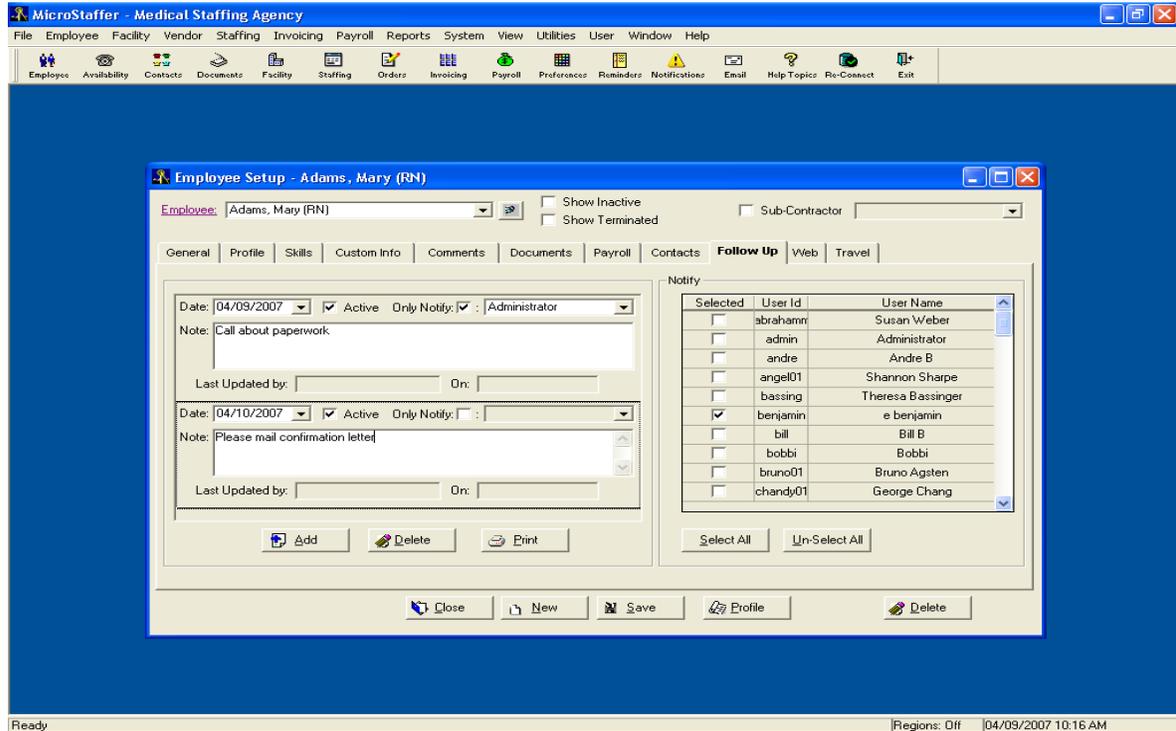
Note that you must define Contact Reason and Result codes in the List Manager window.

Contacts may also be entered quickly by clicking the Contacts button.



j) Follow Up

The Follow Up Tab on the Employee Setup window allows for entry of follow up reminders to system users for items specific to the employee. The entered follow ups will appear in the System User Notification window when the item becomes active. Select "Only Notify" and pick a user from the dropdown list to quickly select a single user for notification.



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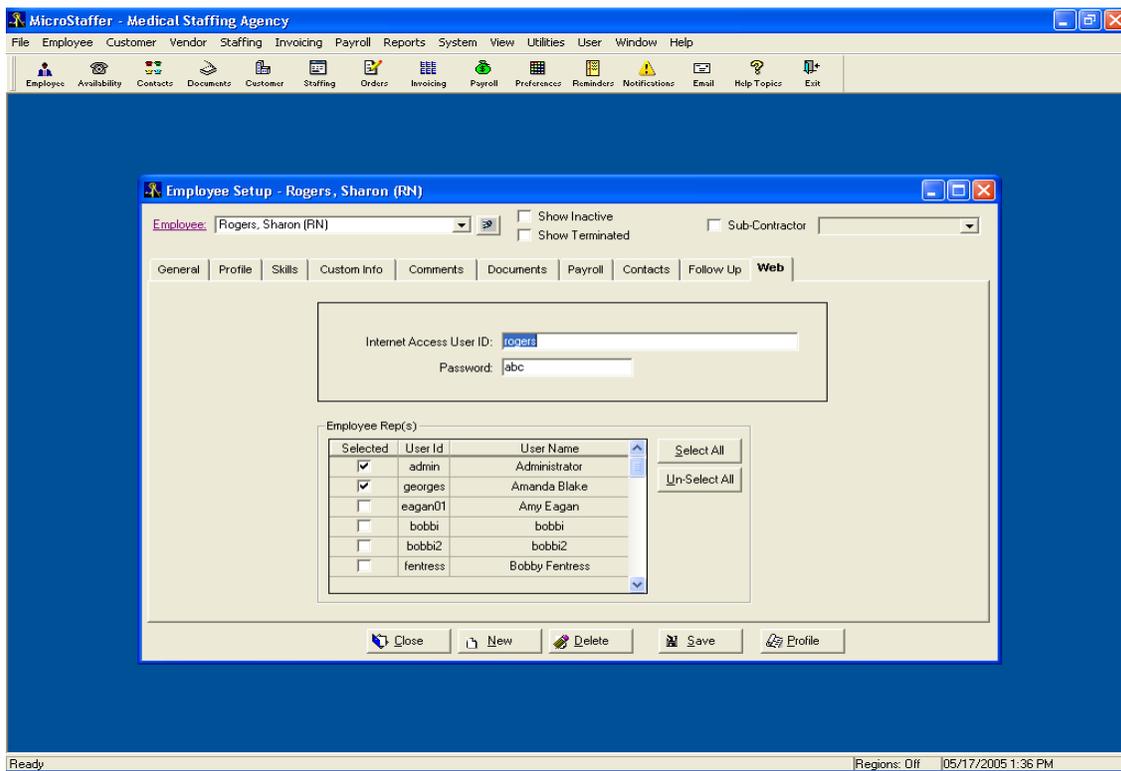
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k) Web Access

The Web Tab on the Employee Setup window allows you to enter a User ID and Password for the Selected Employee to have access to the MicroStaffer Web Module.

With this User ID the Employee can log into your MicroStaffer Web module using any common Web Browser such as Internet Explorer or Netscape Communicator.

Please contact MicroStaffer sales for more information on purchasing the optional Web Module.



S. Employee Specific Rates

Employee specific Pay and Bill rates can be set up on the Employee Rates window. This window is accessible from both the Invoice and Payroll menu items on the main MicroStaffer menu.

 **MicroStaffer Warning** Please note that Employee Specific Pay and Bill Rates take precedence over Customer Specific Pay and Bill rates. If the MicroStaffer Payroll and Invoicing module find an applicable Employee Specific rate, this rate will be used over any other Customer Based rate.

Employee Specific rates give you the ability to create a Pay or Bill rate or rates for a single employee. In other words, custom rates for employees.

To select which type of rate you wish to add, edit or delete, select the applicable 'Pay Rates' or 'Bill Rates' Tab on the Employee Rates window.

Employee rates offer you great flexibility in that there are several categories of rates you may create. **The following is the hierarchy that MicroStaffer uses when deciding which Pay and Bill rate to apply for Employee Specific Rates:**

1. Global Employee Rate - Rate that has no attributes at all.
2. Work Area Rate - Employee rate for One Specific Work Area.
3. Customer Rate - A rate for one Customer only.
4. Customer & Work Area - A rate for one Customer's specific Work Area.
5. Customer & Shift Category - Rate for specific Customer and a specific Shift.
6. Customer, Shift & Work Area - A rate designed for one specific Shift, Customer and Work Area.

For example, say you created a pay rate for Employee Janet Smith. Rate is for when she works in any ER. Now, whenever Nurse Smith works any ER at Any facility, she receives this rate.

Later, you create a rate for her that is higher. This rate is a special rate for St. Luke's ER only.

Now, whenever Nurse Smith works in the ER, she receives the ER rate, unless, she works at St. Luke's.

The entry of Breaks and Split Rates is described in the Client Rates setup section in this user manual.

Note: You can copy and paste one or more rates from one employee to another by Right-Clicking on the White Rates List window.

MicroStaffer User Manual

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MicroStaffer - Sample Medical Staffing Company

File Employee Facility Staffing Invoicing Payroll Reports System User Window Help

Employee Availability Contacts Documents Facility Staffing Orders Invoicing Payroll Preferences Reminders Notifications Email Help Topics Exit

Employee Rates Setup

Employee: Acosta, Jean (RN)

Pay Rates Bill Rates

Rate ID	Facility	Shift	Area	Last Modified by	On
535	Alaska Regional Hospital	7A	ICU	10/1/03 15:20:44	Administrator
536	Alaska Regional Hospital	7A	MS	10/1/03 15:20:44	Administrator
537	Alaska Regional Hospital	7A	PHYSC	10/1/03 15:20:44	Administrator

Add Delete

Rate Starts at...	Ends at...	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Unpaid Break?
1. 7:00 AM	12:00 PM	35.00	35.00	35.00	35.00	35.00	35.00	35.00	<input type="checkbox"/>
2. 12:00 PM	1:00 PM	35.00	35.00	35.00	35.00	35.00	35.00	35.00	<input checked="" type="checkbox"/>
3. 1:00 PM	7:00 PM	40.00	40.00	40.00	40.00	40.00	42.00	42.00	<input type="checkbox"/>
4. 7:00 PM	1:00 AM	40.00	40.00	40.00	40.00	40.00	42.00	42.00	<input type="checkbox"/>
5. 1:00 AM	2:00 AM	40.00	40.00	40.00	40.00	40.00	42.00	42.00	<input checked="" type="checkbox"/>
6. 2:00 AM	End of Shift	40.00	40.00	40.00	40.00	40.00	42.00	42.00	<input type="checkbox"/>

Add Rate Period Delete Rate Period

Export Item Code

Print

(Right Click to Copy Rate Rows or Rate Grid)

Save Close

Ready Regions: Off 10/10/03 3:21 PM

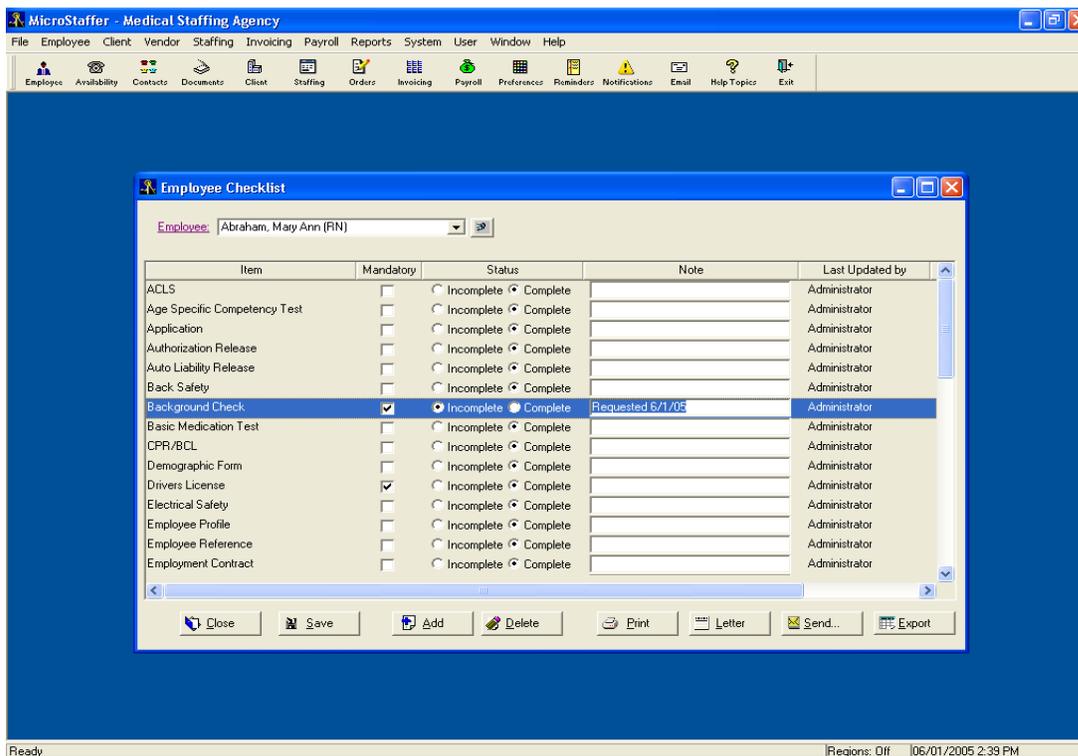
T. Employee Checklist

The Employee Checklist facility is provided to maintain a checklist of items for each employee either prior to hiring or continued maintenance of new items as they become needed.

Employee Checklist codes are created in List Manager found under the System tab. MicroStaffer can also disallow scheduling an employee who has missing mandatory checklist items. This would have to be turned on within the System Options facility under Staffing and Scheduling. Please refer to System Options for more assistance.

1. Maintenance of Employee Checklist Items

Select Checklist from the Employee menu item and choose an employee to work on from the dropdown. The Employee Checklist Codes which were added to all employees at the time of setup will be displayed.



If you wish to add more Employee Checklist items that may not have been applicable to all employees, click Add.

To quickly mark all items complete, incomplete or to delete all, simply right click an item to access the shortcut. To mark one item at a time, click the dot for complete or incomplete. Notes for specific items may also be entered. Remember to save any changes made to an employee checklist.

You may send reminders to employees regarding incomplete checklist items. Please refer to the Mail Merge (Letter), Email (Send) and Export sections of this user manual for the use of each function.

NOTE – If the System Option to disallow scheduling an employee with missing mandatory checklist items is turned on, MicroStaffer will NOT allow booking of any employee with an incomplete checklist.

U. Employee Leads

The ability to maintain and track employee lead information is key in recruiting stellar employees to your agency. No more lead information falling through the cracks, it is all at your fingertips!

Processing of On-Line Applications (Optional – Must have MicroStaffer Web Access Module)

Employee lead information may be transferred from the MicroStaffer Web Access Module if your MicroStaffer System includes this powerful option. The information gathered from the On-Line Application Form within the MicroStaffer Web Access module will flow into the System Notifications window. Only MicroStaffer users who have the 'review On-Line Applicants' checkbox on the User Setup Window check will have the ability to view new applicant data within this window. From the System Notifications window users may forward on-line applicant data to the Employee Leads window or delete unsuitable applicants.

The screenshot shows the 'Employee Lead Setup - Thomas, Sandy (RN)' window. The 'General' tab is active, displaying the following information:

- Employee Lead: Thomas, Sandy (RN)
- First Name: Jane, M.I. []
- Last Name: Doe
- Address: 43 Jenkon Lane
- City: Downingtown
- St.: PA, Zip: 15445
- SS No.: []
- Type: RN, Sex: []
- Date of Birth: 04/05/1967
- Date Applied: 03/01/2004, Available as of: 05/01/2004
- Region(s): []
- Phone Number: (610) 555-1212, Description: Home Number
- E-Mail: sales@microstaffer.com
- Pager E-Mail: []
- Cell E-Mail: []
- Referral Type: []
- Referred by: []

Buttons at the bottom include Close, New, Delete, Save, Transfer, and Profile.

To enter new Employee Lead information, select Leads from the Employee menu. The only required information at this time is first and last name. The following items are optional (see Employee Setup for detailed descriptions of each item):

- Profile Items
- Skills
- Comments
- Documents
- Contacts
- Follow Up
- Custom Info

Transfer Employee Lead to Active Status

To transfer an Employee Lead to an active employee, select the Employee Lead from the dropdown and click Transfer. This will open up the Employee Setup window with the transferred information. You must click save in the employee setup window for the transfer to be complete.

Employee Leads may be inactivated by checking the Inactive box .

V. Vendor Setup

MicroStaffer provides the ability to create vendors that will provide subcontractors if necessary. The client still orders the staffing through your agency but you will subcontract the work out if no suitable employees exist within your available staffing pool. Employees for the vendor are created within Employee Setup and flagged as a subcontractor for their respective agency. Throughout MicroStaffer, this employee will be highlighted so the user is aware of their subcontractor status. As an added bonus, within the availability filters the user has the opportunity to display only employees, only subcontractors or all available.

1. Creating a New Vendor

The creation of a vendor is very similar to the setup of clients.

General Vendor Information

Name – Required.

Address

Active/Inactive flag

Tax ID

Region (if applicable)

Worker's Compensation

General Liability

External Id

Contacts & Directions

Comments – Entry of any comments pertinent to the vendor.

Documents – Vendor's supporting documentation (may include copies of insurance policy for example).

Contacts – Entry of contacts with the vendor with reason and outcome codes.

Editing Vendor Information

To edit vendor information, simply select the vendor that you wish to edit from the dropdown. Make any necessary changes and save.

MicroStaffer - Medical Staffing Agency

File Employee Client Vendor Staffing Invoicing Payroll Reports System Utilities User Window Help

Employee Availability Contacts Documents Client Staffing Orders Invoicing Payroll Preferences Reminders Notifications Email Help Topics Exit

Vendor Setup - New

Vendor: [Dropdown] Display Inactive

General | Contacts & Directions | Comments | Documents | Contacts

Name: [Text] Inactive ID: [Text]

Address: [Text]

City, St., Zip: [Text] [Dropdown] [Text]

Tax ID: [Text] Region(s): [Text]

Worker's Compensation Carrier: [Text]

General Liability Carrier: [Text] Amount: [Text].00

External ID: [Text] Last Modified by: [Text] On: [Text]

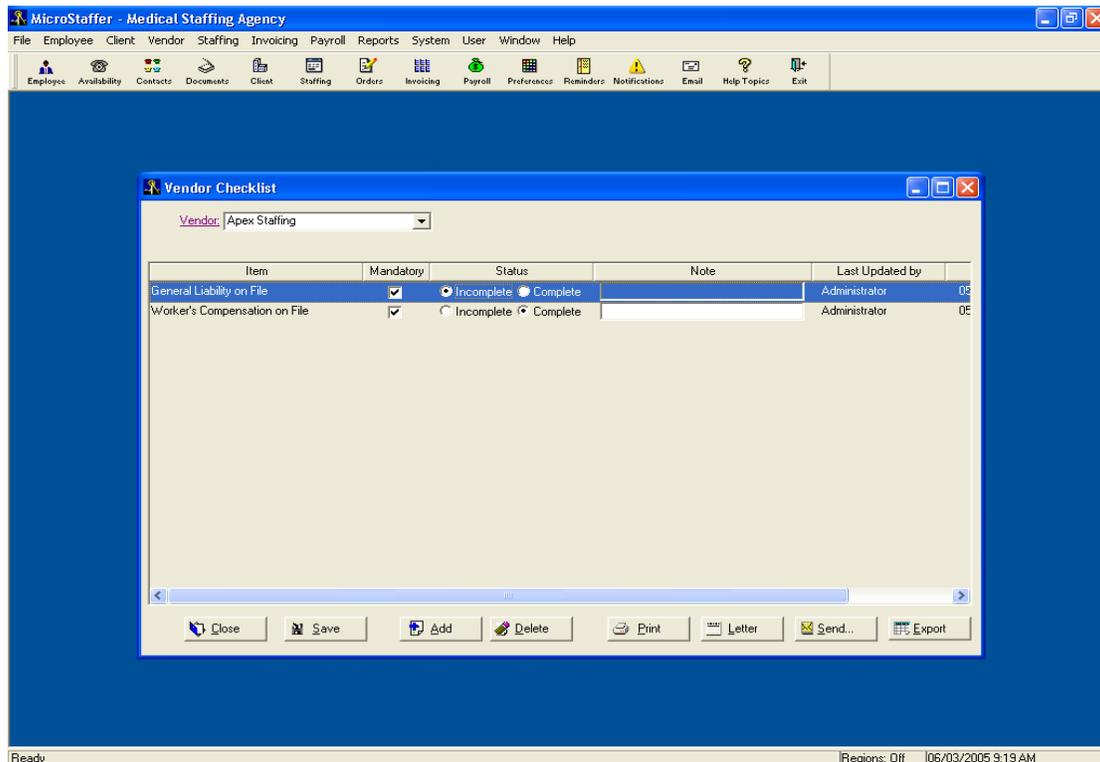
Ready Regions: 001 06/03/2005 9:15 AM

W. Vendor Checklist

The purpose of the Vendor Checklist is to provide the MicroStaffer user with a means to track and maintain pertinent and/or mandatory information for each vendor. Rather than digging through piles of paperwork, the necessary information is maintained and accessible right at your fingertips.

The Vendor Checklist Codes are created in List Manager found under the System tab. Codes which are added to all at the time of setup will be displayed when you select Checklist under the Vendor tab.

This screen includes Vendor Checklist Codes added to all vendors.



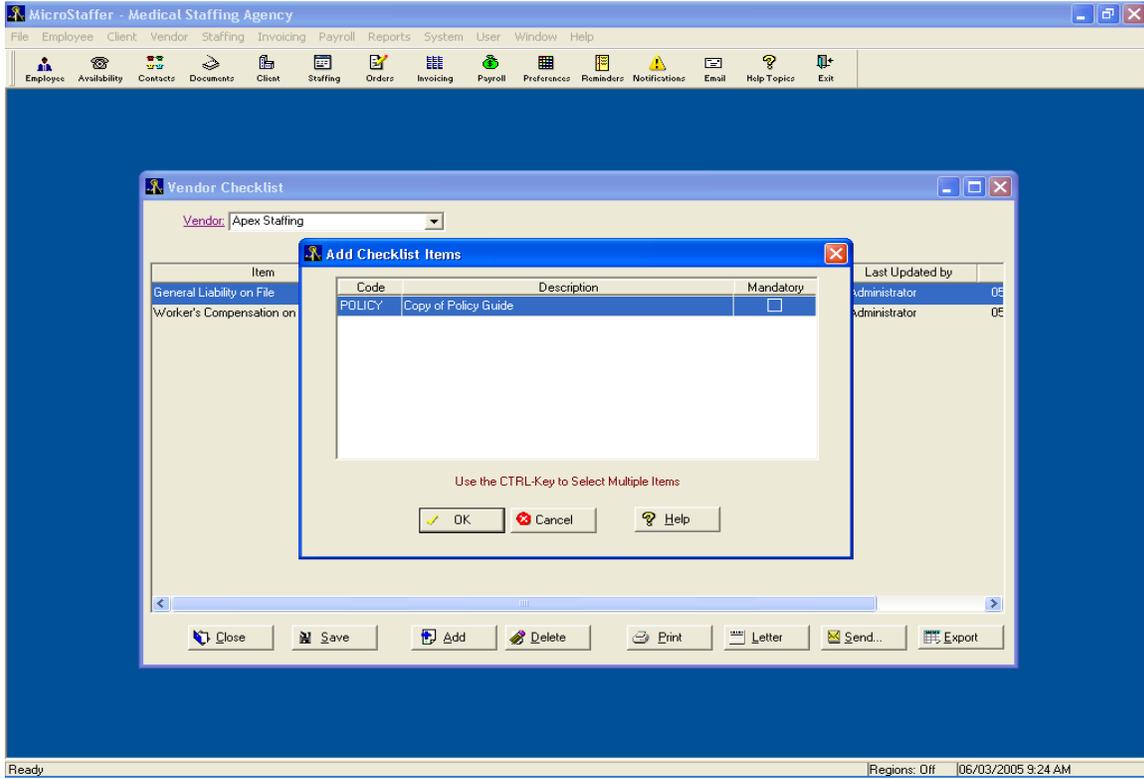
1. Maintenance of Vendor Checklist Items

If you wish to quickly mark all items complete, incomplete or to delete all, simply right click an item to access the shortcut.

Please refer to the Mail Merge (Letter), Email (Send) and Export sections of this user manual for use of each function. To add more Vendor Checklist items that may not have been applicable to all vendors, click Add.

MicroStaffer User Manual

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IV. Using MicroStaffer - Staffing & Availability Tracking

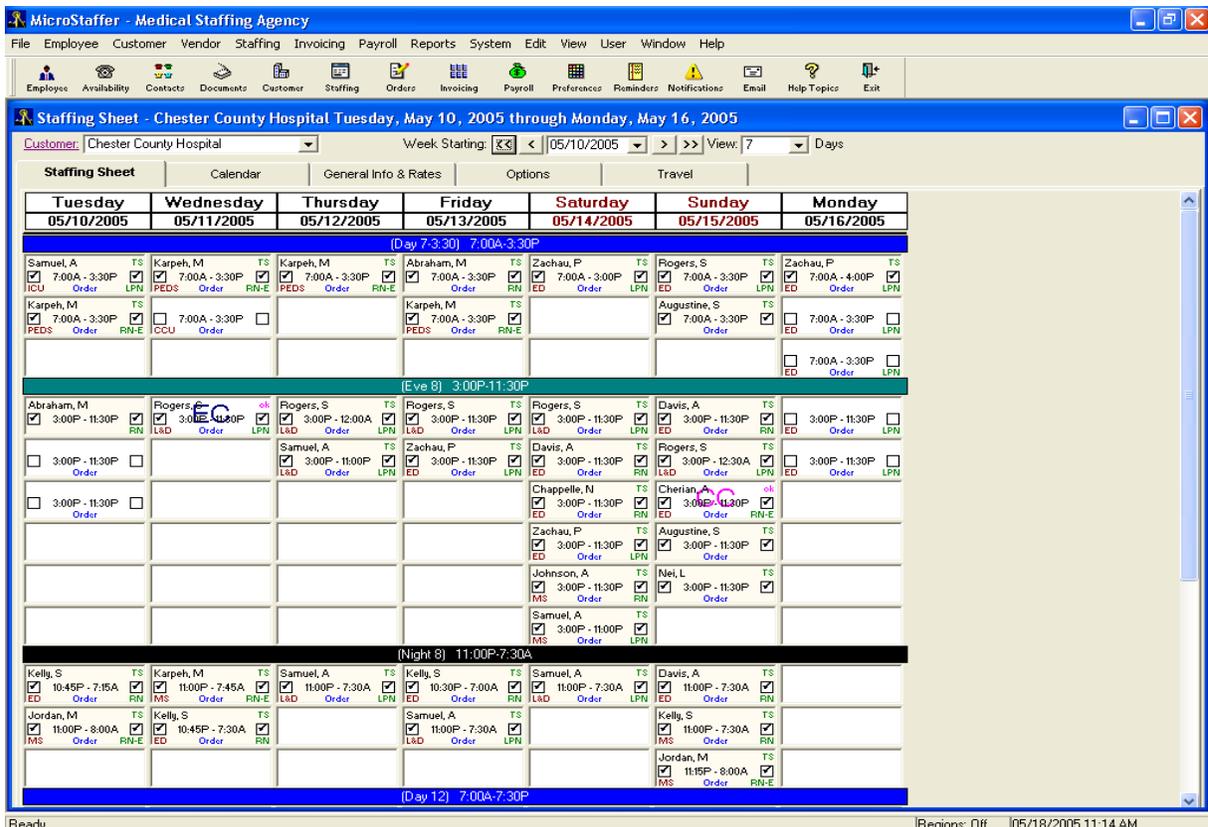
A. Staffing & Scheduling - Staffing Sheet

1. Staffing Sheet & Calendar Overview

The **Staffing Sheet & Calendar** represent the heart of the **MicroStaffer** system. They are where Employee/ Client shifts are scheduled. Well over 90% of all activity in the system will occur on the Staffing Sheet or Calendar. Once employees, clients and rates have been set up, the staffing sheet & calendar will allow you to easily create shifts that automatically pull in all this information.

To access this window, select the Staffing->Staffing Sheet from the Main menu or click on the Staffing Sheet toolbar item. The following Topics cover this Window:

1. Navigating on the Staffing Sheet and Calendar
2. Adding a New Shift
3. Editing Shift Information
4. Making a Shift Payable and Billable
5. Copying a Shift
6. Deleting a Shift



2. Staffing Sheet & Calendar Navigation

The Staffing Sheet displays shifts by Client for any 7 to 35 day period in a spreadsheet like format. To select a client for which to display shifts, general-and-rate information, make a selection from the dropdown located in the top left corner of this window.

The Staffing Calendar displays similar information not on a Shift Basis but rather on a Calendar like spreadsheet format. Since all clients must have at least one shift type defined, at least one row will always appear on the staffing sheet window once a client has been selected.

To change the starting day of the staffing sheet, select a date from the Standard Date Dropdown located in the top right hand corner of the staffing sheet window.

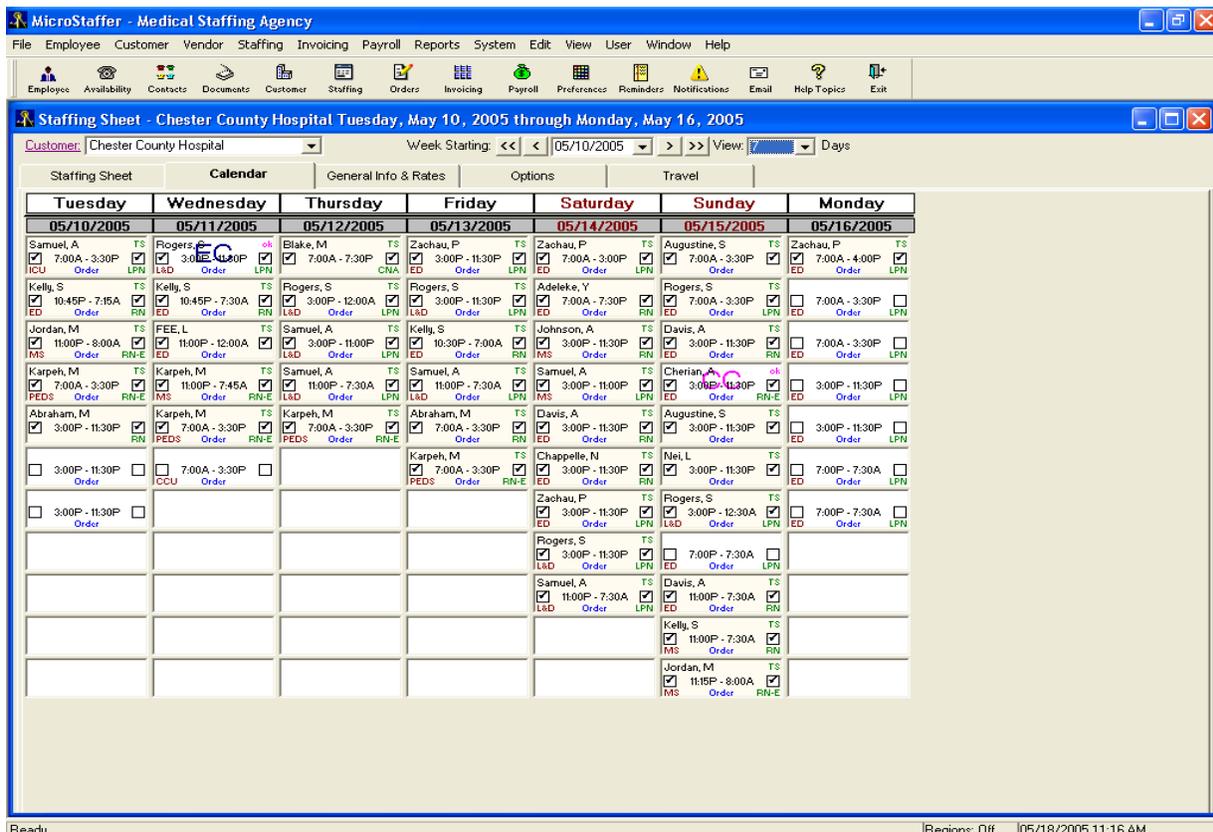
To change the number of days you wish to view, simply select a different number from the 'View Days' dropdown.

MicroStaffer Tip

If you type in the date into the 'Week Starting' field using the keyboard, you must hit the enter key or tab of the date field for the data to be retrieved

The Staffing Sheet and Calendar may be printed or emailed in a variety of formats. Simply right click on the staffing sheet and select "Schedule" from the drop down for options.

The Staffing Sheet and Calendar may also be copied by selecting Copy from the "Schedule" selection. Select the customer to use as a basis, the date range and the target start date for the schedule to be copied.



The screenshot shows the MicroStaffer Medical Staffing Agency software interface. The main window is titled "Staffing Sheet - Chester County Hospital Tuesday, May 10, 2005 through Monday, May 16, 2005". The interface includes a menu bar (File, Employee, Customer, Vendor, Staffing, Invoicing, Payroll, Reports, System, Edit, View, User, Window, Help) and a toolbar with icons for Employee, Availability, Contacts, Documents, Customer, Staffing, Orders, Invoicing, Payroll, Preferences, Reminders, Notifications, Email, Help Topics, and Exit. The main area displays a staffing sheet for Chester County Hospital, showing shifts for various employees across the week from Tuesday, May 10, 2005, to Monday, May 16, 2005. The sheet is organized into columns for each day and rows for individual employees. Each cell in the grid contains shift information, including employee name, shift type (e.g., ICU, RN, LPN), shift times, and checkboxes for "Order", "LSD", "RN-E", "MS", "ED", and "RN".

Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Monday
05/10/2005	05/11/2005	05/12/2005	05/13/2005	05/14/2005	05/15/2005	05/16/2005
Samuel, A 7:00A - 3:30P ICU Order LSD RN-E	Rogers, S 3:00P - 11:30P Order LSD RN-E	Blake, M 7:00A - 7:30P CNA Order LSD RN-E	Zachau, P 3:00P - 11:30P Order LSD RN-E	Zachau, P 7:00A - 3:00P Order LSD RN-E	Augustine, S 7:00A - 3:30P Order LSD RN-E	Zachau, P 7:00A - 4:00P Order LSD RN-E
Kelly, S 10:45P - 7:15A Order RN-E	Kelly, S 10:45P - 7:30A Order RN-E	Rogers, S 3:00P - 12:00A Order LSD RN-E	Rogers, S 3:00P - 11:30P Order LSD RN-E	Adeleke, Y 7:00A - 7:30P Order LSD RN-E	Rogers, S 7:00A - 3:30P Order LSD RN-E	Rogers, S 7:00A - 3:30P Order LSD RN-E
Jordan, M 11:00P - 8:00A MS Order RN-E	FEE, L 11:00P - 12:00A Order RN-E	Samuel, A 3:00P - 11:00P LSD Order RN-E	Kelly, S 10:30P - 7:00A Order LSD RN-E	Johnson, A 3:00P - 11:30P Order LSD RN-E	Davis, A 3:00P - 11:30P Order LSD RN-E	Rogers, S 7:00A - 3:30P Order LSD RN-E
Karpeh, M 7:00A - 3:30P PEDS Order RN-E	Karpeh, M 11:00P - 7:45A Order RN-E	Samuel, A 11:00P - 7:30A LSD Order RN-E	Samuel, A 11:00P - 7:30A LSD Order RN-E	Samuel, A 3:00P - 11:00P MS Order RN-E	Cherian, A 3:00P - 11:30P Order LSD RN-E	Rogers, S 3:00P - 11:30P Order LSD RN-E
Abraham, M 3:00P - 11:30P Order RN-E	Karpeh, M 7:00A - 3:30P Order RN-E	Karpeh, M 7:00A - 3:30P Order RN-E	Abraham, M 7:00A - 3:30P Order LSD RN-E	Davis, A 3:00P - 11:30P Order LSD RN-E	Augustine, S 3:00P - 11:30P Order LSD RN-E	Rogers, S 3:00P - 11:30P Order LSD RN-E
3:00P - 11:30P Order	7:00A - 3:30P OCU Order		Karpeh, M 7:00A - 3:30P PEDS Order RN-E	Chappelle, N 3:00P - 11:30P Order LSD RN-E	Nel, L 3:00P - 11:30P Order LSD RN-E	Rogers, S 7:00P - 7:30A Order LSD RN-E
3:00P - 11:30P Order				Zachau, P 3:00P - 11:30P Order LSD RN-E	Rogers, S 3:00P - 12:30A Order LSD RN-E	Rogers, S 7:00P - 7:30A Order LSD RN-E
				Rogers, S 3:00P - 11:30P LSD Order RN-E	Rogers, S 7:00P - 7:30A Order LSD RN-E	
				Samuel, A 11:00P - 7:30A LSD Order RN-E	Davis, A 11:00P - 7:30A Order LSD RN-E	
					Kelly, S 11:00P - 7:30A MS Order RN-E	
					Jordan, M 11:15P - 8:00A MS Order RN-E	

MicroStaffer User Manual

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3. General Info & Rates

The General Info & Rates tab provides the user with quick access to basic information about the customer and lists the rates for same. To change the display options for the rates, select the radio button for the type of display desired (hourly or shift totals). You may also print all of the rates displayed.

The screenshot shows the MicroStaffer application window with the following details:

- Window Title:** MicroStaffer - MedTemps, Inc.
- Menu Bar:** File, Employee, Customer, Vendor, Staffing, Invoicing, Payroll, Reports, System, Edit, View, User, Window, Help
- Toolbar:** Employee, Availability, Contacts, Documents, Customer, Staffing, Orders, Invoicing, Payroll, Preferences, Reminders, Notifications, Email, Help Topics, Re-Connect, Exit
- Sub-window Title:** Staffing Sheet - Bobbi't Test Facility Friday, Dec 2, 2005 through Thursday, Dec 8, 2005
- Customer:** Bobbi't Test Facility
- Week Starting:** 12/02/2005
- View:** 7 Days
- Navigation Tabs:** Staffing Sheet, Calendar, **General Info & Rates**, Options, Travel
- Form Fields:**
 - Name: Bobbi't Test Facility
 - Address: 88 High Street
 - City, St., Zip: Exton, PA 19341
 - Phone: 6105552222
 - Fax: (empty)
 - Contact: (empty)
- Employee Hourly Pay Rates Table:**

Shift	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Test							
[4847] Standard Rate							
6:45 AM - End of Shift.....	0.00	0.00	0.00	0.00	0.00	0.00	0.00
7A-3P							
[4849] Standard Rate							
7:00 AM - 11:00 AM.....	20.00	20.00	20.00	20.00	20.00	20.00	20.00
11:00 AM - 11:30 AM.....	20.00	20.00	20.00	20.00	20.00	20.00	20.00
11:30 AM - End of Shift.....	20.00	20.00	20.00	20.00	20.00	20.00	20.00

Display Options:
 Hourly Rates
 Shift Rates

Print

Ready | Regions: Off | 12/02/2005 11:06 AM

4. Using the Options Tab

The Options Tab on the Staffing Sheet window allows you set various filter and formats for retrieving and viewing data on both the Staffing Sheet and Calendar.

1. **Status:** Use this filter to display only shifts with the Selected Status. You can use the List feature by entering a comma-separated list of Status ID's (eg. 1,3,4).
2. **Confirmation Status:** This filter allows you to view shift that are confirmed or not with either Employee and/or Client
3. **Order Status:** Use this filter to view orders, open orders, filled orders etc.
4. **Area:** Allows you to retrieve only this shifts for the select area. Again, you can use the list feature by entering a comma-separated list of area codes (eg. MICU,SICU,CCU etc.)
5. **Desired Skill:** As with Areas, you can filter the Staffing Sheet and Calendar using Skill Codes.
6. **Employee Type:** Allows for viewing of shift for selected Employee Types. List feature allows for multiple Types.
7. **Specific Shift:** This Shift Filter will result in only those shifts being displayed that are select in this Dropdown list.
8. **Time Sheet:** You may choose to view only shift with Time Sheet received or not.
9. **Display Filled Shifts Only:** When this box is checked, only rows with at least one shift that has an employee assigned to it will be displayed.
10. **Suppress Blank Rows...:** When this box is checked, the staffing sheet will not display any rows that do not have at least one shift or order. Very useful for printing. Applies only to the Staffing Sheet.

The screenshot shows the MicroStaffer Medical Staffing Agency software interface. The main window is titled "Staffing Sheet - Chester County Hospital Tuesday, May 10, 2005 through Monday, May 16, 2005". The "Options" tab is selected, displaying a filter configuration window. The window contains the following fields and options:

Filter	Select	From	To
Status.....	*** All ***		
Confirmation Status.....	*** All ***	Customer: <input type="checkbox"/>	Employee: <input type="checkbox"/>
Order Status.....	*** ALL ***		
Area.....	*** All ***		
Desired Skill.....	*** All ***		
Employee Type.....	*** All ***		
Specific Shift.....			
Time Sheet.....	*** All ***		

Additional options at the bottom of the filter window:

- Display Filled Shifts Only
- Suppress Blank Rows on Staffing Sheet

A "Reset" button is located to the right of the filter window. The status bar at the bottom of the application shows "Ready" and "Regions: Diff | 05/18/2005 11:18 AM".

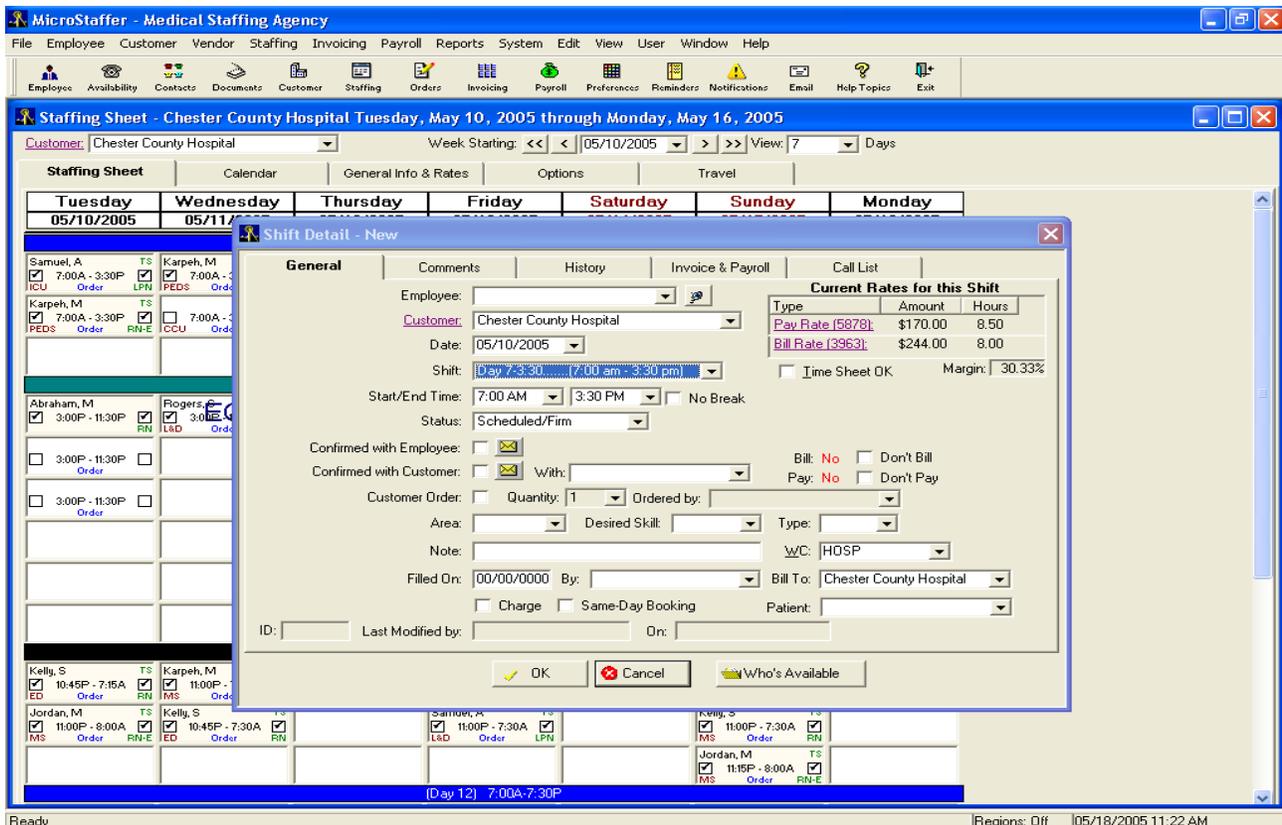
5. Adding a New Shift

A new shift can be added to the Staffing Sheet in one of two ways:

1. Since a minimum of one row always appears for every shift type, simply right-click on an empty or occupied cell for the desired day and shift type and the Sheet Popup Menu will appear. Just select **Add** from the menu and the Shift Detail window will open allowing you to enter the required information.
2. If there are any empty cells on the sheet, just double click on an empty cell for the desired day and shift type and the Shift Detail window will open allowing you to enter the required information. This is basically the same operation as Editing a Shift.

MicroStaffer Tip

If you want to insert a shift, that is placed prior to an existing one, right click on the cell where you want to place the preceding shift and select Insert from the Sheet Popup Menu.



The screenshot displays the MicroStaffer software interface. The main window is titled "Staffing Sheet - Chester County Hospital Tuesday, May 10, 2005 through Monday, May 16, 2005". It shows a grid of staffing assignments for various employees across different days and shift types. A "Shift Detail - New" dialog box is open, allowing the user to enter details for a new shift. The dialog box has several tabs: General, Comments, History, Invoice & Payroll, and Call List. The "General" tab is active, showing fields for Employee, Customer, Date, Shift, Start/End Time, Status, and various checkboxes for confirmation and billing. A "Current Rates for this Shift" table is also visible, showing Pay Rate and Bill Rate.

Type	Amount	Hours
Pay Rate [5878]	\$170.00	8.50
Bill Rate [3963]	\$244.00	8.00

Buttons at the bottom of the dialog box include OK, Cancel, and Who's Available.

6. Copying a Shift

Copies the Contents of an existing shift to create a new shift for another date, shift type or Client.

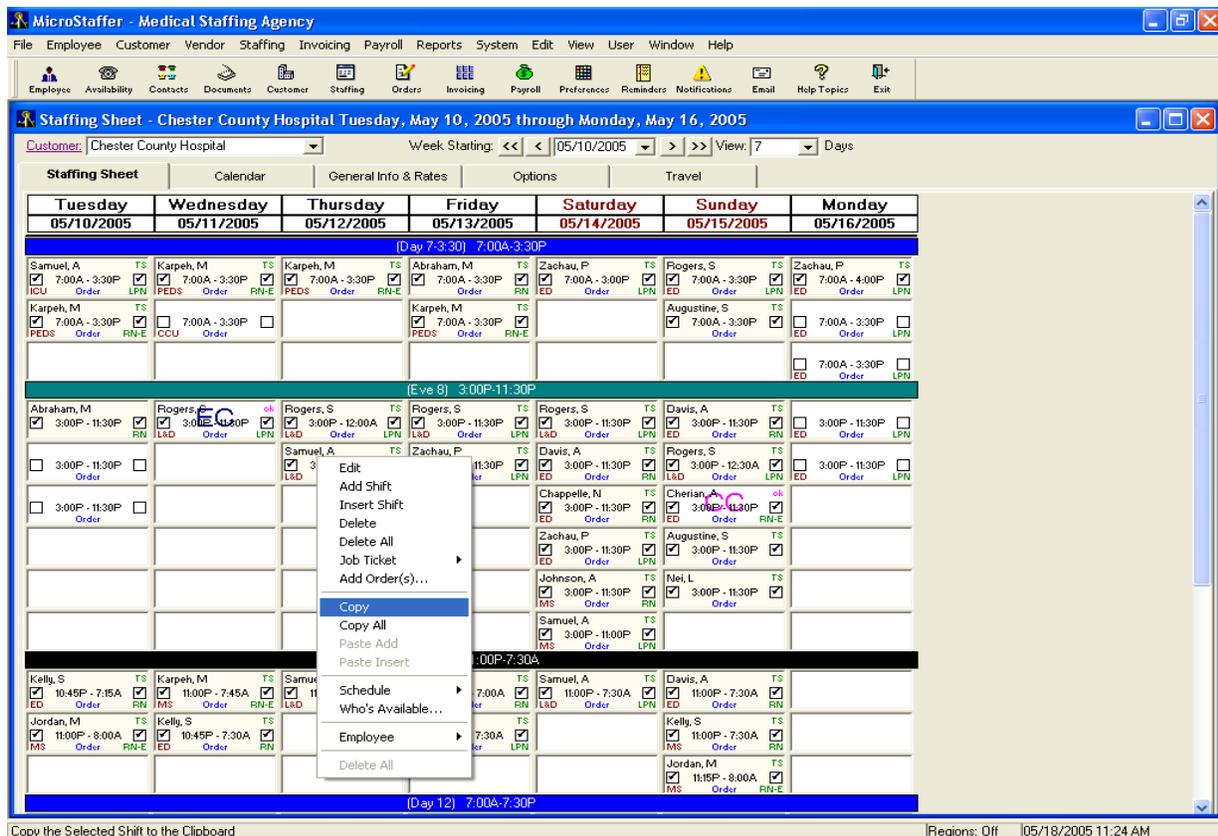
The data that is copied is as follows:

1. The Employee (if any) of the selected shift.
2. The Confirmation Statuses.
3. The Order indicator.

The remaining information defaults as if this was a New Shift.

Copying of shifts can be done in one of two ways:

1. Right click on the shift you wish to copy and select Copy from the popup menu. The shift is now in the copy buffer. Then Right click on the shift type where you wish to paste the copied shift.
 - A. **Paste Add:** Adds the shift after the last shift for this slot.
 - B. **Paste Insert:** Inserts the shift just before the shift located at the mouse pointer.
2. Click on the shift you wish to copy and, while holding down the right mouse button, drag-and-drop the shift to its desired location.

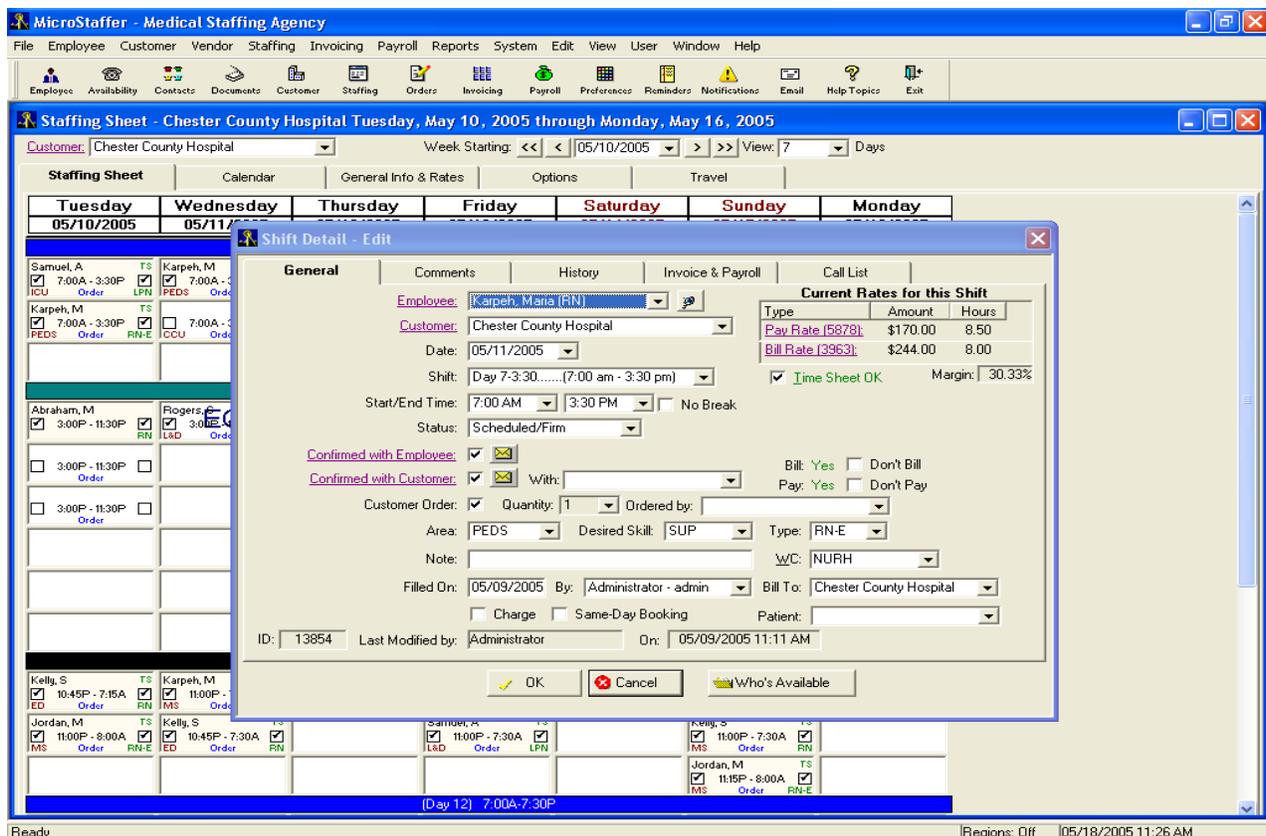


7. Editing Shift Info

You can view and edit the information for a shift on the Staffing Sheet in one of two ways:

1. Right click on the desired shift cell and select the Edit option from the Sheet Popup Menu.
2. Double click on the desired shift cell.

In both cases the Shift Detail Window will open allowing you to view and modify the data for the selected shift.



B. Staffing & Scheduling - Shift Detail Information

1. Overview

The Shift Detail Window allows you to view and modify the data for a particular shift. This window is only accessible from the Staffing Sheet or Calendar Window by Adding a New Shift or Editing Shift Info.

The Window contains five tabs to edit and display information about a shift:

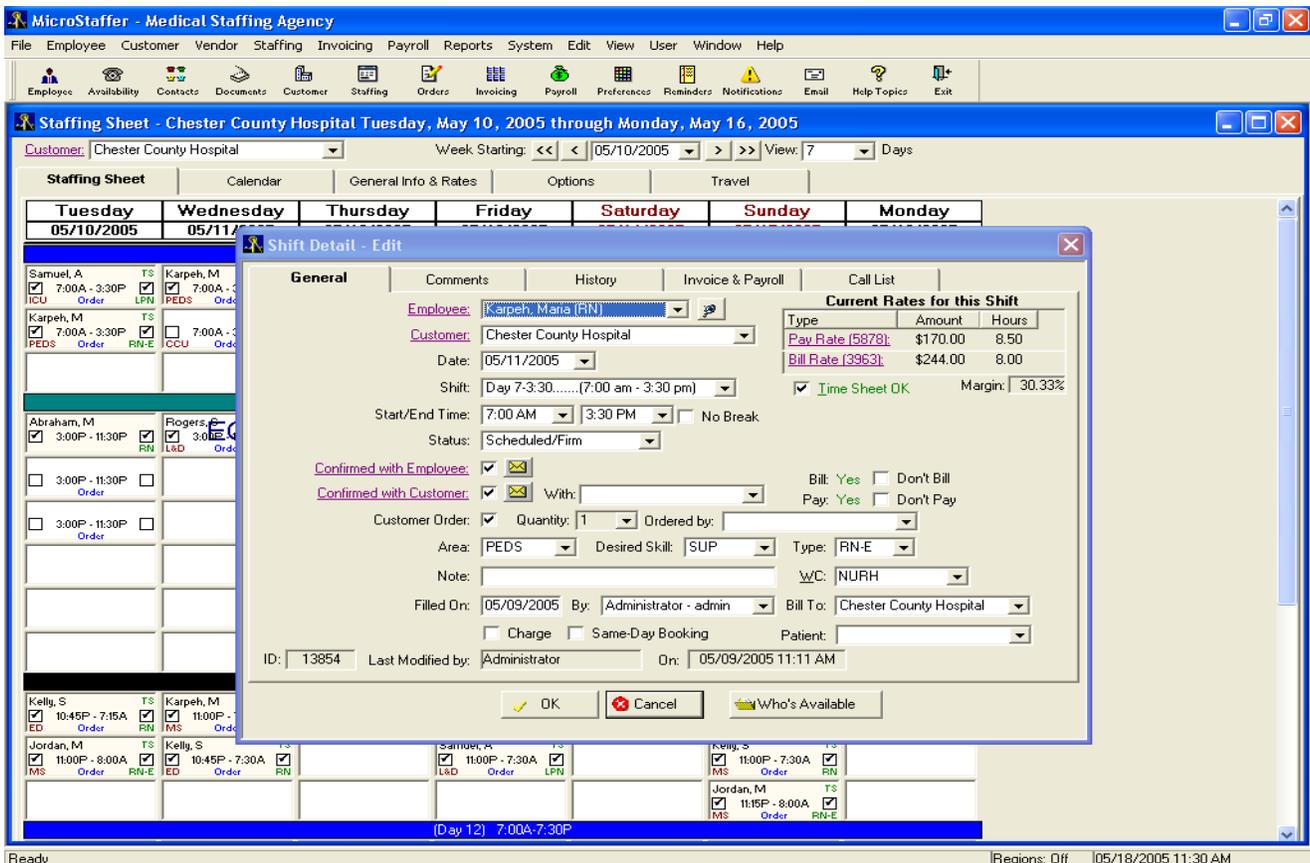
General Info

Comments

History

Invoice & Payroll Info

Call List



2. Shift General Info

The General Info tab on the Shift Detail Window allows for viewing and editing of key data for a shift on the Staffing Sheet.

1. **Employee:** Select the employee for this shift. This is NOT a required field since you could be entering an open order.
2. **Client:** Select the client from the dropdown where the shift will be worked.
3. **Date:** Enter the date of the shift.
4. **Shift:** Select the shift type. (Shift types are created on the Client Setup/Shifts tab).
5. **Start and End Time:** The start and ending times for this shift. These times will default to the starting and ending shift times as defined on the Client Setup window's Shift Setup Tab. However, you may modify these times as you wish to within 4 hours prior to the start time and 8 hours past the end time of the shift as defined on the Client Setup window's Shift Setup Tab. (Both Required).
6. **No Break:** Check this box when a break was not taken. It will adjust the pay and bill rates to reflect the new payment status. (Note; A rate must be setup to include an unpaid break period for this to have any effect).
7. **Confirmed with Employee and Client:** These two checkboxes indicate whether the shift has been confirmed with both the employee and client. They are designed to allow a level of confirmation. **Both must be checked for a shift to become billable and payable.** Clicking on the Email Icons will send a Confirmation Email to either Employee or Client. (Reconfirmation is also available by clicking on either Confirmed hyperlink to access a reconfirmation area).
8. **Status:** Select a status from the status code dropdown for the shift. (Status Codes are created within the System Setting & Utilities window).
9. **Employee/Client Notified:** When the shift status is Employee Canceled or Client Canceled, this checkbox becomes visible. It allows you to indicate that the canceled party has been notified of the cancellation.
10. **Order:** This checkbox indicates that the shift was an order.



MicroStaffer Warning

A shift is not billable or payable until it is **Confirmed with both Employee and Client and has a status that is defined as billable & payable.**



MicroStaffer Tip

To enter unfilled or open orders, check this box and do not assign an employee. Then, when the order is filled, just assign the employee and check the employee and client confirmation boxes.

11. **Shift Rates Info (Current Rates for this Shift):** This list displays the shift rates for the shift. It calculates the number of hours worked for billing and payroll purposes and multiplies the applicable billing and payroll rates respectively. (Displays only when using purchased billing and/or payroll modules.) Clicking on the pay or bill rate allows you to view the properties/amount of the rate and override the length of an unpaid break period if it is set up within the original rate. (NOTE: To handle a "No Break" situation, you must check the No Break box on the Shift Detail window).
12. **Area:** The area where the shift will be worked. (This may have been populated by entry of an order via processing from the optional MicroStaffer web module, or manual order entry via PRN Order Entry. Not required but is an optional filter in the "Who's Available?" area). Areas are defined for each customer on the Client Setup Window's Areas Tab.
13. **Desired Skill:** Enter the desired skill for this shift. Primarily entered for orders. (This may have been populated by entry of an order via processing from the optional MicroStaffer web module, or manual order entry via PRN Order Entry. Not required but is an optional filter in the "Who's Available?" area).
14. **Type:** Enter the employee type. If an employee has been selected to staff this shift, this defaults to the employee type as defined on the Employee Setup window but it can be changed. (This may have been populated by entry of an order via processing from the optional MicroStaffer web module, or manual order entry via PRN Order Entry. Not required but is an optional filter in the "Who's Available?" area).
15. **Note:** Enter any notes associated with shift.
16. **Work Code:** A user defined work code as defined in the List Manager Window. This code can be used for a variety of reporting purposes.
17. **Charge & Same Day Booking:** These fields indicate whether the employee took charge or if this was a same-day booking. Once checked, Payroll and Billing will add Company wide Charge and Same-Day booking bonuses in addition to Employee specific Charge and Same-Day booking bonuses. See Company setup for more information on how Charge and Same-Day booking bonuses are applied.

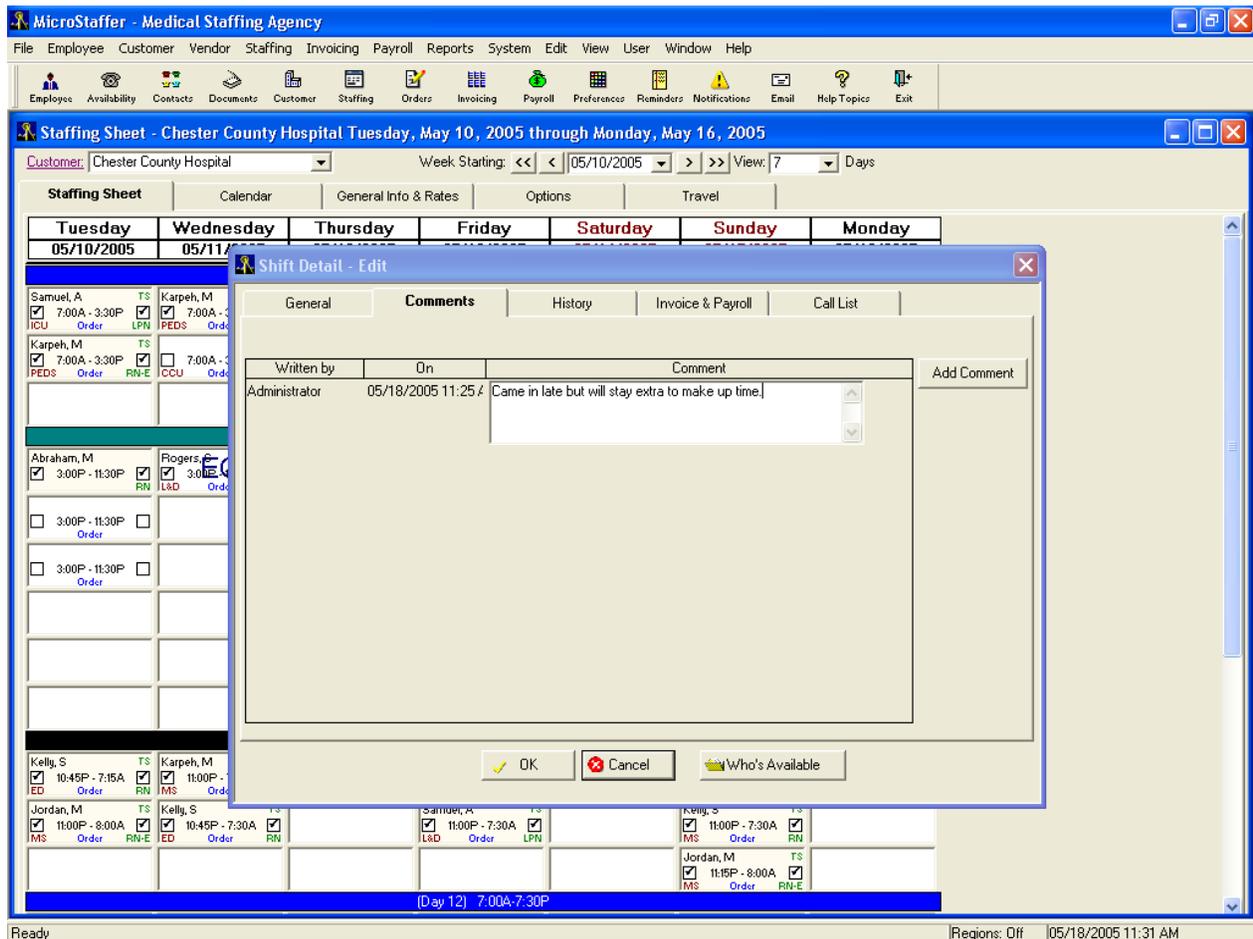
3. Shift Comments

The Comments Tab on the Shift Detail Window allows for viewing and editing of comments for the current shift.

Comments help in giving a more detailed description of any problem or requirements for a shift.

You may add new comments by clicking the Add Comment button.

Once a comment has been saved, it cannot be altered or deleted.



4. Shift History

The Shift History Tab on the Shift Detail Window displays a list of attributes for the selected shift.

Every time a shift is modified in any way, **MicroStaffer** writes the record to this list.

This enables you to view the shift every time a change was made on the **General Info Tab**, giving you an audit trail for shift changes.

The screenshot displays the MicroStaffer Medical Staffing Agency interface. The main window is titled "Staffing Sheet - Chester County Hospital Tuesday, May 10, 2005 through Monday, May 16, 2005". It shows a grid of shifts for various employees across the week. A "Shift Detail - Edit" dialog box is open, showing the "History" tab. The history table contains the following data:

Modified By	Modified Date	Schedule Date	Customer	Employee	Shift
Administrator	07/19/2004 9:56 AM	05/11/2005	Chester County Hospital	Rogers, Sharon	Eve 8

The dialog box also includes "OK", "Cancel", and "Who's Available" buttons. The status bar at the bottom indicates "Ready" and "Regions: Off | 05/18/2005 11:39 AM".

5. Shift Invoice and Payroll Info

The Invoice and Payroll tab on the Shift Detail Window allows you to enter overpay, deduction and bonus pay amounts for a given shift. It also allows you to view the amount paid and billed for a shift that has been run through payroll and invoicing respectively as well as the check and invoice numbers for the processed shift.

Data Entry Fields

- 1. Amount Overpaid:** Enter any amount that was overpaid for the selected shift. **Note:** This field is only enabled if the selected shift has been included on a payroll check. Entry of the overpaid amount here will allow for reconciliation using the Advances & Deductions Report. Adding a Comment to the shift regarding this information is highly recommended.
- 2. Deduction Amount:** Enter any amount you wish to deduct from the shift pay rate for this check. This amount will be deducted when this shift is run through payroll processing. **Note:** This field is only enabled if the selected shift has NOT yet been processed through payroll. Entry of the deduction amount here will allow for reconciliation using the Advances & Deductions Report. Adding a Comment to the shift regarding this information is highly recommended.
- 3. Bonus Pay:** Enter any amount you wish to add to the regular rate for this shift. This amount will be added once the shift is processed by payroll. **Note:** This field is only enabled if the selected shift has NOT yet gone through payroll processing.
- 4. Custom Pay and Bill Amounts:** You may override the pay and billing amounts here. These are the lowest levels that can be set and will override any other rates in the system.
- 5. Custom Pay Start & End Times:** Use these fields to override the regular payroll hours for this shift.
- 6. Custom Bill Start & End Times:** Use these fields to override the regular billed hours for this shift. Note that both the custom pay and bill times are useful when payroll and billing hours are different such as Pay 4, Bill 8.
- 7. Additional Payroll and Billing Items:** Allows you to enter additional items for invoices and checks such as Travel Reimbursements, Bonuses, Expense Reimbursements etc. These items will be included in payroll and invoice processing and listed separately on the payroll check stub.
- 8. Mark as Advance:** Allows you to tag shifts to be used in advance payroll processing. (On the Payroll Processing window, you may select to "Process only shifts marked as Advance on the Shift Detail window").
- 9. Check Note & Invoice Note:** Used to print information on Custom Invoices and Payroll Export.
- 10. Skip for OT:** Check the box if you wish this shift to be skipped for overtime (OT). Overtime can be skipped for a variety of selections from the dropdown: no, payroll only, billing only, payroll and billing.

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The screenshot shows the MicroStaffer application window titled "MicroStaffer - Medical Staffing Agency". The main window displays a "Staffing Sheet" for Chester County Hospital, covering the week from Tuesday, May 10, 2005, to Monday, May 16, 2005. The sheet is organized by day and shift. A "Shift Detail - Edit" dialog box is open, showing the "Invoice & Payroll" tab. This dialog includes fields for "Amount Overpaid on this Shift", "Pay Amount to Deduct for this Shift", "Bonus Pay Amount for this Shift", and "Advance Pay Amount", all currently set to .00. It also has checkboxes for "Set Custom Pay Amount", "Custom Pay Start/End", "Set Custom Bill Amount", and "Custom Bill Start/End". The "Custom Pay Start/End" and "Custom Bill Start/End" are both set to 3:00 PM to 11:30 PM. There are also fields for "Check Note" and "Invoice Note", and a "Skip for OT" dropdown set to "No". At the bottom of the dialog, there are two tables: "Check No." and "Invoice No.", both currently showing "Not Paid" and "Not Invoiced" respectively. The dialog has "OK", "Cancel", and "Who's Available" buttons.

This screenshot is similar to the one above, showing the same MicroStaffer application window and staffing sheet. However, the "Additional Shift Payroll Item" dialog box is open. This dialog has a table with columns for "Description", "Amount", and "Taxable". One entry is visible: "Travel Pay" with an amount of 23.50 and a taxable checkbox that is unchecked. The dialog also includes "OK", "Cancel", "Add", "Delete", and "Help" buttons. The background staffing sheet and the "Shift Detail - Edit" dialog are partially visible behind this window.

6. Call List

The Call List tab on the Shift Detail Window is used to store the names of employees that are likely candidates for filling a particular shift. You may add names to this list and set the appropriate status of the employee.

The status is the reason or outcome code selected for the result of the call.

This will then allow you to see if the employee can still work or not.

Note: You also populate this list by Opening the 'Who's Available' window and dragging and dropping names from the 'Who's Available' List onto this Tab. For example, open the 'Who's Available' window, select one or more names and then, by holding down the Left Mouse button, drag the selected names onto the Call List tab and, then, release the Left Mouse button.

The screenshot displays the MicroStaffer - Medical Staffing Agency application. The main window is titled 'Staffing Sheet - Chester County Hospital Tuesday, May 10, 2005 through Monday, May 16, 2005'. It shows a grid of staffing sheets for various shifts. A 'Shift Detail - Edit' dialog box is open, showing the 'Call List' tab. The 'Call List' tab contains an 'Available Employee Listing' table with columns for Name, Status, Note, and Last M. The table lists three employees: Abraham, Mary Ann (RN) with status 'Offered Wo', Alam, Augustina (SRN) with status 'Left Messag', and Augustine, Susan (RN) with status 'Refused S'. There are 'Add', 'Delete', and 'Print' buttons to the right of the table. Below the table is a 'Default Status' dropdown menu set to 'Called to Notify of Cancellation'. At the bottom of the dialog are 'OK', 'Cancel', and 'Who's Available' buttons. The status bar at the bottom of the application shows 'Ready' and 'Regions: Off | 05/18/2005 11:45 AM'.

C. Staffing & Scheduling - Shift Browser (Time Card Verification)

The Shift Browser is one of MicroStaffer's most powerful scheduling tools. **It's primary purpose is time card verification.**

It allows you to add, modify and delete shifts in a grid like format.

To access the Shift Browser, select the Staffing->Shift Browser from the Main menu.

The Shift Browser's window incorporates the following functions:

- 1. Query Criteria:** The upper portion of the window lets you specify various fields on which to base the retrieval of the data. This allows you to retrieve only those shifts that you wish to work on.
- 2. Results List:** The shift results list is located below the query criteria box. It will display the retrieved shifts once the Search has been performed. The results list functions as the data display and manipulation area for the Shift Browser.

What makes the Shift Browser unique, is that it allows you to instantly modify shift data. Once you make a modification on the list, the changes are instantly saved to the database. **This allows for very fast and accurate data manipulation.**

Also, you can add, edit details and delete shifts. To do so, you may either **right click** on the Results List or select the appropriate menu item from the window's menu. Either menu offers the following options:

- A. Edit:** This will open the shift detail window allowing you to edit data that is not contained on the list itself. You can also access this window by double clicking on the shift.
 - B. Add:** This adds a row to the Results List. Only the shift date and Customer columns will be enabled. Once you have selected a customer, the shift is saved and you may then proceed to change the remaining information on the list. **The shift is not saved until you select a customer.**
 - C. Add Multi:** Allows you to add more than one new row to the Results List.
 - D. Delete:** Deletes the shift from the database.
 - E. Clear All:** Clears the results list. Does NOT delete shifts from the database.
 - F. Sort:** Opens a sort window that allows you to sort on multiple columns.
- 3. Open Browse, Save Browse, Save Browse As...:** These options allow you to save the query criteria and sort order. This is useful if you intend to do repetitive browsing of shift data.

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MicroStaffer - Medical Staffing Agency

File Employee Customer Vendor Staffing Invoicing Payroll Reports System Edit Data Browse User Window Help

Employee Availability Contacts Documents Customer Staffing Orders Invoicing Payroll Preferences Reminders Notifications Email Help Topics Exit

Shift Browser

Filter Select From To

Employee: All
 Customer: Chester County Hospital
 Date: All
 Status: All
 Confirmation Status: All
 Time Sheet: All
 Order Status: ALL
 Paid/Invoiced Status: All

Search
 Reset
 Export
 Print
 Sort
 Close

Shift Date	Customer	Shift Name	Employee	Time Sheet OK	Conf with Employee	Conf with	Order	Status	Shift Start Time	Shift End Time	Area	Desired Skill	WC
07/08/2003	Chester County Hospi	Day 7-3:30.....	Samuel, Angela I	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Scheduled/Firm	7:00 AM	3:30 PM	ICU	NURH	
08/01/2003	Chester County Hospi	Day 7-3:30.....	Samuel, Angela I	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Scheduled/Firm	7:00 AM	3:30 PM	ICU	NURH	
07/04/2003	Chester County Hospi	Day 7-3:30.....	Davis, Amanda I	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Scheduled/Firm	3:00 PM	11:00 PM	MS	NURH	
07/04/2003	Chester County Hospi	Day 7-3:30.....	Davis, Amanda I	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Scheduled/Firm	11:00 PM	8:00 AM	MS	NURH	
06/18/2003	Chester County Hospi	Day 7-3:30.....	Augustine, Karer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Scheduled/Firm	7:00 AM	3:00 PM	MS	NURH	
06/26/2003	Chester County Hospi	Day 7-3:30.....	George, Sheri (R	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Customer Cancr	7:00 AM	3:30 PM	ED	NURH	
06/27/2003	Chester County Hospi	Day 7-3:30.....	Cherian, Alison (f	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Scheduled/Firm	7:00 AM	4:30 PM	ED	NURH	
09/04/2003	Chester County Hospi	Day 7-3:30.....	Cherian, Alison (f	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Scheduled/Firm	7:00 AM	4:00 PM	MS	NURH	
09/01/2003	Chester County Hospi	Day 7-3:30.....	Swanson, Lana I	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Customer Sent i	7:00 AM	11:00 AM	MS	NURH	
09/01/2003	Chester County Hospi	Day 7-3:30.....	Karpeh, Maria (R	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Scheduled/Firm	3:00 PM	11:00 PM	MS	NURH	
09/01/2003	Chester County Hospi	Day 7-3:30.....	Karpeh, Maria (R	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Scheduled/Firm	11:00 PM	7:30 AM	MS	NURH	
08/10/2003	Chester County Hospi	Day 7-3:30.....	Loving, Lisa (CN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Scheduled/Firm	7:00 AM	3:30 PM	ED	NURH	
08/11/2003	Chester County Hospi	Day 7-3:30.....	Diggins, Katherir	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Customer Cancr	7:00 AM	3:30 PM	ED	NURH	
08/12/2003	Chester County Hospi	Day 7-3:30.....	Rogers, Sharon I	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Scheduled/Firm	7:00 AM	3:00 PM	ED	NURH	
08/13/2003	Chester County Hospi	Day 7-3:30.....	Cherian, Alison (f	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Scheduled/Firm	7:00 AM	3:00 PM	ED	NURH	
08/14/2003	Chester County Hospi	Day 7-3:30.....	Diggins, Katherir	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Scheduled/Firm	7:00 AM	3:00 PM	ED	NURH	
07/28/2003	Chester County Hospi	Day 7-3:30.....	George, Sheri (R	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Scheduled/Firm	7:00 AM	3:30 PM	ICU	NURH	
07/31/2003	Chester County Hospi	Day 7-3:30.....	Samuel, Angela I	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Scheduled/Firm	6:45 AM	3:00 PM	MS	NURH	
06/14/2004	Chester County Hospi	Day 7-3:30.....	Cherian, Alison (f	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Customer Sent i	7:00 AM	11:00 AM	PEDS	NURH	

Ready Regions: Off 05/18/2005 12:00 PM

D. Staffing & Scheduling - Availability Searches using “Who’s Available”

The employee availability window allows users to search the MicroStaffer Availabilities database for available employees based on a variety of optional filters.

This window can be accessed from a number of areas within the system such as:

1. Clicking on any Customer Quick Link and selecting ‘Who’s Available’ from the dropdown menu.
2. Right Clicking on any part of any staffing sheet or calendar and selecting ‘Who’s Available’ from the dropdown menu.
3. Clicking the ‘Who’s Available’ button on the Shift Detail Window.

The window is divided into 4 separate tabs:

1. **The Availabilities Tab** displays a list of employees currently available based on the selected Filter Criteria.
 - a. Clicking on an Employees name brings up the Employee Quick link menu.
 - b. When this window is opened from the Shift Detail window, you can double click an employee and this will return you to the Shift Detail window and fill in the Employee with the selected employee from this window.
2. **The Work History Tab** displays information of which employees have worked at the selected Facility over the time period specified. Note that you can also display this information in graphical format by clicking on the graph icons.
3. **The Incompatibilities Tab** displays a list of employees that are not to be scheduled at the Selected Facility.
4. **The Filters Tab** allows you to enter a wide variety of filters that determine which availabilities are retrieved on the Availabilities Tab. The following is a list of filters and their specific functions:
 - a. **Date:** The date for which to search for availabilities.
 - b. **Shift Class:** Matches shift classes which are defined when entering availabilities on the Employee Availability Window.
 - c. **Min. Hours:** Matches Max. Hours which are defined when entering availabilities on the Employee Availability Window.
 - d. **Employee Type:** Limits the retrieved availabilities to only those that match the selected Employee Type. Selecting the List feature allows you to enter a comma separated list of Employee Type codes (eg. CNA,RN)
 - e. **Work Area:** Employees retrieved on the Availability tab must have worked at least one shift in the selected Work Area. You may use the list feature to enter a comma separated list of Work Areas (eg. ICU,MICU,SICU,ER)
 - f. **Desired Skill:** Use this filter to retrieve only available employees who have the selected skill. You may use the list feature to enter a comma separated list of Skills (eg. ER,SICU,PEDS)
 - g. **Favorite Customer:** This filter will retrieve only those employees who have the selected customer listed in their Favorite Customer list on the Employee Profile.
 - h. **Region:** Use the filter to retrieve only those employees which match the selected Region(s) as defined on the Employee Details window
 - i. **Not Currently Working:** Use this filter to remove any ‘Currently Working’ employees from the Open Availabilities list. Note, you MUST define one or more statuses that are used in your system as Working Statuses.
 - j. **Match by Licenses:** Allows you to retrieve only those employees that have licenses of the selected Type and State.

Properties:

The Properties button allows you to set default filter criteria. Using this window allows you to tell MicroStaffer which filter criteria you wish have default from the Shift Detail window each time you open the Employee Availability window.

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MicroStaffer - Medical Staffing Agency

Staffing Sheet - Chester County Hospital Wednesday, May 11, 2005 through Tuesday, May 17, 2005

Customer: Chester County Hospital Week Starting: 05/11/2005 View: 7 Days

Employee Availability

Availabilities | Work History | Incompatibilities | Preferred | Filters

Date: 05/11/2005 Shift Class: Day Min. Hours: Any

Employee Type: All Work Area: All Desired Skill: All Favorite Customer: All

Region(s): NJ-S - South Jersey

Working Status: List 1,5

State: PA Type: All

Sub-Contractors: All Oriented at: All

Buttons: Select, Cancel, Search, Print

MicroStaffer - Medical Staffing Agency

Staffing Sheet - Chester County Hospital Wednesday, May 11, 2005 through Tuesday, May 17, 2005

Customer: Chester County Hospital Week Starting: 05/11/2005 View: 7 Days

Employee Availability

Availabilities | Work History | Incompatibilities | Preferred | Filters

Name	Margin	Type	Shift Class	Status	Booked At	Phone No.	Miles
Baker, Monica	48.00%	CNA	Day	Available		215-224-4272 - Ho	4.80
Blake, Michelle	48.00%	CNA	Any Shift	Available		215-203-0422 - Ho	5.09
Davis, Amanda	30.19%	RN	Day	Available		215-661-0499 - Ho	8.38
Johnson, Ashlev	30.19%	RN	Day	Available		215-247-0835 - Ho	2.24
Rogers, Sharon	30.19%	RN	Day	ady Scheduled/Work	Chester County Hospital	215-592-4095 - Ho	9.54

Buttons: Select, Cancel, Search, Print

E. Staffing & Scheduling - Order Entry

1. Overview

MicroStaffer allows users to Create both Standard PRN orders and Long Term or Travel Orders. Standard PRN orders can be entered using the Shift Detail window, or, by accessing the Standard Order entry window in MicroStaffer.

2. Standard PRN Orders

Standard PRN Orders are mostly entered on the MicroStaffer Order Entry window. This window can be accessed using Hyperlink Quick Links from the Customer Setup, Staffing Sheet and a variety of other windows and reports.

To access the Standard PRN Order entry window from the main menu, select Staffing->PRN Order(s) from the Main menu. The PRN Order entry window allows you to create one or more orders for one or more days. The following fields may be entered:

1. **Customer:** Select the customer for whom the orders are to be generated
2. **Shift:** Selects the Shift Type based on the Customer selected.
3. **Start and End Times:** You may choose to accept the default or enter custom start and end times.
4. **Area, Skill, Employee Type:** Select as desired.
5. **Note:** Enter a comment or note.
6. **WC:** Custom work code.
7. **Ordered by:** Select who placed the order. (Information pulled from Contacts entered on Contacts & Directions tab of customer setup.)
8. **Days and Quantities:** Indicate for which days and quantity for each day. This will determine how many orders are generated for each day that falls within the range period.

MicroStaffer - Medical Staffing Agency

File Employee Customer Vendor Staffing Invoicing Payroll Reports System User Window Help

Employees Availability Contacts Documents Customer Staffing Orders Invoicing Payroll Preferences Reminders Notifications Email Help Topics Exit

Add New Order(s)

Customer: Chester County Hospital

Shift: Day 7-3:30.....(7:00 am - 3:30 pm)

Start/End Time: 7:00 AM 3:30 PM

Status: Scheduled/Firm

Area: Desired Skill: L&D Type: RN

Note: WC: HOSP

Ordered by: Tara Williams

Start Date: 05/19/2005 End Date: 05/22/2005 Range Order

Quantity for Thursday..... 2

Quantity for Friday..... 3

Quantity for Saturday..... 1

Quantity for Sunday..... 0

Quantity for Monday..... 0

Quantity for Tuesday..... 0

Quantity for Wednesday..... 0

Save

Save & New

Save & Close

Exit

Help

Ready Regions: Off | 05/19/2005 1:05 PM

3. Travel and Long Term Orders

Long Term and Travel orders can be entered into MicroStaffer using the Long Term & Travel Order(s) window. To access this window select Staffing->Long Term & Travel Order(s) from the Main menu.

Once this window opens, you may enter all the information for Long Term and Travel Orders. (Note: This stores the basic administrative information for the long term order not the actual shift information. In order to generate the long term schedule for the employee go to the Long Term Schedule generation found within the employee availability tab. Alternatively, the information may be entered on the staffing sheet).

Once an employee name has been selected, the information will be stored on the Travel tab in the Employee setup area of MicroStaffer.

To access existing Orders, click on the Search button. This will open the Order search window which allows you to find existing orders based on the Search criteria you enter.

The screenshot displays the MicroStaffer - Medical Staffing Agency application window. The main menu includes File, Employee, Customer, Vendor, Staffing, Invoicing, Payroll, Reports, System, User, Window, and Help. The toolbar contains icons for Employee, Availability, Contacts, Documents, Customer, Staffing, Orders, Invoicing, Payroll, Preference, Reminders, Notifications, Email, Help Topics, and Exit.

The "Long Term & Travel Order Detail" window is open, showing the following information:

- Customer: Chester County Hospital
- Shift 1: Day 7-3:30.....(7:00 am - 3:30 pm)
- Shift 2: (empty)
- Start Date: 05/19/2005, End Date: 07/31/2005, Expiration Date: 11/15/2005, Display on Web:
- Area: (empty), Employee Type: (empty), Desired Skill: (empty)
- Contact Name: Tara Williams, Desc.: Staffing & Scheduling, Phone: 610-825-6560
- Payment table:

	Housing	Mileage	Air Travel	Per Diem	Other
Pay:	23.00	55.00	.00	.00	.00
Bill:	.00	.00	.00	.00	.00
- Order Status: Open, Date: 05/19/2005, Filled With: (empty)
- General Notes: (empty)
- Transportation Notes: (empty)
- Housing Notes: (empty)
- Created By: (empty), On: (empty), Last Modified by: (empty), On: (empty)

On the right side of the window, there are buttons for New, Search, Delete, Print, Send..., Save, and Close.

The status bar at the bottom shows "Ready" on the left and "Regions: Off | 05/19/2005 2:51 PM" on the right.

F. Staffing & Scheduling - Staffing Center

1. Overview

The MicroStaffer Staffing Center window gives users a quick snapshot of critical scheduling and employee related info for the current day. The window can be accessed by selecting Staffing->Staffing Center from the main menu. You may also have the window automatically open each time you log in by checking the 'Display when Logging into MicroStaffer' checkbox. To view information for Employee Leads only, click on the box at the bottom of the screen.

2. Expirations

The expirations Tab displays a list of all Tickler enabled Profile and Custom info fields for Employees that have expired or are nearing their target expirations dates. Highlight and right click to access a variety of options from email capability to mail merge. Double clicking a single highlighted line will access the Employee Setup facility for editing.

3. Unfilled Orders

All open orders for the current day are displayed. Double clicking a highlighted order will access the Shift Detail window for that order.

4. Open Availabilities

All open availabilities for the current day are displayed. If you check the 'Suppress if Already Working' checkbox, any employee who is available but is already scheduled for this day, will NOT show up in the list. MicroStaffer will use the specified Status(s) to determine what constitutes a Working shift both when this box is checked and when it is not. Right click on the underlined employee to access various hyperlink capabilities.

5. Open Travel Orders

All open travel orders for the displayed period selected are displayed. Double clicking a highlighted order will access the Travel Order window for the specific order.

The screenshot shows the MicroStaffer - Medical Staffing Agency application window. The main menu includes File, Employee, Facility, Vendor, Staffing, Invoicing, Payroll, Reports, System, User, Window, and Help. The Staffing Center window is open, displaying the Expirations tab. The table below lists employee expirations with columns for Employee Name, Type, Item, Exp. Date, and Days Left.

Employee Name	Type	Item	Exp. Date	Days Left
Adams, Mary (RN)	Background Check	Background Check	03/30/2007	0
Aries, Augustina (SRN)	License	Professional License	04/30/2007	20
Aries, Augustina (SRN)	Certification	CPR	01/30/2007	0
Aries, Augustina (SRN)	Certification	BCLS	02/28/2007	0
Aries, Augustina (SRN)	Insurance Policy	Professional Liability	01/30/2007	0
Baker, Monica (CNA)	Background Check	Background Check	03/17/2006	0
Baker, Monica (CNA)	Health Screening	PPD	04/06/2006	0
Baker, Monica (CNA)	License	Professional License	02/15/2007	0
Baker, Monica (CNA)	Certification	ACLS	09/30/2006	0
Bise, Yukiko (RN)	License	Professional License	04/30/2007	20
Bise, Yukiko (RN)	Health Screening	PPD	05/06/2006	0
Bise, Yukiko (RN)	Certification	CPR	08/21/2006	0
Bise, Yukiko (RN)	Health Screening	Physical	10/10/2006	0
Blake, Michelle (DNA)	Insurance Policy	Professional Liability	02/01/2007	0
Braham, Linda (LPN)	Health Screening	PPD	02/10/2006	0

At the bottom of the window, there are checkboxes for 'Show Leads Only' and 'Hide all Non-Accreditation Items'. Below the table are buttons for Print, Send..., Refresh, Close, Sort, and Export. A checkbox at the bottom left is checked and labeled 'Display when Logging into MicroStaffer'.

G. Employee Availability Tracking & Scheduling

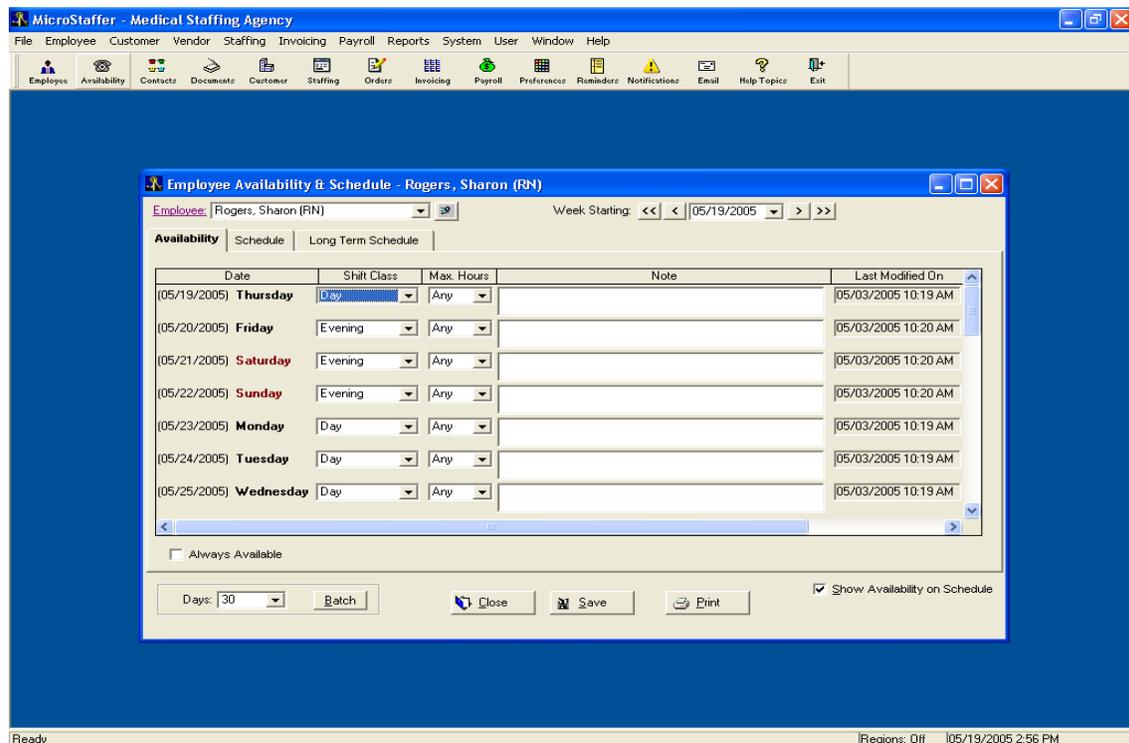
1. Availability & Schedule Overview

The Availability & Schedule Window allows you to enter the days and Shift Class plus Comments for any day on which the selected Employee would like to work and is available. You can also enter long term and permanent availabilities as well as long term schedules for an employee.

To Access this window click on the Start Button select Employee Availability and Schedule from the menu item list.

Once the window is open you must select an employee and starting date from the dropdowns to view and edit the information on these three tabs:

1. Availability Tab
2. Schedule Tab
3. Long Term Schedule Tab



2. Employee Availability

The Employee Availability Tab on the Employee Availability and Schedule window allows for viewing and editing of dates, Shift Classes and Maximum Hours of an employee's availability. Employee availability MUST be entered in order to search using the "Who's Available" feature.

Data Entry Fields

1. **Shift Class:** Select the Shift Class. If the individual is available for any type of shift then select 'Any'. If not available at all then select 'Not Available'.
2. **Max. Hours:** Enter the maximum number of hours the employee can work or 'Any' if there is no limitation.
3. **Note:** Enter any description for the availability. For example, you could enter the preferred areas or customers where this person would like to work.
4. **Batch:** You can enter long term availabilities using the Batch button located at the bottom of the window. This opens the Batch Availability window. Here you can indicate a date range and the availability for each day of the week.



MicroStaffer Tip: If you wish to delete an employee's availability, simply select the desired date range and set each day's availability to blank.

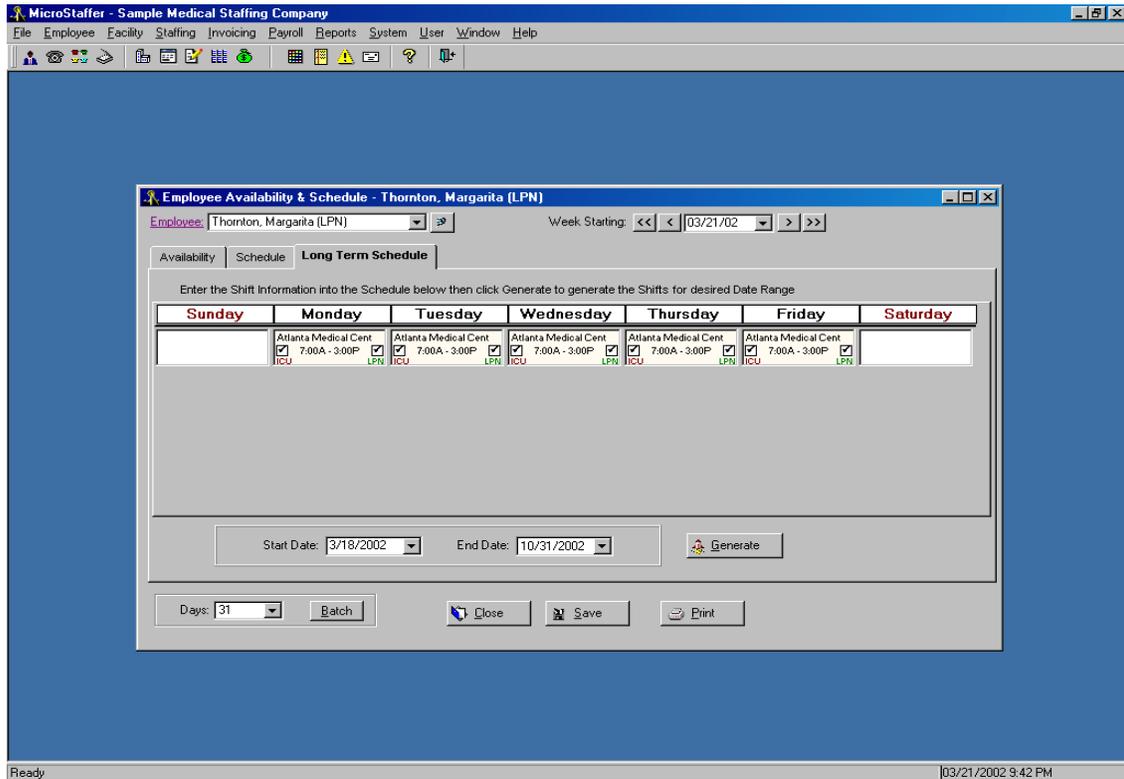
5. **Always Available:** Use this checkbox to indicate a permanent availability. Once checked, the employee's availability will NEVER expire. If a permanent schedule is entered, MicroStaffer adds an Availability Exceptions tab to the choices so that exceptions to the permanent availability may be entered. Please see "Availability Exceptions".

Date	Shift Class	Max. Hours	Note	Last Modified On
Sunday	Day	Any		
Monday	Day	Any		
Tuesday	Day	Any		
Wednesday	Day	Any		
Thursday	Day	Any		
Friday	Day & Evening	Any		
Saturday	Not Available	Any		

4. Employee Long Term Schedule

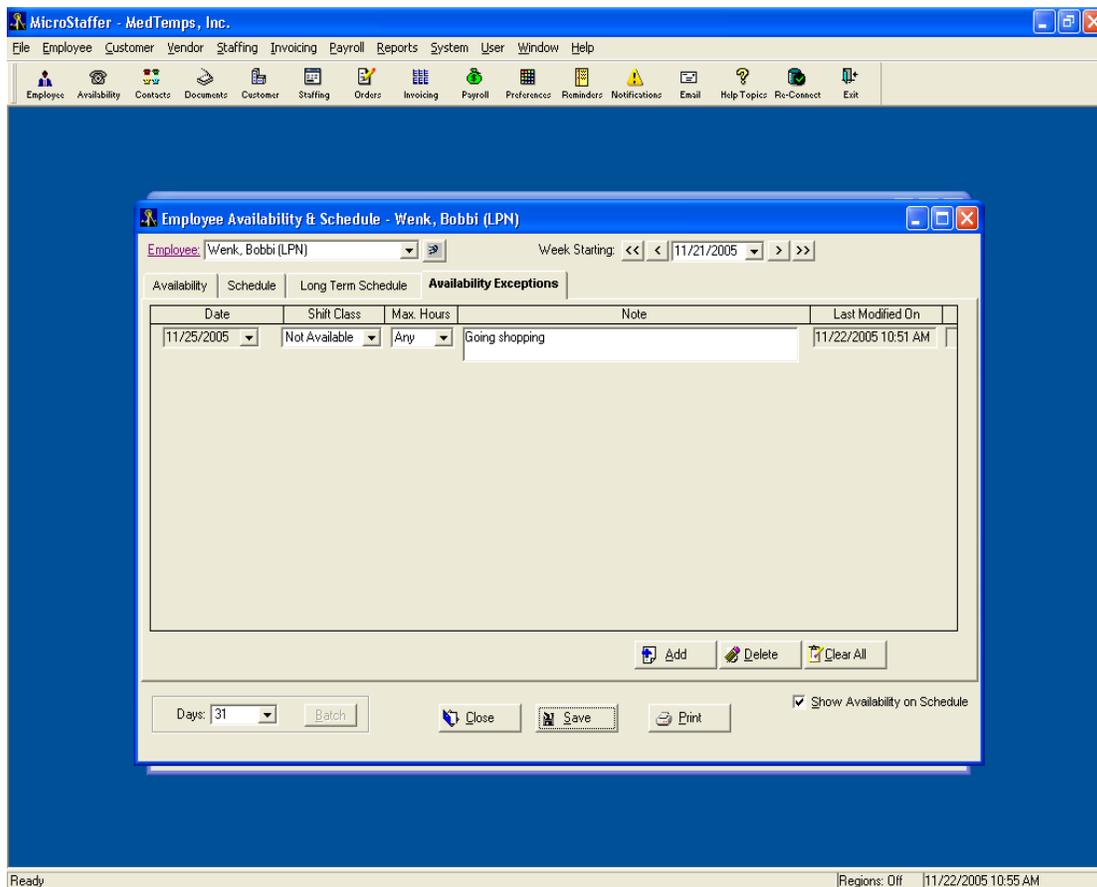
The Employee Long Term Schedule tab on the Employee Availability and Schedule Window allows you to generate a Long-Term schedule for an employee. This is especially useful for scheduling employees on Travel Assignments such as travelling nurses.

Simply enter a week's shift assignments and the start and ending dates for the schedule. Then click the Generate button to generate a recurring schedule for the desired period.



5. Availability Exceptions

The Availability Exceptions tab appears when an employee has a permanent availability entered on the Availability tab. This tab allows for the entry of exceptions to permanent availability: either that the employee is unavailable when they are usually available or the opposite, available when usually unavailable. The availabilities will appear on the employee schedule window if the "Show availabilities on schedule" box is checked.



H. The Job Finder Window

The Employee Job Finder window is intended to assist you in both matching an Employee to an Open Job Order as well as give you a snapshot of an Employees Work History and Profile. The Job Finder window is located under the Employee menu as well as other areas where its location would be pertinent. There are various places where the Job Finder window is available as a hyperlink from an underlined employee name (when you see an underlined item, right click for hyperlink capabilities).

The Job Finder window is especially useful in locating work for an Employee. Moreover, it serves as a quick way of retrieving Employee Work history for your on-call staff as well as any newly hired staffers.

The window is divided into three tabs:

1) Work History

You can retrieve an employees work history using several view types and filter criteria:

- a) View data by Customer worked, Work Area, Shift Type, Skill of Job Order
- b) Use the Time Period filter to indicate the time frame on which to base the work history.
- c) Worked Status defines which status your system considers a 'Worked Shift'. You can also use a list of status numbers separated by commas (eg. 1,5,7...)
- d) To view the data in Graph format simply click on the Graph Icons on the report.

2) Open Orders

This tab retrieves all open orders in the system that match the Filter Criteria indicated. If you wish to staff one of the listed matched items, double click the order line to quickly access the Shift Detail window.

- a) Order Time period indicates the date range for which to retrieve any open orders.
- b) Employee Type filter indicates which employee type an order must be to be retrieved. The employee type code will always default to same as the selected employee.
- c) Use the Omit Orders Status to Filter our Orders that have been cancelled.
- d) Work history - This filter, when used, will only retrieve orders from Facilities at which the selected employee has worked in the past. Again, use the status ID or Status ID list to indicate what a 'Worked Shift' is in your system.
- e) Skills Filter - This filter will only retrieve orders where the skill code matches a skill code for the selected employee.
- f) Work Areas Filter - This filter, when used, will only retrieve open orders when the Work Area of the Order matches a Work Area worked by the selected Employee.

3) Profile

This tab gives you a profile of the Selected Employees Orientations, Incompatibilities (i.e. Places they cannot go or may not go) and Preferred Facilities/Work Locations. This profile information is taken from the employee setup facility.

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The screenshot shows the 'Job Finder for: Rogers, Sharon (RN)' window. The 'Employee' dropdown is set to 'Rogers, Sharon (RN)'. The 'View Data' section has 'By Work Area' selected. The 'Past' dropdown is set to '3 Months' and 'Worked Status' is 'Scheduled/Firm'. A bar chart titled 'Employee Work History - Number of Shifts by Work Area' displays the following data:

Work Area	Number of Shifts
MS	28
L&D	25
ICU	22
ED	13
Other	3
PEDS	2

The status bar at the bottom indicates 'Ready' and 'Regions: Off 05/20/2005 9:36 AM'.

The screenshot shows the 'Job Finder for: Rogers, Sharon (RN)' window with search filters. The 'Display only Open Orders for this Period' section is active, with 'Start Date' and 'End Date' both set to '05/20/2005'. The 'Employee' type is 'RN' and 'Worked Status' is 'All'. The following table shows the results:

Client Name	Date	Shift	Start	End	Area	Type	Skill
Chester County Hospital	05/20/2005	Day 7-3:30	7:00 AM	3:30 PM		RN	L&D
Chester County Hospital	05/20/2005	Day 7-3:30	7:00 AM	3:30 PM		RN	L&D
Chester County Hospital	05/20/2005	Day 7-3:30	7:00 AM	3:30 PM		RN	L&D
Collinswood Care Center	05/20/2005	Day 8	7:00 AM	3:30 PM		RN	

The status bar at the bottom indicates 'Ready' and 'Regions: Off 05/20/2005 10:19 AM'.

I. Managing Contacts in MicroStaffer

MicroStaffer's Contacts Manager interface allows you to enter unlimited contact records for Employees, Customers and Vendors using the Contacts Windows. This window can be accessed from the Start Menu as well as any Quicklinks dropdown menu. These Quicklinks are available throughout the system.

In order to add new contacts you must first define Contact Reason and Result types in the List Manager window.

Existing contacts for Employees, Customers and Vendors can be edited on the Employee Detail, Customer Detail and Vendor Detail windows.

To review and report on all contacts within the system you can use the Contacts Report located in the Reports section of MicroStaffer.

The following fields are on the Contacts Entry window:

- 1. Contact Type:** Select whether this is an Employee, Customer or Vendor contact.
- 2. Reason:** Enter a reason for the contact. (Contact "reason" codes are maintained in the List Manager facility)
- 3. Comments:** Enter a short comment if necessary.
- 4. Outcome:** Enter a result for the contact. (Contact "outcome" codes are maintained in the List Manager facility)
- 5. Date and Time Called**
- 6. Misc. Notes:** Enter detailed notes for the contact if necessary.

The screenshot displays the 'Add Contact' dialog box within the MicroStaffer - Medical Staffing Agency application. The dialog box is titled 'Add Contact' and features a blue header bar. The main content area is white and contains several input fields and controls:

- Customer:** A dropdown menu with 'Chester County Hospital' selected.
- Contact Type:** Three radio buttons: 'Employee' (unselected), 'Customer' (selected), and 'Vendor' (unselected).
- Reason for Contact:** A dropdown menu with 'Staffing needs discussion' selected.
- Comments:** A text input field.
- Outcome:** A dropdown menu with 'Resolved issue' selected.
- Date Called:** A date picker showing '05/20/2005'.
- Time Called:** A time picker showing '10:26 AM'.
- Misc. Notes:** A text area containing the text 'Talked w/ Sally re: new areas for staffing.'

At the bottom of the dialog box, there are four buttons: 'OK' (with a checkmark icon), 'Cancel' (with a red 'X' icon), 'New' (with a plus icon), and 'Help' (with a question mark icon). The background of the application window is blue, and the status bar at the bottom shows 'Ready' and 'Regions: Diff 05/20/2005 10:30 AM'.

V. Using MicroStaffer - Invoicing & Payroll Processing

A. Invoicing in MicroStaffer

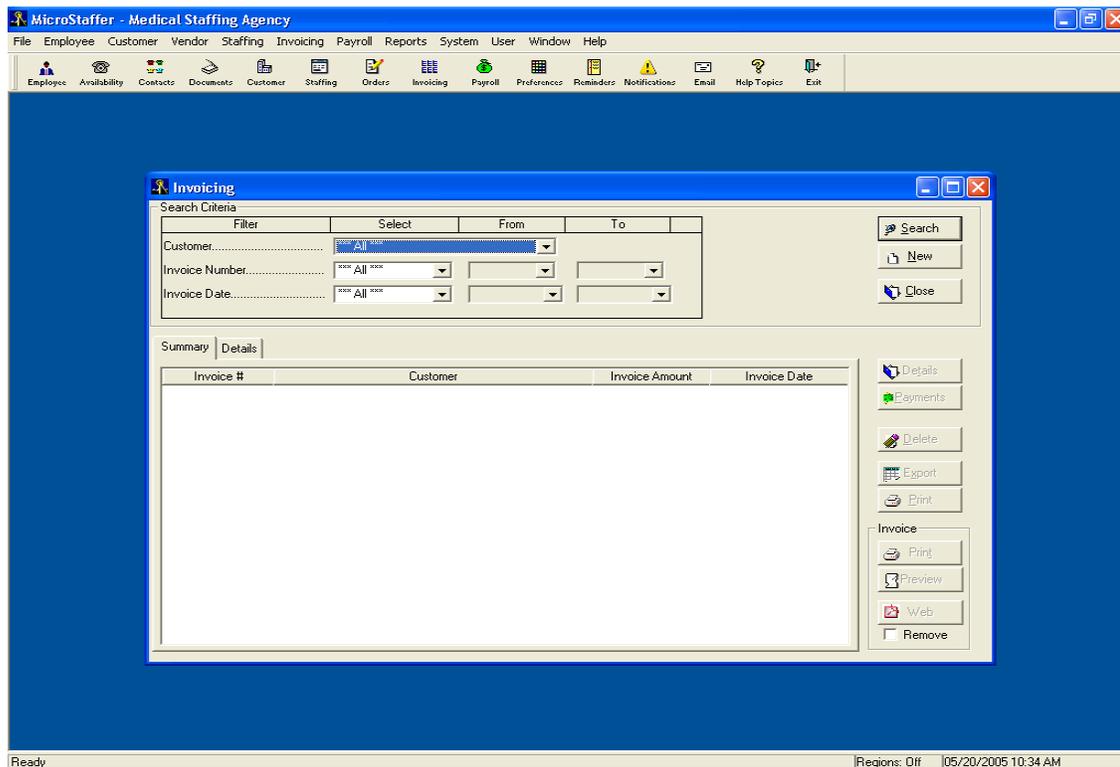
1. Invoicing Overview

The Invoice Window allows for viewing, modifying and editing Invoice data.

To access the Invoice Window select Invoicing-> View & Edit Invoices from the Main Menu or click on the Invoicing toolbar.

The Invoice Window allows you to perform the following tasks:

1. Retrieve Existing Invoices
2. Create New Invoices
3. Edit Invoice Details
4. Print or Preview Invoices
5. Invoice Payments
6. Delete Invoices
7. Exporting Invoice Data

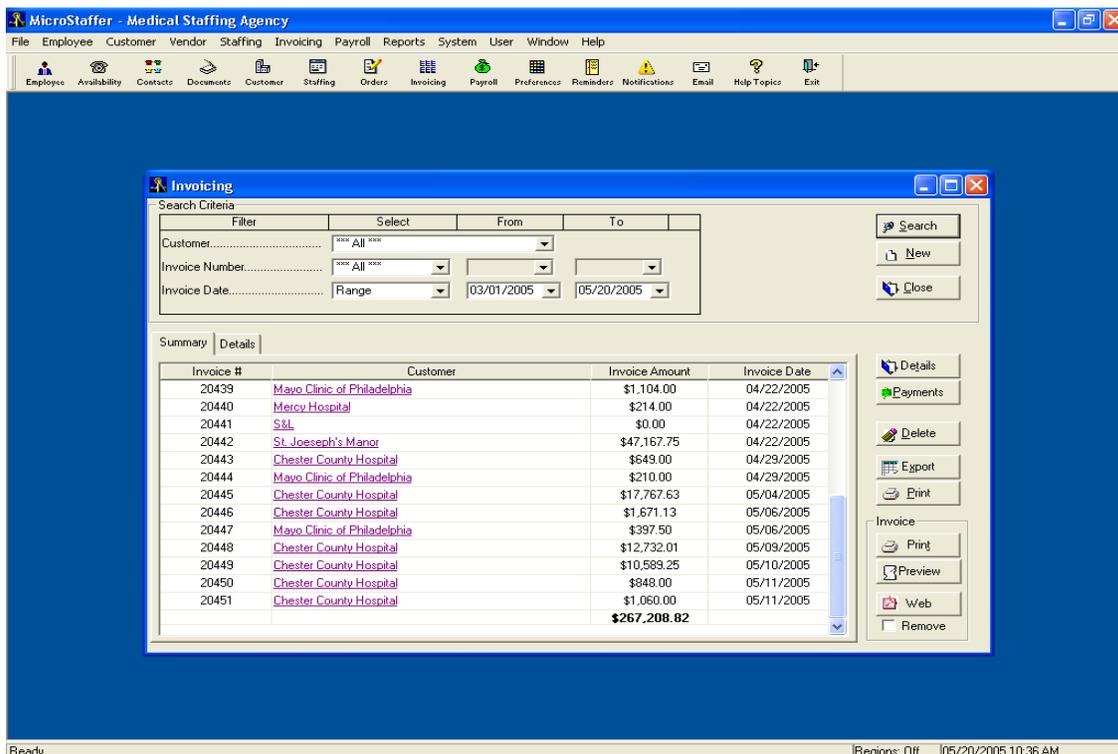


2. Invoice Retrieval

You can retrieve Invoices from the Invoice Window.

Search Criteria Fields

1. **Client:** Select All or a specific Client whose invoices you wish to retrieve.
2. **Invoice Number:** Select All or a range of existing invoice numbers. This dropdown will be populated from entire invoice register and is never filtered by what customer was selected.
3. **Invoice Date:** Select All or a range of dates. A range of dates will include only invoices generated within the specified date range.



3. Creating New Invoices

To create New Invoices, open the Invoice Window and click on the New button or select New from the menu and the New Invoices Window will open allowing you to create new invoices.

The New Invoices Window allows for creating of new invoices from unbilled shifts that have been scheduled for the specified criteria and are Billable.

The following steps outline the New Invoice Creation process:

1. Specify Invoice Filter Criteria:

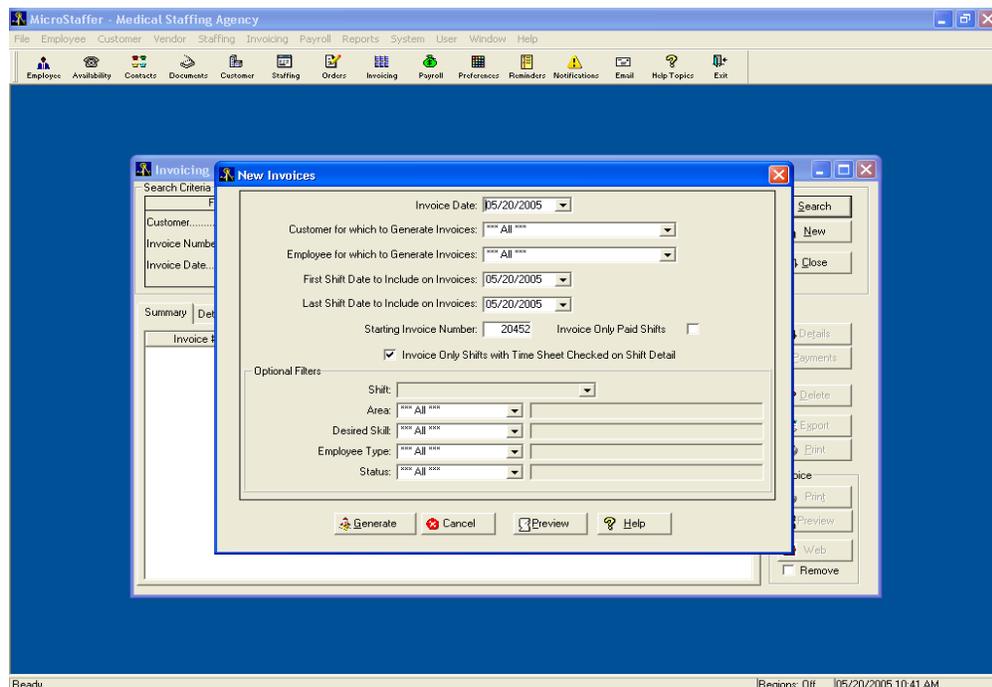
- A. **Client:** Select All or a specific Client for which to generate Invoices.
- B. **Employee:** Select All or specify which employee to generate invoices for.
- C. **Shift Start and End Dates:** Specify the starting and ending dates for shifts to include on invoices.
- D. **Starting Invoice Number:** Specify the starting invoice number for new invoices. You must ensure that invoice numbers remain unique in the system even though MicroStaffer will not allow duplicate invoice numbers. This number will automatically increment after every new invoice generation.
- E. **Additional Filter:** Shift, Area, Skill, Employee Type. Use the 'List' feature by entering Comma-Separated Area codes, Skills, Employee Types and Status ID numbers.

2. Previewing Invoices:

Before you actually create invoices, you may click on the Preview button to see what invoices will be generated given the filter criteria you entered. This is a useful tool to make sure you have entered the information correctly.

3. Generate Invoices:

To generate and save invoices to the database, simply click the Generate button. The New Invoice window will close and the newly generated invoices will appear on the main invoice window's invoice list from where they then can be printed.



4. Invoice Editing

To edit invoice data on existing invoices, you must first retrieve the desired invoice using the Details button on the Invoice Window.

After retrieving the invoice and then clicking on the Details button, the Invoice Detail window will open and allow you to do the following:

- Delete Invoice Line Item:** The delete button will delete the line item (or shift) from the invoice.
Note: Once you delete a line item, the shift will again be available for invoicing. Also, once you have deleted all items, the entire invoice will be deleted.
- Edit Invoice Data:** You may edit any information in the editable fields.
- Export Invoice Data:** Allows you to export the line items for the selected invoice to various data file formats.

MicroStaffer - Medical Staffing Agency

File Employee Customer Vendor Staffing Invoicing Payroll Reports System User Window Help

Employees Availability Contacts Documents Customer Staffing Orders Invoicing Payroll Preferences Reminders Notifications Email Help Topics Exit

Invoicing

Invoice Detail

Invoice: 20428
Customer: St. Joseph's Manor
Invoice Date: 04/13/2005

Date	Employee	Area	Shift	Start	End	Hours	Amount
04/04/2005	Sharon Rogers	MS	Day 8 Hour Shift	7:00 AM	3:30 PM	8.00	\$368.00
04/04/2005	Melvyn Reid	ED	Eve 8 Hour Shift	3:00 PM	11:15 PM	7.75	\$372.00
04/05/2005	Angela Varughese		Day 8 Hour Shift	7:45 AM	5:00 PM	8.75	\$405.50
04/05/2005	Jodie Desir	ICU	Day 8 Hour Shift	7:00 AM	3:30 PM	8.00	\$184.00
04/06/2005	Sharon Rogers	MS	Day 8 Hour Shift	7:00 AM	3:30 PM	8.00	\$368.00
04/06/2005	Donald Massaquoi	L&D	Day 8 Hour Shift	7:00 AM	3:30 PM	8.00	\$184.00
04/06/2005	Jodie Desir	ICU	Eve 8 Hour Shift	3:00 PM	11:30 PM	8.00	\$184.00
04/06/2005	Sonia Stephenson	MS	Eve 8 Hour Shift	3:00 PM	11:30 PM	8.00	\$184.00
04/07/2005	Sharon Rogers	MS	Day 8 Hour Shift	7:00 AM	3:30 PM	8.50	\$586.50
04/07/2005	Jodie Desir	ICU	Day 8 Hour Shift	7:00 AM	3:30 PM	8.00	\$184.00

20444 Mayo Clinic of Philadelphia \$210.00 04/29/2005

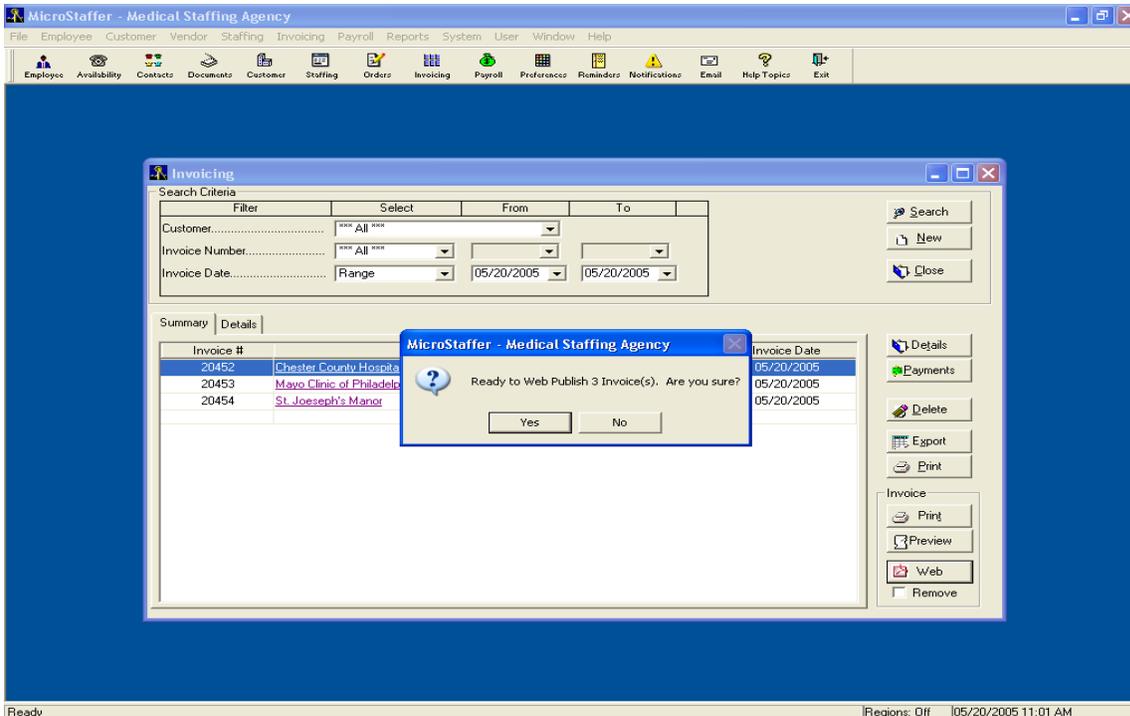
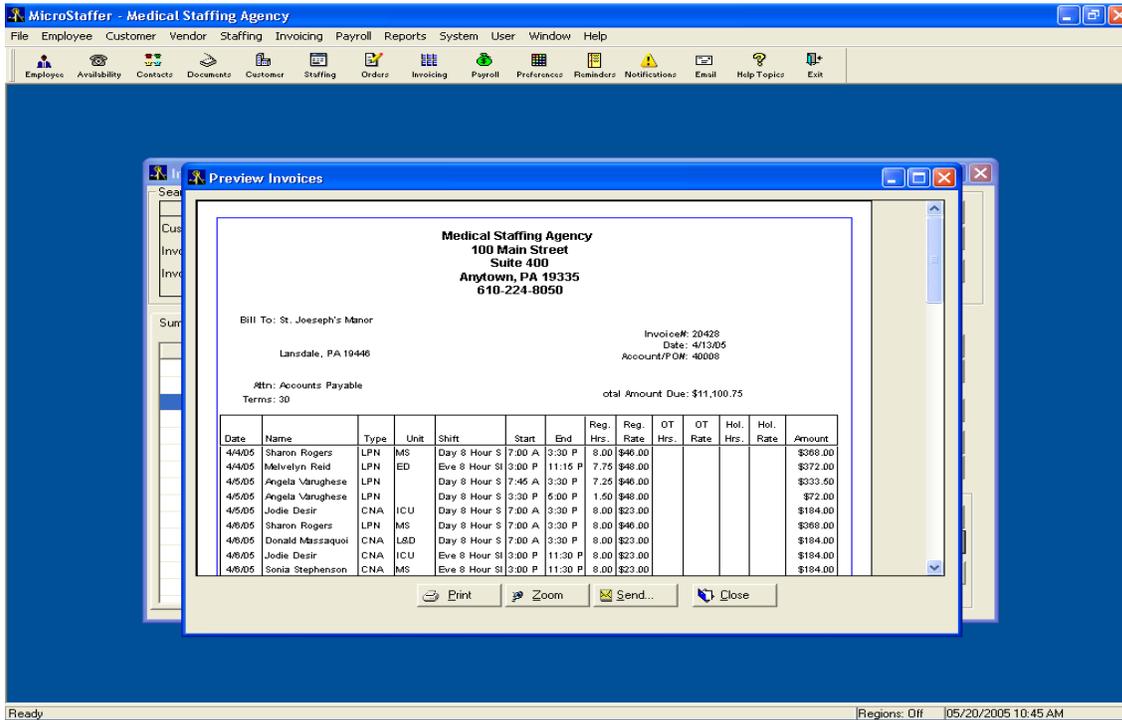
20445 Chester County Hospital \$17,767.63 05/04/2005

Ready Regions: Off 05/20/2005 10:43 AM

5. Invoice Printing

To print or preview existing invoices, you must first retrieve the desired invoices using the Invoice Window.

When you click on the Invoice Print or Print Preview buttons all invoices in the invoice list will be printed or preview respectively.



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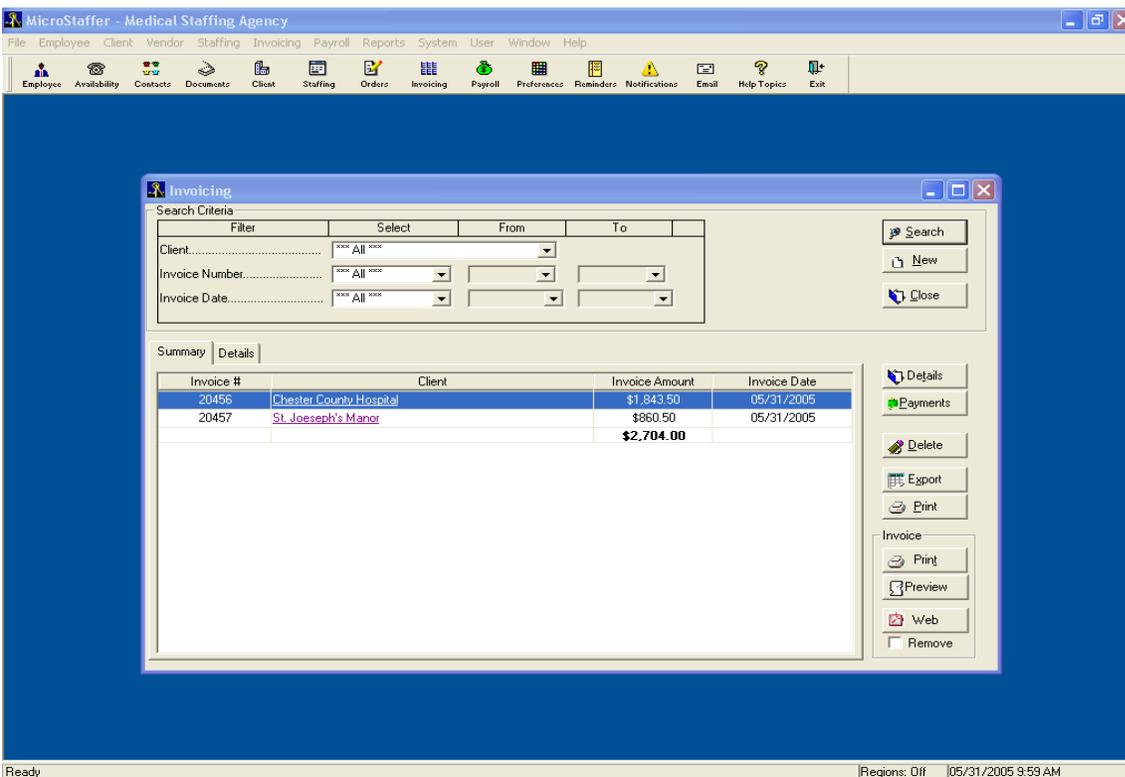
6. Publish Invoice to Web Module (Web enabled systems only)

MicroStaffer provides those systems enabled with the optional Web Module to publish invoices to the web for client access.

Web module access is set up for the client on the Client Setup screen.

After new invoices have been generated, simply click the Web button to publish the invoices to the Web module.

To remove an invoice or group of invoices from the web module, first bring up the invoices to be removed, check the Remove box and click the Web button. This will remove the invoice(s) from the published web list.

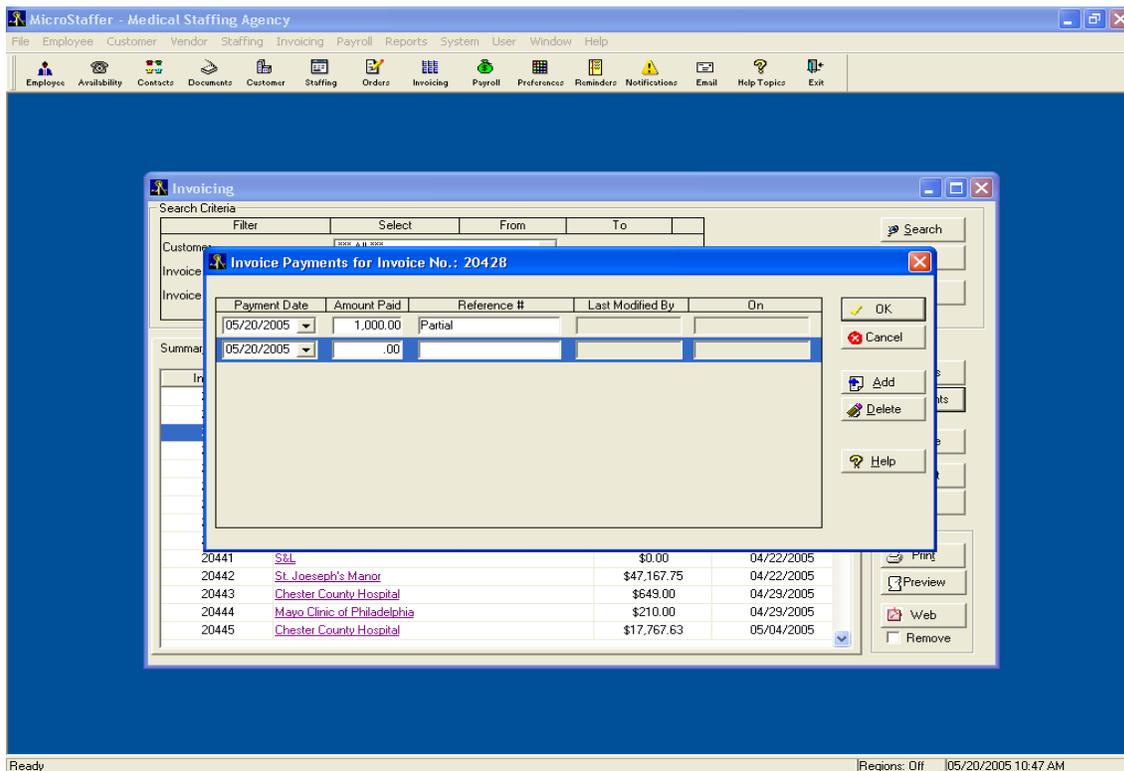


7. Invoice Payments

You may enter payments for invoices using the Invoice Payments window. This window can be accessed from the main Invoice Window.

After selecting the desired invoice, then clicking on the Payments button, the Invoice Payments window will open allowing you to enter one or more payments for the selected invoice.

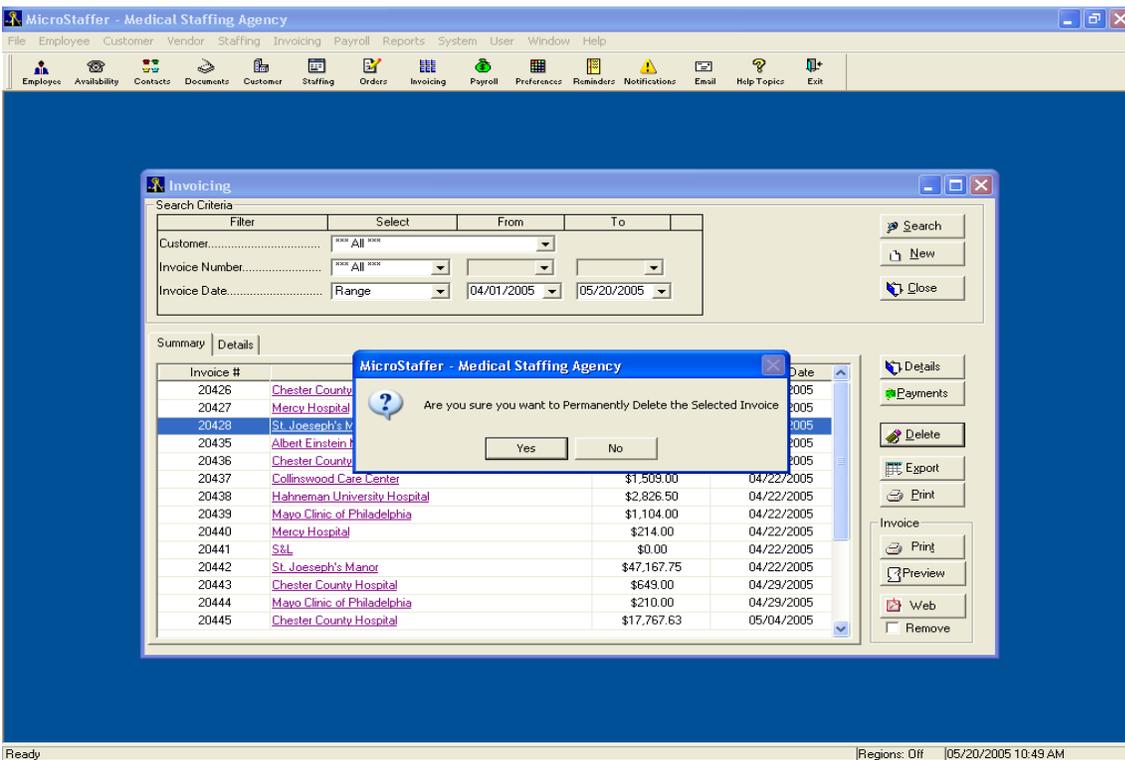
Alternatively, payments to invoices may be maintained via a back office accounting system.



8. Invoice Deleting

To delete an entire invoice, you must first retrieve the desired invoice using the Invoice Window. Then select the desired invoice and click on the Delete button or select Delete from the menu.

Deleting an invoice will reset the 'Invoiced' status of the shifts associated with the invoice allowing them to be invoiced again.



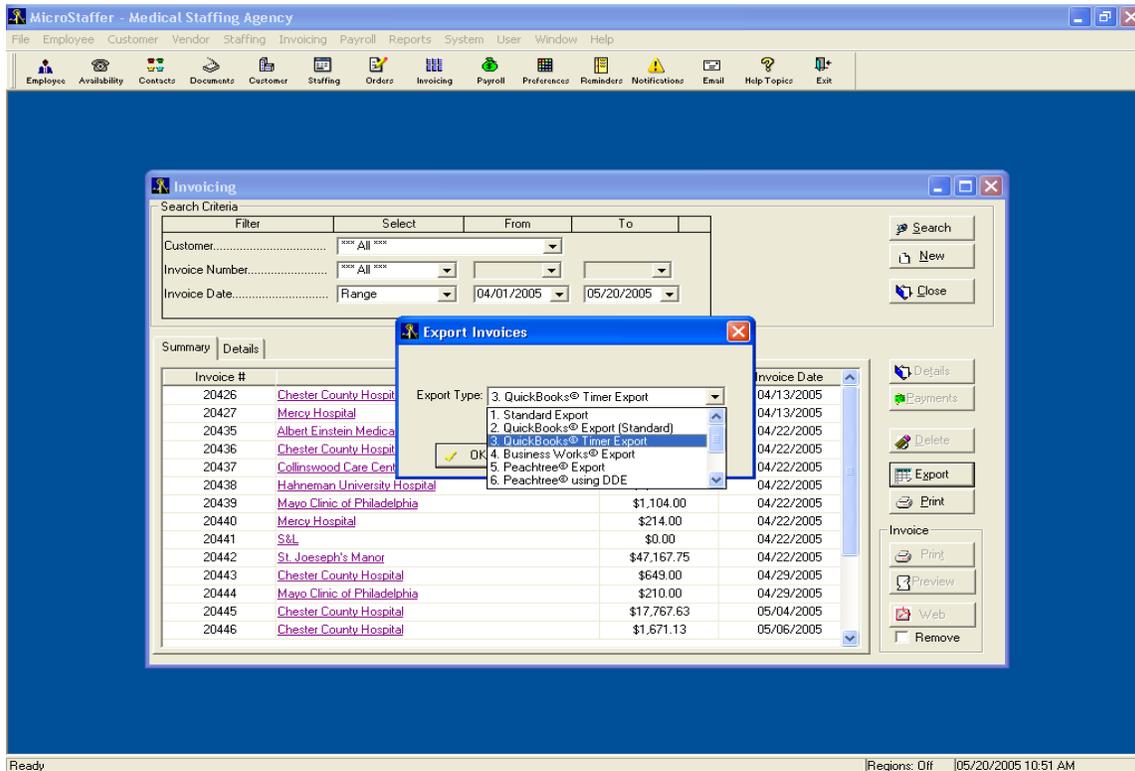
9. Invoice Exporting

You may export both Summary and Detailed invoice information using the Invoice Window.

After retrieving the desired Invoice(s) you can click the Export button which will allow you to save either summary or detailed invoice data.

To save summary data you must have the Summary Tab selected. For detailed data, select the Detail Tab.

First time export, it is highly recommended that you attempt the export with one invoice to be sure the export feature is set up properly.



B. Payroll Processing in MicroStaffer

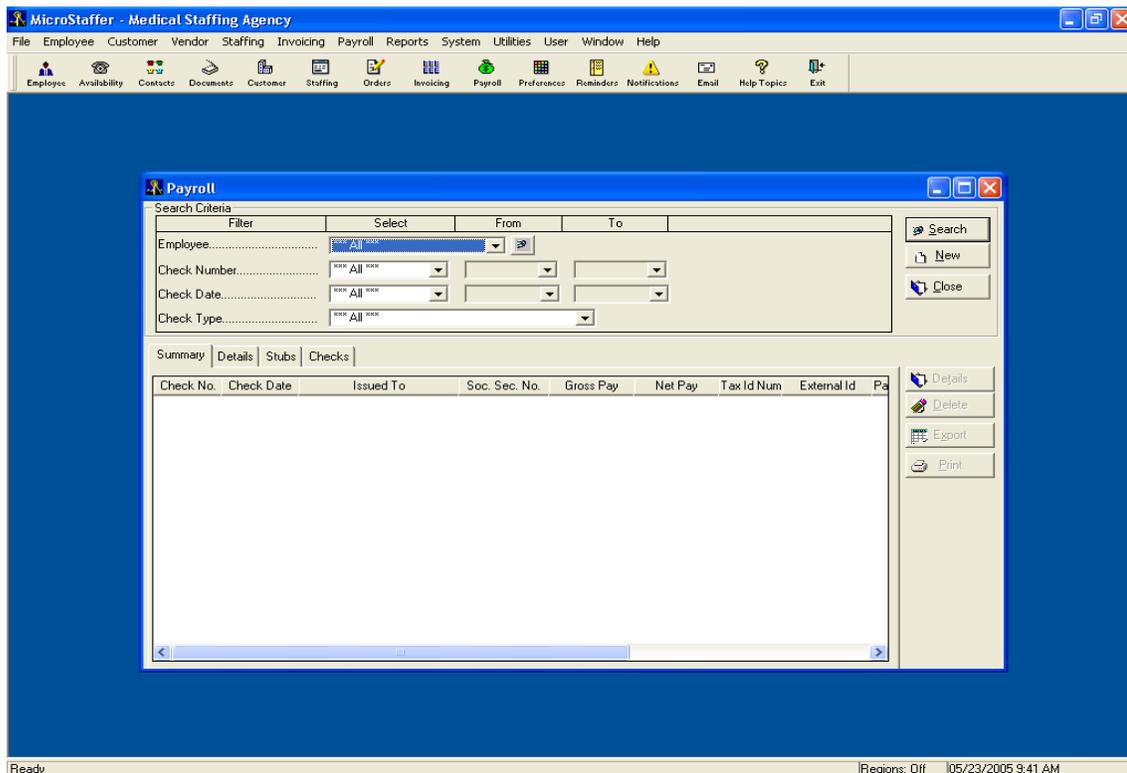
1. Payroll Overview

The Payroll Window allows for viewing, modifying and editing Payroll data.

To access the select Payroll->View & Edit Payroll from the Main Menu or click on the Payroll Toolbar item.

The Payroll Window allows you to perform the following tasks:

1. Retrieve Existing Payroll Checks
2. Create New Payroll Checks
3. Edit Payroll Check Data
4. Print Checks and Check Stubs
5. Delete Payroll Checks
6. Export Payroll Data to external Systems
7. Process W2's for Export to Accountability Tax Processing Software



2. Payroll Retrieval

You can retrieve Payroll Check entries from the Payroll Window.

Search Criteria Fields

- 1. Employee:** Select All or a specific Employee whose payroll checks you wish to retrieve.
- 2. Check Number:** Select All or a range of existing check numbers. This dropdown will be populated from the entire check register and is never filtered by what employee was selected.
- 3. Check Date:** Select All or a range of dates. A range of dates will include only checks generated within the specified date range.
- 4. Check Type:** Select the Types of checks to view (Standard, Advance or Advance Payoff).

The screenshot shows the MicroStaffer - Medical Staffing Agency application window. The Payroll window is open, displaying search criteria and a list of payroll checks. The search criteria are: Employee: All, Check Number: All, Check Date: Range (05/01/2005 to 05/23/2005), and Check Type: All. The list of checks includes columns for Check No., Check Date, Issued To, Soc. Sec. No., Gross Pay, Federal Income Tax, Fica, and Medicare. The total gross pay is \$17,186.75, with total taxes of \$3,441.00, resulting in a net pay of \$215.13.

Check No.	Check Date	Issued To	Soc. Sec. No.	Gross Pay	Federal Income Tax	Fica	Medicare
201897	05/10/2005	Abraham, Mary Ann	071-86-6123	\$2,586.50	(\$490.00)	(\$160.36)	(\$37.50)
201901	05/11/2005	Abraham, Mary Ann	071-86-6123	\$704.00	(\$150.00)	(\$43.65)	(\$10.21)
201902	05/11/2005	Abraham, Mary Ann	071-86-6123	\$1,752.25	(\$504.00)	(\$108.64)	(\$25.41)
201898	05/10/2005	Adeleke, Yvette (Denise)	769-59-2522	\$2,350.25			
201899	05/10/2005	Augustine, Karen	299-96-5981	\$2,350.25	(\$543.00)	(\$145.72)	(\$34.08)
201900	05/11/2005	Augustine, Karen	299-96-5981	\$853.75	(\$229.00)	(\$52.93)	(\$12.38)
201894	05/05/2005	Rogers, Sharon	898-89-0544	\$3,304.50	(\$829.00)	(\$204.88)	(\$47.92)
201895	05/05/2005	Rogers, Sharon	898-89-0544	\$2,174.00	(\$493.00)	(\$134.79)	(\$31.52)
201896	05/05/2005	Rogers, Sharon	898-89-0544	\$1,111.25	(\$203.00)	(\$68.90)	(\$16.11)
Total:				\$17,186.75	(\$3,441.00)	(\$919.87)	(\$215.13)

3. New Payroll Checks

To create New Payroll Checks, open the Payroll Window and click on the New button or select New from the menu and the New Payroll Wizard Window will open allowing you to create new Payroll Checks.

The New Payroll Wizard Window allows for creating of new Payroll Checks from unpaid shifts that have been scheduled for the specified criteria and qualify as Payable. Payable shifts must have a Status that is checked as Payable and be double-confirmed. They must also NOT have been paid yet.

The following steps outline the New Payroll Check generation process:

1. Select the Payroll Processing Method:

- A. **Standard Payroll:** Generates Standard checks based on shift data.
- B. **Advance Checks:** This method of payroll processing allows you to generate checks that pay only a portion of the amount earned. This amount can be specified on the following tab should this Payroll Method be selected. You may also enter a percentage or amount on the individual employee's record on the Employee Setup Window's payroll tab.
- C. **Advance Payoff Checks:** This method pays any remaining balance on Advance Checks, thereby completing the payroll cycle.

2. Select Advance Calculation Method (Advance checks Only)

- A. You may choose to enter a percentage or maximum amount. Note, that Employee specific Percentages or Amounts will override these.
- C. If MicroStaffer tax library is installed you may also choose the Net-To-Gross-Ratio method. This method will use the Tax Withholding information for a given employee to advance the maximum amount based on the taxes that would be deducted for a regular check. Using this method will always advance the most \$\$\$ per check.

3. Specify Check Filter Criteria:

- A. **Employee:** Select All or specify which employee to generate Payroll Checks for.
- B. **Customer:** Select All or a specific Customer for which to generate Payroll Checks.
- C. **Shift Start and End Dates:** Specify the starting and ending dates for shifts to include on Payroll Checks.
- D. **Payroll Type:** This field will allow you to include only those employees that have their payroll period set to the one you select here. You may, of course, select All.
- E. **Starting Check Number:** Specify the starting check number for new Payroll Checks. You must ensure that check numbers remain unique in the system even though MicroStaffer will not allow duplicate check numbers. This number will automatically increment after every new check generation.
- F. **Check Date:** Enter the check date. This will always default to the current date.
- G. **Separate checks for Each Shift** (Standard and Advance Checks only): This option will generate a separate check for each shift instead of grouping them by Employee.
- H. **Pay off Advance Checks:** When this box is checked, any outstanding advances will be paid off on any new checks that are generated.

4. Previewing Payroll Checks:

Before you actually create Payroll Checks, the Preview tab allows you to see what Payroll Checks will be generated given the filter criteria you entered. This is a useful tool to make sure you have entered the information correctly.

5. Generate Payroll Checks:

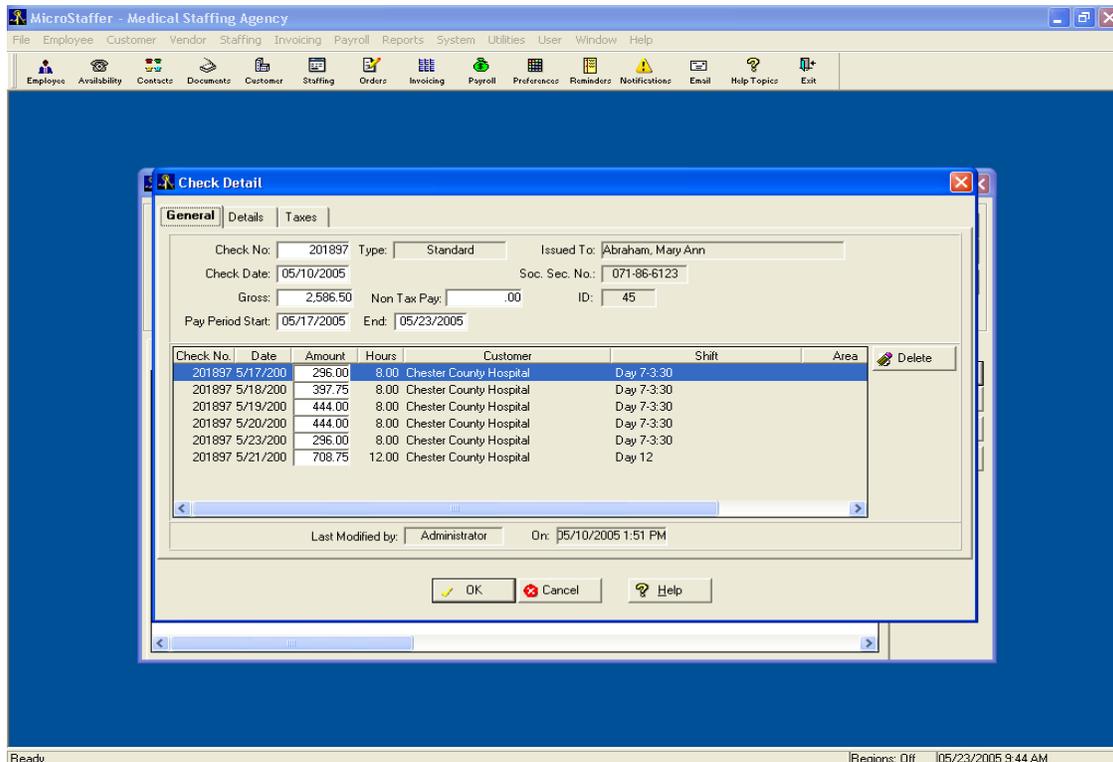
To generate and save Payroll Checks to the database simply click the Finish button. The New Payroll window will close and the newly generated Payroll Checks will appear on the main payroll window's checklist from where they then can be viewed, edited, exported or printed.

4. Payroll Check Editing

To edit payroll data on existing payroll entries, you must first retrieve the desired payroll checks using the Details button on the Payroll Window.

After retrieving the check and then clicking on the Details button, the Payroll Detail window will open and allow you to do the following:

- 1. Delete Check Line Item:** The delete button will delete the line item (or shift) from the check.
Note: Once you delete a line item, the shift will again be available for payroll. Also, once you have deleted all items, the entire check will be deleted.
- 2. Edit Payroll Item Data:** You may edit any information in the editable fields.
- 3. Export Payroll Data:** Allows you to export the line items for the selected check to various data file formats.



5. Payroll Checks and Stubs

MicroStaffer allows you to print checks and stubs for every check you generate. Stubs can be included with the employee's paycheck to give a detailed explanation of earnings.

You can print checks and stubs by retrieving the desired checks on the Payroll window, then selecting the Stubs or Checks tab and then clicking on the Print button or selecting Print from the menu.

Finally, you may also add a Note during printing on both Stubs and Checks. This note will only appear on the printed stub.

To align checks for printing, use the 'Properties' button to modify the X and Y coordinates of items on each check.

The screenshot shows the MicroStaffer - Medical Staffing Agency application window. The Payroll window is open, displaying search criteria and a payroll table. The search criteria are as follows:

Filter	Select	From	To
Employee.....	All		
Check Number.....	All		
Check Date.....	Range	05/01/2005	05/23/2005
Check Type.....	All		

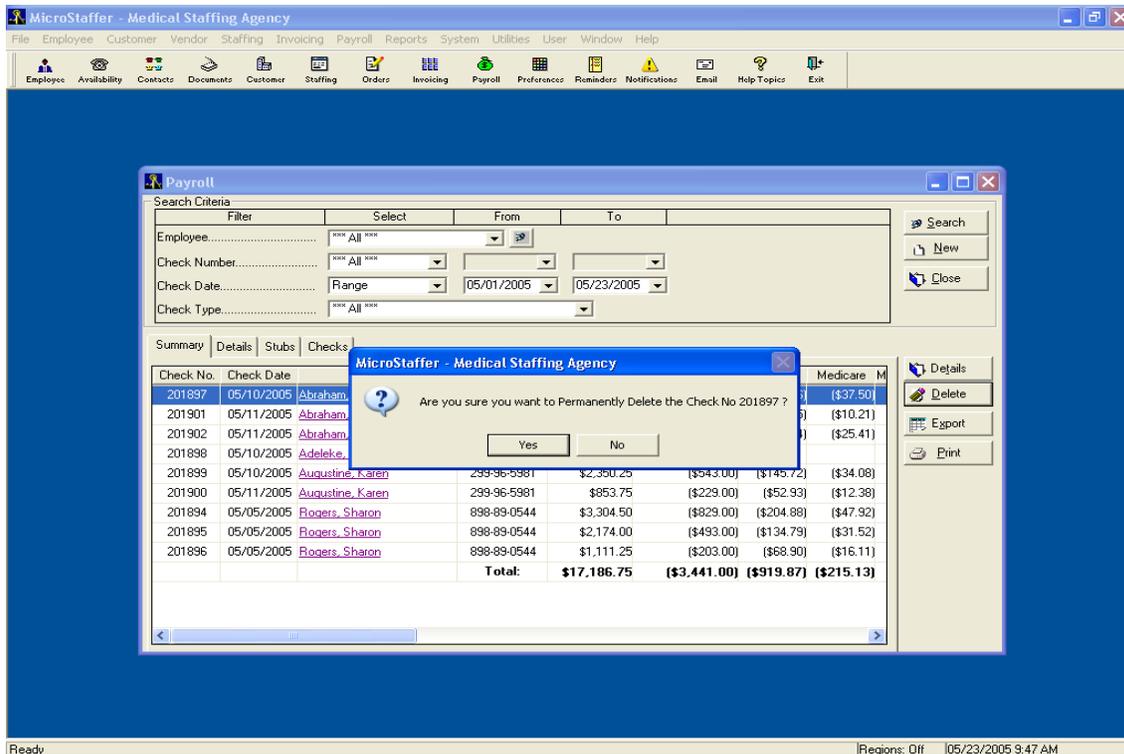
The payroll table shows the following data:

Date	Earnings	Hours	Rate	OT Pay	Bonus Pay	Deduct Amt.	Holi
04/25/2005	\$225.00	7.50	\$30.00				
04/25/2005	\$240.00	8.00	\$30.00				
04/27/2005	\$382.50	8.50	\$30.00	\$127.50			
04/27/2005	\$240.00	8.00	\$30.00				
04/28/2005	\$360.00	8.00	\$30.00	\$120.00			
04/28/2005	\$405.00	9.00	\$30.00	\$135.00			
04/29/2005	\$264.00	8.00	\$33.00				
04/29/2005	\$420.75	8.50	\$33.00	\$140.25			
04/30/2005	\$396.00	8.00	\$33.00	\$132.00			
04/30/2005	\$371.25	7.50	\$33.00	\$127.50			

Summary: Check No: 201894, Name: Sharon Rogers, Gross Pay: \$3,304.50, Net Pay: \$2,120.59, Date: 05/05/2005

6. Payroll Check Deleting

To delete an entire payroll check, you must first retrieve the desired check using the Payroll Window. Then select the desired check and click on the Delete button or select Delete from the menu.



7. Payroll Exporting

You may export both Summary and Detailed payroll information using the Payroll Window.

After retrieving the desired Check(s) you can click the Export button which will allow you to save either summary or detailed payroll data.

To save summary data you must have the Summary Tab selected. For detailed data, select the Detail Tab.

You can also export payroll information to External Systems such as Quickbooks, Peachtree, Business Works etc.

The screenshot displays the MicroStaffer Payroll window with the 'Export Payroll' dialog box open. The dialog box lists the following export options:

- 4. Quickbooks®
- 5. Peachtree® Payroll Export
- 6. Business Works® Export (After-Tax GL)
- 7. Peachtree® Payroll using DDE
- 8. ADP® Payroll Export
- 9. BW Access® Export (Pre-Tax Timecard)
- 10. BW Access® Export (After-Tax GL)

The background window shows a payroll table with the following data:

Check No.	Check Date	Employee	ID	Amount	Other Amount 1	Other Amount 2	Other Amount 3
201897	05/10/2005						
201901	05/11/2005						
201902	05/11/2005						
201898	05/10/2005						
201899	05/10/2005						
201900	05/11/2005	Augustine, Karen	299-36-5981	\$853.75	(\$229.00)	(\$52.93)	(\$12.38)
201894	05/05/2005	Rogers, Sharon	898-89-0544	\$3,304.50	(\$829.00)	(\$204.88)	(\$47.92)
201895	05/05/2005	Rogers, Sharon	898-89-0544	\$2,174.00	(\$493.00)	(\$134.79)	(\$31.52)
201896	05/05/2005	Rogers, Sharon	898-89-0544	\$1,111.25	(\$203.00)	(\$68.90)	(\$16.11)
Total:				\$17,186.75	(\$3,441.00)	(\$919.87)	(\$215.13)

VI. Using MicroStaffer - Reports & Queries

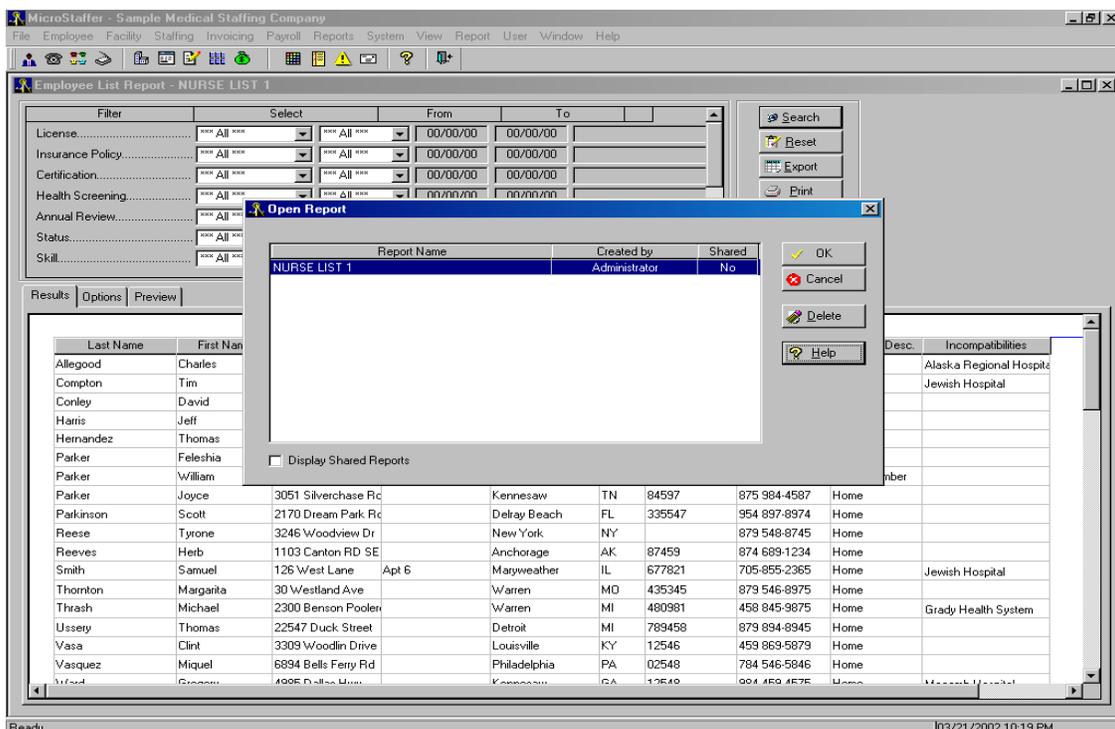
A. Query Manager & Report Engine Overview

The MicroStaffer report engine allows you to retrieve data stored within the system using a user driven report engine.

The report engine offers a consistent means at which to retrieve, view, print and export mission critical staffing and financial information.

MicroStaffer Report Engine Features:

- 1. User Defined Filter Criteria:** Located at the top of all report windows, this area allows you to specify what data to include in your report.
- 2. Results and Preview Tabs:** These tabs display the retrieved data. The results tab displays raw data, the preview tab displays data in Print Preview Mode.
- 3. Options Tab:** Some reports feature an Options tab. This tab is used to select such things as which columns to display as well as summary or detail report formats. Please refer to this often!
- 4. Sorting:** All report data can be sorted by clicking on the column headers on the Results tab.
- 5. Exporting:** All data can be exported to various file formats by clicking on the Export button or selecting Export from the menu.
- 6. Saving Reports:** You may save all settings for a report including query criteria, formats and display columns. This can be done using the Report menu option. You can also share your reports with other users.



B. Queries & Reports

1. Employee Listing Report

This report is used to retrieve lists of employees.

Various query criteria can be entered including Custom Data Fields.

The available report formats are list, profile and credentials.

Highlight items and right click the mouse to view report options which include email capabilities, label printing and mail merge.

MicroStaffer - Sample Medical Staffing Company

File Employee Facility Staffing Invoicing Payroll Reports System View Report User Window Help

Employee List Report

Filter: License, Insurance Policy, Certification, Health Screening, Annual Review, Status, Skill

Last Name	First Name	Address	Address2	City	State	Zip	Phone 1	Phone 1 Desc	Incompatibilities
Allegood	Charles	146 Lakeside Dr		Atlanta	GA		404 894-5984	Home	Alaska Regional Hospit
Compton	Tim	321 Hospital Lane		Denver	NV		784 895-4587	Home	Jewish Hospital
Conley	David	1507 Barkly Drive		Bryson City	NC	28713	879 879-5486	Home	
Harris	Jeff	2543 Ridgecrest Dr		Louisville	KY	54684	789 654-8794	Home	
Hernandez	Thomas	3635 Harmony Lane		Burnsville	MN	45879	789 456-5469	Home	
Parker	Feleshia	2285 Precilla Drive		Las Vegas	NV	55897	874-858-9696	Home	
Parker	William	3418 Vandiver Dr		Marietta	GA	30078	678 555-8745	Home Number	
Parker	Joyce	3051 Silverchase R		Kennesaw	TN	84597	875 984-4587	Home	
Parkinson	Scott	2170 Dream Park R		Delray Beach	FL	335547	954 897-8974	Home	
Reese	Tyrone	3246 Woodview Dr		New York	NY		879 548-8745	Home	
Reeves	Herb	1103 Canton RD SE		Anchorage	AK	87459	874 689-1234	Home	
Smith	Samuel	126 West Lane	Apt 6	Mayweather	IL	677821	705-855-2365	Home	Jewish Hospital
Thornton	Margarita	30 Westland Ave		Warren	MD	435345	879 546-8975	Home	
Thrash	Michael	2300 Benson Pooler		Warren	MI	480981	458 845-9875	Home	Grady Health System
Ussery	Thomas	22547 Duck Street		Detroit	MI	789458	879 894-8945	Home	
Vasa	Clint	3309 Woodlin Drive		Louisville	KY	12546	453 869-5879	Home	
Vasquez	Miquel	6894 Bells Ferry Rd		Philadelphia	PA	02548	784 546-5846	Home	

Results | Options | Preview

Ready 03/21/2002 10:18 PM

2. Work Summary Report

This report allows you to retrieve work history data. It gives you the ability to answer the question of ‘Who worked Where and When’?

This report is extremely useful when trying to fill orders or obtaining an instant glimpse into an employees work history. It is also ideal for monitoring overtime.

For example, assume a Client calls with an order for a specific Work Area. Use this report to input a date range, Work Area and the selected customer and instantly view which employees worked for this client.

There are three report type options on the options tab:

1. **Employee and Client:** Displays hours, shift counts etc. by Employee and Client
2. **Employee Only:** Displays hours, shift counts totals by employee regardless of where the employee worked. i.e. Employee Totals.
3. **Client Only:** Displays hours, shift counts etc. totals by client.

Employee Last Name	Employee First Name	Facility Name	Last Worked On	Shift Count	Hours Worked
		Jewish Hospital	03/21/02	45	
Thrash	Michael	Jewish Hospital	03/21/02	21	157.50
Thomton	Margarita	Jewish Hospital	03/17/02	4	30.00
		Grady Health System	02/21/02	7	
		Atlantic Medical Center	03/21/02	28	
Parker	William	Atlantic Medical Center	03/21/02	16	120.00
Vasquez	Miquel	Atlantic Medical Center	02/23/02	1	7.50
Harris	Jeff	Atlantic Medical Center	03/18/02	1	7.50
		Alaska Regional Hospital	03/19/02	22	
Compton	Tim	Alaska Regional Hospital	02/25/02	4	30.00
Conley	David	Alaska Regional Hospital	02/22/02	4	34.00
Allegood	Charles	Alaska Regional Hospital	02/27/02	4	30.00
Harris	Jeff	Alaska Regional Hospital	02/23/02	1	7.50
Thrash	Michael	Alaska Regional Hospital	03/20/02	13	97.50
Reese	Tyrone	Alaska Regional Hospital	03/15/02	7	52.50
Vasquez	Miquel	Alaska Regional Hospital	03/21/02	4	30.00
Vasa	Clint	Arlington Memorial Hospital	03/21/02	46	
Allegood	Charles	Arlington Memorial Hospital	03/21/02	21	158.00
		Arlington Memorial Hospital	02/25/02	1	7.50

3. Shift Status Report

The Shift Status Report retrieves information on shifts that have been entered into the system. The query criteria portion of this report allows you to retrieve existing bookings based upon key elements that are associated with shifts, checks and invoices.

For example, this report could be used for the following purposes:

1. Confirmed shifts.
2. Canceled shifts that require either the employee or customer to be notified of the cancellation.
3. Unfilled orders. Select 'Not Filled' under Employee Name.
4. Shifts that require confirmation.
5. Shifts that have not been paid or billed. Shifts that have been paid and not billed or billed and not paid.
6. The report includes hyperlink capabilities to client and employee data by clicking on underlined item and selecting the hyperlink from the list.

The screenshot shows the 'Shift Status Report' window in the MicroStaffer application. The window title is 'MicroStaffer - Sample Medical Staffing Company'. The menu bar includes File, Employee, Facility, Staffing, Invoicing, Payroll, Reports, System, View, Report, User, Window, and Help. The toolbar contains various icons for navigation and actions. The main area is divided into a filter section and a results table.

Filter Section:

- Employee: [All]
- Facility: [All]
- Date: [All]
- Status: [All]
- Confirmation Status: [All] Facility: Employee:
- Time Sheet: [All]
- Order Status: [ALL]

Results Table:

Facility Name	Shift Date	Employee Last Name	Employee First Name	Shift Name	Actual Start Time	Actual End Time	Conf. With Employee	Conf. With Facility	Status	Order Status
Jewish Hospital	02/14/02			Day	7:00 AM	3:00 PM	<input type="checkbox"/>	<input type="checkbox"/>	Scheduled/Firm	Yes
Jewish Hospital	02/16/02			Day	7:00 AM	3:00 PM	<input type="checkbox"/>	<input type="checkbox"/>	Scheduled/Firm	Yes
Jewish Hospital	02/20/02			7A	7:00 AM	7:00 PM	<input type="checkbox"/>	<input type="checkbox"/>	Scheduled/Firm	Yes
Grady Health System	02/15/02			Day	7:00 AM	3:00 PM	<input type="checkbox"/>	<input type="checkbox"/>	Scheduled/Firm	
Grady Health System	02/19/02			Day	7:00 AM	3:00 PM	<input type="checkbox"/>	<input type="checkbox"/>	Scheduled/Firm	
Jewish Hospital	02/15/02			Evening	3:00 PM	11:00 PM	<input type="checkbox"/>	<input type="checkbox"/>	Scheduled/Firm	Yes
Jewish Hospital	02/18/02			Night	11:00 PM	7:00 AM	<input type="checkbox"/>	<input type="checkbox"/>	Scheduled/Firm	Yes
Grady Health System	02/17/02			Evening	3:00 PM	11:00 PM	<input type="checkbox"/>	<input type="checkbox"/>	Scheduled/Firm	
Grady Health System	02/17/02			Night	11:00 PM	7:00 AM	<input type="checkbox"/>	<input type="checkbox"/>	Scheduled/Firm	
Grady Health System	02/21/02			Day	7:00 AM	3:00 PM	<input type="checkbox"/>	<input type="checkbox"/>	Scheduled/Firm	
Grady Health System	02/15/02			Day	7:00 AM	3:00 PM	<input type="checkbox"/>	<input type="checkbox"/>	Scheduled/Firm	Yes
Grady Health System	02/15/02			Day	7:00 AM	3:00 PM	<input type="checkbox"/>	<input type="checkbox"/>	Scheduled/Firm	Yes
Alaska Regional Hospital	02/17/02			Day	7:00 AM	3:00 PM	<input type="checkbox"/>	<input type="checkbox"/>	Scheduled/Firm	Yes
Alaska Regional Hospital	02/18/02	Conley	David	Day	7:00 AM	3:00 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Scheduled/Firm	Yes
Albert Einstein Medical Center	02/18/02			Evening	3:00 PM	11:00 PM	<input type="checkbox"/>	<input type="checkbox"/>	Scheduled/Firm	Yes
Alaska Regional Hospital	02/20/02	Conley	David	Day	7:00 AM	3:00 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Scheduled/Firm	Yes
Alaska Regional Hospital	02/20/02			Day	7:00 AM	3:00 PM	<input type="checkbox"/>	<input type="checkbox"/>	Scheduled/Firm	Yes
Alaska Regional Hospital	02/22/02	Allegood	Charles	Day	7:00 AM	3:00 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Scheduled/Firm	Yes

4. Employee Availability Report

The Employee Availability Report retrieves data that was entered into the Employee Availability's Window.

By highlighting items on the list and right clicking the mouse, you may view profiles, print to PDF writer, and email the results.

MicroStaffer - Sample Medical Staffing Company

File Employee Facility Staffing Invoicing Payroll Reports System View Report User Window Help

Employee Availability Report

Filter Select From To

Employee: *** All ***

Shift Class: *** All ***

Shift Date: Range 3/21/02 3/21/02

Employee Type: *** All ***

Desired Skill: *** All ***

Favorite Facility: *** All *** Min. Ranking: *** All ***

Not already Scheduled:

Search, Reset, Export, Print, Sort, Filter, Close

Availability Date	Shift Type	Employee Last Name	Employee First Name	Employee Phone 1	Employee Phone 1 Desc.	Status	Booked At	Note
03/21/02	Any Shift	Smith	Samuel	705-655-2365	Home	Available		
03/21/02	Any Shift	Parker	William	678 555-8745	Home Number	Scheduled/Booked	Atlantic Medical Center	
03/21/02	Any Shift	Parker	Joyce	875 984-4587	Home	Available		
03/21/02	Any Shift	Reeves	Herb	874 689-1234	Home	Available		
03/21/02	Any Shift	Parker	Feleshia	874-858-9696	Home	Available		
03/21/02	Any Shift	Parkinson	Scott	954 897-8974	Home	Available		
03/21/02	Any Shift	Thrash	Michael	458 845-9875	Home	Scheduled/Booked	Jewish Hospital...3:00 F	
03/21/02	Any Shift	Usseery	Thomas	879 894-8945	Home	Scheduled/Booked	Atlanta Medical Center.	
03/21/02	Any Shift	Ward	Gregory	984 459-4575	Home	Available		
03/21/02	Any Shift	Reese	Tyrone	879 548-8745	Home	Available		
03/21/02	Any Shift	Vasquez	Miquel	784 546-5946	Home	Available	Alaska Regional Hospit	
03/21/02	Any Shift	Vasa	Clint	459 869-5879	Home	Scheduled/Booked	Arlington Memorial Hos	
03/21/02	Any Shift	Conley	David	879 879-5486	Home	Available		
03/21/02	Any Shift	Compton	Tim	784 895-4587	Home	Available		
03/21/02	Any Shift	Allegood	Charles	404 894-5984	Home	Available		
03/21/02	Any Shift	Hernandez	Thomas	789 456-5469	Home	Available		
03/21/02	Any Shift	Harris	Jeff	789 654-8794	Home	Available		

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5. Client Listing Report

The Client Listing Report allows you to retrieve selected data for one or more Clients.

The Options Tab allows you to specify alternate report formats including: Standard Listing, Contacts Listing and Comments Listing.

Highlight and right click with the mouse to access a variety of functions for the report results which include email and mail merge.

Name	Address	City	State	Zip	Phone 1	Phone 1 Desc.
Jewish Hospital	217 E Chestnut St	Louisville	KY	40202	502 587 4011	Main
Grady Health System	80 Butler St. SE	Atlanta	GA	30335	404 616-4307	Emergency Room
Desert Spring Hospital	2075 E. Flamingo Rd	Las Vegas	NV	89119	702 733-8800	Main Number
University Medical Center	1800 W. Charleston Blvd	Las Vegas	NV	89102	702 383-2000	Main Number
Los Angeles Community Hospital	4081 E. Olympic Blvd	Los Angeles	CA	90023	323 267-0477	Main Number
UCLA Medical Center	10833 LE Conte Ave	Los Angeles	CA	90095	310 825 9111	Main Number
Cedars Medical Center	1400 NW 12 Ave	Miami	FL	33136		
Fairview Ridge Hospital	201 Niccollet Blvd	Burnsville	MN	55337	612 892-2000	Main Number
California Hospital Medical Cente	1401 S. Grand Ave	Los Angeles	GA	90015	213 748-2411	Main Number
Atlantic Medical Center	400 N. Clyde Morris Blvd	Daytona Beach	GA	90423	904 239-5000	Main Number
Castle Medical Center	640 Ulukahiki St.	Kailua	HI	96734		
Alaska Regional Hospital	2801 DeBarr Rd	Anchorage	AK	30598	907 276-1131	Main Number
Arlington Memorial Hospital	800 W. Randol Mill Rd	Arlington	TX	76012	567-909-1234	Main
Baptist Medical Center	111 Dallas St	San Antonio	TX	78205	210 222-8431	Main Number
Bellevue Hospital Center Ave	462 1st Ave	New York	NY	10016	212 562-4141	Main Number
Bronx Lebanon Hospital Center	1650 Grand Concourse	Bronx	NY	10457	718 590-1800	Main Number
Albert Einstein Medical Center	5501 Old York Rd	Philadelphia	PA	19141	215 456-7890	Main Number
Deaconess Hospital	311 Straight St.	Cincinnati	OH	45219	513 559-2100	Main Number
Atlanta Medical Center	303 Parkway Dr NE	Atlanta	GA	30335	404 265 4000	Main Number

6. Employee, Client and Vendor Contacts Report

The ability to maintain contact information, results and notes is crucial to a smooth running staffing agency. This report is provided to account for contacts between your staff and your employees, clients and vendors.

The report may be run for all contacts regardless of who the contact was with, or separated to be run for each type of contact.

Double click the contact line item, and access to the actual contact entry screen is provided.

The screenshot displays the 'MicroStaffer - Medical Staffing Agency' application window. The 'Contacts Report' window is open, showing a filter section and a table of contact records. The filter section includes dropdown menus for Date (Range: 04/01/2005 to 06/08/2005), User (All), Employee (All), Reason (All), Result (All), and Client (All). The table below shows the following data:

Contacted By	Contact Date	Contacted Party	Contact Type	Contact Reason	Contact Result
Administrator	27/2005 1:28	Rogers, S	Employee	Offered Work	Refused Shift
Administrator	13/2005 11:36	Abraham, M	Employee	Called to Notify of Cancellation	Left Message
Administrator	15/2005 10:11	Baker, M	Employee	Offered Work	Refused Shift
Administrator	17/2005 1:26	Rogers, S	Employee	Offered Work	Refused Shift
Administrator	17/2005 1:27	Rogers, S	Employee	Called to Notify of Cancellation	Left Message
Administrator	13/2005 12:36	Chester County Hospital	Client	Staffing needs discussion	Resolved issue
Administrator	17/2005 1:05	Chester County Hospital	Client	Staffing needs discussion	Left message
Administrator	17/2005 3:00	Chester County Hospital	Client	Staffing needs discussion	Resolved issue
Administrator	13/2005 11:35	Chester County Hospital	Client	Staffing needs discussion	Resolved issue
Administrator	9/2005 10:45	Apex Staffing	Vendor	Cold Call	
Administrator	06/2005 1:37	Get Me A Nurse Now Agency	Vendor	Cold Call	Left Message
Administrator	13/2005 12:35	Apex Staffing	Vendor	Cold Call	

7. Employee Leads Report

The right staffers are important to a well run staffing agency and this MicroStaffer report allows the user to list Employee Leads for a variety of options which include: print, email, mail merge and more.

The Employee Leads report also includes the ability to run in Profile or Credential format if you wish to collect that information from employee leads prior to hiring.

Double click an employee lead line item to access the Employee Lead facility from the report results.

MicroStaffer - Medical Staffing Agency

File Employee Client Vendor Staffing Invoicing Payroll Reports System View Report User Window Help

Employee Availability Contacts Documents Client Staffing Orders Invoicing Payroll Preferences Reminders Notifications Email Help Topics Re-Connect Exit

Employee Lead List Report

Filter Select From To

License..... [All] [All] 00/00/0000 00/00/0000

Insurance Policy..... [All] [All] 00/00/0000 00/00/0000

Certification..... [All] [All] 00/00/0000 00/00/0000

Health Screening..... [All] [All] 00/00/0000 00/00/0000

Annual Review..... [All] [All] 00/00/0000 00/00/0000

Test..... [All] [All] 00/00/0000 00/00/0000

Training..... [All] [All] 00/00/0000 00/00/0000

Results Options Preview

Last Name	First Name	Address	City	State	Zip	Phone 1	Phone 1 Desc.	Follow Up	Follow Up Date	Follow Up Note
Thomas	Sandy	45 Oldwick Lane	Downingtown	PA	19335	(610) 223-0909	Home Number		03/23/2004	
Smith	Janet	100 Main Street	Totowa	PA			Home		11/07/2004	Call her about her
Johnson	Michelle									
McDowell	Sandra	100 Main Street	Totowa	NC	10999		Home	X	06/03/2005	Call her for availab
Patterson	Sandra	100 Jackson Drive	New York	NC			Home			
Bufett	James	123 Duvall Street	Key West	FL	55666	800-444-5555	Home	X	06/06/2005	Need to acquire of

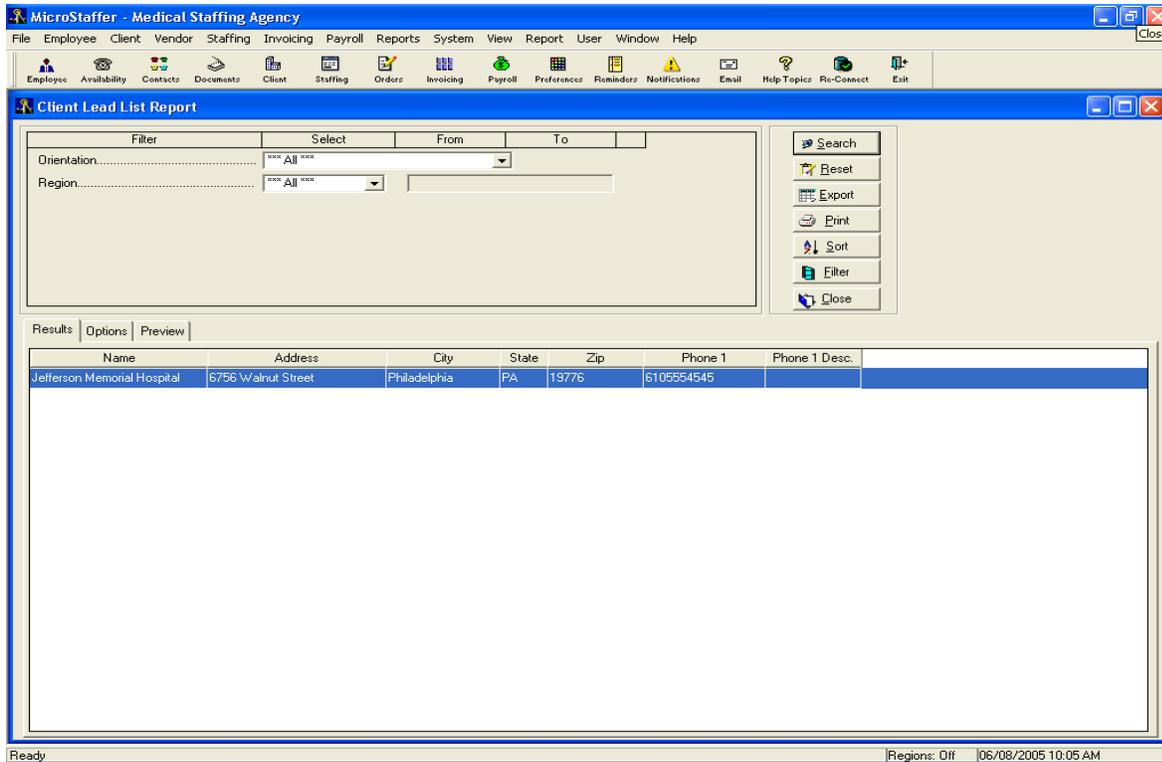
Ready Regions: Off | 06/08/2005 9:55 AM

8. Client Leads List Report

The Client Leads List Report provides the MicroStaffer user with Client Lead information. This is a valuable report in the acquisition of new business and provides the opportunity to stay on top of leads and to maintain old lead information for recontact in the future.

The information may be listed, printed, emailed and more.

Double click a client lead line item to access the Client Lead facility from within the report results.



9. Vendor Listing

Allows for a query/report on the vendors managed within MicroStaffer. This information may be used for email, mail merge, and more.

Name	Address	City	State	Zip	Phone 1	Phone 1 Desc.
Apex Staffing						
MM Staffing Agency	77 yesterday ave	Exton	PA	19341	610-555-1252	main
Today's Staffing	88 Today Building	YToday	ME	15245		
Get Me A Nurse Now Agency	99 Hurry Up ave	Hurrytown	CT	555646		
Get Me A Nurse Now Agency	99 Hurry Up Ave	Hurrytown	CT	555646		

Ready | Regions: Off | 06/08/2005 10:08 AM

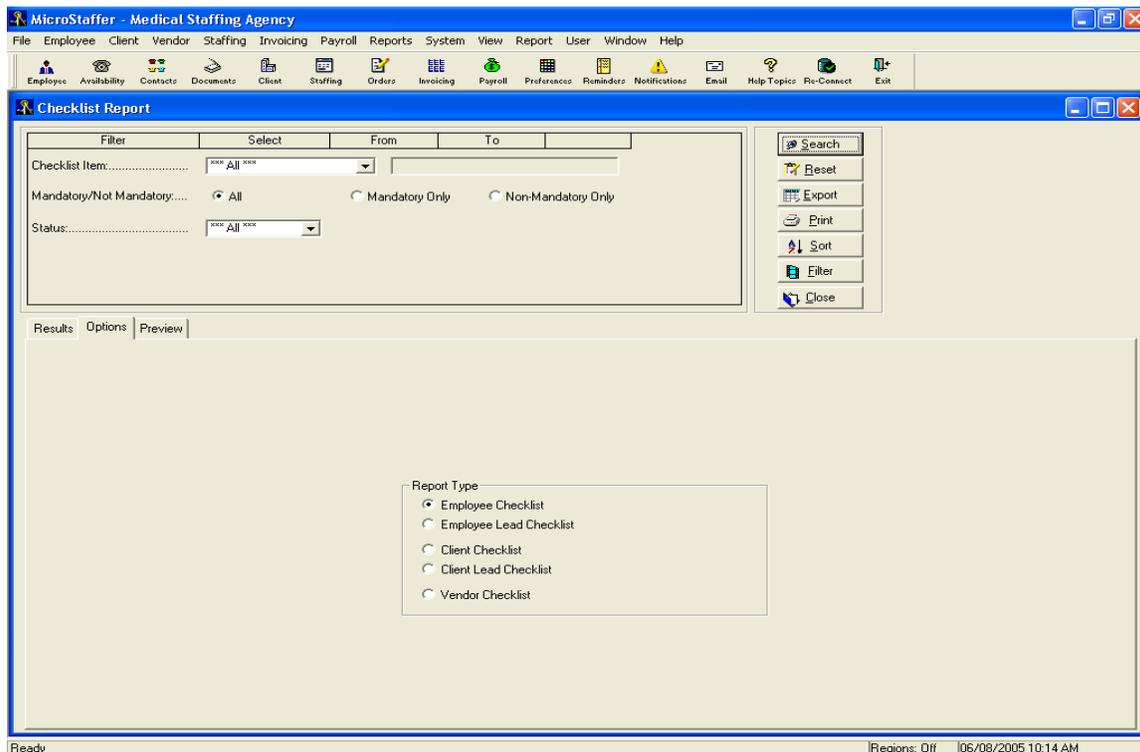
10. Checklist Report

The Checklist Report may be run for any of the following checklists by selecting it in the Options tab:

- Employee Checklist
- Employee Lead Checklist
- Client Checklist
- Client Lead Checklist
- Vendor Checklist

The Checklist Report may be run for a single checklist item, a list of checklist items or all checklist items. It may further be limited by mandatory and completed statuses. The Checklist Report provides a quick way to maintain checklist items without digging through mounds of paperwork.

To run the Checklist Report, select the report format from the Options tab and the limits from the report selections.



MicroStaffer User Manual

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MicroStaffer - Medical Staffing Agency

File Employee Client Vendor Staffing Invoicing Payroll Reports System View Report User Window Help

Employee Availability Contacts Documents Client Staffing Orders Invoicing Payroll Preferences Reminders Notifications Email Help Topics Ric-Connect Exit

Checklist Report

Filter Select From To

Checklist Item: [*** All ***]

Mandatory/Not Mandatory: All Mandatory Only Non-Mandatory Only

Status: [*** All ***]

Search
Reset
Export
Print
Sort
Filter
Close

Results Options Preview

Name	Item	Status	Note
Abraham, Mary Ann	TB Skin Test or CXR	<input type="radio"/> Incomplete <input checked="" type="radio"/> Complete	
Abraham, Mary Ann	Med-Surg Test	<input type="radio"/> Incomplete <input checked="" type="radio"/> Complete	
Abraham, Mary Ann	Basic Medication Test	<input type="radio"/> Incomplete <input checked="" type="radio"/> Complete	
Abraham, Mary Ann	Fire & Safety	<input checked="" type="radio"/> Incomplete <input type="radio"/> Complete	
Abraham, Mary Ann	Electrical Safety	<input type="radio"/> Incomplete <input checked="" type="radio"/> Complete	
Abraham, Mary Ann	Universal Precautions	<input type="radio"/> Incomplete <input checked="" type="radio"/> Complete	
Abraham, Mary Ann	Employment Contract	<input type="radio"/> Incomplete <input checked="" type="radio"/> Complete	
Abraham, Mary Ann	HIPAA Test	<input type="radio"/> Incomplete <input checked="" type="radio"/> Complete	
Abraham, Mary Ann	Form I-94	<input type="radio"/> Incomplete <input checked="" type="radio"/> Complete	
Abraham, Mary Ann	Nursing License	<input type="radio"/> Incomplete <input checked="" type="radio"/> Complete	
Abraham, Mary Ann	Health Checklist	<input type="radio"/> Incomplete <input checked="" type="radio"/> Complete	
Abraham, Mary Ann	CFR/BCL	<input type="radio"/> Incomplete <input checked="" type="radio"/> Complete	
Abraham, Mary Ann	Substance Abuse Policy	<input type="radio"/> Incomplete <input checked="" type="radio"/> Complete	
Abraham, Mary Ann	State Tax Form	<input type="radio"/> Incomplete <input checked="" type="radio"/> Complete	

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06/08/2005

Ready Regions: Off 06/08/2005 10:15 AM

MicroStaffer - Medical Staffing Agency

File Employee Client Vendor Staffing Invoicing Payroll Reports System View Report User Window Help

Employee Availability Contacts Documents Client Staffing Orders Invoicing Payroll Preferences Reminders Notifications Email Help Topics Ric-Connect Exit

Checklist Report

Filter Select From To

Checklist Item: [*** All ***]

Mandatory/Not Mandatory: All Mandatory Only Non-Mandatory Only

Status: [*** All ***]

Search
Reset
Export
Print
Sort
Filter
Close

Results Options Preview

Name	Item	Status	Note
Jefferson Memorial Hospital	Copy of Policy Manual received	<input checked="" type="radio"/> Incomplete <input type="radio"/> Complete	
Jefferson Memorial Hospital	Directions to facility	<input checked="" type="radio"/> Incomplete <input type="radio"/> Complete	
Jefferson Memorial Hospital	Executed Contract	<input checked="" type="radio"/> Incomplete <input type="radio"/> Complete	

Page 1 of 1

06/08/2005

Ready Regions: Off 06/08/2005 10:16 AM

11. Billing Revenue & Profit Report

The Revenue and Profit Report displays profit and loss data on shifts that have been invoiced and/or billed. It will calculate burdens if entered on the Payroll tab in the Employee Setup facility.

Use this report to manage the profitability of your company.

MicroStaffer - Medical Staffing Agency

File Employee Client Vendor Staffing Invoicing Payroll Reports System View Report User Window Help

Employee Availability Contacts Documents Client Staffing Orders Invoicing Payroll Preferences Reminders Notifications Email Help Topics Re-Connect Exit

Revenue & Profit Report

Filter Select From To

Client: [All] [v]

Worked Date: [Range] [04/01/2005] [04/30/2005] [v]

Area: [All] [v]

Employee/Corporation: [Employees Only] [v]

Employee Type: [All] [v]

Shift Class: [All] [v]

Invoice Date: [All] [v]

Search [v]

Reset [v]

Export [v]

Print [v]

Sort [v]

Filter [v]

Close [v]

Results | Preview

Client	Revenue	Cost	Profit Amount	Burden Amount	Profit %	# Of Shifts Invoiced	# Of Shifts Paid	# Of Hours Invoiced	# Of Hours Paid
St. Joseph's Manor	\$5,173.50	\$9,080.63	(\$2,907.13)	\$0.00	-56.00%	18	43	143.50	344.50
Mercy Hospital	\$1,000.00	\$600.00	\$400.00	\$0.00	40.00%	5	5	40.00	40.00
Chester County Hospital	\$39,762.76	\$9,936.75	\$29,844.00	\$283.01	74.00%	88	28	703.50	227.25
Mayo Clinic of Philadelphia	\$210.00	\$0.00	\$210.00	\$0.00	100.00%	1	0	7.50	0.00
Total:	\$46,146.26	\$18,616.38	\$27,246.87	\$283.01	39.50%	112	76	894.50	611.75

Ready | Regions: Df | 07/12/2005 10:00 AM

12. Check Register

The Check Register Report is ideally suited for retrieving a variety of check and payroll related data.

Use this report to access payroll information and export it into various file formats. This data can then be used to feed any external payroll systems for accounting and tax withholding purposes.

The report allows you to retrieve both summary and detailed check information. You may also select which data columns to display and/or export.

You can use the 'Save Report' feature to save a regularly scheduled payroll extract. This allows you to facilitate payroll processing to any external payroll systems quickly and easily.

Check Date	Check Number	Issued To	Gross Pay	Net Pay	Ss No	Tax Id	External Id	Check Type
02/20/02	2000	Charles Allegood	442.50	442.50	789457895			Standard
02/20/02	2001	Tim Compton	667.50	667.50	879546987			Standard
02/20/02	2002	David Conley	471.25	471.25	789154987			Standard
02/20/02	2003	Jeff Harris	238.00	238.00	456987712			Standard
02/20/02	2004	William Parker	450.00	450.00	555555555			Standard
02/20/02	2005	Herb Reeves	690.00	690.00	555178955			Standard
02/20/02	2006	Margarita Thornton	702.00	702.00	321589745			Standard
02/20/02	2007	Michael Thrash	690.00	690.00	555121497			Standard
02/20/02	2008	Clint Vasa	462.00	462.00	458795455			Standard
02/20/02	2009	Miquel Vasquez	238.00	238.00	789451595			Standard
02/20/02	2010	Gregory Ward	217.50	217.50	123547498			Standard
03/21/02	2011	William Parker	238.00	238.00	555555555			Standard
03/21/02	2012	Margarita Thornton	224.00	224.00	321589745			Standard
03/21/02	2013	Thomas Ussey	1155.00	1155.00	123548798			Standard
			6,885.75	6,885.75				

13. Invoice Register

The Invoice Register Report is ideally suited for retrieving a variety of invoice related data.

Use this report to access invoice information and export it into various file formats. This data can then be used to feed any external systems for accounting. It may also be useful in performing invoice aging tasks.

The report allows you to retrieve both summary and detailed invoice information. You may also select which data columns to display and/or export.

The screenshot displays the 'Invoice Register Report' window within the 'MicroStaffer - Sample Medical Staffing Company' application. The window title bar includes standard OS controls. The menu bar contains: File, Employee, Customer, Staffing, Invoicing, Payroll, Reports, System, View, Report, User, Window, Help. The toolbar contains icons for various functions. The report interface includes a 'Filter' section with dropdown menus for Customer, Invoice Number, Invoice Date, Payment Status, Shift Date, and Employee Type. A 'Results' section shows a table with columns: Invoice Date, Invoice Number, Invoiced To, Invoice Total, and External Id. The table contains 10 rows of data, with a total of 10,628.78. The status bar at the bottom shows 'Ready' and the date/time '03/21/2002 10:27 PM'.

Invoice Date	Invoice Number	Invoiced To	Invoice Total	External Id
02/20/02	1000	Alaska Regional Hospital	2625.000	
02/20/02	1003	Atlanta Medical Center	682.500	
02/20/02	1004	Atlantic Medical Center	990.000	
02/20/02	1002	Arlington Memorial Hospital	682.500	
02/20/02	1005	Baptist Medical Center	975.000	
02/27/02	1006	Jewish Hospital	2034.780	
02/20/02	1001	Albert Einstein Medical Center	315.000	
03/19/02	1007	Atlanta Medical Center	322.500	
03/21/02	1008	Atlanta Medical Center	2001.500	
			10,628.78	

14. Advances and Deductions Report

The Advances and Deductions Report allows you to track and manage all payroll amounts that were advanced and/or deducted from shifts and checks.

When employees are paid in excess of actual work performed, you may enter a payroll advance amount on the Payroll and Billing tab of the shift detail window. This represents the amount paid but not worked. On a subsequent shift you may then enter a payroll deductions amount to offset the advanced amount.

The Advances and Deductions report displays all advances and deductions that are entered in this matter, thereby allowing you to both maintain a proper audit trail as well as ensuring that all overpayments have been properly paid back.

MicroStaffer - Sample Medical Staffing Company

File Employee Customer Staffing Invoicing Payroll Reports System View Report User Window Help

Advances and Deductions Report

Filter Select From To

Employee..... All

Shift Date..... All

Search
Reset
Export
Print
Sort
Filter
Close

Results Preview

Employee: Parker, William

Date	Shift	Check#	Amount Deducted	Amount Overpaid
3/23/02	Night	2011	0.00	23.00
Total:			0.00	23.00
			Net:	(\$23.00)

Ready 03/21/2002 10:56 PM

15. Payroll Tax Reports

The Payroll Tax Reports window is used to retrieve data for Taxes and Deductions applied to payroll items.

The Options Tab allows several different views of Payroll and Withholding data:

1. Earnings & Taxes (List Format)
2. Earnings & Taxes (List Format) with State Earnings
3. Earnings & Taxes (Spreadsheet Format)
4. Earnings & Taxes (Spreadsheet Format) with State Earnings
5. Earnings & Taxes (Spreadsheet Format with Earnings for each deduction)
6. Federal and State Payroll Tax Withholding report

The screenshot shows the 'Payroll Tax Reports' window in the MicroStaffer application. The window title is 'MicroStaffer - Sample Nursing Service Company'. The menu bar includes 'File', 'Employee', 'Facility', 'Staffing', 'Invoicing', 'Payroll Reports', 'System View', 'User', 'Window', and 'Help'. The toolbar contains various icons for navigation and actions. The main area is divided into a filter section and a results table.

Filter Section:

Filter	Select	From	To
Employee.....	*** All ***		
Payroll/Check Date.....	Range	1/22/02	12/31/02
Check Number.....	*** All ***		

Results Table:

Check No.	Check Date	First Name	Last Name	Soc. Sec. No.	Gross Pay	Federal Income Tax	Fica	Medicare	Ky Income Tax	Ny Income Tax	Nyc Resider
1036	01/22/02	ANDREA	AGUILAR	125-66-2167	379.50	-34.95	-23.53	-5.50			-9.52
1037	01/22/02	PAULINE	HUTSON	131-70-8864	379.50	-43.61	-23.53	-5.50			-10.53
1044	02/15/02	DOMENICA	CARRIER	556-31-0641	393.75	-28.44	-24.41	-5.71			-9.25
1045	02/18/02	JOSEPH	FALCON	118-54-7497	379.50						
1046	03/18/02	MARY	ABRAHAM	131-76-7285	536.25	-44.16	-33.25	-7.78	-79.39		
Total:					2,068.50	-151.16	-104.72	-24.49	-79.39	-29.30	-1

The status bar at the bottom shows 'Ready' and the date/time '03/21/2002 10:57 PM'.

MicroStaffer User Manual

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16. Work Codes

This report provides an analysis of work codes. Work Codes are created within the List Manager window and attached to a shift within the company set up window on the shifts tab. Each shift may have a particular work code assigned with rates being calculated for items such as worker's compensation where the rate changes based upon the type of work being performed.

The screenshot shows the 'Work Code Report' window in the MicroStaffer application. The window title is 'MicroStaffer - Medical Staffing Agency'. The menu bar includes: File, Employee, Client, Vendor, Staffing, Invoicing, Payroll, Reports, System, View, Report, User, Window, Help. The toolbar contains icons for Employee, Availability, Contacts, Documents, Client, Staffing, Orders, Invoicing, Payroll, Preferences, Reminders, Notifications, Email, Help Topics, Re-Connect, and Exit.

The 'Work Code Report' window has a filter section with the following fields:

- Client: All
- Date: Range from 06/01/2005 to 06/30/2005
- State: (empty)
- WC Code: (empty)

On the right side of the filter section, there are buttons for Search, Reset, Export, Print, Sort, Filter, and Close.

The main report area is titled 'Work Code Analysis - Detail' and 'Page 1 of 3'. It shows the following summary information:

- Run Date: 07/12/2005
- Range: 06/01/2005 - 06/30/2005
- For: Medical Staffing Agency

The table below shows the detailed work code analysis data:

W/C CODE	STATE	W/C RATE	GROSS PAY	W/C AMT.	REG HOURS	OT HOURS	SS# CUST#	Name
NURH	PA		240.00		8.00	0.00	180-66-5191	Cherian, Alison
Customer Total:			240.00	0.00	8.00	0.00	2	St. Joseph's Manor
NURH	PA		424.00		8.00	0.00	071-86-6123	Abraham, Mary Ann
NURH	PA		424.00		8.00	0.00	071-86-6123	Abraham, Mary Ann
NURH	PA		296.00		8.00	0.00	167-80-8151	Wang, Susan
NURH	PA		296.00		8.00	0.00	167-80-8151	Wang, Susan
NURH	PA		296.00		8.00	0.00	167-80-8151	Wang, Susan
NURH	PA		296.00		8.00	0.00	167-80-8151	Wang, Susan
NURH	PA		296.00		8.00	0.00	167-80-8151	Wang, Susan
NURH	PA		296.00		8.00	0.00	167-80-8151	Wang, Susan
NURH	PA		104.00		8.00	0.00	555-47-8547	Wenk, Bobbi
NURH	PA		104.00		8.00	0.00	555-47-8547	Wenk, Bobbi
NURH	PA		104.00		8.00	0.00	555-47-8547	Wenk, Bobbi

The status bar at the bottom shows 'Ready' on the left and 'Regions: Diff | 07/12/2005 10:09 AM' on the right.

17. Pay and Billing Rates Report

The System Pay and Billing Rates report allows you to view and edit all Pay and Billing rates in the MicroStaffer system. The options tab allows you to view rates for customers or employees. Other options include:

Pay Rates Only: This option displays only pay rates based on the filter criteria specified.

Bill Rates Only: This option displays only bill rates based on the filter criteria specified.

Pay and Bill Rate: Displays both Pay and Bill rates.

The rate types reported on can be selected from:

All

Standard Rates only

Custom Rates only

The report may further be broken down by limiting date active, inactive or non specific dates on the report. (These dates are set when creating the rate code). For all rates regardless of date, select all.

Please note that this report is editable and you may edit any rates directly.

MicroStaffer - MedTemps, Inc.

File Employee Customer Vendor Staffing Invoicing Payroll Reports System View Report User Window Help

Employee Availability Contacts Documents Customer Staffing Orders Invoicing Payroll Preferences Reminders Notifications Email Help Topics Re-Connect Exit

System Pay and Billing Rates Report

Filter Select From To

Customer: Brookwood Medical Center

Rate Type:

- All
- Standard Rates
- Custom Rates

Employee: All

Search, Reset, Export, Print, Save, Filter, Close

Results Options Preview

Brookwood Medical Center							
Shift	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Brookwood A-P..... (6:45 AM - 7:15 PM)							
Pay Rates							
(4029) Standard Rate							
6:45 AM - End of Shift.....	.00	.00	.00	.00	.00	.00	.00
(4038) RN MS CATT A-P							
6:45 AM - 12:15 PM.....	27.00	27.00	27.00	27.00	27.00	27.00	27.00
12:15 PM - 12:45 PM (Break).....	27.00	27.00	27.00	27.00	27.00	27.00	27.00
12:45 PM - 3:15 PM.....	27.00	27.00	27.00	27.00	27.00	27.00	27.00
3:15 PM - End of Shift.....	27.00	27.00	27.00	27.00	27.00	27.00	27.00
(4039) RN CAT 2, A-P							
6:45 AM - 12:15 PM.....	28.00	28.00	28.00	28.00	28.00	28.00	28.00
12:15 PM - 12:45 PM (Break).....	28.00	28.00	28.00	28.00	28.00	28.00	28.00
12:45 PM - 3:15 PM.....	28.00	28.00	28.00	28.00	28.00	28.00	28.00
3:15 PM - End of Shift.....	28.00	28.00	28.00	28.00	28.00	28.00	28.00
(4040) LPN All Areas A-P							
6:45 AM - 12:15 PM.....	20.00	20.00	20.00	20.00	20.00	21.00	21.00
12:15 PM - 12:45 PM (Break).....	20.00	20.00	20.00	20.00	20.00	21.00	21.00
12:45 PM - 3:15 PM.....	20.00	20.00	20.00	20.00	20.00	21.00	21.00

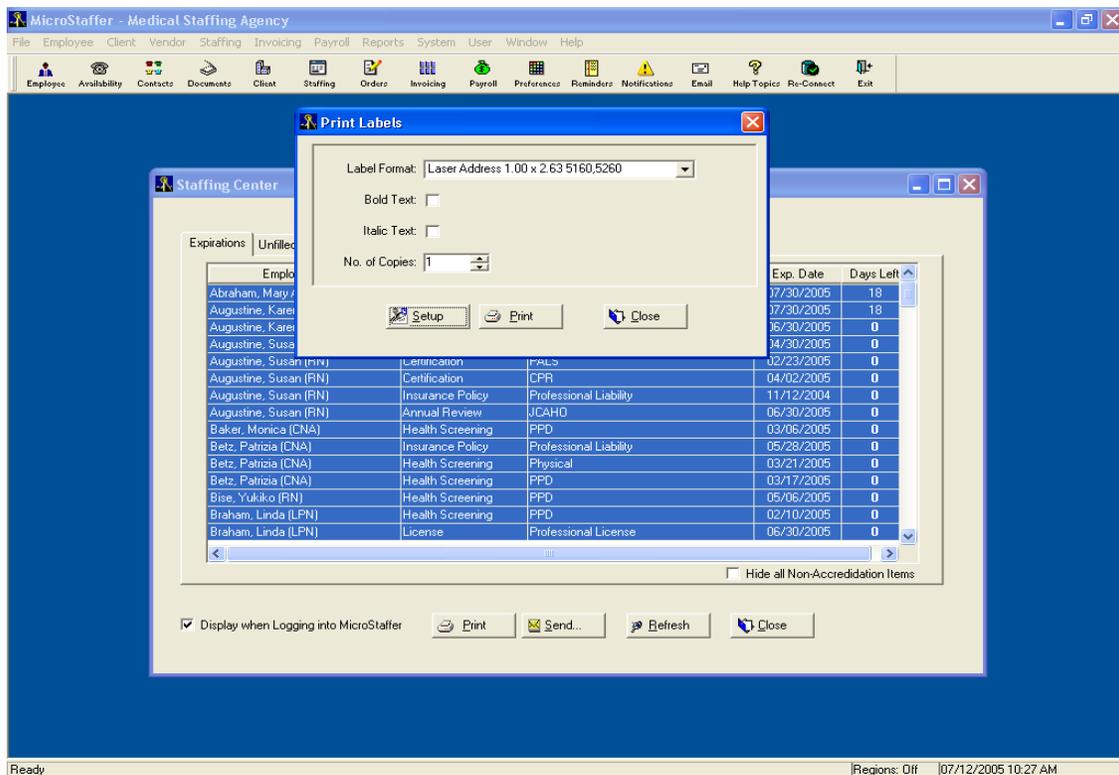
11/14/2005 Page 1 of 18

Ready Regions: Off 11/14/2005 11:37 AM

C. Label Printing

Label printing may be completed from a variety of data sources which may include report queries or Staffing Center information.

The selected items to print labels for were highlighted and then right clicked to access the label printing option. Choose the format desired and continue.



D. Custom & Management Reports

Management Reports are designed for reporting tasks that involve detailed and summary analysis of various data for performance and trend indicators. These reports are divided into several areas and include complex and user friendly graphical, sort and filter capabilities.

Custom Reports are programmed and written by MicroStaffer programmers based on specifications of our customers. This is a fee based service that allows us to offer Custom Reports to our customers.

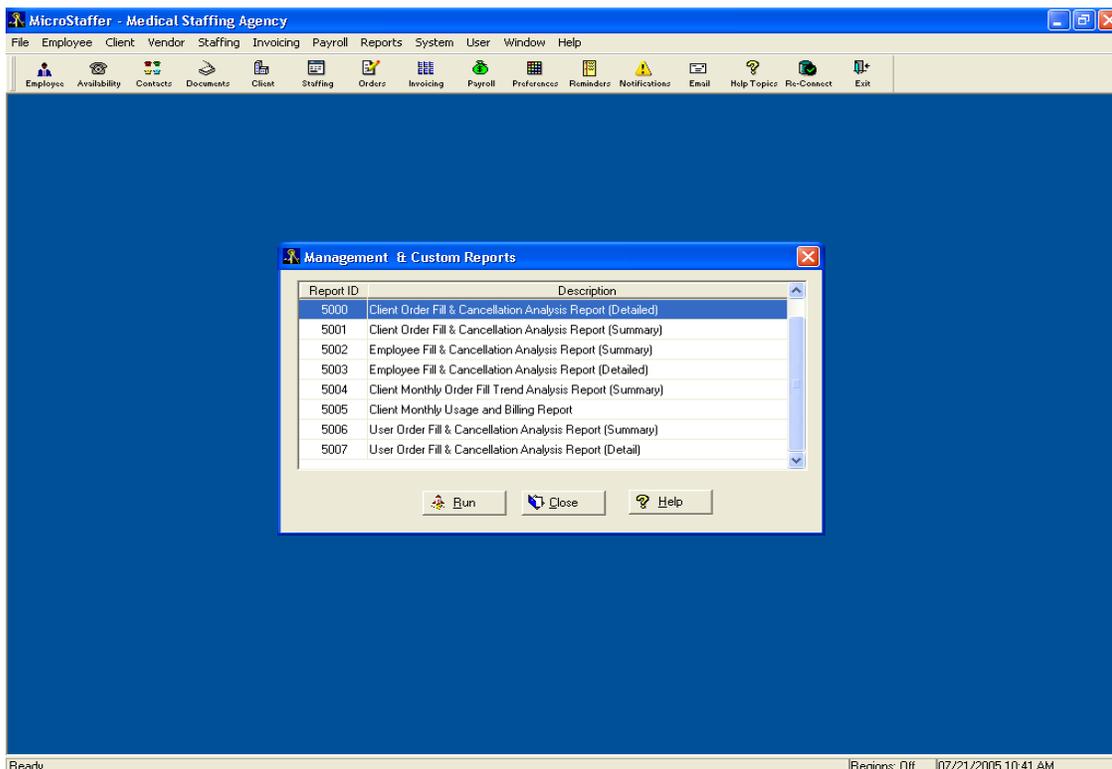
1. Management Report Overview

In general, all Management Reports within MicroStaffer share common functionality that allow users to Sort, Export, Filter, Print and Email reports.

Summary Reports also offer the user the ability to drill down into detail level reports by double clicking any given output row on the Summary report.

Graphical Display mode is also available on select Reports by clicking on the Graph Icons in the Report Header Columns.

Each descriptive column of all Management Reports are based on the Type Classification for every Status Code in the Status Code List on the System Settings and Utilities' Status List Tab.

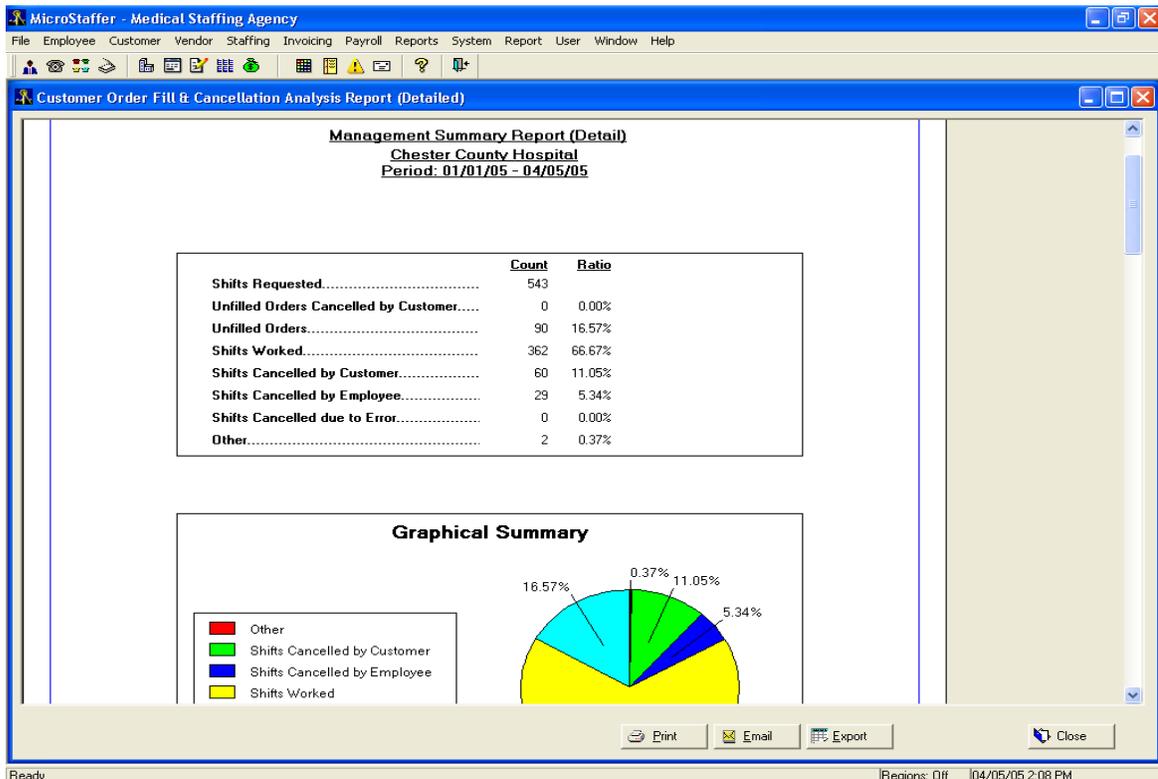


2. Report 5000 - Customer Order Fill & Cancellation Analysis Report (Detail)

The Client Order Fill & Cancellation Analysis Report (Detailed) provides a detailed analysis of shifts requested for the specified client and includes a breakdown that lists the employees involved within each type of status code. The report is run for a specified client and date range. This analysis includes a breakdown and graphical analysis of shifts requested by:

- Unfilled orders cancelled by client
- Unfilled orders
- Shifts worked
- Shifts cancelled by client
- Shifts cancelled by employee
- Shifts cancelled due to error
- Other

The report may also be run for Orders Only when the box is checked. This will include only those shifts which are marked as a Client Order on the Shift Detail window. (This is automatically checked for new orders entered into MicroStaffer.)



3. Report 5001 – Client Order Fill & Cancellation Analysis Report (Summary)

The Client Order Fill & Cancellation Analysis Report (Summary) is run for all clients for a specified date range. Click the box next to Include Projected Billing and Payroll Numbers if you wish those numbers to be included in the report calculation, otherwise, leave the box blank. Click the box next to Report on Orders only if you wish to run the report for only items marked as a Client Order on the Shift Detail window. This report provides an analysis of shifts requested by:

- Unfilled orders cancelled by client
- Unfilled orders
- Shifts worked
- Shifts cancelled by client
- Shifts cancelled by employee
- Shifts cancelled due to error
- Other
- Billed
- Paid

The Client Order Fill & Cancellation Analysis Report (Summary) also provides a drill down capability into Report 5000 - Client Order Fill & Cancellation Analysis Report (Detailed). Simply double click a client name to display the detailed report for that location. Click BACK to return to the summary report.

To access a graphical representation of the data listed in the specific columns of the Client Order Fill & Cancellation Analysis Report (Summary) simply click the graph button. Click BACK to return to the summary report.

Customer	Requested	Filled	%	Unfilled	%	Cancelled Orders	%	Cancelled by Customer	%	Cancelled by Employee	%	Cancelled by Error	%	Other	%	Billed	Paid	%
Albert Einstein Medical Center	10	2	20%	8	80%	0	0%	0	0%	0	0%	0	0%	0	0%	\$0.00	\$0.00	0%
Chester County Hospital	126	94	75%	25	20%	0	0%	5	4%	1	1%	0	0%	1	1%	\$41,623.33	\$10,577.25	75%
Collinswood Care Center	5	0	0%	5	100%	0	0%	0	0%	0	0%	0	0%	0	0%	\$0.00	\$0.00	0%
Mayo Clinic of Philadelphia	17	10	59%	0	0%	0	0%	3	18%	4	24%	0	0%	0	0%	\$1,575.50	\$0.00	100%
Mercy Hospital	16	16	100%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	\$0.00	\$0.00	0%
St. Joseph's Manor	32	29	91%	1	3%	0	0%	0	0%	0	0%	0	0%	2	6%	\$184.00	\$0.00	100%
Total:	206	151	73%	39	19%	0	0%	8	4%	5	2%	0	0%	3	1%	\$43,382.83	\$10,577.25	46%

4. Report 5002 – Employee Shift Fill & Cancellation Analysis Report (Summary)

The Employee Shift Fill & Cancellation Analysis Report (Summary) is run for all employees for a specified date range. Click the box next to Include Projected Billing and Payroll Numbers if you wish those numbers to be included in the report calculation, otherwise, leave the box blank. It provides an analysis by employee and is broken down by the following criteria:

- Shifts scheduled
- Shifts worked
- Shifts cancelled by client
- Shifts cancelled by employee
- Shifts cancelled by error
- Other
- Billed
- Paid
- Profit Margin

The Employee Shift Fill & Cancellation Analysis Report (Summary) also provides a drill down capability into Report 5003 - Employee Shift Fill & Cancellation Analysis Report (Detailed) by double clicking the employee name. Click BACK to return to the summary report.

To access a graphical representation of the data listed in the specific columns of the Employee Shift Fill & Cancellation Analysis Report (Summary) simply click the graph button. Click BACK to return to the summary report.

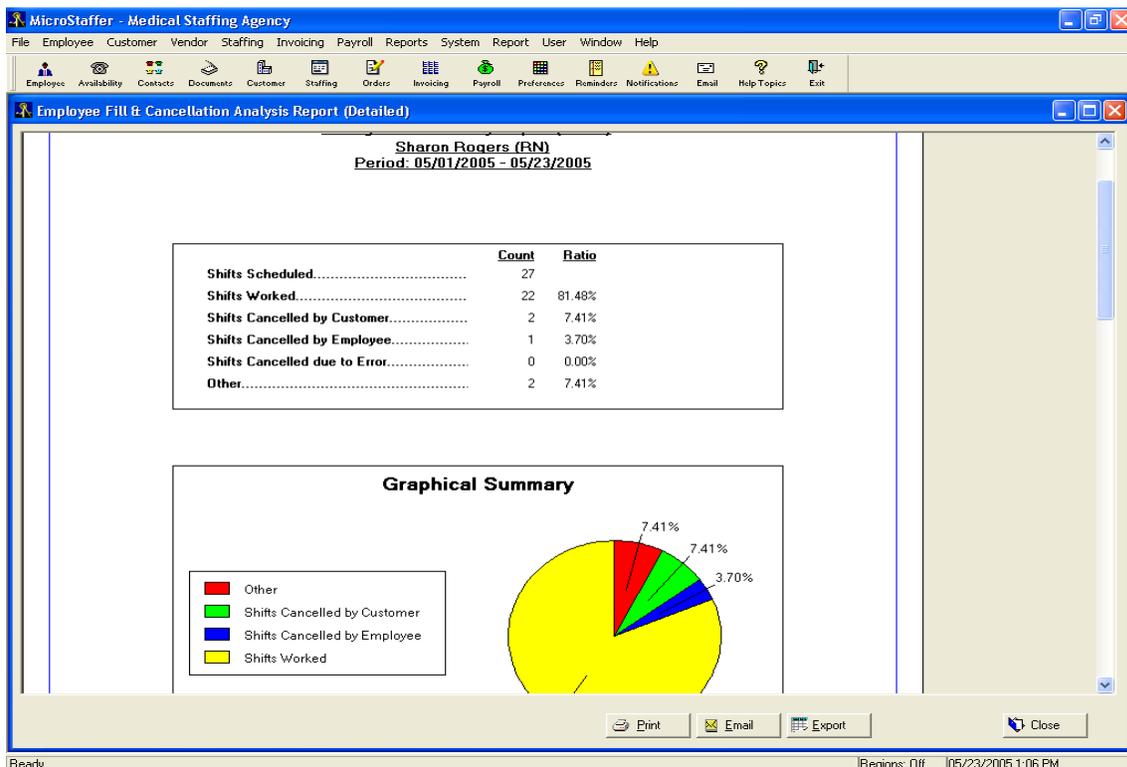
Employee	Scheduled	Worked	%	Cancelled by Customer	%	Cancelled by Employee	%	Cancelled by Error	%	Other	%	Billed	Paid	Profit Margin
raham, Mary Ann (RN)	9	9	100%	0	0%	0	0%	0	0%	0	0%	\$3,833.75	\$2,586.50	33%
eleke, Yvette (Denise) (RN)	7	7	100%	0	0%	0	0%	0	0%	0	0%	\$3,769.75	\$2,350.25	38%
gustine, Karen (RN)	6	6	100%	0	0%	0	0%	0	0%	0	0%	\$3,409.75	\$2,350.25	31%
gustine, Susan (RN)	2	2	100%	0	0%	0	0%	0	0%	0	0%	\$549.00	\$0.00	100%
ker, Monica (CNA)	1	1	100%	0	0%	0	0%	0	0%	0	0%	\$0.00	\$0.00	0%
ke, Michelle (CNA)	3	3	100%	0	0%	0	0%	0	0%	0	0%	\$476.25	\$0.00	100%
bata, Tamitope (RN)	3	3	100%	0	0%	0	0%	0	0%	0	0%	\$0.00	\$0.00	0%
appelle, Nicole (RN)	1	1	100%	0	0%	0	0%	0	0%	0	0%	\$480.00	\$0.00	100%
erian, Alison (RN)	3	2	67%	1	33%	0	0%	0	0%	0	0%	\$526.13	\$0.00	100%
rik, Melissa (CNA)	17	16	94%	0	0%	1	6%	0	0%	0	0%	\$0.00	\$0.00	0%
vis, Amanda (RN)	7	7	100%	0	0%	0	0%	0	0%	0	0%	\$4,635.00	\$0.00	100%
minique, Jennifer (RN)	5	5	100%	0	0%	0	0%	0	0%	0	0%	\$0.00	\$0.00	0%
inson, Ashley (RN)	1	1	100%	0	0%	0	0%	0	0%	0	0%	\$480.00	\$0.00	100%
rdan, Michele (RN)	10	9	90%	0	0%	0	0%	0	0%	1	10%	\$758.69	\$0.00	100%
rpeh, Maria (RN)	10	9	90%	1	10%	0	0%	0	0%	0	0%	\$1,791.88	\$0.00	100%
lly, Stacy (RN)	4	4	100%	0	0%	0	0%	0	0%	0	0%	\$2,466.88	\$0.00	100%
ving, Lisa (CNA)	2	2	100%	0	0%	0	0%	0	0%	0	0%	\$410.00	\$0.00	100%
assaquoi, Donald (CNA)	1	1	100%	0	0%	0	0%	0	0%	0	0%	\$184.00	\$0.00	100%
il, Linda (CNA)	1	1	100%	0	0%	0	0%	0	0%	0	0%	\$228.75	\$0.00	100%
id, Melvelyn (LPN)	2	2	100%	0	0%	0	0%	0	0%	0	0%	\$0.00	\$0.00	0%
rgers, Sharon (RN)	27	22	81%	2	7%	1	4%	0	0%	2	7%	\$7,574.00	\$3,290.25	57%
imuel, Angela (LPN)	11	11	100%	0	0%	0	0%	0	0%	0	0%	\$5,634.00	\$0.00	100%

5. Report 5003 - Employee Shift Fill & Cancellation Analysis Report (Detailed)

The Employee Shift Fill & Cancellation Analysis Report (Detailed) is run for a specified employee and date range. It provides a detailed accounting and graphical analysis of the following items for the specified employee:

- Shifts scheduled
- Shifts worked
- Shifts cancelled by client
- Shifts cancelled by employee
- Shifts cancelled by error
- Other

The Employee Shift Fill & Cancellation Analysis Report (Detailed) also provides a breakdown by facility.



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6. Report 5004 – Client Monthly Order Fill Trend Analysis Report (Summary)

The Client Monthly Order Fill Trend Analysis Report (Summary) is run for a specified month or range of months. Select the month to start calculation, the year and the number of months to include on the report. You may also choose to suppress accounts with no activity. This report provides an analysis of monthly order fill trends by:

- Client
- Orders
- Filled
- Fill %
- Revenue
- Unfilled Revenue
- Totals

Customer Monthly Order Fill Trend Analysis Report (Summary)

Customer	A. January - 2005						B. February - 2005					C. March - 2005					Total			
	Orders	Filled	Fill %	Revenue	Unfilled Revenue		Orders	Filled	Fill %	Revenue	Unfilled Revenue		Orders	Filled	Fill %	Revenue	Unfilled Revenue	Orders	Filled	Revenue
Albert Einstein Medical Center	37	18	49%	\$6,749.00	\$2,288.50		14	3	21%	\$960.00	\$1,762.00		0	0	0%	\$0.00	\$0.00	51	21	\$11,511.50
Chester County Hospital	244	162	66%	\$75,571.23	\$5,300.13		124	98	79%	\$51,051.45	\$6,927.13		97	92	95%	\$44,344.71	\$1,672.00	465	352	\$117,973.69
Collinswood Care Center	8	3	38%	\$337.50	\$416.00		20	3	15%	\$1,691.50	\$784.00		0	0	0%	\$0.00	\$0.00	28	6	\$1,828.50
East Wilmington Health and R	0	0	0%	\$0.00	\$0.00		0	0	0%	\$0.00	\$0.00		1	1	100%	\$384.00	\$0.00	1	1	\$384.00
Everton Heights	0	0	0%	\$0.00	\$0.00		8	0	0%	\$0.00	\$0.00		0	0	0%	\$0.00	\$0.00	8	0	\$0.00
Hahneman University Hospital	40	10	25%	\$3,344.00	\$1,560.00		25	6	24%	\$1,042.50	\$1,536.00		50	25	50%	\$6,165.00	\$1,536.00	115	41	\$11,042.50
Holy Cross Hospital	0	0	0%	\$0.00	\$0.00		1	0	0%	\$0.00	\$0.00		0	0	0%	\$0.00	\$0.00	1	0	\$0.00
Mather University Hospital	1	1	100%	\$383.12	\$0.00		0	0	0%	\$0.00	\$0.00		0	0	0%	\$0.00	\$0.00	1	1	\$383.12
Mayo Clinic of Philadelphia	3	3	100%	\$1,104.00	\$0.00		0	0	0%	\$0.00	\$0.00		3	3	100%	\$276.00	\$0.00	6	6	\$1,380.00
Mercy Hospital	21	21	100%	\$4,200.00	\$0.00		20	20	100%	\$4,020.25	\$0.00		23	23	100%	\$4,600.00	\$0.00	64	64	\$8,820.25
Park Pleasant Nursing Home	0	0	0%	\$0.00	\$0.00		0	0	0%	\$0.00	\$0.00		1	1	100%	\$945.00	\$0.00	1	1	\$945.00
S&L	0	0	0%	\$0.00	\$0.00		2	2	100%	\$0.00	\$0.00		0	0	0%	\$0.00	\$0.00	2	2	\$0.00
St. Joseph's Manor	86	70	81%	\$22,950.00	\$2,381.25		116	98	84%	\$28,168.75	\$6,342.25		191	125	65%	\$37,110.25	\$8,940.50	393	293	\$89,221.50
Total	440	288	43%	\$114,638.85	\$11,945.88		330	230	33%	\$86,934.45	\$17,351.38		366	270	47%	\$93,724.96	\$12,148.50	1136	788	\$298,508.81

05/23/2005

Print Preview

Print | Email | Export | Filter | Close

Ready | Regions: Off | 05/23/2005 2:49 PM

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7. Report 5005 – Client Monthly Usage & Billing Report

The Client Monthly Usage & Billing Report reports on a client for a specified date range. The report may be run for a specific area within the client or run for all areas. It may be run for billed shifts only, or run to include projected billing amount for unbilled shifts.

Depending upon the report limits set by the user, the Client Monthly Usage & Billing Report may include:

- Unit Name
- Billed Amount
- Billed Hours
- Shift Count

Medical Staffing Agency
100 Main Street
Anytown, PA 19335

Customer Monthly Usage and Billing Report
Chester County Hospital
Period: 05/01/2005 - 05/23/2005

Unit Name	Billed Amount	Billed Hours	Shift Count
*****	\$12,267.25	199.00	23
ED.....	\$12,342.45	238.00	31
ICU.....	\$1,393.50	23.00	3
L&D.....	\$11,799.50	157.00	19
MS.....	\$2,028.75	75.00	9
PEDS.....	\$1,791.88	40.00	5
Total:	\$41,623.33	732.00	90

05/23/2005 Page 1 of 1

Print Preview

Print Email Export Filter Close

Ready |Regions: Off |05/23/2005 2:52 PM

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8. Report 5006 – User Order Fill & Cancellation Analysis Report (Summary)

The User Order Fill & Cancellation Analysis Report (Summary) provides an analysis of orders by user name for a specified date range. It may be run to include projected billing amounts for unbilled shifts. The report includes:

- User
- Orders Entered
- Orders Filled
- Cancelled orders
- Cancelled by Client
- Cancelled by Employee
- Cancelled by Error
- Other
- Billed
- Paid
- Margin

The User Order Fill & Cancellation Analysis Report (Summary) also provides a drill down capability into Report 5007 - User Order Fill & Cancellation Analysis Report (Detail) by double clicking the user name. Click BACK to return to the summary report.

To access a graphical representation of the data listed in the specific columns of the User Order Fill & Cancellation Analysis Report (Summary) simply click the graph button. Click BACK to return to the summary report.

Customer	Entered	%	Filled	%	Cancelled Orders	%	Cancelled by Customer	%	Cancelled by Employee	%	Cancelled by Error	%	Other	%	Billed	Paid	Margin
Administrator	1,143	97%	713	98%	1	100%	106	100%	82	100%	8	100%	0	0%	\$266,623.26	\$106,603.03	60%
Debbie Feder	4	0%	0	0%	0	0%	0	0%	0	0%	0	0%	0	0%	\$0.00	\$0.00	0%
Demo User	24	2%	7	1%	0	0%	0	0%	0	0%	0	0%	0	0%	\$1,183.00	\$100.00	92%
Lynn Lynch	8	1%	5	1%	0	0%	0	0%	0	0%	1	100%	1	100%	\$0.00	\$0.00	0%
Total:	1,179		725	61%	1	0%	106	9%	82	7%	8	1%	1	0%	\$267,806.26	\$106,703.03	38%

9. Report 5007 – User Order Fill & Cancellation Analysis Report (Detail)

The User Order Fill & Cancellation Analysis Report (Detail) provides an analysis of a selected user for a specified date range. It provides a detailed accounting and graphical analysis of the following items for the specified user and compares the items to all users:

- Shifts Requested
- Shifts Worked
- Unfilled Orders
- Unfilled Orders Cancelled by Client
- Shifts Cancelled by Client
- Shifts Cancelled by Employee
- Shifts Cancelled Due to Error
- Other
- Filled Shifts Claimed BY Other Users
- Filled Shifts Claimed FROM Other Users

The User Order Fill & Cancellation Analysis Report (Detail) also provides a specific user activity breakdown of the above listed items that includes date/time stamp, client, shift date, shift name, employee and confirmation status.

Medical Staffing Agency
100 Main Street
Anytown, PA 19335

Management Summary Report (Detail)
User Activity
Administrator
Period: 01/01/2005 - 03/31/2005

	This User	All Users	%
Shifts Requested.....	35	77	45%
Shifts Worked.....	14	26	54%
Unfilled Orders.....	23	50	46%
Unfilled Orders Cancelled by Customer.....	1	1	100%
Shifts Cancelled by Customer.....	1	1	100%
Shifts Cancelled by Employee.....	1	1	100%
Shifts Cancelled due to Error.....	0	0	
Other.....	0	1	0%
Filled Shifts Claimed BY Other Users.....	0		
Filled Shifts Claimed FROM Other Users.....	0		

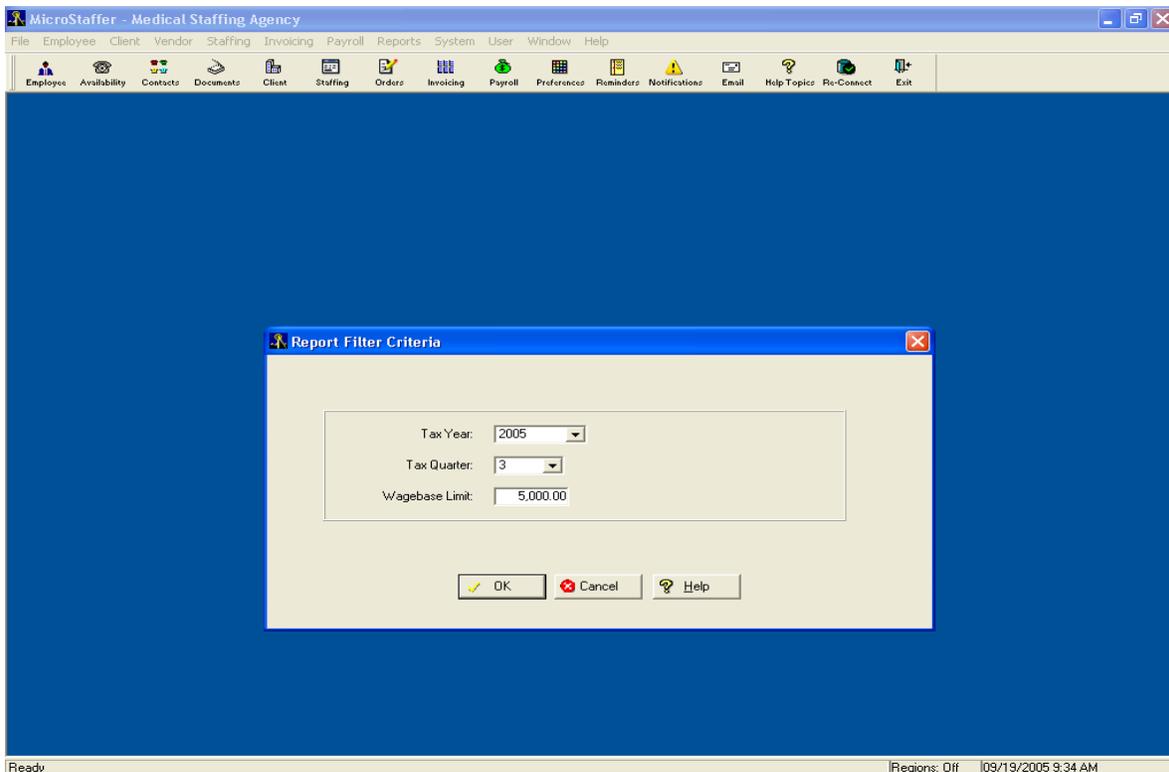
Graphical Summary

Print Email Export Close

Ready | Regions: Off | 05/24/2005 9:30 AM

10. Report 5008 - Employee Payroll Quarterly Excess Earnings Report

The Employee Payroll Quarterly Excess Earnings Report provides a report of excess earnings. Select the Tax Year, Quarter and wagebase for the year to process.



E. Generation of Form 941 & 941b

MicroStaffer Payroll (when used in conjunction with the MicroStaffer Tax Withholding Library) allows users to create Adobe Acrobat® File Data Format (.FDF) files which can be used to populate both Editable IRS forms **941** (Employer's QUARTERLY Federal Tax Return) & **941b** (Schedule B Form 941. Report of Tax Liability for Semiweekly Schedule Depositors). Please note the following prerequisites and recommendations before performing the Step-by-Step Export-Import process for form 941 & 941b which is located in the second part of this document:

1. You must have Adobe Acrobat® (Free Reader Version 7.0 or higher) installed on the PC which you will use to import the MicroStaffer .FDF files into the IRS .PDF files for forms 941 & 941b. Please note the menu **layouts to perform the import are different** between the Free Reader version of Adobe Acrobat® and Adobe Acrobat® Standard or higher (e.g. Professional).
2. You should begin by downloading the most recent versions (Based on the Tax Year you are filing for) of forms 941 & 941b from the IRS web site. These must be in the form of editable .PDF files and can be found on the main IRS Web Site.

As of May 2007, these forms could be found at:

Form 941: <http://www.irs.gov/pub/irs-pdf/f941.pdf>

Form 941b: <http://www.irs.gov/pub/irs-pdf/f941sb.pdf>

Only forms from the IRS Web Site should be used and it is recommended that you always use blank versions of these forms. This is a list of the **only** fields that MicroStaffer will populate programmatically during the .FDF import process:

a. Form 941 - Employer's QUARTERLY Federal Tax Return

1. EIN – Employer Identification Number
2. Name – Company Name
3. Address
4. City
5. State
6. Zip code
7. Quarter
8. Box 1 – Number of Employees
9. Box 2 – Wages, tips...
10. Box 3 – Total income tax...
11. Box 5a – Social Security Wages and liabilities
12. Box 5c – Medicare Wages and liabilities
13. Box 5c – Total Social Security & Medicare Taxes
14. Box 6 – Total Taxes before adjustments
15. Box 7a – Current quarter's fractions of cents (This column will only show the difference in actual (MicroStaffer) vs. calculated Social Security & Medicare Taxes). This can also be described as the difference between Box 6 and Box 8.
16. Box 7h – Total Adjustments
17. Box 8 – Total taxes after adjustments
18. Box 9 – Advance earned income credit (EIC) payments made to employees
19. Box 10 – Total taxes after adjustments for advance EIC

b. Form 941 – Schedule B – Report of Tax Liability for Semiweekly Schedule Depositors

1. All boxes

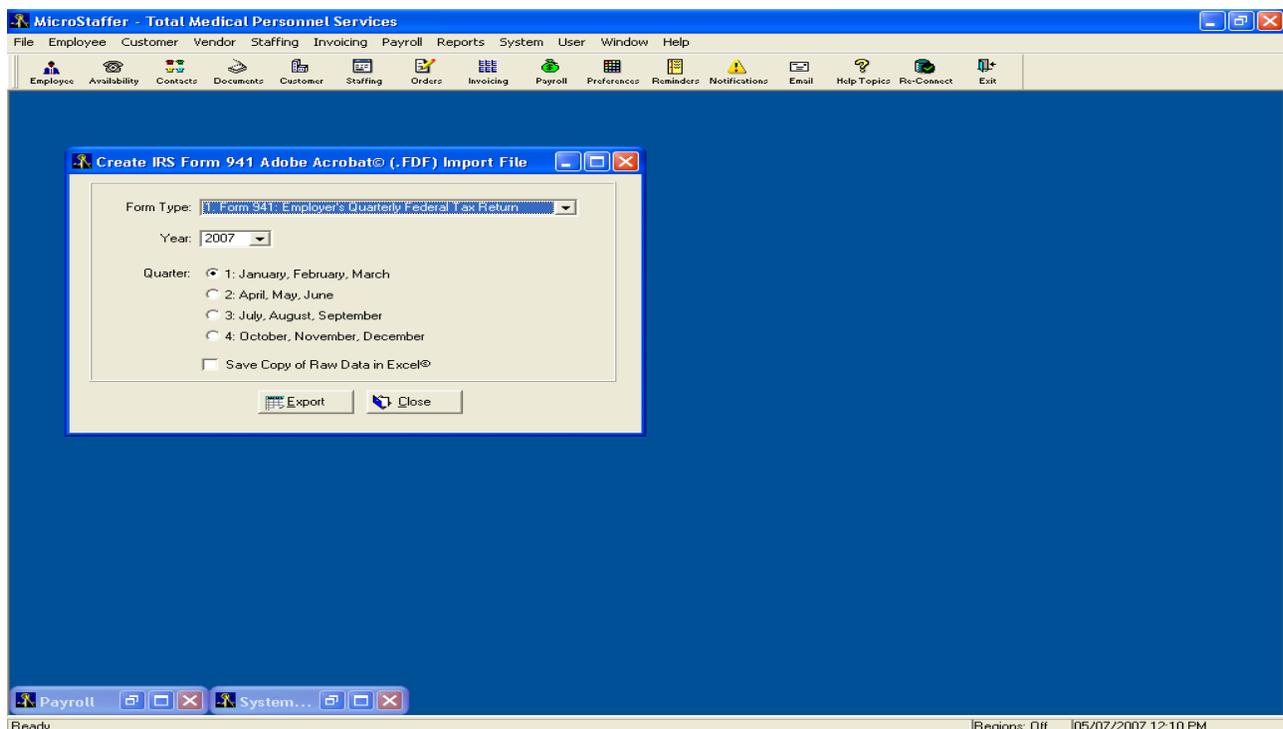
3. You must open the forms using Adobe Acrobat® from within Windows® Directly. Do not open these files from within Internet Explorer or any other Web Browser.
4. Once you have imported the data from MicroStaffer into the forms you can either print them or perform a 'Save As'. We do NOT recommend that you simply hit 'Save' as this will save the populated .PDF form file in place of the blank .PDF form file.
5. Depending of which version of Adobe Acrobat® you are using, you may receive the following error message during the import process:

"An error exists on this page. Acrobat may not display the page correctly. Please contact the person who created the PDF document to correct the problem."

Please disregard this message. However, it is good practice to make sure that all boxes listed above for either Form 941 or 941b have been filled in regardless of this error.

Step-by-Step MicroStaffer 941 Adobe Export/Import Process

1. Create a 941 Form Data File (.FDF) using MicroStaffer
 - a. You must be running MicroStaffer Version 8.0 Build 208 or higher.
 - b. Log into MicroStaffer and open the main Payroll window using the main menu toolbar or the main menu Payroll->'View and Edit Payroll' menu item.
 - c. Once you have the Payroll window open, select Utilities->Process 941's from the Main Menu. Note: The utilities menu item will only appear if you are on the Payroll window. It may look as follows:



- d. Under 'Form Type', select which form you wish to run.
- e. Choose a year and Quarter.
- f. The 'Save Copy of Raw Data in Excel©' checkbox will allow you to save the data used to create the .FDF file in an Excel file also. This is used primarily for tech support purposes.
- g. Click the 'Export' button. This will run the .FDF 941 Export batch and prompt you to enter in a file name and location in .FDF format. We recommend that you save the file for forms 941 and 941b in files f941.fdf and f941b.fdf respectively. Make sure you note the folder location (eg. My documents, c:\<drive> etc.). You will need to know this when you import the data into Adobe Acrobat©.

2. Importing your MicroStaffer 941 Form Data File (.FDF) using Adobe Acrobat©

- a. Begin by opening a blank version of either form 941 or 9431b using Adobe Acrobat©. This can be done by opening Adobe Acrobat© from within Windows© either by using shortcut to Adobe Acrobat© on your desktop or from the Start Menu in Windows© and the selecting File->Open from within Adobe Acrobat© (Reader or higher).

Or, you can also locate the blank editable .PDF file (941 or 941b) using My Computer or Windows Explorer and then Right-Clicking and selecting 'Open With' or just double clicking the file..

You must open the .PDF files for forms 941 or 941b using Adobe Acrobat©. You can use Adobe Acrobat© Reader (Free Version), Standard or Enterprise or higher. The Free Version of Adobe Acrobat© can be downloaded from the Adobe web site: <http://www.adobe.com>.

- b. Once you have opened the .PDF files for either form 941 or 941b in Adobe Acrobat©, you can then perform the import:

1. If you are using Adobe Acrobat Reader© (Free Version):

From the Main Menu in Adobe Acrobat Reader© select Document->Forms->Import Data from the Main Menu in Adobe Acrobat Reader©.

2. If you are using Adobe Acrobat© Standard or Enterprise:

From the Main Menu in Adobe Acrobat© select Advanced->Forms->Import Forms Data from the Main Menu in Adobe Acrobat©.

Then, navigate to the folder location in Windows© where you saved the .FDF MicroStaffer form data file(s) that you created in Step 1 above. Then, click on the 'Select' button. This will import the data from MicroStaffer into your blank 941 or 941b .PDF file.

- c. Once the data is imported, please fill out the remaining lines and boxes in form 941 such as, for example: Box 11 (Total deposits for quarter), Box 14 (State abbreviation) and any other information which is not populated by MicroStaffer. Form 941b should be completed in full by MicroStaffer; no additional data entry required for 941b.

Please note it is your responsibility to assure the accuracy of form 941 and 941b.

- d. Once you have completed and verified the .PDF files for forms 941 and/or 941b you may then either:
 1. Print the forms or,
 2. Perform as 'Save As' using the Main Menu in Adobe Acrobat©.

We do not recommend that you simply "Save" the .PDF files since this will replace the Blank versions of these with the populated versions.

VII. Using MicroStaffer – Mail Merge

Mail Merge Manager - Enhance communications with Employees, Client and Vendors using MicroStaffer's fully integrated Mail Merge Manager. MicroStaffer's Mail Merge Manager is a fully integrated document editor and mail merge processor.

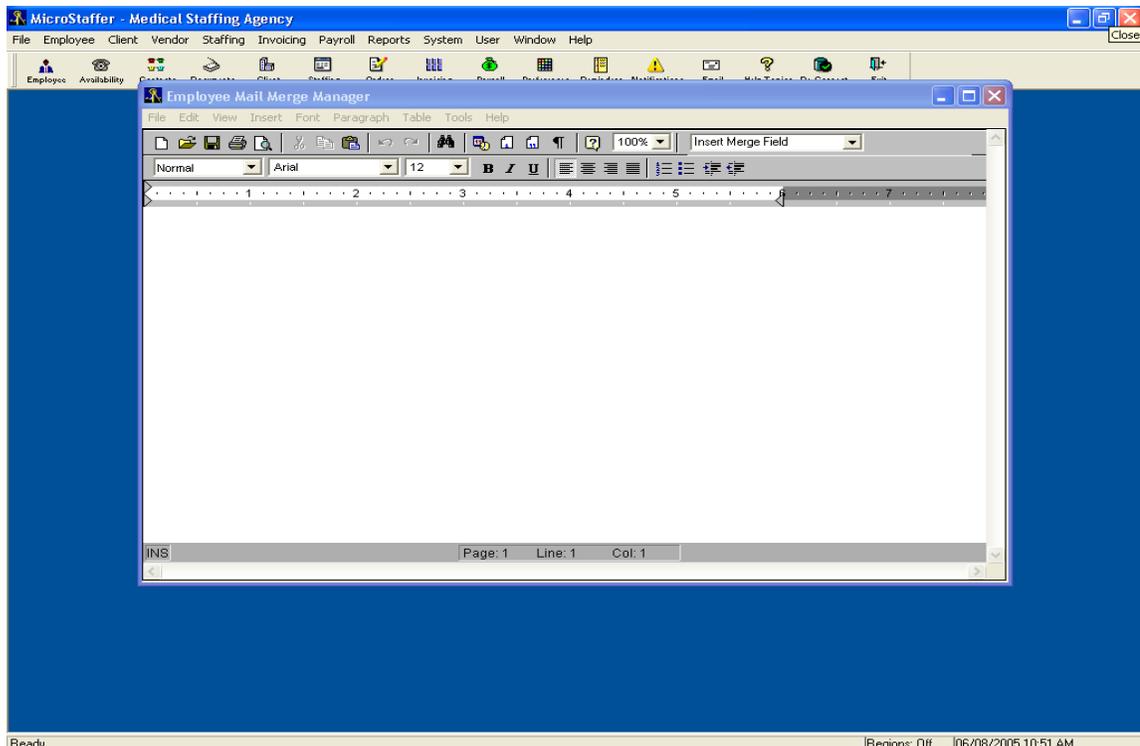
A. Template Categories & Creation

MicroStaffer maintains separate document templates within the Mail Merge Manager for Employees, Clients and Vendors. Once created by a user, these document templates may be accessed within a variety of facilities within MicroStaffer.

Template Category	Data Source within MicroStaffer	Frequently Used (User Defined) Formats may Include
Employee	Staffing Center Employee List Employee Leads List	Credential Expiration Notice Birthday Greetings
Customer	Customer List Report Customer Checklist Customer Leads Checklist Report	Thank You for Your Business
Vendor	Vendor Listing Vendor Checklist	Maintain Insurance Info

To create a document template, select Mail Merge Manager from the tab you wish to use. The following example is the creation of a Credential Expiration letter template for employees.

When you first access the Employee Mail Merge Manager, a blank document screen appears. This is where you will create the template.

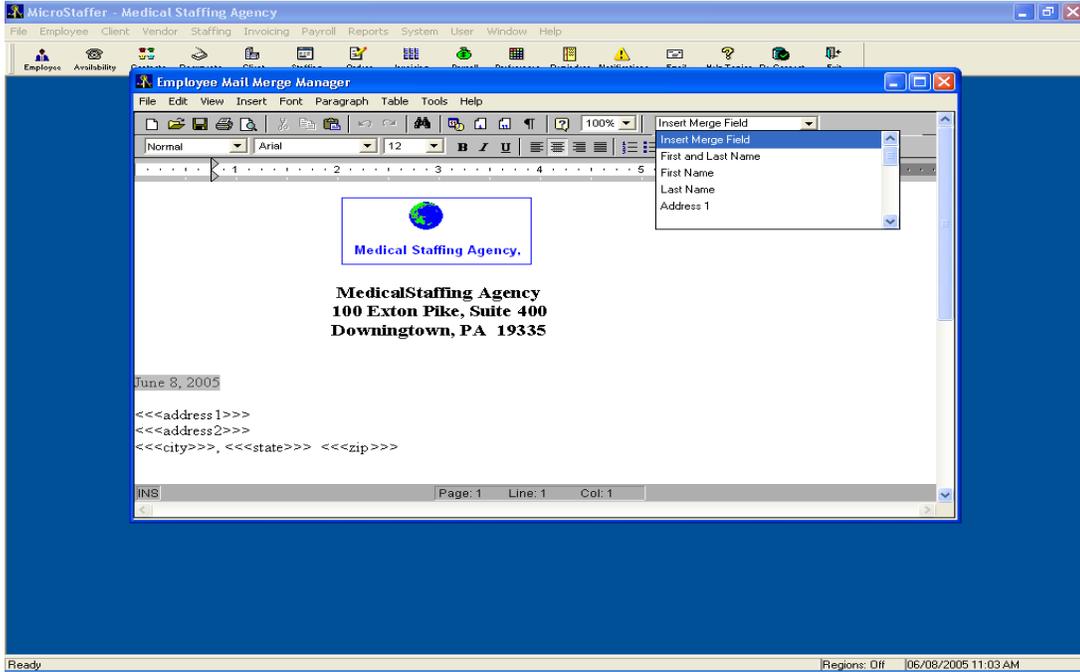


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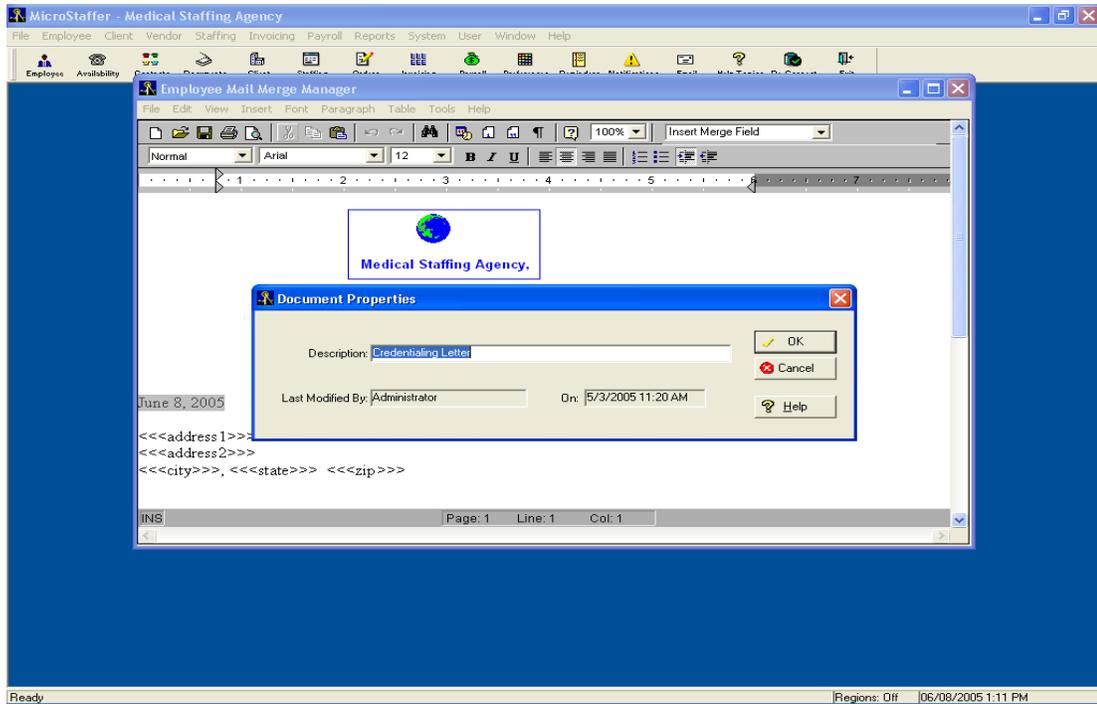
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1. Template Creation

The template is created within the Document Editor by writing a blank letter which includes specific merge fields from the Insert Merge Field dropdown. Please see the following example:



The document was created with the employee name, address, first name as salutation and a List of Credentials in a table format. Later, you will see this information merged from a tickler, but for now, the format needs to be saved. When you are finished creating the document template click File, Save As and type in the name of the format to be saved.

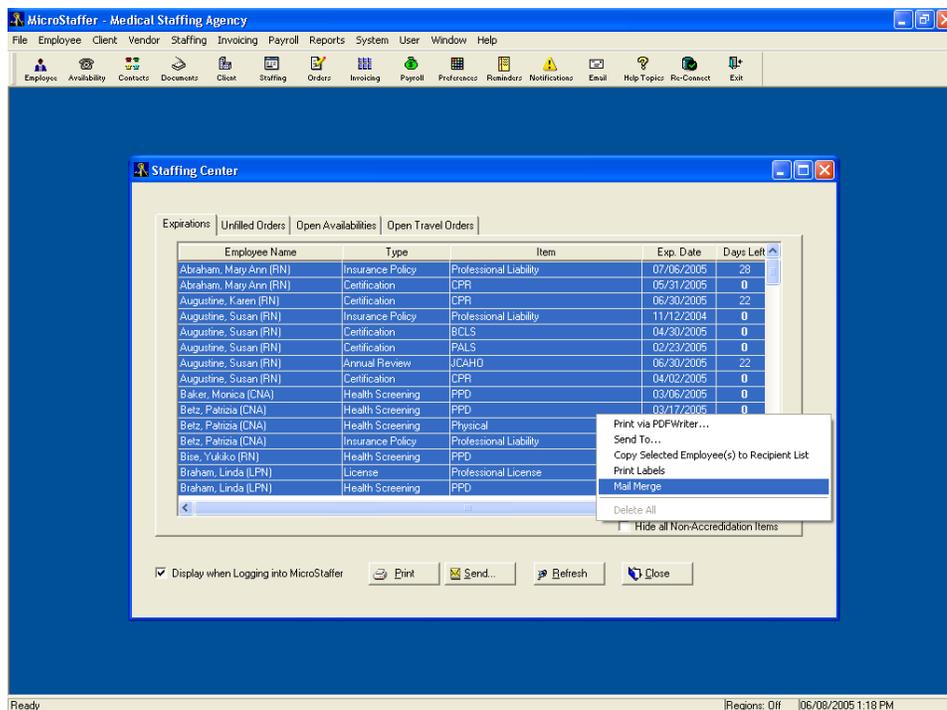


Now you have a saved document format to use when creating mail merged documents. This example is specifically for an employee type mail merge, but documents may also be created for clients and vendors by selecting the Mail Merge Manager found under the specific tab.

2. Mail Merge

Now, to actually process a mail merge using the Credential Expiration Notice Letter. There are a few places to access the data source for the mail merge, but in this example we will rely on the tickler file generated automatically by MicroStaffer when a credential item is about to expire – The Staffing Center.

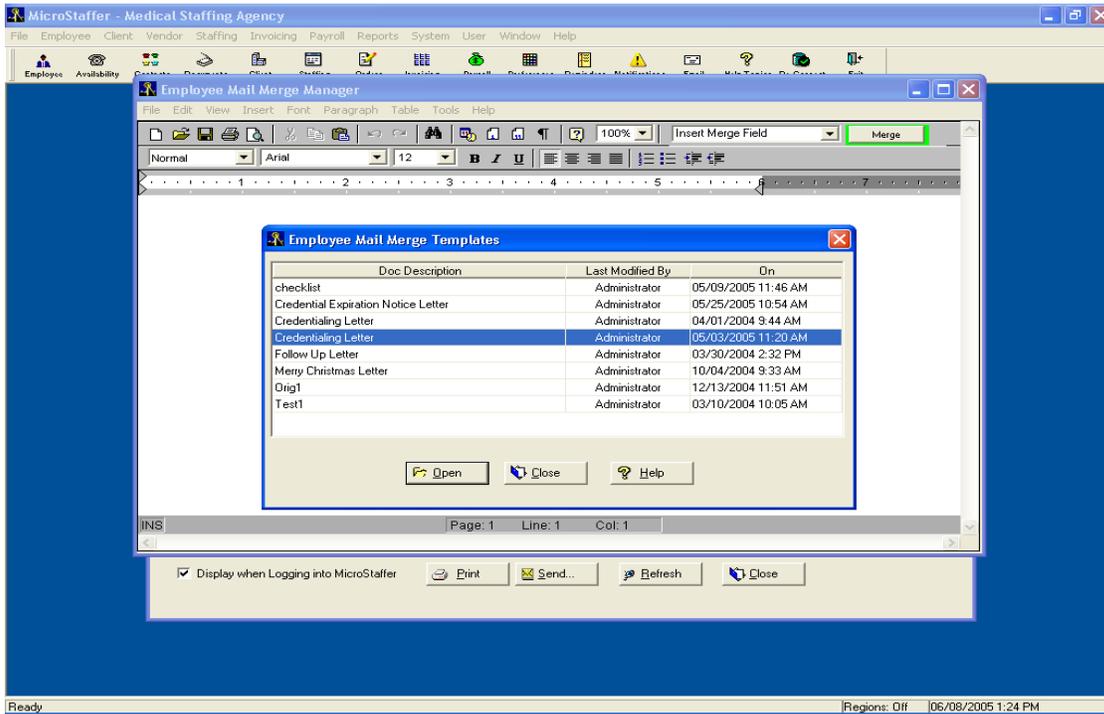
If you wish to include all of the items on the Staffing Center window, you must highlight them all by pressing SHIFT and clicking the mouse button to highlight a group of items. Then click the RIGHT mouse button to access the options available, including mail merge.



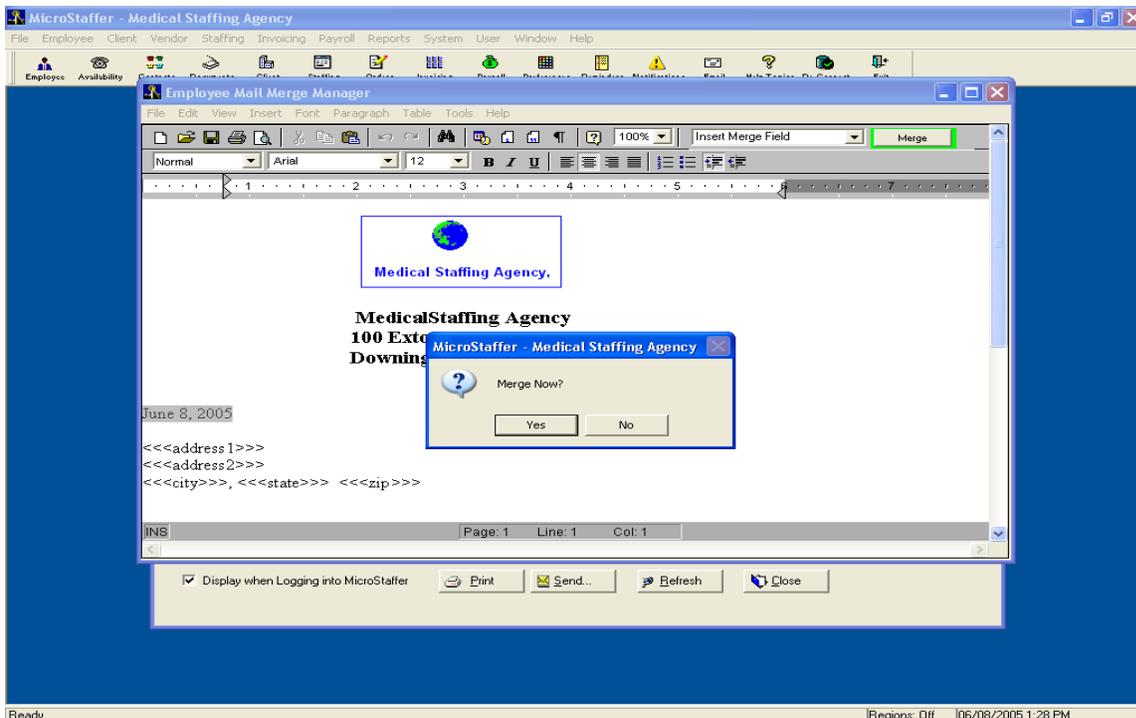
You will be notified that the mail merge will only be processed for the highlighted rows and asked to continue, click Yes or No. After you continue, the available formats for the employee category will appear. Click the format you wish to use for the merge and Open.

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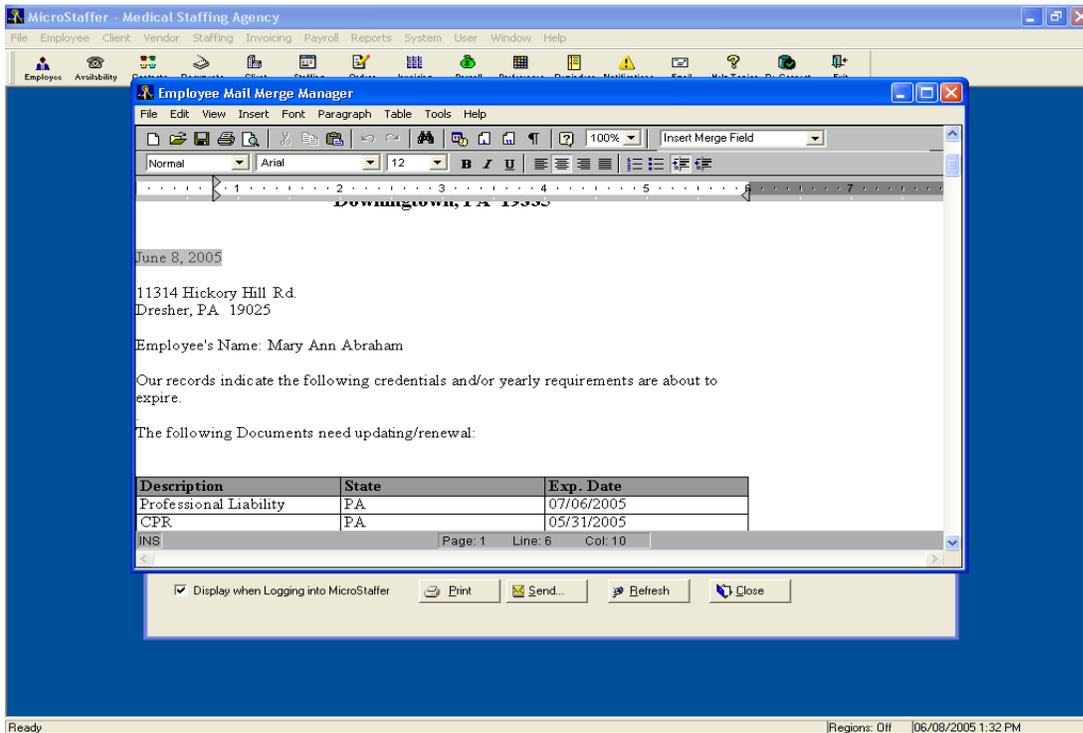
Then you will be asked if you wish to Merge now? Click Yes to merge.



The merge is completed using the document template to generate form letters to all of the employees listed on the Staffing Center as the data source. There are many other sources of data for the generation of mail merged documents (Please refer to table). The completed merged documents may be saved.

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3. Edit Mail Merge Document Templates

To alter a mail merge document template, select Mail Merge Manager and File, Open and select the document template and either edit, save or delete.

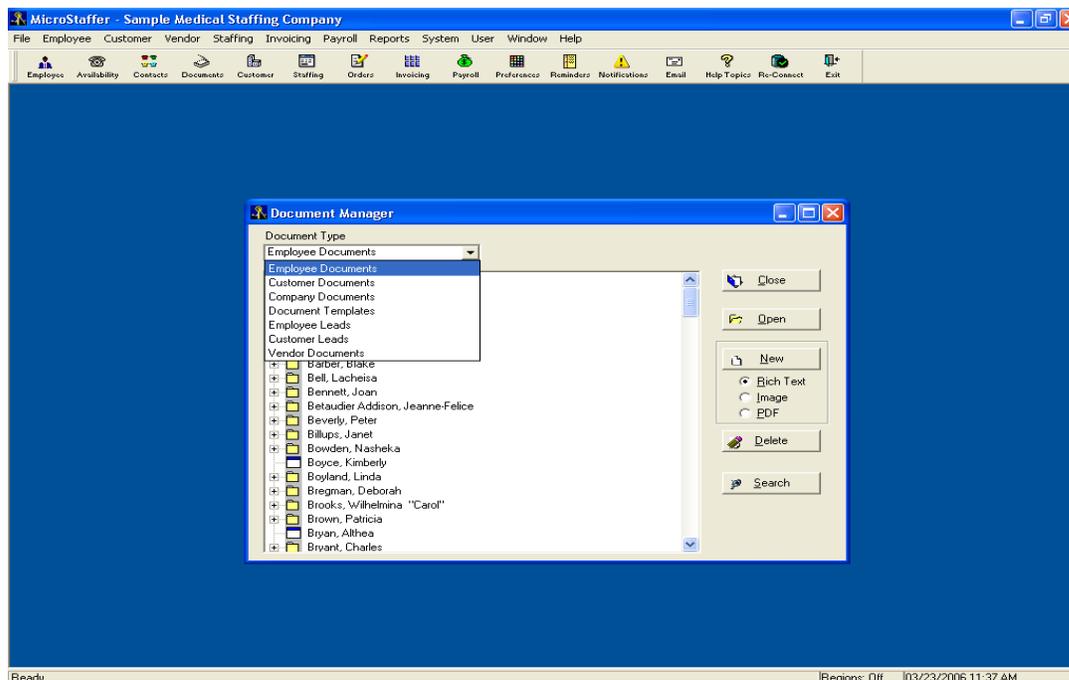
VIII. Using MicroStaffer - Document Manager

MicroStaffer's Document Manager allows for the maintenance of important documentation for a variety of categories. This powerful tool provides the documentation you need at your fingertips. Documents may be added to various categories using the Document Manager facility, or alternatively, via the Documents tab in the following facilities: Employee; Employee Leads; Company; Company Leads; and Vendor.

MicroStaffer Document Manager allows you to import Rich Text Format (.RTF) documents, Images (Imaging & Scanning module) and PDF files. MicroStaffer handles each format in a different manner.

Document Type categories include:

- Employee Documents
- Client Documents
- Company Documents
- Document Templates (Rich Text Format only)
- Employee Leads Documents
- Client Leads Documents
- Vendor Documents



A. Document Manager - Templates & .rtf files

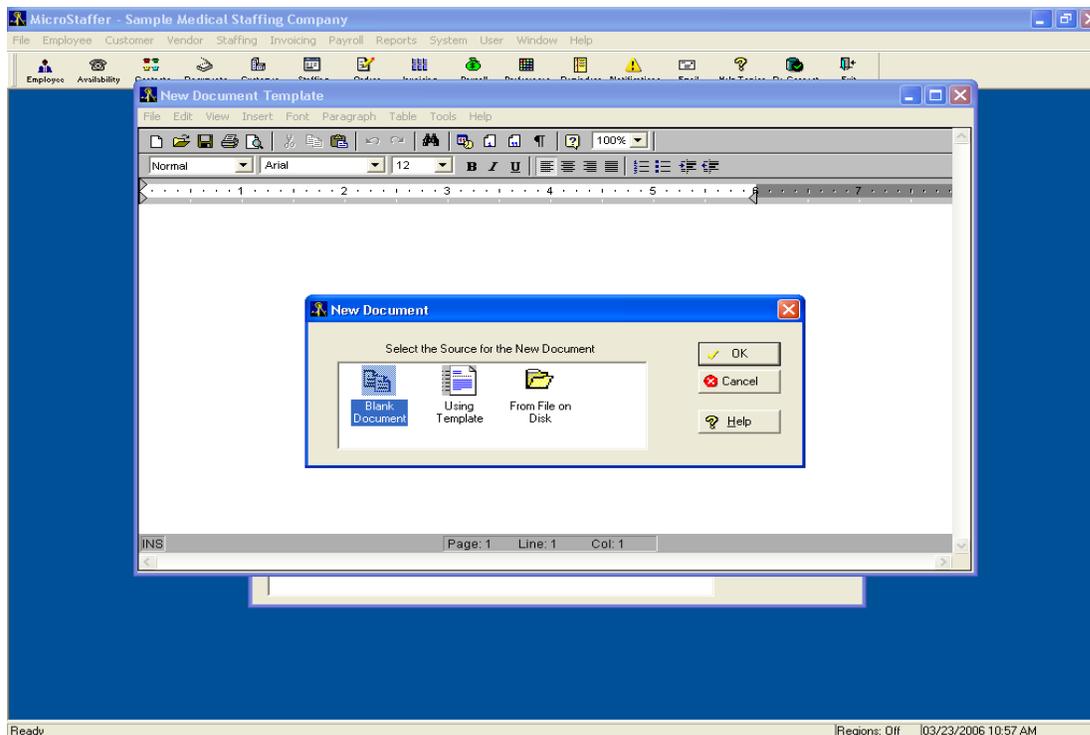
A document template is simply a template (Rich Text Format) that is reused within MicroStaffer for maintenance of extra informational data for the document type categories. Creating templates for frequently used documents is a time saver that should be considered when using MicroStaffer. Document Templates could include: Plan of Care (Patient); Interview Questions (Employee Lead); Basic Contract (Client); Emergency Contact information (Employee).

Click New to select a source for the Document Template and choose from:

Blank document - Opens a new document template.

Using Template - Presents a list of existing templates.

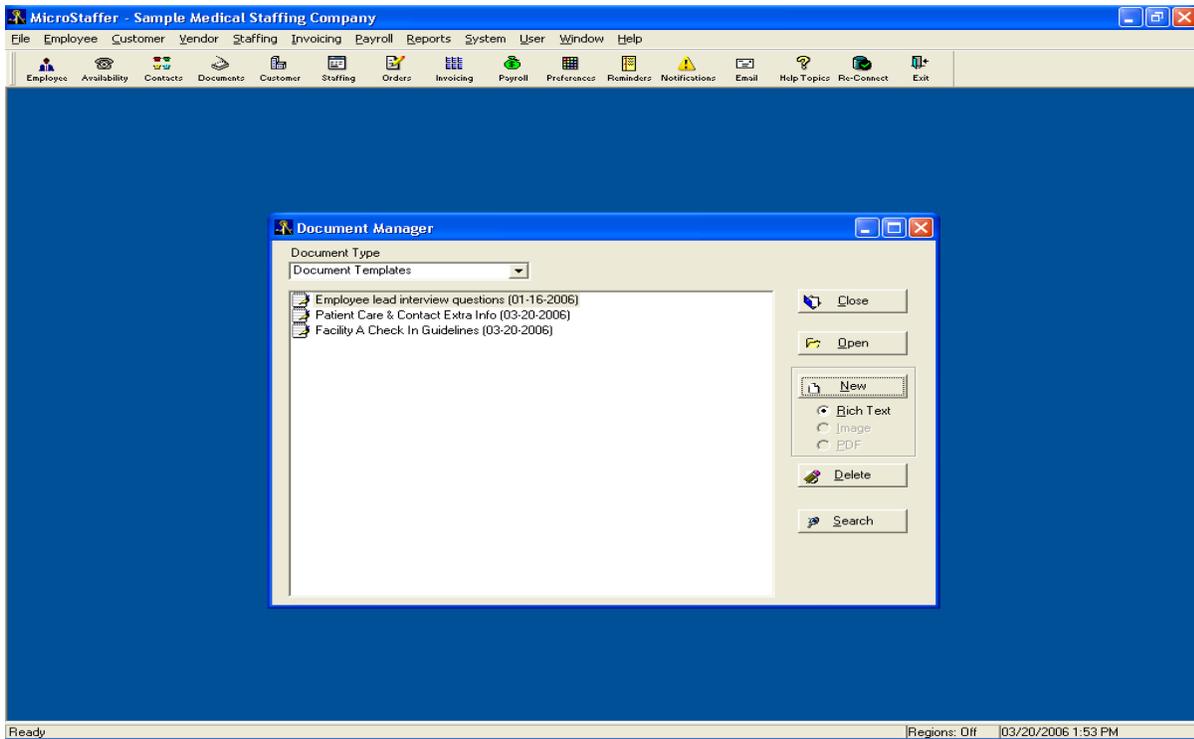
From File on Disk - Opens a window that lists saved .rtf files in the target directory (HINT: You can import editable data from Microsoft Word documents by saving them in Rich Text Format and then importing them into the MicroStaffer Document manager)



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Document Templates may be maintained within the Document Template selection in MicroStaffer. Simply open the template and edit then save. The following screen is an example of the available Document Templates created in this test version of MicroStaffer.

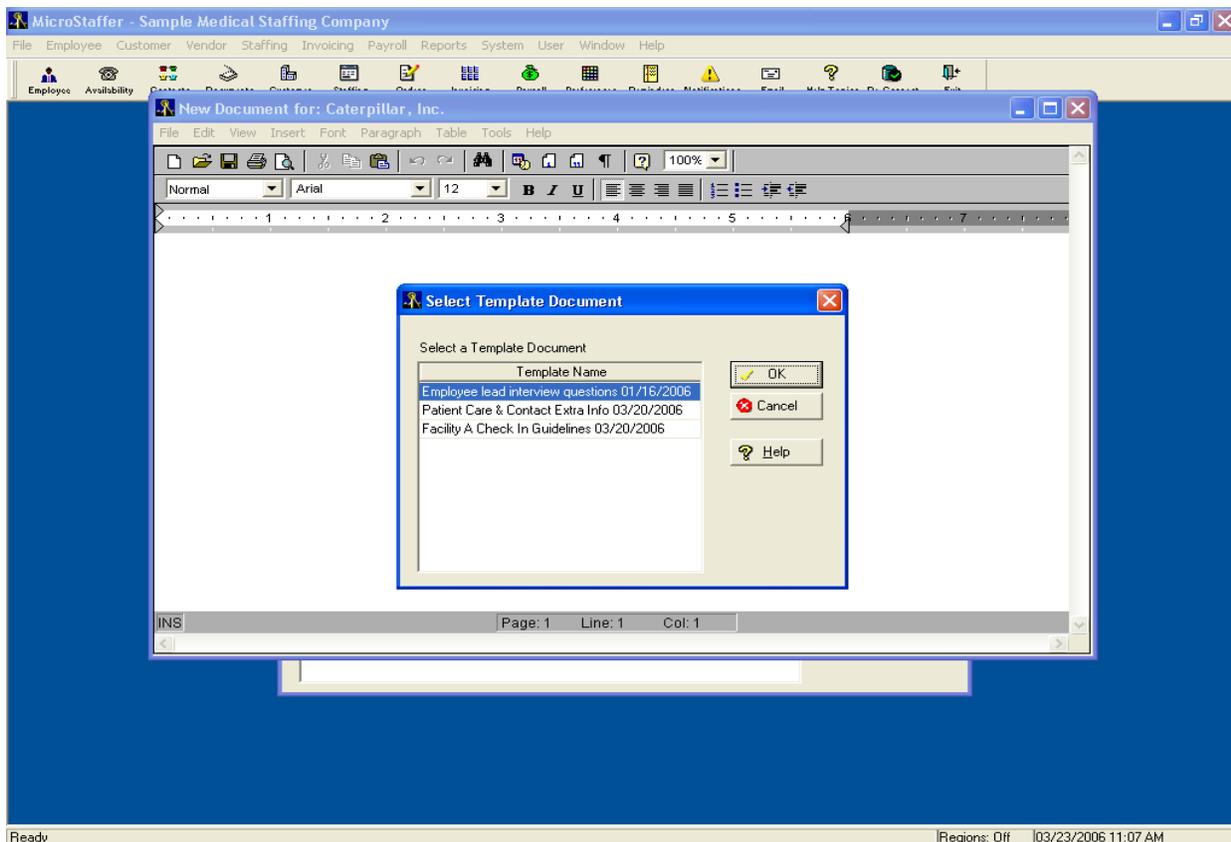


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To add a document to employees and employee leads; clients and client leads; companies; and vendors using a saved Document Template: select the employee, click the Rich Text radio button and click New. From the New Document box, select Using Template to access the list of available Template Documents. Select the template document, edit as needed and save.

Alternatively, documents may be added using the Documents tab found within each category's set up area.



B. Document Manager - Image Files

MicroStaffer allows for the importation of previously scanned image files or, by using the MicroStaffer Scanning & Imaging module, MicroStaffer will scan in documents directly from your attached device. (NOTE: A trial version of the MicroStaffer Scanning & Imaging module is included with MicroStaffer. However, only licensed users of the Scanning & Imaging module will be eligible for support of same.)

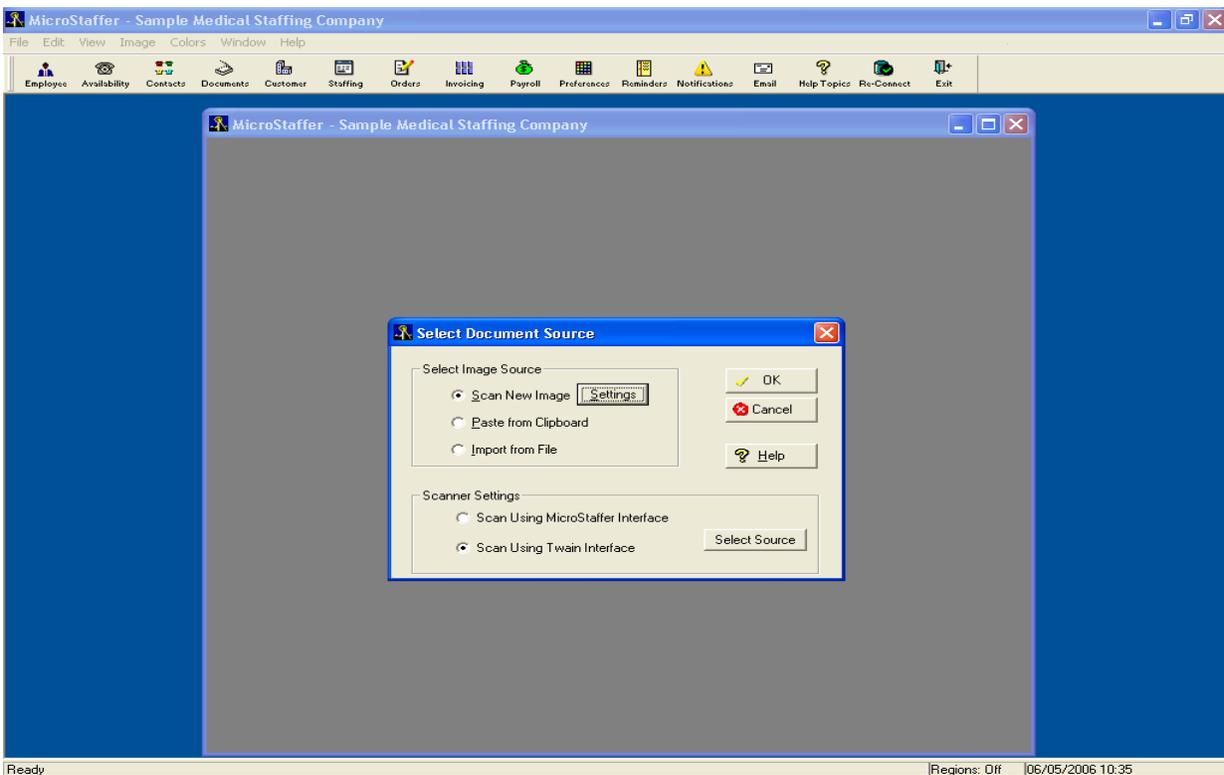
NOTE: Image formats (Incoming & Storage format IDs) are set within System -> System Options -> Scanning & Imaging.

Select the Document Type category to work with and select the Image radio button, then press New. A Select Document Source window will appear. The example below has the Scanner Settings button clicked so that you may refer to the settings. The available options are:

Scan New Image - Allows you to scan a new image from an attached scanner. Please be sure to use the Settings button. It is recommended that the Twain Interface be used first.

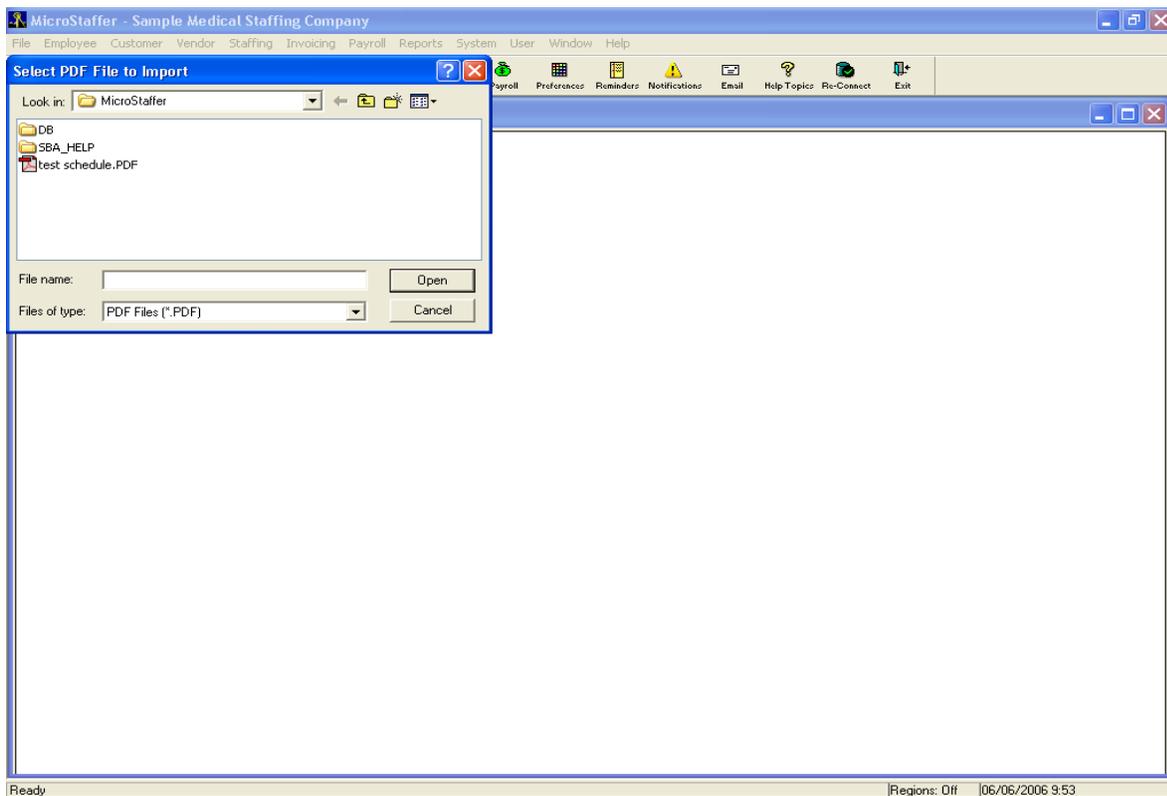
Paste from Clipboard - Allows image to be pasted from clipboard.

Import from File - Allows for importation of previously scanned images.



C. Document Manager - .pdf Files

Document Manager allows for importation of created .pdf files for the various document type categories. First, choose the Document Type category to work in along with the individual employee, customer or vendor. Click on the PDF radio button and select New. You will be directed to a window in which you may select the .pdf file from the default directory or an alternate directory.



IX. The MicroStaffer Web Access Module

A. Overview

The optional MicroStaffer Web Access Module allows you to grant Internet access to selected Employees and Customers using any standard Web Browser such as Netscape Communicator or Microsoft Internet Explorer. This module also allows you to post on-line application forms which flow directly into your MicroStaffer Employee Leads section. Please contact MicroStaffer to purchase this module.

Employees can access schedules and enter availabilities. Customers can also access schedules, view basic employee information, enter on-line orders and view published invoices.

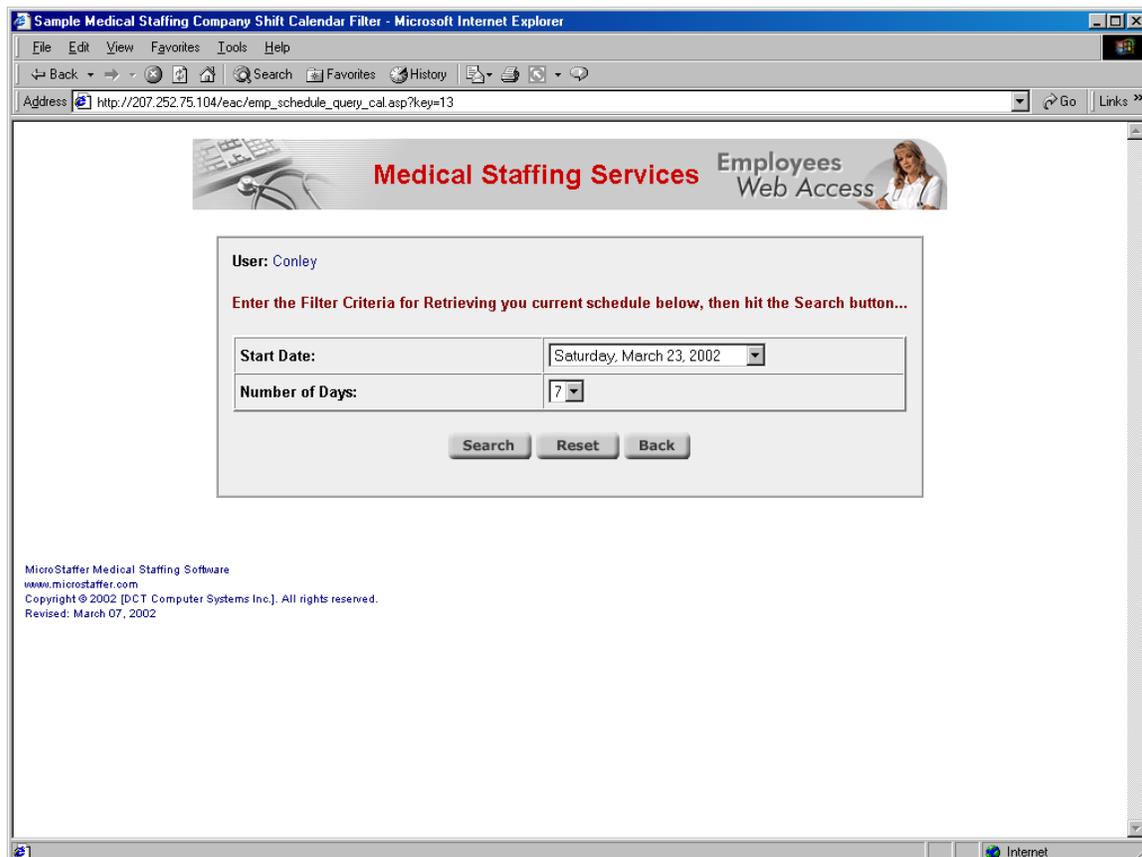
The Web Access Module is hosted by you and must be installed on your Windows based Network server.

To grant Web access to Employees and Customers you must create User ID's and Passwords in the Employee Setup and Customer Setup windows within MicroStaffer.

B. Employee Access

1. Accessing Employee Schedules

Employees can view their schedules in both List and Calendar format. The Schedule query window allows them to enter various filter criteria.



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Clicking on the Search button displays the Employees schedule based on the Filter criteria that was entered.

Medical Staffing Services Employees Web Access

Calendar for: **David Conley** From: **4/13/2002** To: **4/19/2002**

Saturday 04/13/02	Sunday 04/14/02	Monday 04/15/02	Tuesday 04/16/02	Wednesday 04/17/02	Thursday 04/18/02	Friday 04/19/02
		Arlington Memorial Hospital 7:00AM - 3:00AM (ED) Scheduled/Firm EC=[X] / FC=[X]		Arlington Memorial Hospital 7:00AM - 3:00AM (ED) Scheduled/Firm EC=[X] / FC=[X]		
		Atlanta Medical Center 11:00PM - 7:00AM (ICU) Scheduled/Firm EC=[X] / FC=[X]				

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 Revised: March 07, 2002

Schedules can also be displayed in List format.

Medical Staffing Services Employees Web Access

Schedule for: **David Conley** From: **3/23/2002** To: **4/21/2002**

Shift	Date	Location	Start	End	Unit	NC	HC	Status	Type
Day	3/25/2002	Arlington Memorial Hospital	7:00AM	3:00AM	ED	X	X	Scheduled/Firm	RN
Night	3/25/2002	Atlanta Medical Center	11:00PM	7:00AM	ICU	X	X	Scheduled/Firm	RN
Day	3/27/2002	Arlington Memorial Hospital	7:00AM	3:00AM	ED	X	X	Scheduled/Firm	RN
Day	4/1/2002	Arlington Memorial Hospital	7:00AM	3:00AM	ED	X	X	Scheduled/Firm	RN
Night	4/1/2002	Atlanta Medical Center	11:00PM	7:00AM	ICU	X	X	Scheduled/Firm	RN
Day	4/3/2002	Arlington Memorial Hospital	7:00AM	3:00AM	ED	X	X	Scheduled/Firm	RN
Day	4/8/2002	Arlington Memorial Hospital	7:00AM	3:00AM	ED	X	X	Scheduled/Firm	RN
Night	4/8/2002	Atlanta Medical Center	11:00PM	7:00AM	ICU	X	X	Scheduled/Firm	RN
Day	4/10/2002	Arlington Memorial Hospital	7:00AM	3:00AM	ED	X	X	Scheduled/Firm	RN
Day	4/15/2002	Arlington Memorial Hospital	7:00AM	3:00AM	ED	X	X	Scheduled/Firm	RN
Night	4/15/2002	Atlanta Medical Center	11:00PM	7:00AM	ICU	X	X	Scheduled/Firm	RN
Day	4/17/2002	Arlington Memorial Hospital	7:00AM	3:00AM	ED	X	X	Scheduled/Firm	RN

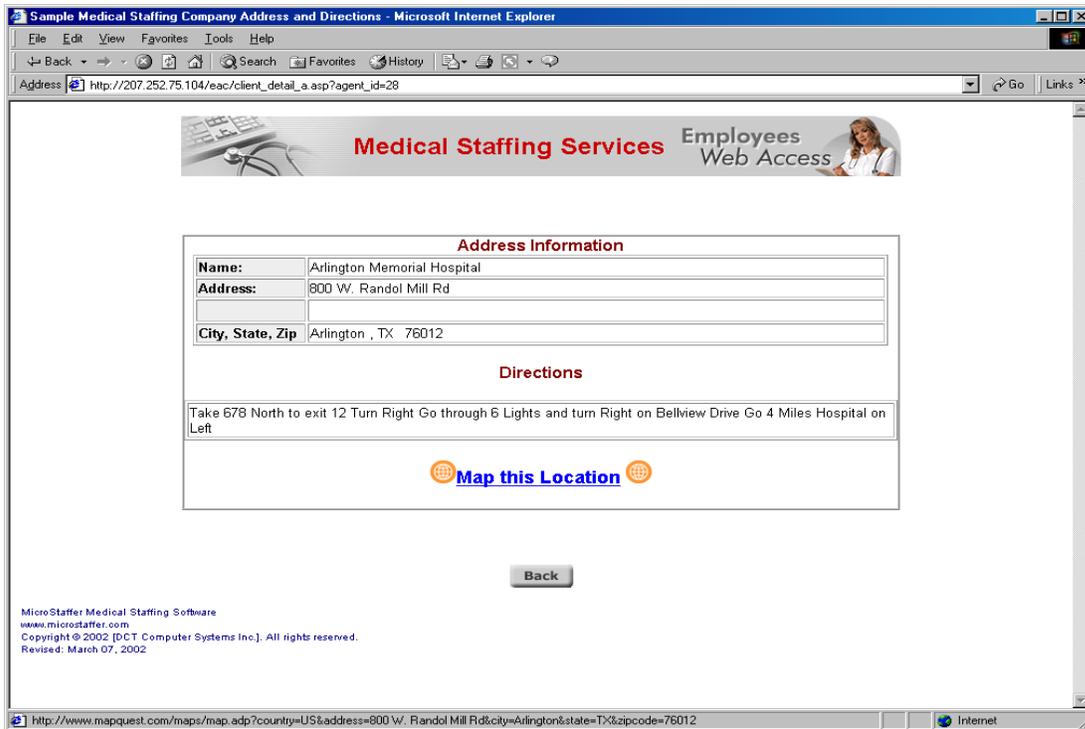
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 Revised: March 07, 2002

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By clicking on the Customer's name in either the Calendar or List view of the schedule, Employee's can view information about the selected Facility or Customer. They may also click on the 'Map It' icon to access MapQuest and view a location map of the Customer.



By clicking on the Shift Description in either the Calendar or List view of the schedule, Employee's can view detailed information about the selected Shift or Job Assignment.



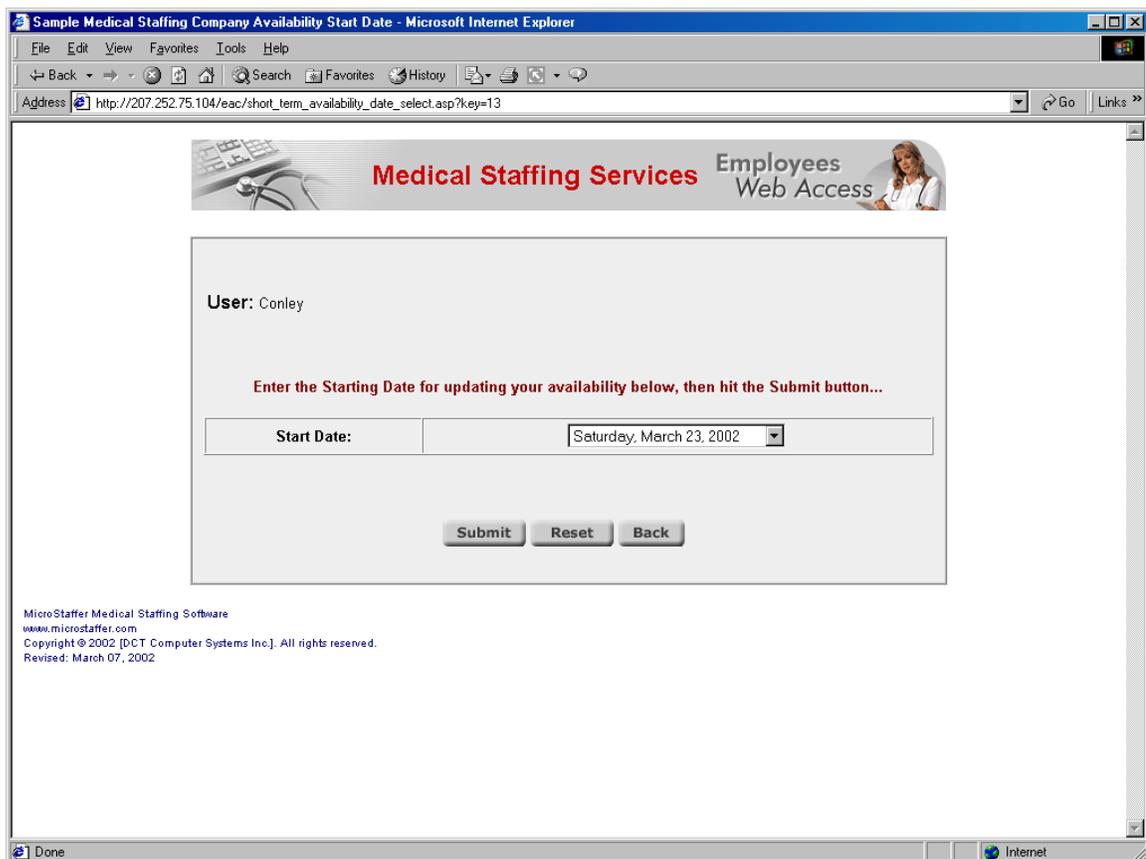
2. Entering Availabilities

Employees can also Enter New or Edit existing work availability using the Web Module. Both Daily and Permanent Availability may be entered.

Any changes to the Availability is forwarded directly to the Microstaffer system and displayed on the User Notifications Window. In order for a user to be alerted to New or Modified Availabilities, he/she must be assigned as an Employee Rep within MicroStaffer for the given Employee.

Notifications will be displayed in MicroStaffer both when Logging In as well as any time the User is running the MicroStaffer application.

The first step in entering new or modifying existing Daily Availabilities is to select the starting time period as shown below.



Sample Medical Staffing Company Availability Start Date - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites History Print

Address http://207.252.75.104/eac/short_term_availability_date_select.asp?key=13 Go Links

Medical Staffing Services Employees Web Access

User: Conley

Enter the Starting Date for updating your availability below, then hit the Submit button...

Start Date:

Submit Reset Back

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Revised: March 07, 2002

Done Internet

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Once the Starting Date for the Availabilities has been selected, Employees may then fill out the form and click on the Submit Button. Once submitted, a Confirmation page is displayed which the user may view or print.

Availability - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites History

Address http://207.252.75.104/eac/short_term_availability_load.asp

Medical Staffing Services Employees Web Access

Enter your availability for the day of the week below, then hit the Submit button...

Date	Shift	Max. Hours	Note
Saturday 03/23/02:	Not Available	Any	
Sunday 03/24/02:	Not Available	Any	
Monday 03/25/02:	Day	8	
Tuesday 03/26/02:	Day	8	
Wednesday 03/27/02:	Day	8	
Thursday 03/28/02:	Day	8	I can also do a double here...
Friday 03/29/02:	Not Available	Any	My kids are out from school. Please don't schedule m

Submit Reset Back

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Sample Medical Staffing Company Availability Saved - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites History

Address http://207.252.75.104/eac/short_term_avail_update_conf.asp?user_key=13&start_date=03/23/02

Medical Staffing Services Employees Web Access

Your new Availability has been Saved as shown below:

Day	Shift Class	Max. Hours.	Note
03/23/2002	Not Available	Any	
03/24/2002	Not Available	Any	
03/25/2002	Day	8.00	
03/26/2002	Day	8.00	
03/27/2002	Day	8.00	
03/28/2002	Day	8.00	I can also do a double here...
03/29/2002	Not Available	Any	My kids are out from school. Please don't schedule me.

Back

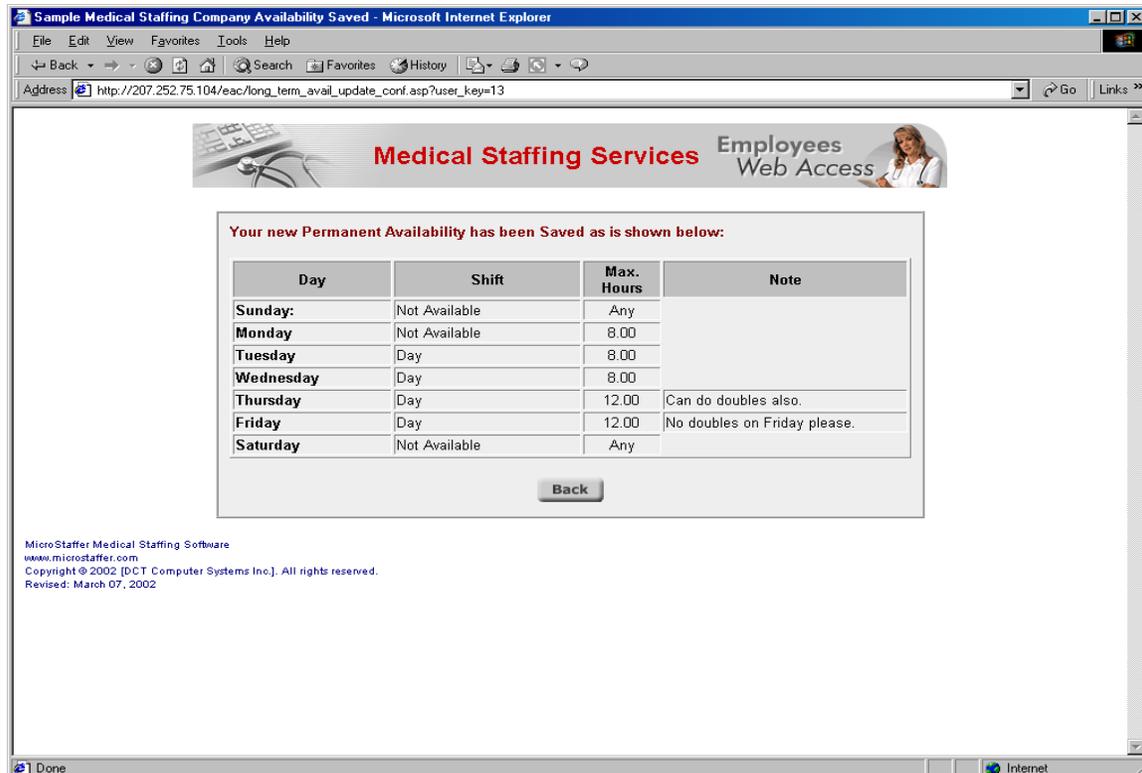
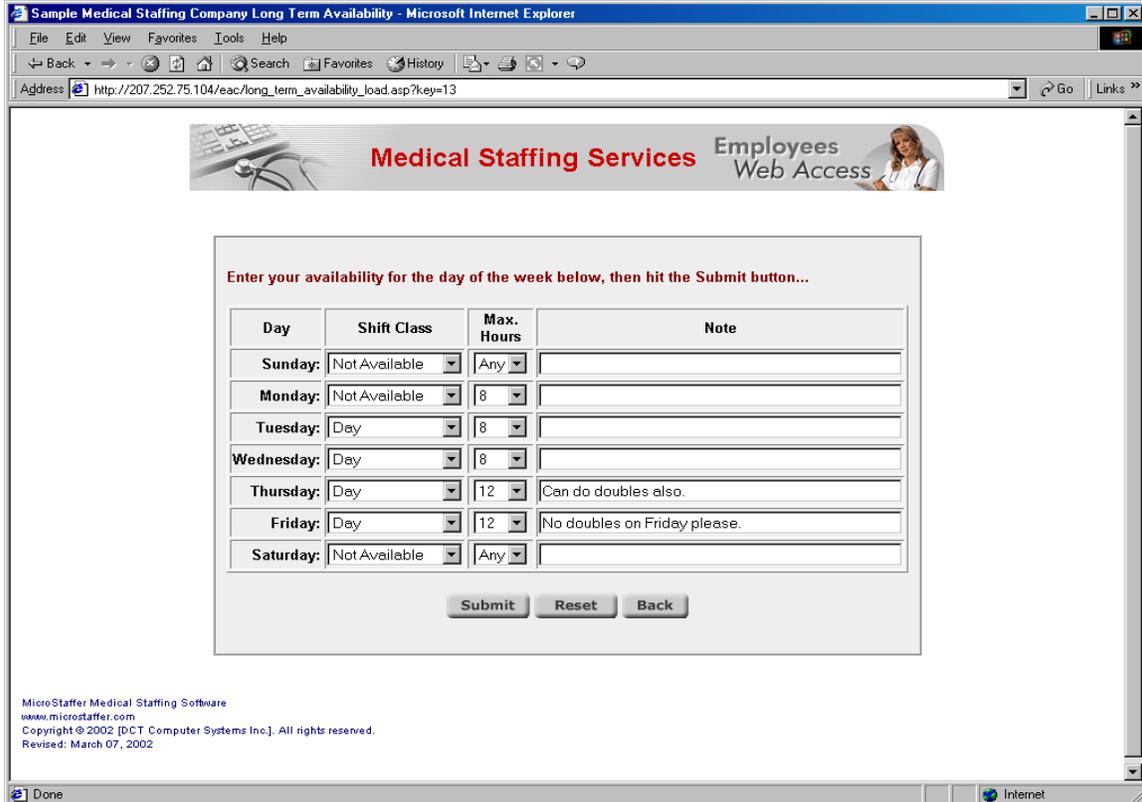
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Employees may also enter Permanent Availabilities. These are not date specific and indicate a long-term Availability. Again, once the Permanent Availability form has been submitted the Employee is shown a confirmation page.

All Availabilites, whethere Daily or Permanent flow directly into your central MicroStaffer system.



C. Client Access

1. Accessing Client Schedules

Clients/Facilities can view their schedules in both List and Calendar format. The Schedule query window allows them to enter various filter criteria.

Scheduling List Query - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites History

Address http://207.252.75.104/eac/schedule_query.asp?key=14 Go Links

Medical Staffing Services Hospitals Web Access

User: Susan Michaels (Nurs. Super.)
Enter the Filter Criteria for Retrieving you current schedule below, then hit the Search button...

Facility:	Atlanta Medical Center
Start Date:	Saturday, March 23, 2002
Number of Days:	30
Unit:	A
Shift Status:	Any

Search Reset Back

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Internet

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The Calendar format Customer schedule displays Orders and Shifts in a traditional calendar view.

Medical Staffing Services Hospitals Web Access

Calendar for: Atlanta Medical Center From: 4/10/2002 To: 4/16/2002

Wednesday 04/10/02	Thursday 04/11/02	Friday 04/12/02	Saturday 04/13/02	Sunday 04/14/02	Monday 04/15/02	Tuesday 04/16/02
11:00PM - 7:00AM (ICU) Unfilled Order	7:00AM - 3:00PM (MS) Unfilled Order	7:00AM - 7:00PM (L&D) Unfilled Order	7:00AM - 3:00PM (MS) Unfilled Order	7:00AM - 7:00PM (L&D) Unfilled Order	Ussery, T 3:00PM - 11:00PM (L&D) Scheduled/Firm EC=[X] / FC=[X]	7:00AM - 3:00PM (MS) Unfilled Order
	Ussery, T 3:00PM - 11:00PM (L&D) Scheduled/Firm EC=[X] / FC=[X]	Ussery, T 3:00PM - 11:00PM (L&D) Scheduled/Firm EC=[X] / FC=[X]	11:00PM - 7:00AM (ICU) Unfilled Order	Ussery, T 3:00PM - 11:00PM (L&D) Scheduled/Firm EC=[X] / FC=[X]	11:00PM - 7:00AM (ICU) Unfilled Order	7:00AM - 7:00PM (L&D) Unfilled Order
	11:00PM - 7:00AM (ICU) Unfilled Order		11:00PM - 7:00AM (ICU) Unfilled Order		Thornton, M 11:00PM - 7:00AM (Peds) Scheduled/Firm EC=[X] / FC=[X]	Ussery, T 3:00PM - 11:00PM (L&D) Scheduled/Firm EC=[X] / FC=[X]
	Thornton, M 11:00PM - 7:00AM (Peds) Scheduled/Firm EC=[X] / FC=[X]				11:00PM - 7:00AM (L&D) Unfilled Order	
					Conley, D 11:00PM - 7:00AM (ICU) Scheduled/Firm EC=[X] / FC=[X]	

The List Customer schedule displays Orders and Shifts in a tabular format.

Medical Staffing Services Hospitals Web Access

Schedule for: Atlanta Medical Center From: 3/23/2002 To: 4/5/2002

Shift	Date	Employee	Start	End	Unit	NC	HC	Status	Type
Evening	3/24/2002	Thomas Ussery	3:00PM	11:00PM	L&D	X	X	Scheduled/Firm	RN
Evening	3/25/2002	Thomas Ussery	3:00PM	11:00PM	L&D	X	X	Scheduled/Firm	RN
Night	3/25/2002	Margarita Thornton	11:00PM	7:00AM	Peds	X	X	Scheduled/Firm	LPN
Night	3/25/2002	David Conley	11:00PM	7:00AM	ICU	X	X	Scheduled/Firm	RN
Evening	3/26/2002	Thomas Ussery	3:00PM	11:00PM	L&D	X	X	Scheduled/Firm	RN
Evening	3/28/2002	Thomas Ussery	3:00PM	11:00PM	L&D	X	X	Scheduled/Firm	RN
Night	3/28/2002	Margarita Thornton	11:00PM	7:00AM	Peds	X	X	Scheduled/Firm	LPN
Evening	3/29/2002	Thomas Ussery	3:00PM	11:00PM	L&D	X	X	Scheduled/Firm	RN
Evening	3/31/2002	Thomas Ussery	3:00PM	11:00PM	L&D	X	X	Scheduled/Firm	RN
Evening	4/1/2002	Thomas Ussery	3:00PM	11:00PM	L&D	X	X	Scheduled/Firm	RN
Night	4/1/2002	Margarita Thornton	11:00PM	7:00AM	Peds	X	X	Scheduled/Firm	LPN
Night	4/1/2002	David Conley	11:00PM	7:00AM	ICU	X	X	Scheduled/Firm	RN
Evening	4/2/2002	Thomas Ussery	3:00PM	11:00PM	L&D	X	X	Scheduled/Firm	RN
Evening	4/4/2002	Thomas Ussery	3:00PM	11:00PM	L&D	X	X	Scheduled/Firm	RN
Night	4/4/2002	Margarita Thornton	11:00PM	7:00AM	Peds	X	X	Scheduled/Firm	LPN
Evening	4/5/2002	Thomas Ussery	3:00PM	11:00PM	L&D	X	X	Scheduled/Firm	RN

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Clicking on the Employee Name on both the Calendar and List view schedule, displays basic Employee Information.

Medical Staffing Services Hospitals Web Access

Employee Detail

General Info

Last Name:	Thornton	Type:	LPN
First Name:	Margarita	Gender:	F
D.O.B:	1/5/1985		

Licenses

License Number	Exp. Date	Issue Date	State	Note	Description
2165947	2/28/2003	2/28/2001	MD		Licensed Practical Nurse

Certifications

Description	Exp. Date	Issue Date	State	Note
ACLS	6/12/2002	6/12/2001		
CPR	5/15/2002	5/15/2001		

Health Screenings

Description	Exp. Date	Issue Date	Note
Drug Screen	6/9/2002	6/9/2001	

Skills

Health Screenings

Description	Exp. Date	Issue Date	Note
Drug Screen	6/9/2002	6/9/2001	

Skills

Skill	Description	Ranking	Years Held
NEONATAL	Neonatal	4	3+

Ranking Legend: 1 = Theory, No Practice 2 = Intermittent Experience 3 = Able To Perform Independently 4 = Proficient, Able to Supervise

Insurance Policies

Description	Provider	Exp. Date	Issue Date	Note
Professional Liability	NSO	9/18/2002	2/12/2002	

Employment History

Employer	Start Date	End Date	Unit	Note
No records returned.				

Documents List

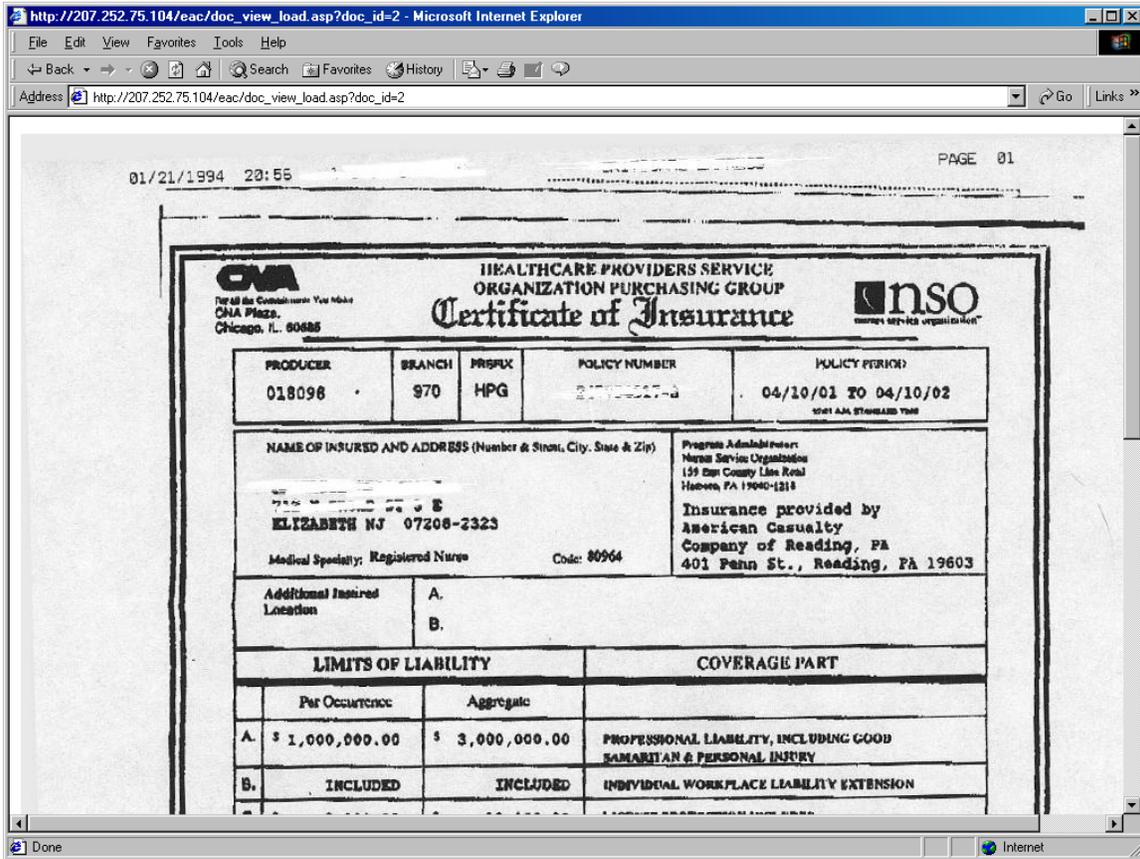
Description
Malpractice Insurance Policy

Back

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Documents scanned into MicroStaffer can also be displayed by clicking on their Hyperlinks in the Employee profile.



2. Entering Orders On-Line

Clients/Facilities can enter new orders into the MicroStaffer Web Access Module. Once submitted, the order information flows into the MicroStaffer User Notifications window. Only MicroStaffer users who have been assigned as Account Reps to the submitting Client will be notified of these orders and be able to process them. In effect, they act as 'Gatekeepers' and control the flow of New Orders from clients into MicroStaffer.

Notifications will be posted during Login into MicroStaffer and also anytime the user is in the MicroStaffer system.

Below is a typical Order Entry form.

The screenshot shows a web browser window titled "New Order Entry - Microsoft Internet Explorer". The address bar shows the URL: http://207.252.75.104/eac/order_entry.asp?key=14. The page header features the text "Medical Staffing Services Hospitals Web Access" with a small image of a man in a white coat. Below the header is a form titled "Enter the Criteria for your need(s) below, then hit the Submit button...". The form contains the following fields:

Date:	Monday, March 25, 2002
Shift:	Day... (7:00AM - 3:00PM)
Unit/Area:	ICU
Employee Type:	(RN) - Registered Nurse
Skill:	(CCU) - Critical Care
Order Quantity:	3
Comment/Note:	Please send Sarah Jones, Tammy Smith and Ellen Jackson. I already spoke with them and they can

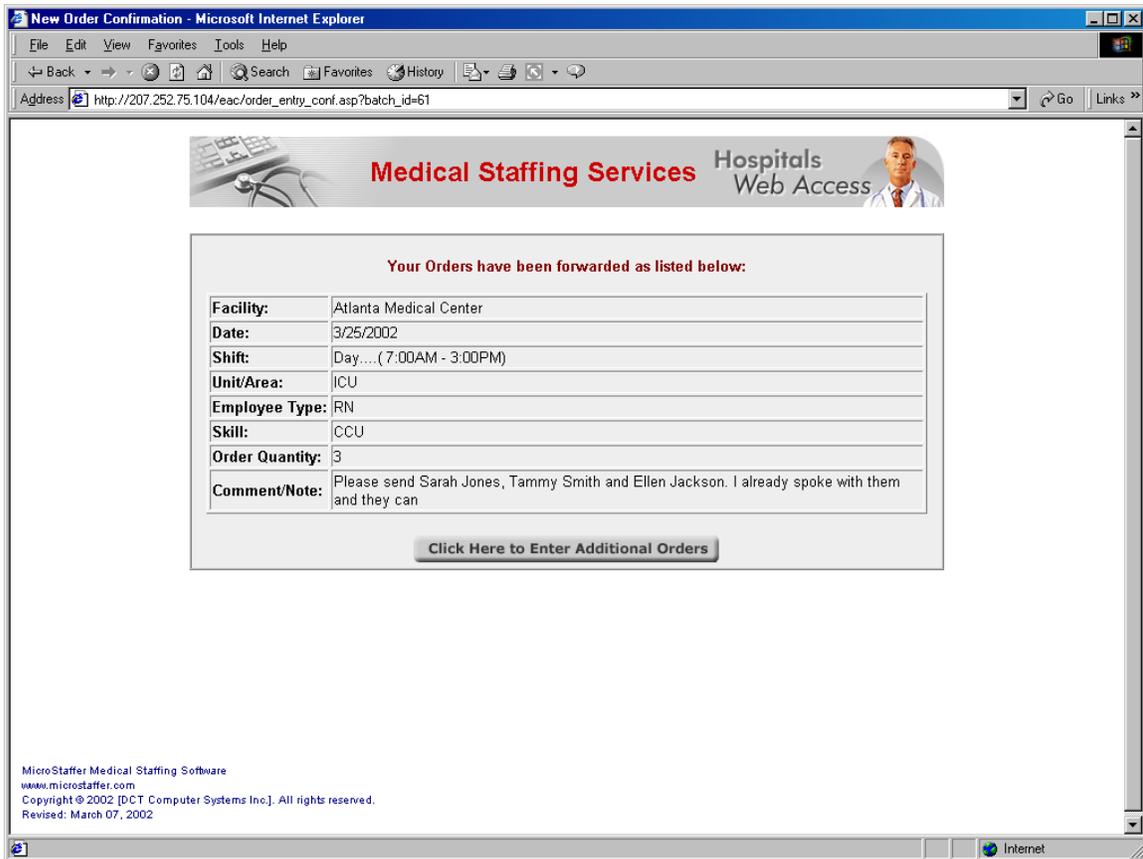
At the bottom of the form are three buttons: "Submit", "Reset", and "Back".

At the bottom left of the browser window, it says "MicroStaffer Medical Staffing Software www.microstaffer.com". At the bottom right, it says "Done" and "Internet".

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Once the order has been submitted, a confirmation page is displayed which the Customer may view and print.

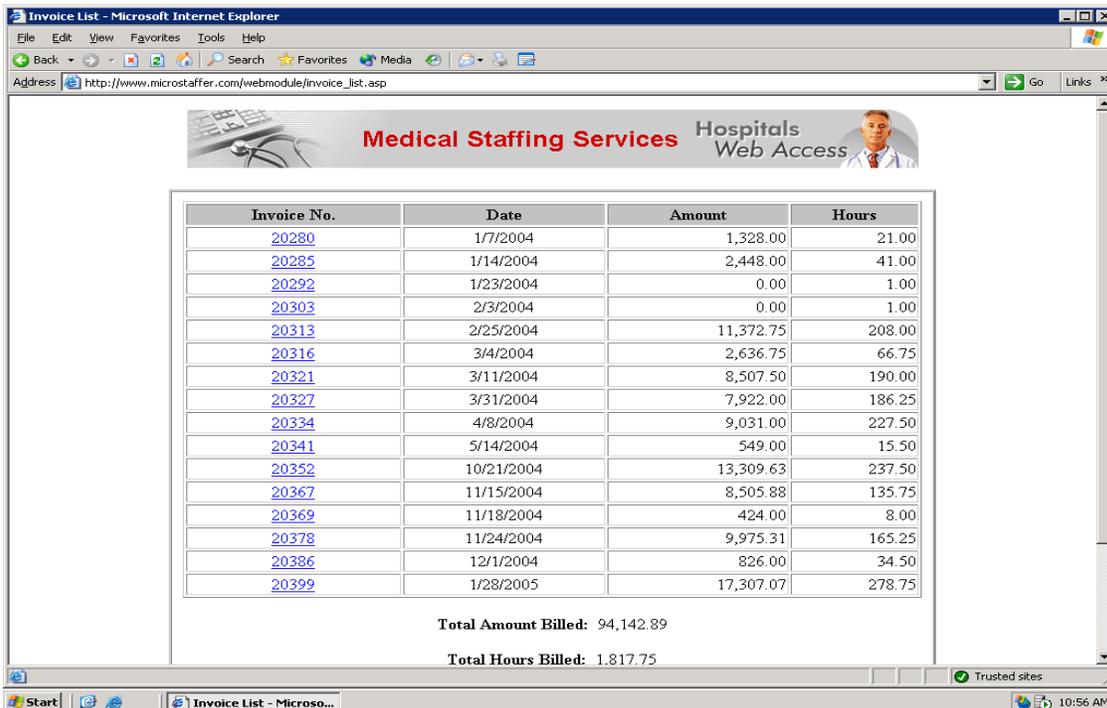
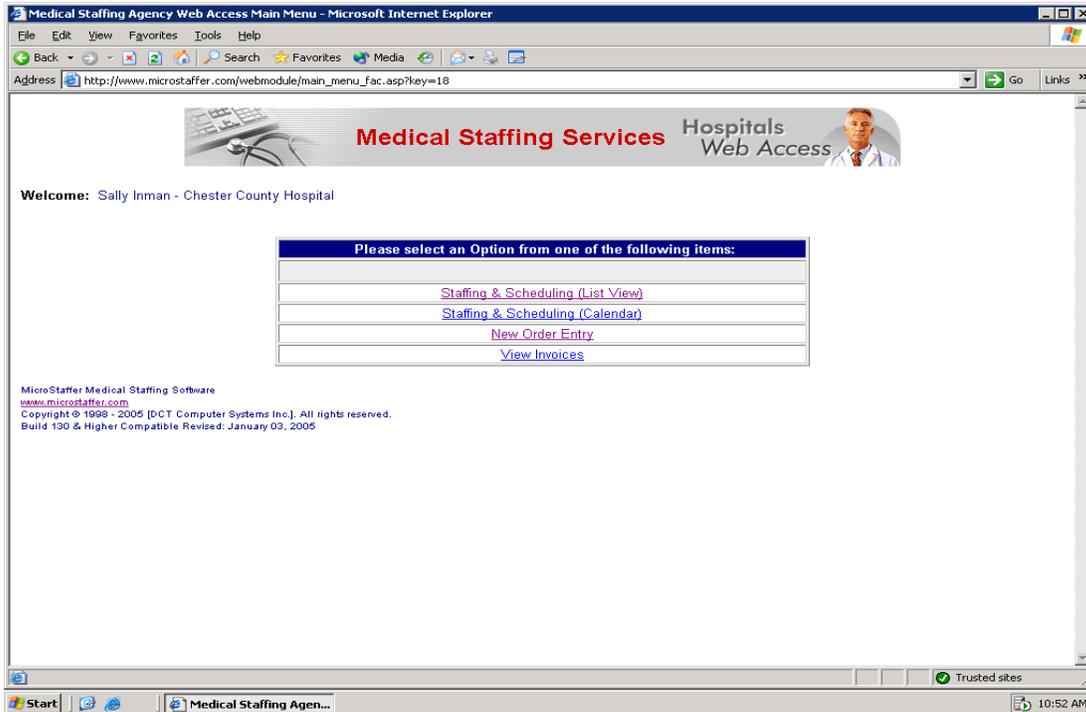


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3. Viewing of Published Invoices

After Client logs in they select View Invoices and selects criteria in which to view invoices.



D. On-Line Applications

The MicroStaffer Web Access Module allows applicants to enter employee profile data from any Web Browser. They may even paste in their entire resumes.

Information gathered on the On-Line application form flows into the MicroStaffer Notifications window. Only MicroStaffer users who have the 'Review On-Line Applicants' checkbox on the User Setup Window checked, will see New Applicant data in this window.

Users may then forward the application into the MicroStaffer Employee Leads window or they may delete it. Once in the Employee Leads window, the information can then be transferred into the Employee window or be deleted.

Welcome to Medical Staffing Services On-Line Application!

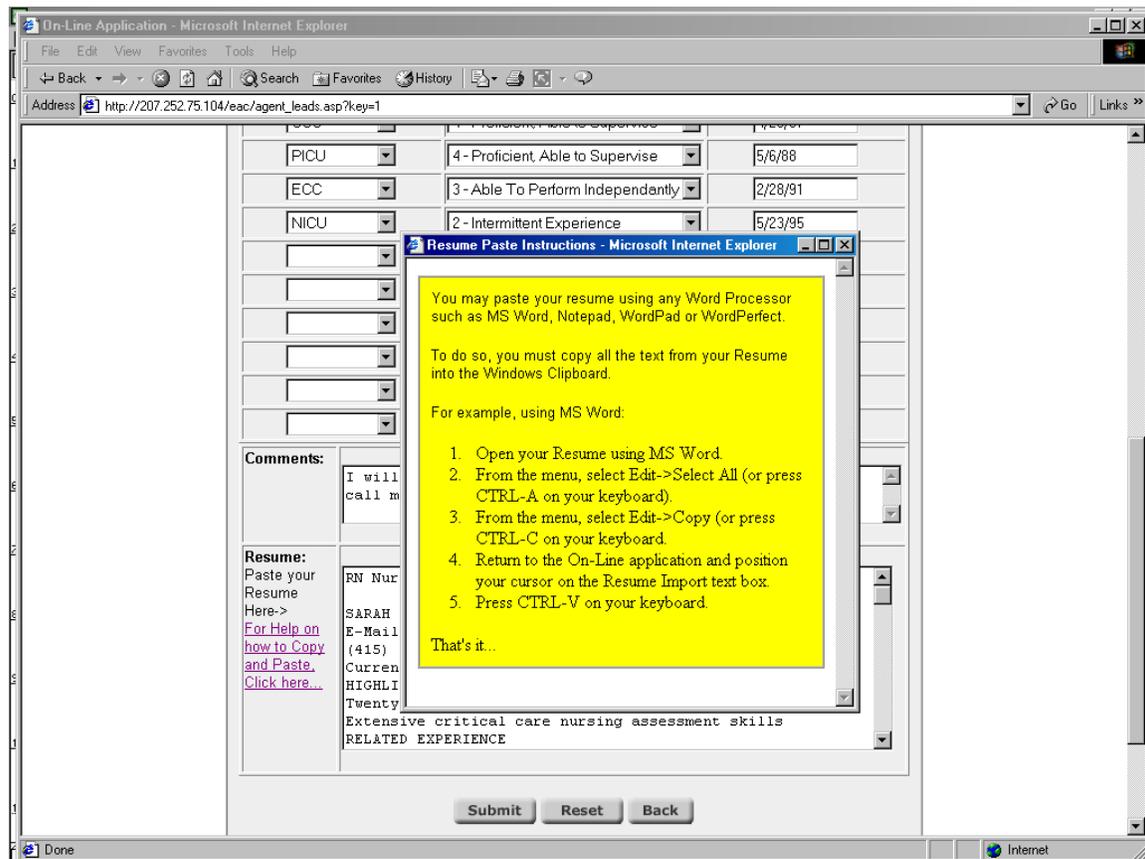
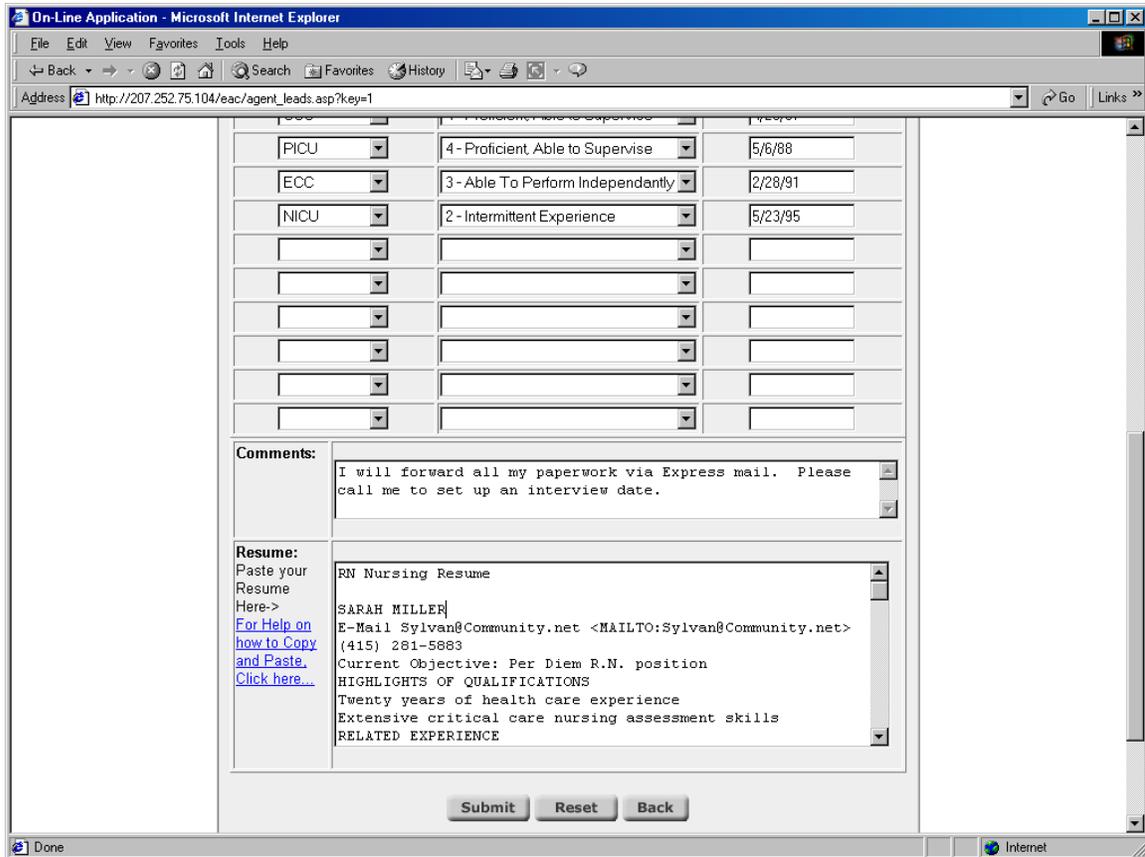
Please complete the following On-Line Application and Click the Submit button...
* Indicates required field

First Name:*	<input type="text" value="Sarah"/>	M.I.:	<input type="text" value="L"/>
Last:*	<input type="text" value="Miller"/>		
Address:*	<input type="text" value="4523 East 45th Street"/>		
	<input type="text" value="Apt. 4508"/>		
City:*	<input type="text" value="New York"/>	State:	<input type="text" value="NY"/>
		Zip:	<input type="text" value="10021"/>
Home Phone:	<input type="text" value="212-999-0909"/>	Work Phone:	<input type="text" value="212-888-2387"/>
Other Phone:	<input type="text" value="212-778-1234"/>	Description:	<input type="text" value="Cell"/>
Type:	<input type="text" value="RN"/>	Gender:	<input type="text" value="F"/>
		D.O.B:	<input type="text" value="11/23/67"/> (m/d/yy)
Email:	<input type="text" value="smiller345@home.com"/>		
Pager Email:	<input type="text" value="smiller444@pagemail.net"/>		
Cell Email:	<input type="text"/>		

Skills		
Skill	Ranking (Optional)	Date Acquired (m/d/yy) (Optional)
<input type="text" value="CCU"/>	<input type="text" value="4 - Proficient Able to Supervise"/>	<input type="text" value="4/23/87"/>
<input type="text" value="PICU"/>	<input type="text" value="4 - Proficient Able to Supervise"/>	<input type="text" value="5/6/88"/>
<input type="text" value="ECC"/>	<input type="text" value="3 - Able To Perform Independantly"/>	<input type="text" value="2/28/91"/>
<input type="text" value="NICU"/>	<input type="text" value="2 - Intermittent Experience"/>	<input type="text" value="5/23/95"/>

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X. Import/Export of Data

A. System Data Import

1. Importing System Data Overview

The MicroStaffer System Data Import Utility allows you to import data into select areas of the MicroStaffer system such as Employee and Customer records.

The utility is designed to be used when first starting up a new MicroStaffer system. **Continued importing of data is not recommended.**

Please note the following when performing any type of System Data Import:

- 1. It is STRONGLY RECOMMENDED that you first make a backup of your database before performing any type of System Data Import.**
2. To access the Import Utility, click on the System button, then select Import.
3. Every column specified in the Import column list **MUST** be in the source text file. Even if the column is not required, you must include it in the source text file. In the case of blank or unknown values, just leave a zero space character.
4. The import source file **MUST** be a tab delimited text file.
5. The import source file **MUST NOT** have any column headings.
6. The import process will attempt to insert or update as many records as possible that pass validation. You may view the Error Log file to view the error messages and line numbers that failed during the import.

It is strongly recommended that you first create a data source (eg. a temporary database table) that mimics the data structure specified for the import. This will ensure that there are no validation errors occurring from mismatched data types or data lengths.

2. Importing Employee Records into Microstaffer

It is possible to Insert and Update Employee Records in MicroStaffer from and external text file. To import or update records using and External File, click on the System button and Select Import. This file must be a tab delimited text file with NO HEADERS and must conform to the following data specifications:

Importing Employee Records into MicroStaffer

Column	Order	Data Type	Required	Details
External ID	1	CHAR (15)	N	You may import any ID type filed from the source system.
Active Flag	2	CHAR (1)	N	A=Active, I=Inactive
Last Name	3	CHAR (30)	Y	
First Name	4	CHAR (20)	Y	
Middle Initial	5	CHAR (1)	N	
Social Security Number	6	CHAR (11)	Y	Must be formatted as: ###-##-####. Duplicates not allowed. Key field.
System ID	7	CHAR (10)	N	Leave Blank. Internal use only.
Address1	8	CHAR (30)	Y	
Address2	9	CHAR (30)	N	
City	10	CHAR (30)	Y	
State	11	CHAR (3)	N	
Zip	12	CHAR (10)	N	
Phone_1	13	CHAR (15)	N	
Phone_2	14	CHAR (15)	N	
Phone_3	15	CHAR (15)	N	
Phone_1_description	16	CHAR (25)	N	
Phone_2_description	17	CHAR (25)	N	
Phone_3_description	18	CHAR (25)	N	
Sex	19	CHAR (1)	N	M=Male, F=Female
Date of Birth	20	CHAR (10)	N	Valid formats: MM/DD/YY or MM/DD/YYYY
Company ID	21	CHAR (10)	N	Leave blank. Internal use only.
Date Hired	22	CHAR (10)	N	Valid formats: MM/DD/YY or MM/DD/YYYY
Date Terminated	23	CHAR (10)	N	Valid formats: MM/DD/YY or MM/DD/YYYY
Email	24	CHAR (70)	N	
Pay Frequency	25	CHAR (2)	N	DY=Daily, WK=Weekly, BW=Bi-Weekly, SM=Semi-Monthly, MO=Monthly, QA=Quarterly, SA=Semi-Annually, AN=Annually
Employee Type Code	26	CHAR (5)	N	These MUST correspond to a valid Employee Type Code as defined within MicroStaffer. Codes not located will be added to the Employee Type List.
Employee Type Description	27	CHAR (40)	N	When you specify the Employee Type code and it is not found in MicroStaffer. The import process will add it to the list of employee codes and use this description.
Federal Filing Status	28	INTEGER	N	1=Single, 2=Married, 3=Head of Household, 4=Supplemental
Federal Allowances	29	INTEGER	N	
Lead Indicator	30	INTEGER	Y	1=Lead or Candidate, 0=Regular Employee
Region Type Code	31	CHAR (5)	N	Leave blank for no region.
Region Description	32	CHAR (50)	N	A descriptive name for region if it does not exist in MicroStaffer.

3. Importing Employee Certification Records

Employee Certifications Import Specifications

Note: When importing Certifications into MicroStaffer, the corresponding employee record must exist. The employee record is located using the Social Security Number specified in the import file.

Existing Certification records are updated. Certifications are located using the Certification Type Code and State Code.

Column	Order	Data Type	Required	Details
Social Security Number	1	CHAR (11)	Y	Must be formatted as ###-##-####. Must exist in the Employee Table.
Certification Type Code	2	CHAR (5)	Y	Must exist in the Company certifications list. If not found, it will be added to the Company Certifications list during the import.
Certification Description	3	CHAR (40)	N	Used if the Certification Type Code does not exist in the Company Certifications list. If omitted and Certification Type Code is not found, Certification Type Code will be used as the description.
Expiration Date	4	CHAR (10)	N	Specifies the Certification expiration date. Valid formats: MM/DD/YY or MM/DD/YYYY
Enable Tickler Flag	5	INTEGER	Y	Indicates whether you wish to enable the Certification Expiration Tickler. 1=Enable, 0=Do Not Enable
Tickler Days	6	INTEGER	Y	Indicates the number of days before Certification Expiration at which the Tickler should appear. You must set the Tickler Flag to 1 for this to work. A negative number indicates the days BEFORE expiration occurs. A positive number indicates the number of days AFTER expiration. For example, -7 indicates that the tickler should fire 7 days before the Certification expires.
Issue Date	7	CHAR (10)	N	Specifies the Certification issue date. Valid formats: MM/DD/YY or MM/DD/YYYY
State Code	8	CHAR (2)	N	Indicates the State for this Certification.
Comment	9	CHAR (255)	N	

Employee Certification Import Specifications

4. Importing Employee Health Screening Records

Employee Health Screenings Import Specifications

Note: When importing Health Screenings into MicroStaffer, the corresponding employee record must exist. The employee record is located using the Social Security Number specified in the import file.

Existing Health Screening records are updated. Health Screening are located using the Health Screening Type Code.

Importing Employee Health Screening Records

Column	Order	Data Type	Required	Details
Social Security Number	1	CHAR (11)	Y	Must be formatted as: ###-##-####. Must exist in the Employee table.
Health Screening Type Code	2	CHAR (5)	Y	Must exist in the Company Health Screenings list. If not found, it will be added to the Company Health Screenings list during the import.
Health Screening Description	3	CHAR (40)	N	Used if the Health Screening Type Code does not exist in the Company Health Screenings list. If omitted and Health Screening Type Code is not found, health Screening Type Code will be used as the Health Screening Description.
Expiration Date	4	CHAR (10)	N	Specifies the Health Screening expiration date. Valid formats: MM/DD/YY or MM/DD/YYYY
Enable Tickler Flag	5	INTEGER	Y	Indicates whether you wish to enable the Health Screening Expiration tickler.
Tickler Days	6	INTEGER	Y	Indicates the number of days before Health Screening Expiration at which the Tickler should appear. You must set the Tickler Flag to 1 for this to work. A negative number indicates the days BEFORE expiration occurs. A positive number indicates the number of days AFTER expiration. For example, -7 indicates that the tickler should fire 7 days before the Health Screening expires.
Issue Date	7	CHAR (10)	N	Specifies the Health Screening issue date. Valid formats: MM/DD/YY or MM/DD/YYYY
Comment	8	CHAR (255)	N	

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5. Importing Employee Insurance Policy Records

Employee Insurance Policies Import Specifications

Note: When importing Insurance Policies into MicroStaffer, the corresponding employee record must exist. The employee record is located using the Social Security Number specified in the import file. Existing Insurance Policy records are updated. Insurance Policies are located using the Insurance Policy Type Code and State Code.

Column	Order	Data Type	Required	Details
Social Security Number	1	CHAR (11)	Y	Must be formatted as: ###-##-####. Must exist in the employee table.
Insurance Policy Type Code	2	CHAR (5)	Y	Must exist in the Company Insurance Policy list. If not found, it will be added to the Company Insurance Policy list during the import.
Insurance Policy Description	3	CHAR (40)	N	Used if the Insurance Policy Type Code does not exist in the Company Insurance Policy list. If omitted and Insurance Policy Type Code is not found, Insurance Policy Type Code will be used as the Insurance Policy Description.
Policy Provider	4	CHAR (50)	N	
Policy Number	5	CHAR (25)	N	
Coverage 1	6	DECIMAL (12,2)	N	
Coverage 2	7	DECIMAL (12,2)	N	
Coverage 3	8	DECIMAL (12,2)	N	
Coverage 4	9	DECIMAL (12,2)	N	
Deductible 1	10	DECIMAL (12,2)	N	
Deductible 2	11	DECIMAL (12,2)	N	
Expiration Date	12	CHAR (10)	N	Specifies the Insurance Policy expiration date. Valid formats: MM/DD/YY or MM/DD/YYYY.
Enable Tickler Flag	13	INTEGER	Y	Indicates whether you wish to enable the Insurance Policy Expiration tickler. 1=Enable, 0=Do Not Enable
Tickler Days	14	INTEGER	Y	Indicates the number of days before Insurance Policy Expiration at which the Tickler should appear. You must set the Tickler Flag to 1 for this to work. A negative number indicates the days BEFORE expiration occurs. A positive number indicates the number of days AFTER expiration. For example, -7 indicates that the tickler should fire 7 days before the Insurance Policy expires.
Issue Date	15	CHAR (10)	N	Specifies the Insurance Policy issue date. Valid formats: MM/DD/YY or MM/DD/YYYY.
State Code	16	CHAR (2)	N	Indicates the State for this Insurance Policy
Comment	17	CHAR (255)	N	

6. Importing Employee License Records

Employee Licenses Import Specifications

Note: When importing Licenses into MicroStaffer, the corresponding employee record must exist. The employee record is located using the Social Security Number specified in the import file.

Existing license records are updated. Licenses are located using the License Type Code and State Code.

Column	Order	Data Type	Required	Details
Social Security Number	1	CHAR (11)	Y	Must be formatted as: ###-##-####. Must exist in the Employee Table.
License Type Code	2	CHAR (5)	Y	Must exist in the Company Licenses list. If not found, it will be added to the Company Licenses list during the import.
License Description	3	CHAR (40)	N	Used if the License Type Code does not exist in the Company Licenses list. If omitted and License Type Code is not found, License Type Code will be used as the License Description.
License Number	4	CHAR (25)	N	
Expiration Date	5	CHAR (10)	N	Specifies the license expiration date. Valid formats: MM/DD/YY or MM/DD/YYYY.
Enable Tickler Flag	6	INTEGER	Y	Indicates whether you wish to enable the License Expiration tickler. 1=Enable, 0=Do Not Enable.
Tickler Days	7	INTEGER	Y	Indicates the number of days before License Expiration at which the Tickler should appear. You must set the Tickler Flag to 1 for this to work. A negative number indicated the days BEFORE expiration occurs. A positive number indicates the number if days AFTER expiration. For example, -7 indicates that the tickler should fire 7 days before the license expires.
Issue Date	8	CHAR (10)	N	Specifies the license issue date. Valid formats: MM/DD/YY or MM/DD/YYYY.
State Code	9	CHAR (2)	N	Indicates the State for this license.
Comment	10	CHAR (255)	N	

7. Importing Employee Skills List Records

Employee Skills List Import Specifications

Note: When importing Skills into MicroStaffer, the corresponding employee record must exist. The employee record is located using the Social Security Number specified in the import file.

Column	Order	Data Type	Required	Details
Social Security Number	1	CHAR (11)	Y	Must be formatted as: ###-##-####. Must exist in the Employee table.
Skill Code	2	CHAR (10)	Y	Must exist in the Company Skills List. If not found, it will be added to the Company Skills list during the import.
Skill Description	3	CHAR (40)	N	Used if the Skill Code does not exist in the Company Skills list. If omitted and Skill Code is not found, the Skill Code will be used as the Skill Description.
Skills Ranking Code	4	CHAR (1)	N	A ranking associated with the skill. Must exist in the Skill Ranking list within MicroStaffer. If not found in the Skills Ranking list, it will be added to this list during the import.
Skills Ranking Description	5	CHAR (50)	Y	Used if the Skill Ranking Code does not exist in the Skills Ranking List. If omitted and Skill Ranking Code will be used as the Skill Ranking Description.
As of date	6	CHAR (10)	N	Specifies the date the skill was attained. Valid formats: MM/DD/YY or MM/DD/YYYY.

8. Importing Customer Records

Customer/Facility Base Data Import Specifications

Note: When importing Skills into MicroStaffer, the corresponding employee record must exist. The employee record is located using the Social Security Number specified in the Employee Record.

Notes:

- I. Note that ALL columns listed above must be in the import file. Leave blanks for unknown or missing values.
- II. Customer name is the Key field used in this import. If a records exists with the same Customer name field, that record is updated not inserted.
However, shift information (i.e. shift types 1 through 5) are never updated.
- III. Shift information for Shift 1 MUST be fully specified (i.e. Name, Type, Start Time, End Time). Note that MicroStaffer customer records MUST contain at least one shift type.
- IV. Shift information must be fully specified in Sequence. For example, if you specify information for Shift 4 but omit data for Shift 3, Shift 4 information will NOT be imported.
- V. Shift Start time and End time cannot be the same.

Column	Order	Data Type	Required	Details
Customer Name	1	CHAR (50)	Y	If the customer already exists, the import job will update the existing record using the Customer Name as the key field.
Address 1	2	CHAR (30)	N	
Address 2	3	CHAR (30)	N	
City	4	CHAR (30)	N	
State	5	CHAR (3)	N	
Zip Code	6	CHAR (10)	N	
Phone Number 1	7	CHAR (20)	N	
Phone Number 2	8	CHAR (20)	N	
Phone Number 3	9	CHAR (20)	N	
Phone Number 4	10	CHAR (20)	N	
Phone Number 1 Description	11	CHAR (25)	N	Eg. Main office, Nursing office etc.
Phone Number 2 Description	12	CHAR (25)	N	
Phone Number 3 Description	13	CHAR (25)	N	
Phone Number 4 Description	14	CHAR (25)	N	
Fax Number 1	15	CHAR (20)	N	

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Fax Number 2	16	CHAR (20)	N	
Fax Number 1 Description	17	CHAR (25)	N	
Fax Number 2 Description	18	CHAR (25)	N	
Contact 1	19	CHAR (30)	N	
Contact 2	20	CHAR (30)	N	
Contact 3	21	CHAR (30)	N	
Contact 4	22	CHAR (30)	N	
Contact 1 Description	23	CHAR (25)	N	
Contact 2 Description	24	CHAR (25)	N	
Contact 3 Description	25	CHAR (25)	N	
Contact 4 Description	26	CHAR (25)	N	
Invoice Attn. to Note	27	CHAR (50)	N	
Invoice Payment Terms	28	CHAR (25)	N	
Invoice Acct./PO#	29	CHAR (15)	N	
External ID	30	CHAR (20)	N	Use this field to insert Customer ID Number from another system.
Orientation Indicator	31	INTEGER	N	1=Orientation if Required, 0=Orientation is NOT required. Defaults to 0 if left blank.
Inactive Indicator	32	INTEGER	N	1=Customer is NOT active, 0=Customer is Active. Defaults to 0 when left blank.
Email 1	33	CHAR (70)	N	
Email 2	34	CHAR (70)	N	
Email 3	35	CHAR (70)	N	
Email 1 Desc.	36	CHAR (30)	N	
Email 2 Desc.	37	CHAR (30)	N	
Email 3 Desc.	38	CHAR (30)	N	
Billing Customer Name	39	CHAR (50)	N	Use only when the Billing Address Indicator is set to 1.
Billing Address 1	40	CHAR (30)	N	

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Billing Address 2	41	CHAR (30)	N	
Billing City	42	CHAR (30)	N	
Billing State	43	CHAR (3)	N	
Billing Zip	44	CHAR (10)	N	
Billing Address Indicator	45	INTEGER	N	Set to 0 if you want to use Billing information that is different from the standard Customer Name & Address. Set to 1 if you want to set the Billing Name & Address the same as the regular name & Address. Defaults to 1 when left blank.
Region Type Code	46	CHAR (5)	N	Use this code to identify the Geographical Region for this Customer.
Region Description	47	CHAR (50)	N	Used if the Region Type Code does not exist in the Company Region list. If left blank and Region Type Code is not found, Region Type Code will be used as the Region description.
Shift 1 Name	48	CHAR (40)	Y	A descriptive name for the shift. Examples are Day 8, Day 12 etc. REQUIRED.
Shift 1 Type	49	CHAR (1)	Y	Valid Types are: D=Day, E=Evening, N=Night. REQUIRED.
Shift 1 Start Time	50	CHAR (10)	Y	A string whose value is a valid time (such as 8:00, 10:15, 20:30). MicroStaffer determines whether the time is am or pm based on a 24 hour clock. REQUIRED. MUST be in increments of 15 minutes (7:33 am is not allowed. Use 7:30 am or 7:45am)
Shift 1 End Time	51	CHAR (10)	Y	See Shift 1 Start Time for validation. REQUIRED. Cannot be the same as Start Time.
Shift 2 Type	52	CHAR (1)	N	Valid types are: D=Day, E=Evening, N=Night.
Shift 2 Name	53	CHAR (40)	N	A descriptive name for the shift. Examples are Day 8, Day 12, etc.
Shift 2 Start Time	54	CHAR (10)	N	See Shift 1 Start Time for validation.
Shift 2 End Time	56	CHAR (10)	N	See Shift 1 Start Time for validation.
Shift 3 Name	57	CHAR (40)	N	A descriptive name for the shift. Examples are: Day 8, Night 12, etc.
Shift 3 Type	58	CHAR (1)	N	See Shift 1 Start Time for validation.
Shift 3 Start Time	59	CHAR (10)	N	See Shift 1 Start Time for validation.
Shift 3 End Time	60	CHAR (10)	N	See Shift 1 Start Time for validation.
Shift 4 Name	61	CHAR (40)	N	A descriptive name for the shift. Examples are Day 8, Day 12, etc.
Shift 4 Type	62	CHAR (1)	N	Valid Types are: D=Day, E=Evening, N=Night.
Shift 4 Start Time	63	CHAR (10)	N	See Shift 1 Start Time for validation.
Shift 4 End Time	64	CHAR (10)	N	See Shift 1 End Time for validation.
Shift 5 Name	65	CHAR (40)	N	A descriptive name for the shift. Examples are Day 8, Day 12, etc.
Shift 5 Type	66	CHAR (1)	N	Valid Types are: D=Day, E=Evening, N=Night.
Shift 5 Start Time	67	CHAR (10)	N	See Shift 1 Start Time for validation.
Shift 5 End Time	68	CHAR (10)	N	See Shift 1 End Time for validation.
Units/Work Areas List	69	CHAR (255)	N	A comma separated list of Units or Work Areas for this Customer. Each unit must be no longer than 10 Characters. Eg. MICU, SICU, MS, ER.

B. Peachtree Accounting Import

1. Peachtree Accounting Import/Export & DDE Overview

MicroStaffer's Invoicing and Payroll modules are fully integrated with Peachtree Accounting's Accounts Receivable and Payroll systems.

To enable the transferring of data into Peachtree it is required to complete an extensive one-time setup that will facilitate the accurate synchronization of data between the two systems.

Note also that for Payroll transfer, you must process payroll using MicroStaffer's built-in payroll tax module.

The following is a step-by-step guide that will help you in setting up the Import/Export and DDE mechanisms between MicroStaffer and Peachtree Accounting (Version 8 or higher)..

Peachtree Payroll Import & DDE Setup Overview

1. Synchronizing Earnings, Tax, Deduction and Contribution items between Peachtree and MicroStaffer.
2. Synchronizing Employees between Peachtree and MicroStaffer.
3. Setting up the Check Export Item Settings for Earnings, Taxes, Deductions and Contributions in MicroStaffer.
4. Importing Payroll Journal Entries into Peachtree Accounting.

Peachtree A/R Import & DDE Setup Overview

5. Synchronizing Customers between Peachtree and MicroStaffer
6. Exporting Invoice entries from MicroStaffer
7. Importing Sales Journal Entries from MicroStaffer into Peachtree

2. Peachtree Payroll Item Synchronization

In order to be able to transfer Peachtree payroll journal entries from MicroStaffer, it is required that all necessary payroll items be created in MicroStaffer and Peachtree Accounting.

MicroStaffer's payroll module comes with a set of pre-defined taxes which can be viewed on the System Settings and Utilities window's Taxes Tab.

It is imperative that all deductions and taxes be set up properly in MicroStaffer in order for the payroll import to be effective. This includes the creation of Employer Tax fields in MicroStaffer. This must be done by the MicroStaffer user manually.

For example, below is a list of common tax items you may find in a typical company.

1. Gross Pay (Salary)
2. Federal Income Tax
3. FICA (Employee)
4. Medicare (Employee)
5. State Tax (Employee)
6. FICA (Employer)
7. Medicare (Employer)
8. State Disability (Employer)
9. FUTA (Employer)
10. 401(K) (Employee)
11. 401(K) (Employer)

Note that while items 1 through 4 can be assigned to an employee by using the MicroStaffer system supplied taxes, you must create the other items (FUTA, FICA(Employer) etc.) yourself using the System Settings and Utilities window's Taxes Tab. Here you can create custom deductions and taxes which can then be assigned to employees.

Note that only 'Employee' taxes get deducted from pay checks in MicroStaffer. Employer taxes are used only for the purposes of tracking expenses and liabilities and, of course, transferring to Peachtree or other accounting systems.

It is **MOST IMPORTANT** that, when using the Peachtree Import Utility or DDE, any tax or deduction item that is being transferred to Peachtree also exists on the Employee Record within Peachtree. The transfer will fail otherwise. For example, if you are exporting a 401(K) deduction for a payroll check in MicroStaffer, you must have the same 401(K) deduction activated on the employee record in Peachtree. We therefore recommend that you include any and all taxes and deductions on the Default Taxes list within Peachtree so that whenever an employee is being imported or created in Peachtree that all these are assigned.

Once you have created all desired taxes, deductions and contributions within MicroStaffer, you must then ensure that Peachtree earnings and taxes are also set up correctly.

Here are several guidelines that must be followed:

1. Each Peachtree employee must have 'Salary' listed and checked with GL Account 77500 on the 'Maintain Employees/Sales Reps' window in Peachtree. **Salary MUST be the first item listed on the 'Pay Info' tab.**
2. All Employee and Employer tax fields that are being used in MicroStaffer must be checked in Peachtree on the EmployEE and EmployER tabs on the 'Maintain Employees/Sales Reps' window in Peachtree.

3. Peachtree Employee Synchronization

In order to be able to Transfer Payroll Journal entries to Peachtree Accounting it is required that each payroll record sent from MicroStaffer have a matching Employee ID record in Peachtree.

MicroStaffer uses the 'External ID' field on the Employee record for this purpose. It is the MicroStaffer user's responsibility to ensure that each MicroStaffer Employee's External ID field matches with it's Employee ID counterpart in Peachtree.

While you may achieve this synchronization manually, MicroStaffer also allows you to both populate the MicroStaffer Employee External ID systematically as well as export Employee Records into Peachtree using both the MicroStaffer Export window and/or DDE.

Note: If you are planning to use DDE only to transfer and maintain Employee Records between MicroStaffer and Peachtree you must only complete Steps I and III below. You do not have to create the MicroStaffer Export file that is.

I. Maintaining the External ID Field

I. Populating the MicroStaffer Employee External ID Field

It is possible to set every Employee External ID field in Microstaffer by accessing the Employee Setup window in MicroStaffer and then selecting Utilities->Set All External ID's to...

- A. System ID:** Sets all External ID fields for all employees to the MicroStaffer internal System ID.
- B. S.S. Number:** Sets all External ID fields for all employees to the employee's Social Security Number.
- C. Name Alpha-Key:** Sets all External ID fields to the employees last name. Duplicates will be set to last name + internal system ID.

II. Creating the Employee Export File

Once all External ID's in MicroStaffer have been set, you may then use the MicroStaffer Employee Export utility for Peachtree to export employee records into a comma separated text file (CSV) for import into Peachtree.

To create the CSV file, click on System-> Export Data. Once this window opens:

1. Select 'Employee Record(s): Peachtree Accounting Format' from the 'Export Format' dropdown.
2. Enter the file name to save the data to in the 'Export File' field. For example, C:\EMPLOYEE.CSV
3. Select the Employee(s) to export. Note, to select multiple employees click on each record using the Mouse while holding down the CTRL key or Shift key. You may also click on the 'Select All' button to select all records.
4. Finally, click on export to create the export file.

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III. Importing Employees into Peachtree

Once the export file has been created (C:\EMPLOYEE.CSV), start Peachtree Accounting and do the following to import the Employee records:

- a. Click on File->Select Import/Export from the main menu within Peachtree.
- b. Click on Payroll then Employee List then click on Import from the Toolbar. The Employee List window will open.
- c. On the 'Fields' tab begin by clicking on the Show None button. Then on the 'Field Settings' list click each 'Show' column in this **EXACT** order:
 1. Employee ID
 2. Employee First Name
 3. Employee Middle Initial
 4. Employee Last Name
 5. Employee
 6. Inactive
 7. Address Line-One
 8. Address Line-Two
 9. City
 10. State
 11. Zip
 12. Employee Social Security #
 13. Employee Type
 14. Telephone
 15. Email
 16. Federal Filing Status
 17. Federal Allowances
 18. Additional Fed Withholdings
 19. Date Hired
 20. Date Terminated
 21. Pay Method
 22. Pay Frequency
 23. Pay Info-Use Standard 1

The numbers under the 'Col #' field on the Peachtree Fields List must match those numbers above.

- d. Next, click on the 'Options' tab
- e. Under 'Import Options' check 'First Row Contains Headings'. This **MUST** be checked!
- f. Under 'Import/Export' file select the file that was used in Step B above.
- g. We now recommend that you click on the 'Save' button to save the Import Template. This way, any time you wish to update the employee records or import new additions to the employee list, you can simply access the Saved Employee Template which will contain all the current settings and selections.
- h. Finally, **UNLESS YOU ARE USING DDE** click on the 'OK' button to import the Employee records. Note, Peachtree will add new records for employees not found and update those that are already present. This step is done only if doing \import, not DDE transfer.

IV. Transferring Employees Using DDE

Instead of using the Peachtree Import Utility to import Employees, you can also use DDE to transfer employees from MicroStaffer to Peachtree. This is a more convenient and simpler method of synchronizing the two employee lists, especially on an ongoing basis whenever you enter new employees.

The only requirement for using DDE is that you must create an import template in Peachtree Accounting as described in step 3 above.

The name of this template must be entered into the User Preferences which can be accessed by clicking on the Standard Windows menu in MicroStaffer and selecting User->Preferences.

This window also contains settings that will automatically update Peachtree accounting each time an Employee record is added or edited.

4. Peachtree Check Export

Before you can transfer Payroll Journal entries from MicroStaffer into Peachtree Accounting, you must set up Payroll Field ID's, GL account numbers and Payroll Checking account numbers within MicroStaffer. These can only be set up once you have generated at least one payroll check in MicroStaffer by using the 'Export' button on the Main Payroll Window in MicroStaffer.

After you have generated a payroll check in MicroStaffer, the check will be displayed on the Payroll Window's Summary Tab.

Click on the 'Export' button, then select Peachtree Payroll Export from the 'Export Type' dropdown, then click on the 'Setup' button.

On the Peachtree Check Export window you must fill in the Field Number, Field Account and possible the Field Expense account for each payroll item that is used in your system. You must also enter the Cash Account for Payroll.

Please note that with respect to the Field Number, Peachtree documentation is EXTREMELY vague and we ask you to forgive us for any difficulty in entering the Field Numbers for each payroll item.

- I. **Field Number:** Each payroll item (eg. Gross Pay, Federal Income Tax, FICA etc.) must have it's appropriate Field Number filled in. To accurately determine the Field Number applicable to each item you must access the Peachtree Employee Defaults window. To open this window in Peachtree, from the main menu click on Maintain->Default Information->Employees.

Export pay field ID numbers range from 1 through 20.

Export Employee tax fields range from 22 through 50

Export Employer tax fields range from 51 through 60

DDE pay field ID number = 1

DDE Employee tax fields range from 2 through 30

DDE Employer tax fields range from 31 through 40

The following is an example of Field ID's in Peachtree and their mappings to MicroStaffer Field Numbers:

<u>Peachtree Field Name</u>	<u>Import/Export ID</u>	<u>DDE ID</u>	<u>MicroStaffer Field</u>
Salary	1	1	Gross Pay
Fed_Income	22	2	Federal Income Tax
Soc_Sec	23	3	FICA
Medicare	24	4	Medicare
State	25	5	State Tax in MicroStaffer
K401	26	6	Custom Deduction in MicroStaffer
Soc_Sec_ER	51	31	Employer Contribution in MicroStaffer
Medicare_ER	52	32	Employer Contribution in MicroStaffer
FUTA_ER	53	33	Employer Contribution in MicroStaffer

- I. **Field Account:** For each applicable payroll item you must enter the Peachtree Account. These account numbers can be found on any Peachtree Employee Defaults window. For Gross Pay in MicroStaffer use the G/L account number for Gross Pay on the Peachtree Employee Defaults window EmployEE Fields tab where it lists Gross (eg. 77500). For Employee deductions and taxes use the items on this tab below Gross. For Employer contributions use the EmployER tab Liability Account numbers.
 - II. **Field Expense Account:** These values apply only to Employer contributions. They should be left blank for Non-Employer-Contributions. Examples here are FUTA, FICA (Employer) etc. The account numbers can be found on the EmployER tab on the Peachtree Employee Defaults window.
 - III. **Cash Account:** Enter the Cash Account from where Payroll Checking comes from. For example, you could enter 10300. This number comes from your Peachtree Chart of Accounts.
- Finally, you can click OK and then select the Export file into which to export the payroll transactions that you later will import into Peachtree (eg. PAYROLL.CSV)

5. Peachtree Payroll Journal Import

To begin Payroll Journal Entries into Peachtree Accounting you must first create an Import Template.

Once the export file has been created from MicroStaffer (C:\PAYROLL.CSV), start Peachtree Accounting and do the following to import the payroll entries records:

1. Click on File->Select Import/Export from the main menu within Peachtree.
2. Click on Payroll then Payroll Journal then click on Import from the Toolbar. The Employee List window will open.
3. On the 'Fields' tab begin by clicking on the Show None button. Then on the 'Field Settings' list click each 'Show' column in this EXACT order:

Col 1	Employee ID
Col 2	Check Number
Col 3	Date
Col 4	Cash Account
Col 5	Pay Period
Col 6	Weeks in Pay Period
Col 7	Number of Distributions
Col 8	Pay Field-Number
Col 9	Pay Field-Account
Col 10	Pay Field-Expense Account
Col 11	Pay Field-Amount
Col 12	Pay Field-Memo Amount

The numbers under the 'Col #' field on the Peachtree Fields List must match those numbers above.

4. Next, click on the 'Options' tab
5. Under 'Import Options' check 'First Row Contains Headings'. This MUST be checked!
6. Under 'Import/Export' file select the file that was used to export checks from MicroStaffer
7. We now recommend that you click on the 'Save' button to save the Import Template. This way, any time you wish to import new checks into the payroll journal, you can simply access the Saved Import Template which will contain all the current settings and selections.
8. Finally click on the 'OK' button to import the Payroll records. Note, Peachtree will add new records for checks not found and update those that are already present.

6. Peachtree Customer Synchronization

In order to be able to Transfer Sales Journal entries to Peachtree Accounting it is required that each invoice record sent from MicroStaffer have a matching Customer ID record in Peachtree.

MicroStaffer uses the 'External ID' field on the Client record for this purpose. It is the MicroStaffer user's responsibility to ensure that each MicroStaffer Client's External ID field matches with it's Customer ID counterpart in Peachtree.

While you may achieve this synchronization manually, MicroStaffer also allows you to both populate the MicroStaffer Client External ID systematically as well as export Client Records into Peachtree using both the MicroStaffer Export window and/or DDE.

Note: If you are planning to use DDE only to transfer and maintain Customer Records between MicroStaffer and Peachtree you must only complete Steps I and III below. You do not have to create the MicroStaffer Export file that is.

I. Maintaining the External ID Field

I. Populating the MicroStaffer Client External ID Field

It is possible to set every Client External ID field in MicroStaffer by accessing the Client Setup window in MicroStaffer and then selecting Utilities->Set All External ID's to...

- A. **System ID:** Sets all External ID fields for all clients to the MicroStaffer internal System ID.
- B. **Name Alpha-Key:** Sets all External ID fields to the client's name. Duplicates will be set to name + internal system ID.
- C. **Business Works Name Key**
- D. **Peachtree Classic Name Key**

II. Importing Customers into Peachtree

Once the export file has been created (C:\CUSTOMER.CSV), start Peachtree Accounting and do the following to import the Customer records:

- I. Click on File->Select Import/Export from the main menu within Peachtree.
- II. Click on Accounts Receivable then Customer List then click on Import from the Toolbar. The Customer List window will open.
- III. On the 'Fields' tab begin by clicking on the Show None button. Then on the 'Field Settings' list click each 'Show' column in this **EXACT** order:
 - A. Customer ID
 - B. Customer Name
 - C. Contact
 - D. Bill to Address Line-One
 - E. Bill to Address Line-Two
 - F. Bill to City
 - G. Bill to State
 - H. Bill to Zip
 - I. Telephone 1
 - J. Telephone 2
 - K. Fax Number
 - L. E-Mail Address

The numbers under the 'Col #' field on the Peachtree Fields List must match those numbers above.

IV. Next, click on the 'Options' tab

V. Under 'Import Options' check 'First Row Contains Headings'. This **MUST** be checked!

VI. Under 'Import/Export' file select the file that was used in Step B above.

- VII. We now recommend that you click on the 'Save' button to save the Import Template. This way, any time you wish to update the customer records or import new additions to the customer list, you can simply access the Saved Customer Template which will contain all the current settings and selections.
- VIII. Finally, **UNLESS YOU ARE USING DDE** click on the 'OK' button to import the Customer records. Note, Peachtree will add new records for customers not found and update those that are already present. This step is done only if doing import, not DDE transfer.

III. Transferring Customers Using DDE

Instead of using the Peachtree Import Utility to import Customers, you can also use DDE to transfer customers from MicroStaffer to Peachtree. This is a more convenient and simpler method of synchronizing the two customer lists, especially on an ongoing basis whenever you enter new customers.

The only requirement for using DDE is that you must create an import template in Peachtree Accounting as described in step 3 above.

The name of this template must be entered into the User Preferences which can be accessed by clicking on the Standard Windows menu in MicroStaffer and selecting User->Preferences.

This window also contains settings that will automatically update Peachtree accounting each time a Customer record is added or edited.

7. Peachtree Invoice Export

To export Invoices from MicroStaffer for later Import into Peachtree Accounting you must first retrieve the desired invoices on the MicroStaffer Main Invoice window.

Click on the Export button and Select Peachtree Accounting from the Export Type dropdown.

Click on the 'Options Button' to enter the proper Peachtree Accounts Receivable and GL Account Numbers for invoices. These can be viewed in the Peachtree Chart of Accounts.

To export the invoices just click OK and enter the desired file location and name.

To use DDE, just select the DDE transfer/export option.

8. Peachtree Sales Journal Import

To begin Sales Journal Entries into Peachtree Accounting you must first create an Import Template.

You can create the Peachtree Import file by accessing the MicroStaffer main invoice window, retrieving one or more invoices and clicking the Export button. Then select the Peachtree Export format from the dropdown.

Once the export file has been created from MicroStaffer (C:\SALES.CSV), start Peachtree Accounting and do the following to import the sales journal entry records:

- I. Click on File->Select Import/Export from the main menu within Peachtree.
- II. Click on Accounts Receivable then Sales Journal then click on Import from the Toolbar. The Sales Journal window will open.
- III. On the 'Fields' tab begin by clicking on the Show None button. Then on the 'Field Settings' list click each 'Show' column in this **EXACT** order:
 - A. Customer ID
 - B. Invoice ID
 - C. Date
 - D. Date Due
 - E. Accounts Receivable Account
 - F. Number of Distributions
 - G. Description
 - H. G/L Account
 - I. Tax Type
 - J. Amount

The numbers under the 'Col #' field on the Peachtree Fields List must match those numbers above.

- IV. Next, click on the 'Options' tab
- V. Under 'Import Options' check 'First Row Contains Headings'. This **MUST** be checked!
- VI. Under 'Import/Export' file select the file that was used to export invoices from MicroStaffer
- VII. We now recommend that you click on the 'Save' button to save the Import Template. This way, any time you wish to import new Invoices into the Sales Journal, you can simply access the Saved Import Template which will contain all the current settings and selections.
- VIII. Finally click on the 'OK' button to import the Sales Journal records. Note, Peachtree will add new records for checks not found and update those that are already present.

9. Peachtree DDE Preferences

MicroStaffer allows you to set preferences for DDE transfer of Accounts Receivable, Customer, Payroll and Employee records.

These settings can be used to automatically update Peachtree Accounting when generating new Invoices and Payroll and when both updating and creating new Employees and Customers.

The user preferences window can be accessed from anywhere in the system by clicking on the Standard Windows menu at the very top of the MicroStaffer application and selecting User->Preferences.

XI. Troubleshooting

A. System Crashes

Unfortunately, Windows is not always a stable environment. Factors such as the number of processes, memory, CPU, display types etc. affect each PC differently.

Occasionally, MicroStaffer may experience what is called a System Crash. Usually, this is a Fatal Error that will shut down the application completely and generate an operating system error log entry.

The first thing to do in such an event is to restart the computer. This usually remedies these problems and also completely restarts the MicroStaffer database server (desktop systems only).

If the problems persist, call technical support.

Systems running on Windows 95, 98 or ME are also susceptible to crashes because of the built-in resource limitations of these versions of Windows. We highly recommend that all MicroStaffer desktop PC's run Windows NT 4.0, 2000 Professional or XP (Home or Professional). Remember that Windows 95,98 and ME are Home Based version of windows and are not intended for use with business applications such as MicroStaffer.

If you must run on windows 95, 98 or ME, you should not open more than one window simultaneously within MicroStaffer. You should also run the Windows Resource Meter (located under the Accessories Program Group within Windows) to monitor the resources on an ongoing basis while running MicroStaffer.

B. Logins Exceeded Message

The 'Logins Exceeded' message appears on user licensed systems whenever the number of users has exceeded the license maximum. This can occur on both desktop and network systems.

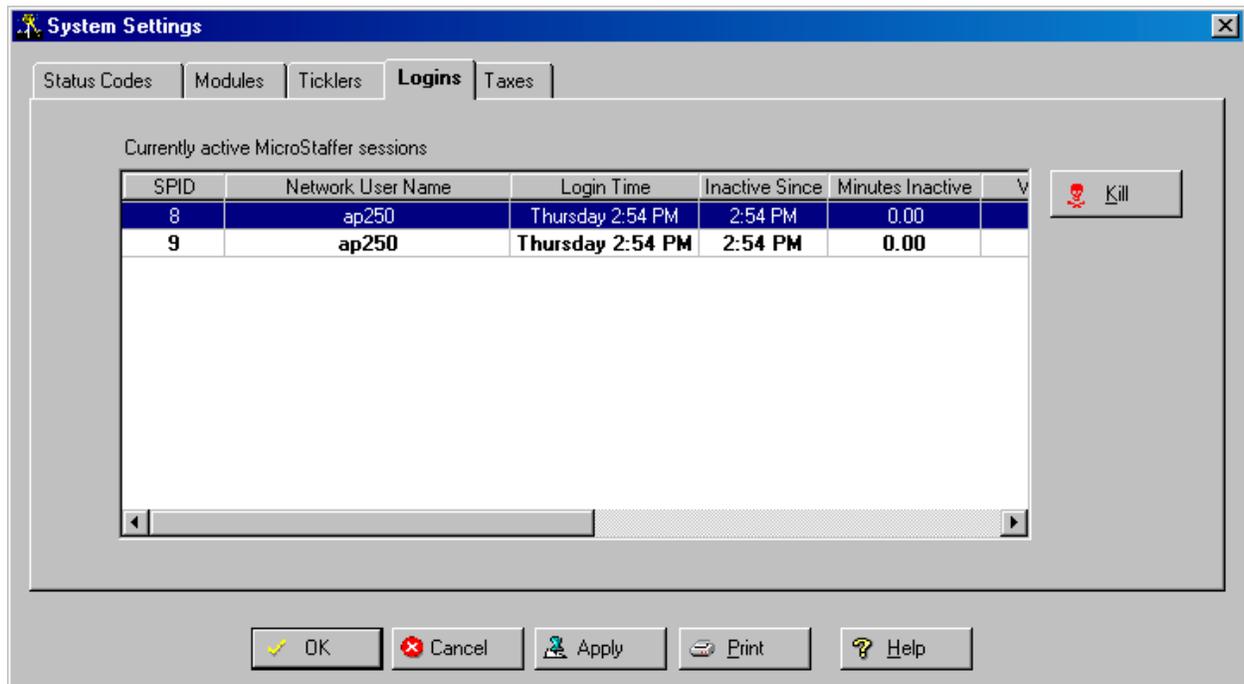
Should the message appear on a desktop system, we recommend that you restart the PC. This should make the message disappear.

On network systems you will be shown the currently logged in sessions. These each represent one connection to the database server.

Normally, each process is from a different machine on the network. However, if you or another user had to 'Hard Boot' or Power down the PC unexpectedly without shutting down properly, you will remain logged into the server even though your PC is shut down. This is what 's called 'Orphaned Processes'. While the SQL Database server will eventually terminate the Orphaned process, it may take considerable time before the job is killed.

The logins' window allows you to kill any orphaned processes owned by your PC as well as any other processes (given you have been granted Kill permission).

Killing processes frees up user login licenses.



C. Unable to Insert Unpaid Break into Rates Setup

Whenever you are entering Pay or Billing rates, you will notice a checkbox called 'Unpaid Break'.

This checkbox indicates that the period covered by the start and end time of the selected rate row will not be billed (unless of course the break was not taken) or paid.

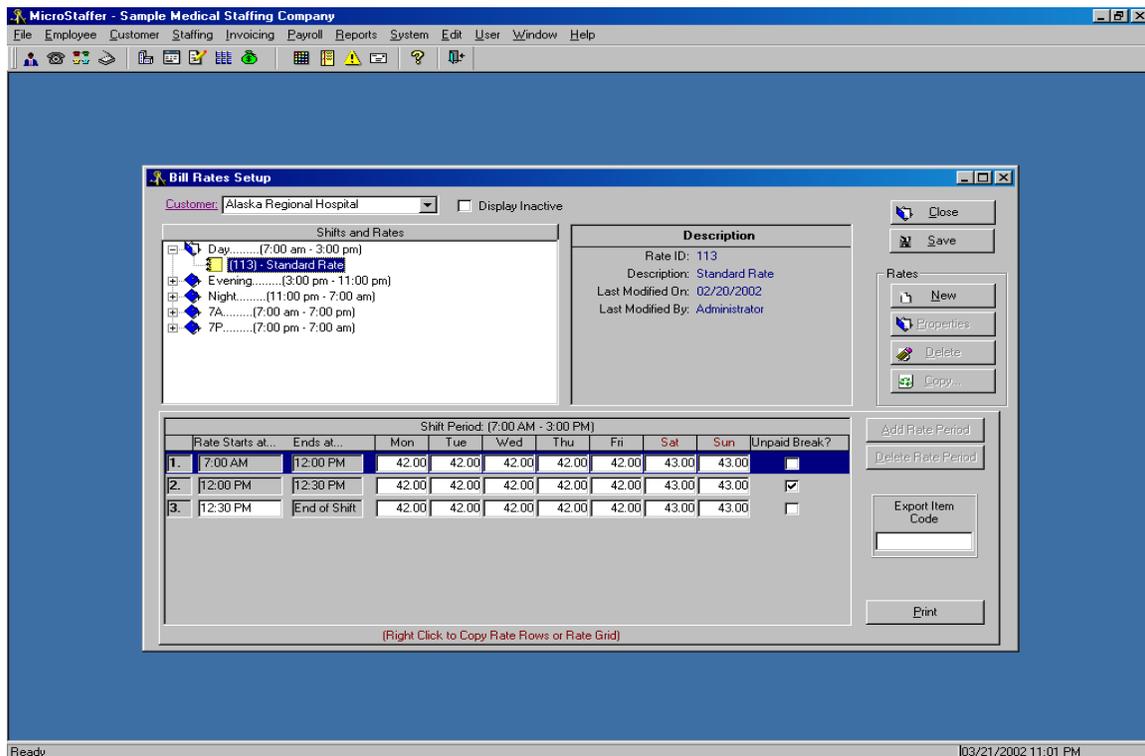
This checkbox is only enabled when the rate row resides between two non-break rows.

For example, you must enter at least 3 rows and then only the middle row would have the checkbox enabled.

Row 1 7a-12p

Row 2 12p-12:30p

Row 3 12:30p - End of Shift



D. Unable to Connect

Whenever you start the MicroStaffer application it will automatically attempt to connect to the database. This action occurs during the time the MicroStaffer splash screen is displayed.

Even though you are prompted by a login window which asks you for your user id and password, MicroStaffer has already connected to the database at this point. So, once you get the login window, your connection has already been made.

The following are some guidelines for when the database connection fails.

I. Desktop Systems:

- A. Incorrect connection settings. Check you ODBC settings in the Control Panel for the MicroStaffer Database Server
- B. Insufficient memory: Ensure that you have at least 32MB of Ram.
- C. Corrupt Database: Contact technical support.
- D. OS Failure: Try restarting the computer

II. Network Systems:

- A. Incorrect connection settings: Open the MicroStaffer Connect window and click on properties to ensure the proper entries have been made
- B. Database Server not running: Ensure that the Microsoft or Sybase database server is running on the Network server
- C. Unable to Ping Server: Go to DOS prompt and try entering PING followed by the Network server name or IP address. If you cannot PING successfully, contact your Network support staff.
- D. Restart Server: Try restarting the Network server.
- E. Not Logged in Properly: **You must have Client for Windows Network installed on you PC (See Network Neighborhood or My Network Places) and you MUST have logged into your PC with a valid User ID Password.**

