Payson Fire Department
Standard Operating Procedures

Section: General **Subject: Staffing With The CrewSense System**	**SOP # 2.4.9** **Date: 6/16** **Revision Hx:**

PURPOSE

The purpose of this policy is to provide guidelines for the use of the shift coverage system, 'CallBack' also known as 'CrewSense', in use at time of publication.

POLICY

All department members should be familiar with the callback system to the extent their position dictates. Administrative users should have a good working knowledge of the entire system. Lower level users should be familiar with the aspects that effect their positions. The CrewSense system shall be used to manage scheduling and time off for the department.

PROCEDURE

The shift coverage system should be utilized to its available capabilities by all shifts to provide for consistency filling vacancies and maintaining adequate staffing levels. The system can also be used to ensure staffing for special events like rodeos or other standby situations as well as the scheduling of Reserve Firefighters. The system has the capability to process PTO requests as well as shift trades. A User Guide can be found after logging in at https://crewsense.com/Application/Login , click on your name and then 'User Guide' in the drop down menu. Employees have the option to receive notices from the system by phone message, text, or through the CrewsSense app.

Definitions

Permission Levels:
Admin Users are most commonly tasked with scheduling, filling overtime, and overall employee management. Admin Users have the most control of the system, and should be from PFD management level positions and / or key users.

Admin users can:
- Add / Edit Employees
- Initiate new CallBacks
- Send Group Notifications
- Create / Edit / Delete Lists, Groups, Specialty Classifications
- Approve / Deny Time off Requests
- Edit Schedule via the Crew Scheduler & Time Off Calendar
- Upload / Edit documents in the File Manager
- Manually re-rank employees positions via the CallBack Rankings

Sub-Admin
- Initiate new CallBacks
- Send Group Notifications
- Approve / Deny time off requests

- Edit Schedule via the Crew Scheduler & Time Off Calendar
- Plus All permissions of End User

Dispatcher
- Initiate new CallBacks
- Send Group Notifications
- Plus All permissions of End User

Company Officer
- is an End User that can move people on the schedule but cannot add or remove them (except move them to the off duty box)

End Users have restricted access to certain areas of the CallBack Staffing system. End Users can:
- Respond to CallBack opportunities
- Receive Group Notifications
- View the Crew Scheduler
- Submit Time off Requests
- Generate Trade Requests with other members
- Edit their User Profile (phone numbers, contact method, etc)
- View documents in the File Manager
- Upload / Edit documents in the File Manager
- Select their Availability

PTO

PTO requests should be submitted through the system prior to the PFD 'Request For Leave' form being submitted. Employees calling in sick should do so no later than 06:30 the day of their shift. They should either request the day off through the system prior to calling the BC. The BC can then approve the request and initiate a callback if needed. Employees should follow their requests made through the system with a paper request as soon as possible. The preferred notification time for PTO vacation is 18 days in advance. PTO in the CrewSense system is referred to as 'Time Offs'. A time off request should be submitted for full or partial shifts but no more than 24 hours per request. All information should be complete before submitting the request to the supervisor.

Callbacks

Callbacks can be initiated for any open slot. If a PTO request has been approved the corresponding open slot will appear on the Crew Scheduler. Click on the open slot to open a window where you have the choice to fill that slot with a callback or manually place an employee in that slot. If an employee is manually placed be sure to categorize the hours appropriately (ie overtime). Follow the steps in the callback and make your selections based on the needs for that day. If filling a slot for someone that called in sick it's recommended that you change the wait time in the Callback settings to 'no wait time' to speed up the Callback. Callbacks can be 'Cancelled' at any time prior to the callback being completed. 'Deleting' a callback is not recommended. Deleting also deletes the data associated with it, including the open slot that was filled with the Callback.

Extra Assignments

Assignments can be viewed by going to 'Crew Scheduler', 'Assignments', 'View/Edit Assignments'. To add an assignment for a special event select the green button labeled 'Add Assignment'. Give the assignment a name (i.e. Rodeo Coverage), starting date, time duration, and how many positions. Fill these new temporary assignments by clicking on the ‘Open Slots’ in the Crew Scheduler for the affected day(s). Follow the same procedure you would to fill an open slot by choosing ‘Fill With Call Back’ or by assigning someone manually to the open slot.

Ready Alerts

Messages or notifications can be sent to employees individually or as groups. The groups can be chosen manually or from the Shift Groups, Classifications such as Paramedic and Tech Rescue, or a List that consists of Captains, Engineers, etc. To prepare a message choose ‘Ready Alert’ from the top menu and the type from the drop down menu. Select your intended receiver(s), enter the message, check the ‘Also Send Via Email’ box to have the message delivered by phone and email. Click ‘Send’.

Time Off/Event Calendar

The Time Off/Event Calendar can found by choosing ‘Time Offs’ from the top menu then clicking on ‘Time Off/Event Calendar’. Any type of event can be added to this calendar and will be visible for all employees. Time off will automatically appear on this calendar when approved through the system, but can also be entered manually if necessary. To enter an event, or manually enter a Time Off, click in the white area of the desired day, choose ‘Time Off’ or ‘Other Event’. Enter the details and click on ‘Save’. Events added to this calendar should be Department related or approved by a Battalion Chief.

Shift Trades

There are no time constraints on shift trades and no limit to how many can be taken by employees. The agreement to trade shifts is a matter between the employees involved and not the employer. Timesheets should be completed to reflect the originally scheduled day(s), not the day(s) actually worked. If an employee that has agreed to the shift trade calls off for the day he/she agreed to work, the originally scheduled employee can work that day or use PTO, subject to Battalion Chief approval. If the employee doesn’t have PTO time available, leave without pay will be used. The employees involved in the shift trade should agree on an alternate day and start the process again or request that a Battalion Chief delete the trade request from the trade request history in CrewSense. Shift trades shall be initiated at least seven days before the trade date. Shift trades are allowed in accordance with Section 7(p)(3) of the FLSA.

Shift trades can be entered into the system for approval after employees have agreed on the days to be traded. Once approved, the employees will be notified and the appropriate days will be traded on the crew scheduler automatically. To submit a trade request go to the ‘Trade Board” and select ‘Request Trade’. To the right of ‘Send to Admin for Approval’, select the Battalion Chief of the employee requesting the trade to be notified. Next, the employee agreeing to the trade should be entered in the box for ‘Select employee’. Enter the ‘Shift start date’ and ‘Shift end date’, add a short message in the ‘Note’ box and ‘Send trade request’. The trade request will first go for approval to the employee accepting the trade, and then to the Battalion Chief selected. Both employees will be notified when the trade has been approved. Once approved, the trade will be reflected in the Crew Scheduler daily view with the employee that is working listed as ‘Trade Time Working’ and the employee originally scheduled as ‘Trade Time Off’. When the payback date is agreed upon by the employees, the other employee involved should repeat the procedure described above. The Battalion Chief should review the trade request before approving to assure adequate staffing objectives for the effected day(s).