

All About Staff Roles

In this article, we are going to learn about staff roles and how they play a huge part in Usked!



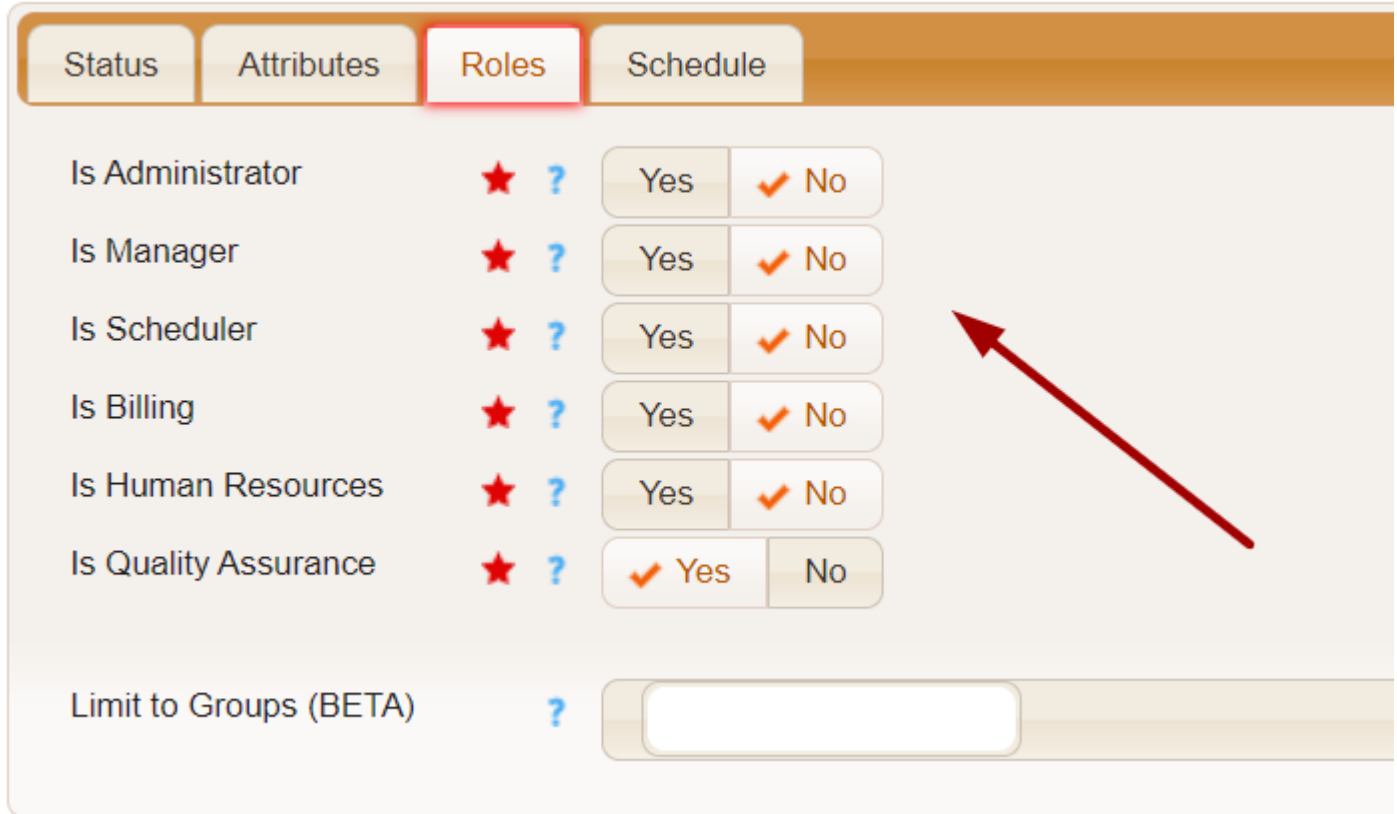
FAQ

1. Now that I have my buttered roll...what is a staff role?

Staff Roles enable staff access to certain parts of Ūsked! Staff can have zero, one, or multiple staff roles!

2. Where do I choose the staff roles for staff members?

If you navigate to **PEOPLE > STAFF > CLICK ON THE PENCIL ICON**, you will see a tab dedicated to staff roles. You can choose yes/no as desired.



Status	Attributes	Roles	Schedule
Is Administrator	★ ?	Yes	✓ No
Is Manager	★ ?	Yes	✓ No
Is Scheduler	★ ?	Yes	✓ No
Is Billing	★ ?	Yes	✓ No
Is Human Resources	★ ?	Yes	✓ No
Is Quality Assurance	★ ?	✓ Yes	No
Limit to Groups (BETA)	?	<input type="text"/>	

3. Let's talk about what each staff role does!



Administrator

Abilities

- Can switch to any other user in the system.
- Can change the banner image (your company's logo)
- Can change the password for any user including other staff.

Reports

- The user log report



Manager

Abilities

- Can switch to any other non-staff user in the system.
- Can edit any service request at any time regardless of the lock-out period.
- Can send broadcast email and SMS messages to service providers. (For more on broadcast messages, [see here](#)).
- Can view the history of most objects in the system.
- Can finalize and inactivate screening evaluation results.

Reports

- Alerts
- Dock Pay
- Fill Latency
- First Time Logins
- List of Email Addresses
- Non-Staff Job Feeds

- Screenings Overview
- Screenings with Details
- Service Provider Rates
- Survey Responses
- User Log
- Who Is On Now?
- Who Was On Today?

Settings

- [Audience Sizes](#)
- [Dress Codes](#)
- Support Topics
- Survey
- Regions
- [Paperwork](#)
- [Email Templates](#)
- [Screening Types, Sections, & Parts](#)

Alerts

- When someone cancels a service request and forces all service provider slots to be non-billable.
- When additional minutes for a service provider slot is not the same value for customer billing and service provider pay.
- When someone submits feedback via web.

Scheduler



Abilities

- Can send blocks and service requests into the email composer.
- Can post and un-post blocks and service requests.
- Can create and update blocks for recurring service requests.
- Can use the FTF magic button for blocks.
- Can add service requests to the service request cart. (For more look [here.](#))
- Can create, view, and update file attachments, points of contact, and locations for any group member. ([More about file attachments](#))
- Can convert new clients on service requests into users and group members.
- Can confirm and re-confirm service requests.

Reports

- Check Do-Not-Send Lists

- [Check Service Provider Availability](#)
- Check Service Request Availability
- Confirmation Performance
- FTF
- Fill Rate Performance
- Find Conflicting Service Requests
- Hours by Service Code
- Service Provider Demand
- Service Provider History
- Service Provider Hours
- Service Providers
- Service Providers by Region
- Short Notice Checking Tool

Alerts

- When a non-staff group member changes any of their email addresses, phone numbers, or IM accounts.
- Conflicting service provider slots.
- Conflicting assignment with leave.
- Conflicting service requests for clients.
- Out-of-state requests.
- Assigning a holiday service code to a service provider slot that is not on a holiday (and vice versa).
- When combined travel expenses and mileage reimbursement would be more than the set travel cap.
- When there is a gender mismatch between the assigned service provider and the requested gender.
- When assigning a service provider that has not yet passed screening.
- When assigning a service provider that does not meet all of the required paperwork for the group or service.
- The service request was modified by the client.
- If the service provider has had their assignment reduced within the cancel billable policy time.
- If it is past the start time of a service request but unassigned service provider slots do not have the FTF flag turned on.
- If leave is approved for service providers that have already been assigned to service requests.



Billing

Abilities

- Can see customer billing and service provider pay amounts in dashboard reports. (More on Dashboards [here](#))
- Can edit invoices and timesheets on behalf of any service provider.
- Can add and remove billable objects of any age on all invoices and timesheets.
- Can change the pay period of unprocessed invoices.
- Can convert empty invoices to timesheets.
- Can submit invoices and timesheets manually.
- Can create and edit any leave request or leave balance.
- Can view and edit [staff days](#).
- Can [process payroll](#).
- Can [export data to QuickBooks™](#).
- Can create and edit service providers. For more on how visit [here](#).

Reports

- Customer Billing Report
- Service Provider Pay Report
- Alerts
- Dock Pay
- Fill Latency
- Freelance Billable Hours
- Freelance Payable Hours
- Old Assignments Invoiced Report
- Payroll Reports
- Service Provider History
- Service Provider Rates
- Staff Billable Hours
- Staff Payable Hours
- Tracking Report
- Unvoiced Assignments Report
- User Log

Settings

- Departments
- [Staff](#)
- [Pay Periods](#)
- [Holidays](#)
- [Mileage Rate](#)
- [Services](#)
- [Service Codes](#)
- [Service Zones](#)

Alerts

- When any service provider's mailing address has been changed.

- When a service provider has been assigned to a service request and a [pay rate cannot be found](#).
- When any changes are made to a service provider slot for a service request completed in the past.
- Requests from scheduling to unlock a service provider slot so it can be modified.
- Whenever there is a leave balance violation.



Human Resources

Abilities

- Can view the transaction history of some objects in uSked.
- Can finalize screening evaluation results.
- Can inactivate screening evaluation results.
- Can create and edit any leave request.

Reports

- Expired Paperwork
- Missing Paperwork

- Screenings Overview
- Screenings with Details
- Unverified Paperwork

Settings

- Staff
- [Paperwork](#)
- [Email Templates](#)
- [Services](#) (limited to screening and paperwork parts)
- [Service Zones](#)

Alerts

- When a service provider has been assigned to a service request and a [pay rate cannot be found](#).



Quality Assurance

Abilities

- Can evaluate screening responses.
- Can ask for help when evaluating screening responses.

Reports

- Screenings (for evaluation only)

Office Staff



All users with at least one role enabled (except the QA role) are considered office staff and have the following abilities.

Abilities

- Has access to all blocks, contract days, and service requests for all groups.
- Can view blocks, contract days, approved leave, and other extra details, in the 35-day view.
- Has additional filters to use in the 7-day view.

- Can see extra details in the information boxes for blocks and service requests.
- Can force service provider slots to be non-billable when canceling service requests.
- Can view and edit internal notes.
- Can view details by hovering the mouse cursor over client names and service provider names.
- Can modify do-not-send lists.
- Can create and modify user accounts, groups, group members, and service provider profiles.
- Can copy preferred service providers from one group member to another for a user.
- Can assign service providers to service requests and update any field in the service provider slot.
- Can create, view, and update any service request at any time up to the lock-out period.
- Has access to many additional fields for service requests.
- Can new submit service requests for service dates in the past.
- Can update canceled service requests.
- Can send a request to billing to unlock a service provider slot.
- Has access to a pop-up calendar on the main menu bar.
- Can search by service request ID number in the main menu bar.
- Can create and modify [dashboards](#).
- Has access to the [1-day view](#).
- Has access to the [service request cart](#) and related features.
- Can create, update, download, and accept quotes for customers.
- Can view, create, and update all [paperwork](#) (but not necessarily the supporting files).
- Can view the history of some objects in uSked.
- Can make and update [recurring service requests](#).
- Can use the billing details feature for service requests.
- Can manually send system alerts for service requests.
- Can run the scenario optimizer on service requests in the service request cart.
- Can upload biographies and resumes for service providers.
- Can [change the password for any non-staff user](#).

Reports

- Service Provider Slot Non-Default Values

- Big Payable Hours



Supervisor

Abilities

- Can create and edit leave requests for any subordinate.
- Can adjust leave balance for any subordinate.

Alerts

- When a subordinate creates or modifies a leave request.