JOB AID: **CREATING THE RIGHT SCHEDULE**

One of the biggest challenges that any business owner faces is staffing their offices with the right number of people. You need to make sure that you have enough staff members to serve all the clients who walk through your door. However, you do not want to overstaff and risk spending more on payroll than you planned.

To do this, you need a system that allows you to project how many preparers and receptionists you will need to effectively take care of the clients that come to your office for tax preparation or other tax related needs. You need to create schedules that make sense, with the right number of people working at the right time.

When you schedule correctly:

- Payroll expenses support the revenue generated for the period.
- Clients do not have to wait an unacceptable amount of time before they are assisted.
- The phone is answered in a timely manner.
- Employee morale is high.
- Client satisfaction is high.
- The office operates at full capacity.
- The office can prepare the maximum number of tax returns.
- No client is lost!

When you don't schedule correctly:

- Money is wasted on unnecessary payroll.
- There are not enough tax preparers to take care of the clients.
- Tax preparers are stressed.
- Morale is low.
- Clients are unhappy.
- Client complaints are high.
- The phone is not answered in a timely manner.
- The wait time is unacceptable.
- Clients walk out.
- Revenue and clients are lost!

Jackson Hewitt® TAX SERVICE

Projections & Employee Scheduling

Help　　Projections

Weekly Projections for Office - 61716

Back

Week	Customized	LY Actual Starts	CY Projected Starts	Productivity Factor	Total Preparer Hours	Total Receptionist Hours
Dec 31 - Jan 06		0	8	1.0	84	0
Jan 07 - Jan 13		0	10	1.0	84	0
Jan 14 - Jan 20		0	14	1.0	84	0
Jan 21 - Jan 27		0	27	0.8	84	0
Jan 28 - Feb 03		0	41	0.8	84	0
Feb 04 - Feb 10		0	32	0.8	84	0
Feb 11 - Feb 17		0	22	1.0	84	0
Feb 18 - Feb 24		0	17	1.2	84	0
Feb 25 - Mar 03		0	14	1.2	84	0
Mar 04 - Mar 10		0	13	1.2	84	0
Mar 11 - Mar 17		0	11	1.2	84	0
Mar 18 - Mar 24		0	11	1.2	84	0
Mar 25 - Mar 31		0	11	1.2	84	0
Apr 01 - Apr 07		0	14	1.2	84	0
Apr 08 - Apr 14		0	26	1.0	84	0
Apr 15 - Apr 21		0	14	1.0	87	0

Export (Excel)

Using the **Projections** eService helps take the guess work out of scheduling. It will tell you how many tax preparers and receptionists you need to schedule based on the number of returns that have been projected. This information is automatically fed into the **Employee Scheduling** eService, which will make the task of scheduling much easier to manage.

Because the goal of the **Projections** eService is to help you staff appropriately, the application projects the number of "starts" your offices will have. This includes receipts used for Holds and Voids in addition to the receipts that become actual tax returns.

Note: To use Projections, you must be assigned to a security group that has the permission for Projections. Since the effects of managing projections effectively are so critical, projections are managed by the General Manager or Franchisee.

Employee Availability & Scheduling

Before you create a schedule, you must first review and assess your staff's availability. This is a two-step process:

1. **Collect availability information from all employees during the hiring process.**

   Talk to employees as well as potential employees about the dynamics of the tax season. Discuss the demands during Peak and how being flexible and available during peak and the final filing days may have a positive impact in their earning potential for the tax season.

   As you discuss availability, consider using these questions to guide your discussion.

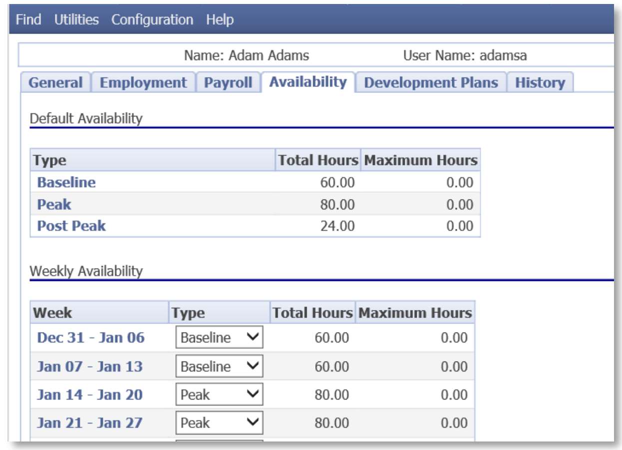
   "How many hours each week will you be comfortable working?

   Are you able to take any vacation days or hours from your regular job to work additional time during peak? We are open extended hours during Peak. Can I count on you to work at least one late night during this time?"[This implies we are not open on most Sundays…… not sure we want to suggest that…..change up the example as you wish…]

2. **Record the information in the Employee Information eService.**

   Once you've collected availability information from your employees, record it in the **Employee Information** eService.

   To learn more, review the About files located under the help link within the Employee Information eService on JHnet.


Find Utilities Configuration Help

Name: Adam Adams User Name: adamsa

General | Employment | Payroll | Availability | Development Plans | History

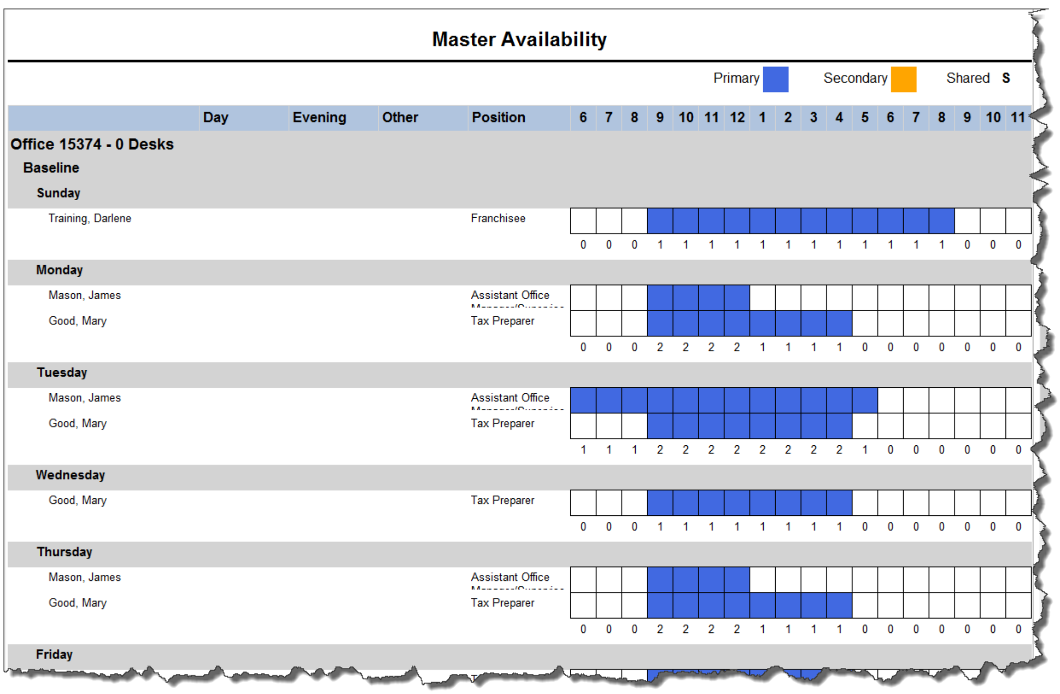
Default Availability

Type	Total Hours	Maximum Hours
Baseline	60.00	0.00
Peak	80.00	0.00
Post Peak	24.00	0.00

Weekly Availability

Week	Type	Total Hours	Maximum Hours
Dec 31 - Jan 06	Baseline	60.00	0.00
Jan 07 - Jan 13	Baseline	60.00	0.00
Jan 14 - Jan 20	Peak	80.00	0.00
Jan 21 - Jan 27	Peak	80.00	0.00

Once you enter everyone's availability, make sure you review the 'Master Availability Report' available on JHnet. This report allows you to view all of your employee's availability by day



When creating schedules…

- Schedule the first person ½ hour before opening, to:
  - Organize the office
  - Review any important daily memos or communications
  - Check for messages left by clients
  - Prepare for the day's clients; prep folders and print Client Data Sheets
- During Peak, schedule all available preparers.
  - Schedule preparers based on 2 returns per hour per preparer, or use your own proven return ratio.

- Stagger preparers' shifts so schedules overlap.
    - If your projections show three people in at 9:00 am, you might schedule one for 8:45 am, one for 9:00 am, and one for 9:15 am.
    - There will likely be a natural overlap regardless, as preparers finish up their last return of the day.
    - Prepare for extended office hours during Peak

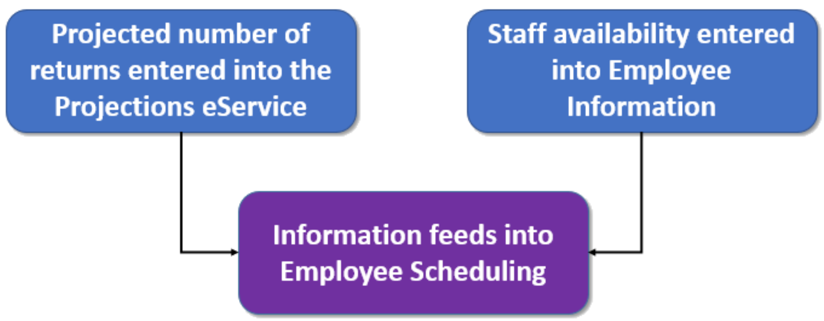
During Peak, you could schedule a receptionist to:

- Assist with customer service
- Manage the telephone
- Manage the waiting area, and
- Assist with the distribution of checks and paperwork

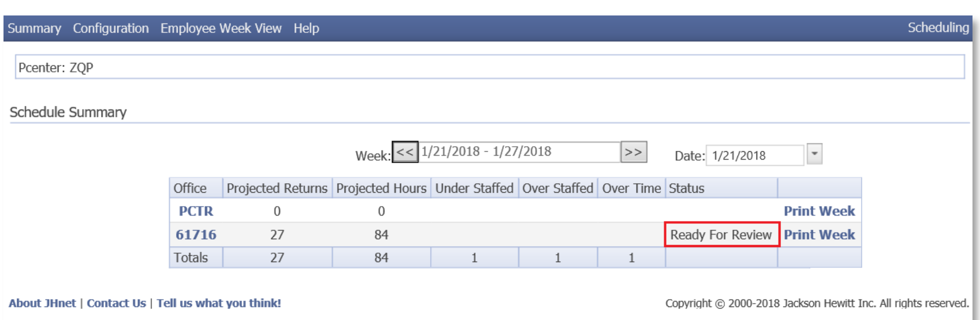
Employee Scheduling

The **Employee Scheduling** eService uses information from the **Projections** and **Employee Information** eServices to assist you in creating and maintaining a schedule that makes sense for your organization.

The process begins with the **Projections** eService. This information feeds into **Employee Scheduling** and shows you where you need to schedule your staff to meet your projected goals. Then, you enter your staff's availability in **Employee Information**. This will also feed into **Employee Scheduling** and allow you to see who is available on what day and time.



Once the schedule has been created the next step is to finalize. This is usually done by the Franchisee, General Manager or another high-level manager.

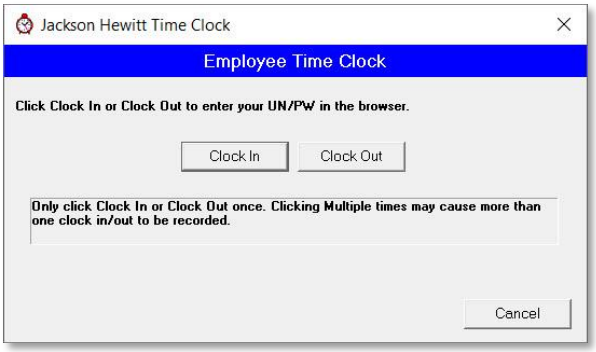


Office	Projected Returns	Projected Hours	Under Staffed	Over Staffed	Over Time	Status	
PCTR	0	0					Print Week
61716	27	84				Ready For Review	Print Week
Totals	27	84	1	1	1		

To learn how to create schedules, review the About files located under the help link within the Employee Scheduling eService on JHnet.

Employee Time Clock

The **Employee Time Clock** allows your staff members to actually clock in and out in ProFiler® when they are scheduled to work.



Once you've finalized the schedule, your staff members can clock into the **Employee Time Clock** in ProFiler at their scheduled times. The Clock In/Clock Out process is simple, and takes just seconds. Each staff member must clock in and out as a part of their daily routine. As the Time Clock collects hours worked, this information is fed into the **Time Tracker** eService through FTS (*File Transfer System*).

The **Employee Time Clock** and **Time Tracker** work hand in hand to allow you to monitor staffing at all of your office locations, review time cards, and manage the payroll finalization process from anywhere you have access to a computer with Internet access. These applications are intended to reduce certain manual tasks and payroll expenses by giving you better management and control of payroll hours.

NOTE: For more information on the Time Tracker application, view the Managing Wait Times Online Module located on the Learning Center.

Monitoring Productivity

Productivity is the measurement used to track your staff members' hours worked against the number of returns prepared. By defining a productivity goal (the number of hours it SHOULD take a preparer to prepare one return), you can effectively manage your payroll, which ultimately affects your profitability.

The productivity ratio is determined by the number of preparer hours recorded on the **Employee Time Clock** system divided by the number of receipts used. ***The overall goal is a productivity factor of 1 hour per receipt.***

Note: The actual daily productivity factor will vary according to the customer traffic in your offices. Remember that some of your tax preparers and lead preparers may perform duties other than tax preparation, which will cause them to have lower productivity numbers.

Productivity reports are created on a daily schedule so that they may be viewed early the next day. This gives you the best chance to make adjustments that will help you maintain your goals for payroll.

To access the productivity reports:

1. Open **JHnet** and select the **Reports** tab.
2. Select the desired report. Productivity reports that are available to you and your staff include an analysis of productivity by:
   - **Employee and Day** – this is the total number of receipts generated per staff member over the total work hours per work day.
   - **Office and Employee** – this is the total number of receipts generated by staff members of selected office(s) over the total staff member work hours logged for the office.
   - **Office and Day** – this is the total number of receipts generated by all staff members of selected office(s) over the total work hours logged for the office for a given work day.

The employee access to the productivity reports is based on the security rights assigned by the franchisee in account management on JHnet.

