

The Staff Record

Last Modified on 11/03/2020 12:31 am EST

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

Staff: Heather Barnhardt

Buttons: RETURN, SAVE CHANGES, DELETE

Tabs: Instructor Schedule (PDF), Add Time Entry, Instructor Calendar, Weekly Schedule, Email, Text

Horizontal Menu: Summary, Classes, Compensation, Time Card, Portal Settings, Feedback, Skills, Certifications, Availability, Misc, Picture, Notes (0), Resources (0)

Form Fields:

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

Tabs

Summary Tab

This tab houses contact and general employment information for the staff member. The majority of the fields are self explanatory, however, there are some fields (*Staff ID*, *Salaried*, *Instructor*, *Type*, *Position*, and *Public Nickname*) that impact how other areas of Jackrabbit function.

Staff ID (optional)	If you currently use staff/employee IDs, these can be entered in Jackrabbit. The IDs will display in the Pay Rate report (<i>Reports menu > Staff section</i>) and the Export to Payroll spreadsheet (<i>Staff Portal menu > Time Clock > Export to Payroll > Export CSV File</i>).
Salaried	Select No for hourly staff members. If a staff member is salaried (not hourly) and you will be using Express Payroll, ensure that you have the <i>Salaried</i> field set to Yes. This is only necessary if you will be using the Time Clock and Express Payroll for payroll processing. Salaried employees must be set up separately with Express Payroll, setting this field to Yes omits this staff person's data when the <i>Email File to Express Payroll</i> button is selected (<i>Staff Portal menu > Time Clock > Export to Payroll</i>).
	<p>If a staff member is not an instructor assigned to classes (front desk or administration for example) set the <i>Instructor</i> field to No.</p> <p>This will:</p> <ul style="list-style-type: none">• Omit the staff member's name from all Instructor drop-down lists (filters)

Instructor	<p>throughout Jackrabbit</p> <ul style="list-style-type: none"> • Omit the staff member from the Daily View calendar • Omit the staff member from the Instructor Schedule report and the Instructor Scheduled Time report (<i>Reports</i> menu > <i>Staff</i> section) • Allow you to email instructors and non-instructors separately • Omit the actual vs scheduled hours comparison on the <i>Approve/Unapprove Time</i> page when using the Time Clock. <p>If the staff member is an instructor, they can be assigned a Public Nickname which will display online instead of their first and last name.</p>
Type	The Type field allows you to search and report on your staff members by their type of employment: Full-Time, Part-Time, Substitute, Independent Contractor, or Volunteer. The Type is displayed on the List Active and List All Staff reports (<i>Staff</i> menu) and is a criteria (filter) available in Search Staff (\$ <i>staff</i> menu).
Position (optional)	The Position field allows you to search and report on your staff members based on the type of work they do for you, for example, Coach, Office Staff, or Supervisor. Position drop-down list items are added using the Drop-down List Editor (<i>Tools</i> menu). The Position is displayed on the List Active and List All Staff reports (<i>Staff</i> menu) and is a criteria available in Search Staff (\$ <i>staff</i> menu).
Public Nickname	<p>Only available for staff members set as <i>Instructor</i> = Yes, the Public Nickname field gives you complete control over what information is shown about your instructors online when you are using Online Integration in Jackrabbit.</p> <p>The Public Nickname field is what will display to identify your instructors:</p> <ul style="list-style-type: none"> • In the class search page of your Online Web Registration form (unless you are hiding the Instructor column) • In the Parent Portal (when <i>Show Instructor Nickname</i> = Yes in your Portal settings) • In your Class Listings Tables (when the Instructor column is added) <p>When you add a new staff member and create their <i>Staff</i> record, the Public Nickname field is automatically populated with the instructor's first and last name. The default can be left as is to display the instructor's full name, or it can be changed to whatever you prefer (100 character limit), for example Coach John instead of John Linton. If you set the new staff member to <i>Instructor</i> = No, the Public Nickname field is hidden.</p>



To keep from showing any information for a particular instructor, delete everything



from their Public Nickname field and save the changes.

Classes Tab

The Classes tab provides a listing of the staff member's active and future classes. Use the **View Class History** button to view the staff member's previous classes.

Staff: Heather Barnhardt

← RETURN **SAVE CHANGES** DELETE

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

Summary **Classes** Compensation Time Card Portal Settings Feedback Skills Certifications Availability Misc Picture Notes (0) Resources (0)

View Class History

View 1 - 22 of 22 Print

Click a class link to go to the Class Record.

Loc	Class	Status	Session	Curr Enroll	Wait List	Room	Start Date	End Date	Days	Times
E-Cheer	Advanced Tumbling - T/Th - 6:00	Active	2020	2	0		1/1/2020	12/31/2020	TuTh	6:00pm - 7:00pm
E-Cheer	Advanced Tumbling - T/Th - 7:00	Active	2020	3	0		1/1/2020	12/31/2020	TuTh	7:00pm - 8:00pm
E-Dance	Ballet - Beg - F	Active	2020	5	0	Studio B	1/1/2020	12/31/2020	F	5:00pm - 6:00pm
E-Dance	Ballet - Beg - MWF	Active	2020	7	0	Studio A	1/1/2020	12/31/2020	MWF	5:00pm - 6:00pm

Compensation Tab

This tab offers an area to enter multiple pay rates. Use the **Add Pay Rate** button to add each pay rate. Rates can be filtered using the **Filter By** drop down. See the [Staff Portal Time Clock](#) topic for full details on pay rates and the Compensation tab.

Because this tab houses confidential information, there are User Permissions that can be used to restrict a user's access to it. Located in the *Staff* section of permissions, the "Compensation tab" or the "Compensation tab when User ID is linked to Staff" permissions can be used to lock down this sensitive information. See [Set/Edit Jackrabbit User ID Permissions](#) to learn more.

Time Card Tab

Used in conjunction with the Time Clock, all time entries for a staff person display on this tab. See the [Staff Portal Time Clock](#) topic for full details on Jackrabbit's Time Clock feature.

A User's access to this tab can be restricted with the "Time Card and Portal Settings tab" User ID permission in the *Staff* section. See [Set/Edit Jackrabbit User ID Permissions](#).

Portal Settings Tab

Used in conjunction with the Staff Portal, all settings controlling what the staff person is able to see and do in their portal are located on this tab. See [Staff Portal Settings](#) for full details.

A User's access to this tab can be restricted with the "Time Card and Portal Settings tab" User ID permission in the *Staff* section. See [Set/Edit Jackrabbit User ID Permissions](#).

Feedback Tab

Notes regarding your staff performance, such as feedback from their students, can be entered on this tab. Be sure to **Save Changes** after adding feedback. Use the **More** link to display the entire Staff Feedback field.

A User's access to this tab can be restricted with the 'Feedback tab' User ID permission in the Staff section. See [Set/Edit Jackrabbit User ID Permissions](#).

Skills Tab

The Skills tab can be used to indicate which skill/instrument an instructor can teach. Use the **Add Skill** button to add a Skill.

Certifications Tab

Add certifications achieved along with dates earned. See [Staff Certifications](#) for details.

Availability Tab

Add a staff member's standard hours and exceptions here. See the [Staff Availability/Exceptions](#) topic for more information.

Misc Tab

Add miscellaneous information related to the staff member here.

Picture Tab

Staff pictures can be added to this tab. Use the **Pencil** icon to browse for the image you want to upload. The image will be automatically resized and centered.

Notes Tab

Add, edit, or delete notes for a staff member here. Search notes, filter the notes by tags, and sort the notes by the date created or by the date modified. [Learn more about Notes in Jackrabbit.](#)

Resources Tab

Upload files and add hyperlinks (URLs) to the staff member's record. Store up to 15MB of data [Learn more about Resources in Jackrabbit.](#)

Buttons

Instructor Schedule Button

The Instructor Schedule button will open a page where you can use search criteria and display settings to create a schedule for the instructor. The schedule is offered in several formats including export to

Excel and PDF.

Add Time Entry Button

See **Staff Portal: Time Clock** topic for details.

Instructor Calendar Button

Use the Instructor Calendar button to display the Instructor's *Monthly Calendar*. The calendar provides links to the Class records.

Weekly Schedule Button

The Weekly Schedule button will open the Instructor's *Weekly Calendar*. The calendar provides links to the Class records.

Email Button

The Email button will open the Email editor where you can create and send an email to the staff member.

Text Button

If you have **texting** enabled, the Text button will open the editor where you can compose and send a text message to the staff member.
