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Staff scheduling. Simplified.

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# Think Differently

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# Executive Summary

Accushield was founded by a healthcare facility operator who was motivated to solve the challenges that his facility and other healthcare facilities faced on a daily basis. Working with over 7,000 senior living, skilled nursing, and other healthcare facilities, Accushield has created solutions for many of these challenges, including the current staffing challenges. Flex, our flexible scheduling platform, is Accushield's curated shift management solution that has proven to increase employee engagement, retention, and recruitment and remove significant administrative burdens from operators. Simple to implement and user-friendly, Flex provides the empowerment and flexibility needed by staff members in order to schedule effectively.

Flex is reshaping the healthcare industry by helping to solve its most pressing problems:

- Unpredictable staffing shortages
- Low staff engagement and retention
- Staff recruitment
- Administrative burden of absenteeism
- Managing and reducing labor costs, including reducing agency spend and overtime cost
- Managing complex scheduling across multiple departments and facilities
- Tracking actual staffing agency hours against invoiced hours

Best of all, Flex can be implemented in less than 3 weeks, with minimal technical effort required by your organization, and can drive meaningful results in less than 90 days. Flex has been implemented in over 800 healthcare facilities, with more than 50,000 users delivering value and measurable results for their facilities. Flex customers typically experience an ROI of 5x to 10x during the first year following implementation.

Key current customer metrics include:

- Up to 90% overall shift fulfillment rates with internal staff
- 85% reduction in administration time in fulfilling shifts
- 70% acceptance of call-outs within the first 30 minutes
- Up to 70% reduction in usage of third-party agencies
- 40% reduction in overtime costs
- Increase in employee engagement, satisfaction, and communication
- Increase in staff recruitment
- Enhanced patient and resident care

We are excited about how our specialized healthcare technology experience, innovative product, proven teams, and scalable processes can benefit your organization, your staff, and the patients or residents you serve.

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# Core Shift Management Features

- **Automated Scheduling** – Flex's use of templates as well as its instant call-out features based on employee availability automate key scheduling activities and drive flexibility for both schedulers and employees. Real-time visibility around open shift availability through the Flex mobile app empowers employees to work when and how often they would like to work, promoting work-life balance and increasing overall engagement and retention.

  Flex's open API allows for integration with HR and payroll systems. Flex's near-term deliverable for predictive scheduling will leverage AI algorithms to analyze historical data, customer demand patterns, employee availability, and other relevant factors. By harnessing the power of machine learning, Flex will create intelligent scheduling models that can accurately predict future demand and optimize workforce allocation.

- **Mobile Accessibility** – Flex is a mobile-responsive SaaS platform that allows for on-the-go scheduling and shift management for administrators. Flex's iOS and Android apps for employees provide real-time connectivity to schedules, direct in-app communication, and the ability to view and accept open shifts at their discretion. Easy integration with native calendars, including notifications, ensures that employees can manage their personal and work calendars in one space.

- **Reporting and Analytics** – Flex accumulates comprehensive data points throughout the scheduling process. Our open API allows for integration with a wide range of software platforms in order to push or pull data. Flex is currently integrated with PointClickCare, UKG, and ADP and can be integrated with other patient management and healthcare-related systems as needed.

  Flex also utilizes Microsoft Power BI, allowing for highly customizable reports and analytics from a micro-view (location or position view) to a macro-view (corporate-wide view). Real-time dashboards on the Flex platform provide administrators with open shift status and key metrics necessary to drive operational efficiencies.

- **Comprehensive Training and Support** – Following implementation, Flex offers its users a comprehensive online training library with self-training modules for both administrators and employees. In addition, Flex provides trainers who are readily available for additional product workshops and customized training.

  Live support is available from 6:00 a.m. to 10:00 p.m. EST Monday-Sunday. Each customer is assigned a designated Customer Success Manager (CSM) who coordinates the onboarding process and works directly with each facility GM to roll out the system. The CSM also coordinates required management reporting and analytics and arranges for monthly and quarterly business reviews.

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- **Customizable Scheduling Templates** – Flex's scheduling process is based on templates. Templates can be easily created, saved, and shared with other administrators and schedulers. Scheduling can be done months in advance to minimize administrative burden.

- **Real-time Availability Tracking** – Visibility of employee availability is always real-time based on their respective schedules. Shift cancellation can be configured to be in real-time or subject to administrative review and approval.

    Employees also have the option to configure their availability by day and time. This ensures that they only see open shift requests that fall within their window of availability. Administrators, when looking to fulfill open shifts, will only see employees who meet the position qualifications and are available for that time slot.

- **Shift Swapping and Trading** – Employees can release a shift, allowing that shift to automatically become an open shift that can be viewed by other employees who have appropriate qualifications for the position. Employees will have a defined number of days in order to release a shift based upon pre-set facility requirements.

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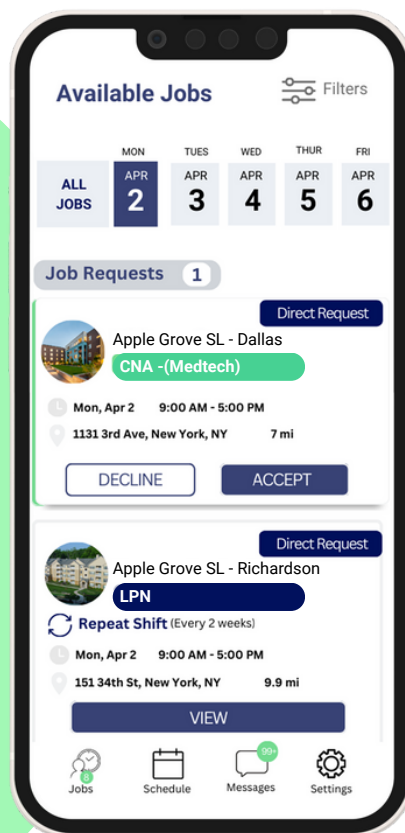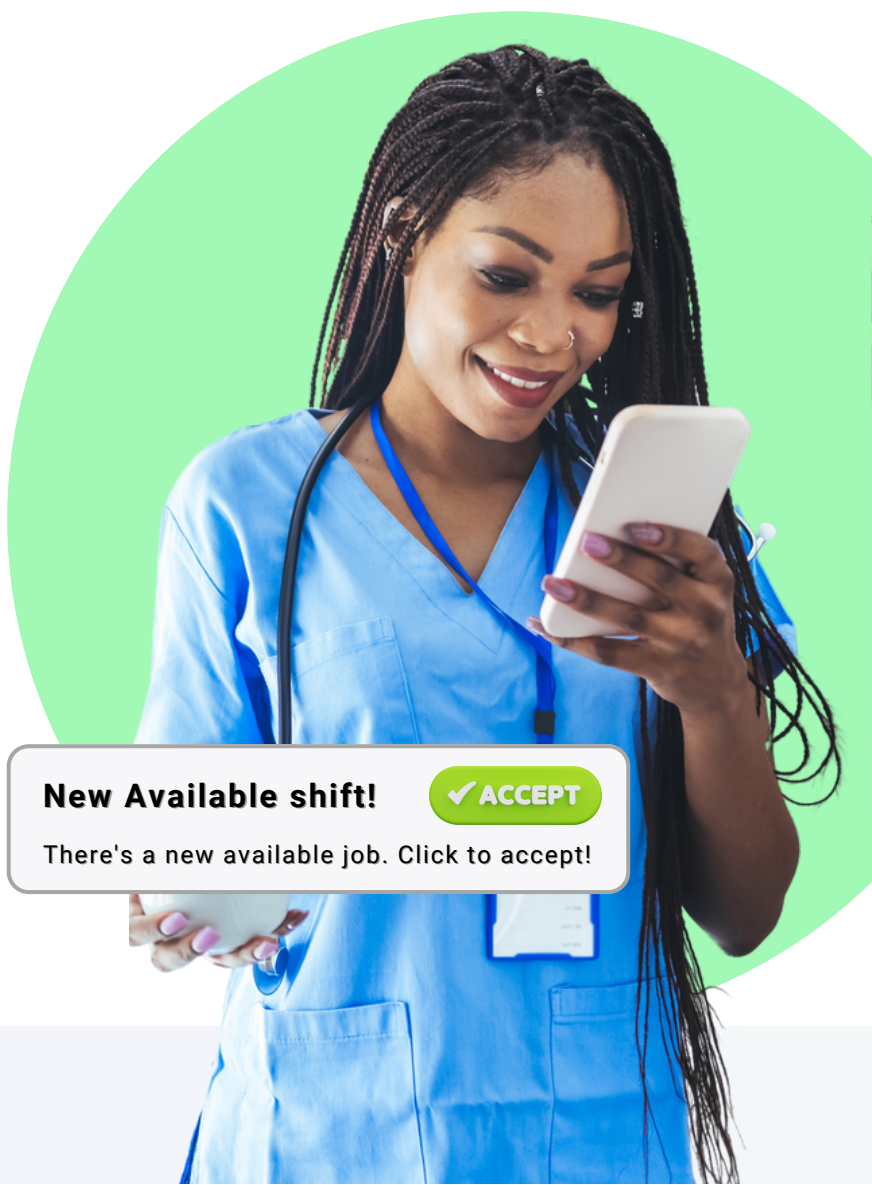
# Additional Shift Management Features

- **Time and Attendance** – Flex provides two time and attendance options, a kiosk-based sign in/out or an in-app, geofenced sign in/out.

- **In-app Communication** – Flex allows administrators to communicate directly with all employees, any subset of employees, or specific individuals. In-app messaging allows employees to respond and have direct, one-to-one communication with their administrators.

- **Internal Agency** – Flex allows organizations to create a private agency that is accessible by multiple locations. These internal agencies are similar to third-party agencies but consist of company employees rather than third-party employees and contractors. Any approved location can access these employees, with the assurance that they have been properly trained and do not carry the staffing agency wage premium.

- **Incentives and Rewards** – Flex allows administrators to increase the probability of acceptance of open shifts by providing incentives. An employee can view incentive details via the Flex mobile app.

- **Rankings** – For unionized environments, Flex's ranking algorithms ensure compliance with union rules for call-out of open shifts. Flex's ranking algorithms have been approved in many unionized environments (assisted living, skilled nursing, memory care, and hospitals) throughout North America. Ranking can also be deployed in non-unionized environments to provide open shift availability to employees in any order of preset preferences.

- **Rotational Rankings** – Flex's ranking algorithms can also provide further sophistication by rotating the initial recipient of a call-out shift based on who accepted a previous open shift.

- **Dynamic Groupings** – Flex provides the ability to send open shift requests to customized groups of employees. One popular use case is to make open shifts available to the lowest cost group of employees first, then the second lowest cost, etc. This feature allows for numerous customizable configurations, seeking to optimize shift fulfillment while ensuring compliance and/or minimal cost.

- **Audit Trails** – Flex provides administrators with full visibility of the sequence of prior open shift requests, including the time that requests were sent to each employee (time-stamped). This provides support for any issues regarding preferential treatment or union grievances around seniority rankings.

> "Using Flex is as easy as 1-2-3. It is quick and convenient and it takes no time at all. It has improved my life by allowing me to pick up shifts outside of work, my scheduled work-time. It has allowed me to have peace of mind and not worry too much about work if there is work available when I need it or not."
>
> *–**Jessica B**., Employee, Amica Senior Lifestyle*

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- **Specialized Experience** – Accushield has needed to be innovative since its founding in 2013 to meet our customers' evolving needs. Accushield's mobile applications, cloud-based HIPAA-compliant solutions, and in-depth data reporting and analytics have been designed specifically to help our customers better improve results across their facilities. With the introduction of Flex, Accushield is leveraging its technology and integrating it via a strategic partnership with BookJane to deliver streamlined shift management and flexible scheduling solutions for healthcare professionals.

- **Implementation Ability/Effective Outreach** – Accushield has proven it can deliver technology solutions in a healthcare environment, having implemented its solutions in over 7,000 buildings. Additionally, Accushield has demonstrated that it can address significant customer challenges and scale quickly throughout its history. One example is the critical relief that Accushield brought to senior living communities and nursing homes during the height of the pandemic when it addressed the need for health screening brought on by Covid. Taking that experience and combining it with the successful implementations of the Flex scheduling solution in over 800 facilities across the United States, Canada, and the UK substantiates that Accushield can innovate and scale to the scheduling needs our customers face. Flex implementations have ranged from single locations to enterprise-wide deployments. We have shown we can not only scale quickly, but we can work with small and large customers across different healthcare settings.

  Beyond the implementation, though, we have a team of Customer Success Managers who reach out proactively to our customers to ensure they are realizing all of the benefits of the solution, while learning what additional needs they may have. We also have a Support team to handle inbound requests and a training library for customers to get additional help whenever they need it. Lastly, we have built robust reporting and dashboards for customers to have real-time visibility into performance and results. This combination of proactive, reactive, and self-serve communication has resulted in consistently high NPS and customer satisfaction scores across our customer base.

- **Quality of Performance History** – Flex has been able to significantly reduce traditional scheduling system implementation timelines due to the intuitive simplicity of the Flex system. Flex's implementation timeline is primarily dependent on the time and resources that customers can devote to the process. Typical implementations are completed in a 4 to 6-week time frame, with implementations completed in as little as 2 weeks in certain situations.

  One other major strength is worth noting. Change management is a challenge that is critical to our customers' success with Flex. Given our 800+ Flex installations, we have learned how to work with our customers' teams to create a positive approach to change management and system adoption.

  At the over 800 facilities that have deployed Flex, employee retention has increased by up to 40% while scheduling and staff-related administrative time has reduced by upwards of 70%. Customers have seen a dramatic reduction in overtime and agency spend (50% or more) and just as important, Flex has returned hundreds of non-value administrative hours back to teams, allowing them to focus on improving patient and resident care.

# Accushield Care Marketplace

The Accushield Care Marketplace, similar to Expedia, Hotels.com, and Amazon, allows staffing agencies to showcase their services and compete based on pricing, quality ratings, and availability. This free platform empowers senior living and skilled nursing operators to access the best agency talent at the lowest cost.



Using Accushield's nationwide network of over 7,000 senior living and skilled nursing partners, the Care Marketplace provides senior living and skilled nursing operators with the following advantages:

## Lowest cost, highest quality ratings

Select from a diverse range of highly-rated and cost-effective agency caregivers, fostering healthy competition that prioritizes resident care while keeping tabs on labor expenses.

## Streamlined agency clock-in and out

Accushield's efficient, easy-to-use, kiosk-based agency clock-in and out feature. This feature enables facilities to ensure accurate agency timekeeping, eliminate manual timesheets, and effortlessly track agency hours rendered.

## Agency invoice verification

Elimination of inaccurate agency invoices that sometimes show up 60-90-120 days late. When an agency caregiver clocks in at the Accushield kiosk, the time and attendance are digitally captured along with the individual's photo.

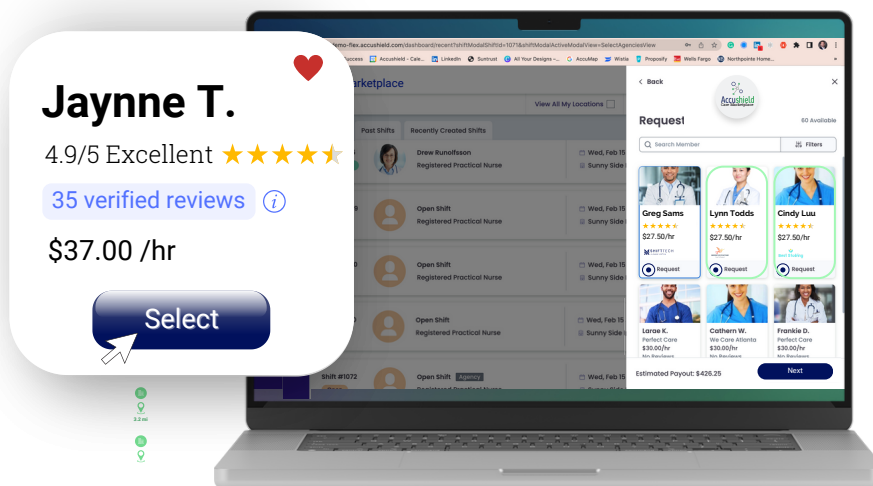Learn more at accushield.com/solutions/flex/care-marketplace/

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## Kiosk-based Agency Time & Attendance

Accurate agency time and attendance tracking is vital in senior living and skilled nursing facilities to maintain proper staffing ratios and control labor costs. Care Marketplace users can utilize our agency clock-in and out feature at the kiosk, which eliminates manual timesheets and effortlessly tracks agency hours.
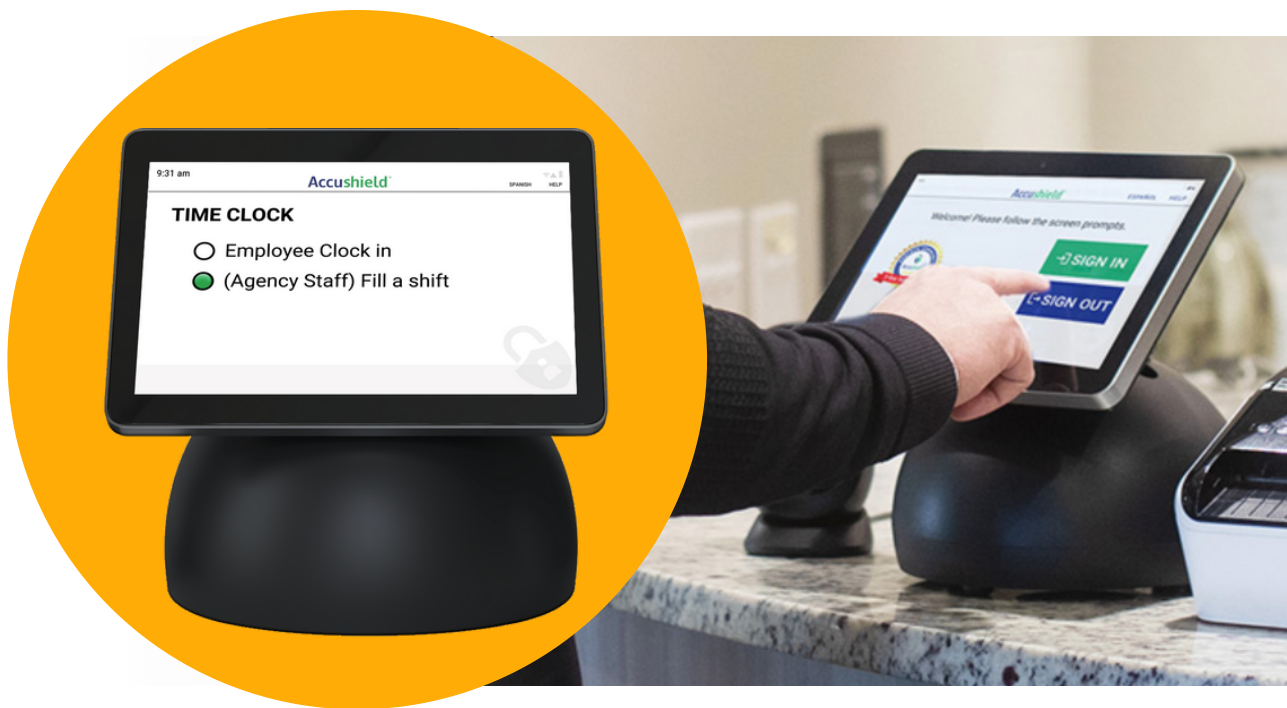


## Agency Ratings & Reviews

To ensure your residents receive the best care available when you use agency staff, it is important to rate the quality of agency caregivers based on their performance. Ratings and reviews help our industry's best caregivers rise to the top, creating better care and outcomes for your residents.



Learn more at accushield.com/solutions/flex/care-marketplace/

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# Next Generation Time Clock

**It's time you demand more out of your time clock! Introducing the first Time & Attendance + Visitor Management kiosk.**

Welcome to the future of time clocks. Your time clock should be more than a way to verify your team's time and attendance. You deserve a clock-in process that works as hard as you do so you can focus on what matter most – your residents and staff. You deserve a time clock that is accurate and ensures your staff is symptom-free before they start their shift. Last but not least, you deserve the peace of mind knowing you can verify, with a photo, every time a staffing agency provider clocks in and out.

Standard Features:

- Overtime Calculation
- Export to Payroll
- Real-Time Tracking
- Online Time Card Editing
- Export Reports to Excel
- Shift Management
- Mobile App
- Employee Portal
- Customized Overtime
- Mobile GPS Clocking
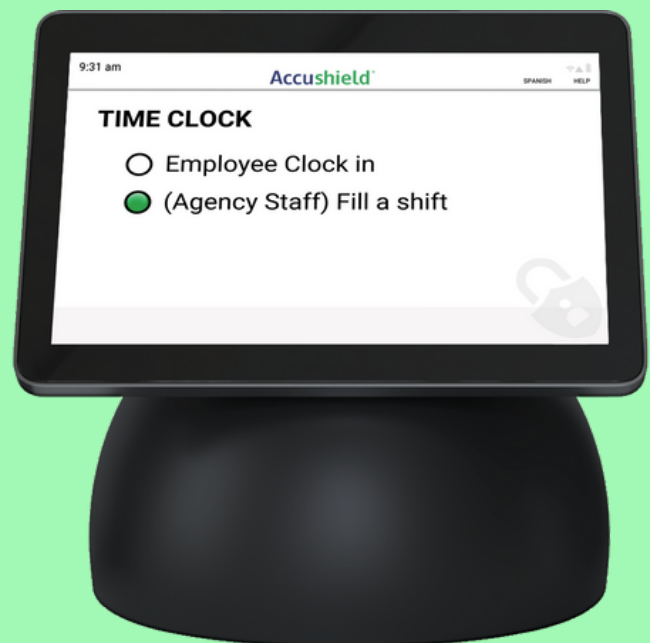
# References

| Contact Name | Role | Organization | Contact Info |
|---|---|---|---|
| Danny Venoitt | Innovation Lead | St. Mary General Hospital | Upon request |
| Justin Stein | Chief People Officer | Bickford Senior Living | Upon request |
| Ed Russell | Chief Executive Officer | WCS Care | Upon request |
| Mike Lavallee | Chief Executive Officer | Seasons Retirement Communities | Upon request |
| Christy Parsons | Vice President of People | Schlegel Villages | Upon request |
| Katrina Mulholland | Sr. Director of People | Amica Senior Lifestyles | Upon request |
| Terry Bressette | Long Term Care Operations Assistant | Jarlette Health Services | Upon request |

AMICA SENIOR LIFESTYLES    revera    OMA ONTARIO MEDICAL ASSOCIATION    S Health    Seasons RETIREMENT COMMUNITIES    SCHLEGEL VILLAGES

Americare senior living    Beacon HEALTH MANAGEMENT    Bickford SENIOR LIVING    Ahava Healthcare    SOUTHBRIDGE CARE HOMES    PRO VITA

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⊙ **Case Studies**
- Schlegel Villages: https://go.accushield.com/schlegel
- Amica Senior Lifestyles: https://go.accushield.com/amica
- WCS Care: https://go.accushield.com/wcs
- BeeHive: https://go.accushield.com/beehive

⊙ **Flex Scheduling Demo Video**
- SE Health + BookJane (aka: Flex): https://go.accushield.com/se-health

⊙ **Flexibility and Creativity**
- Flex is designed to provide scheduling flexibility for both the healthcare facility and the employee.
- Scheduling templates provide both repeatable efficiency and easy schedule alteration.
- Automated, instant call-out capabilities create a "Gig" economy approach to open shifts.
- Flex empowers employees to accept open shifts at their discretion and availability.
- Flex was designed to accommodate unionized environments. Numerous features, including overtime compliance, seniority preferences, and other dynamic grouping and ranking criteria can be applied to both union and non-union environments. Each facility can ensure that open shift requests are going to preferred individuals or groups of individuals in a defined and configurable sequence.
- Though Flex has a standardized implementation process, we have learned by implementing it in over 800 locations that each facility is a snowflake to some degree. Our team is able to adapt our implementation process to specific needs that certain facilities present.

⊙ **Improve operational efficiency and employee retention and morale**
- **Administration** – Easy templating, instant call-out, strong reporting, and other features allow staff to spend time on other tasks such as recruiting, employee retention and resident and patient care.
- **Full-time Employees** – Full schedule visibility, including open shifts, via the mobile app drives employee satisfaction.
- **Part-time/Gig Employees** – Clear visibility of open shifts allows flexibility around work schedules, increasing engagement with the facility and overall retention.

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# Implementation Strategy

Accushield utilizes an agile and flexible implementation approach to work specifically with each organization to rapidly configure and deploy Flex. We work in close collaboration with your team to ensure that the change management, communication, training, feedback, and internal marketing efforts are coordinated and rapidly executed. In the early development phase, we especially focus on usage and usability while consistently recording all end user feedback. In our experience, training and consistent usages are the most important, and often neglected, success factors for a digital transformation project of this type. This is why we offer dedicated support throughout the entire onboard process as well as ongoing support throughout the duration of our relationship. Our Customer Success Team does all of the heavy lifting in setting up your unique platform environment and is readily available for ongoing support.
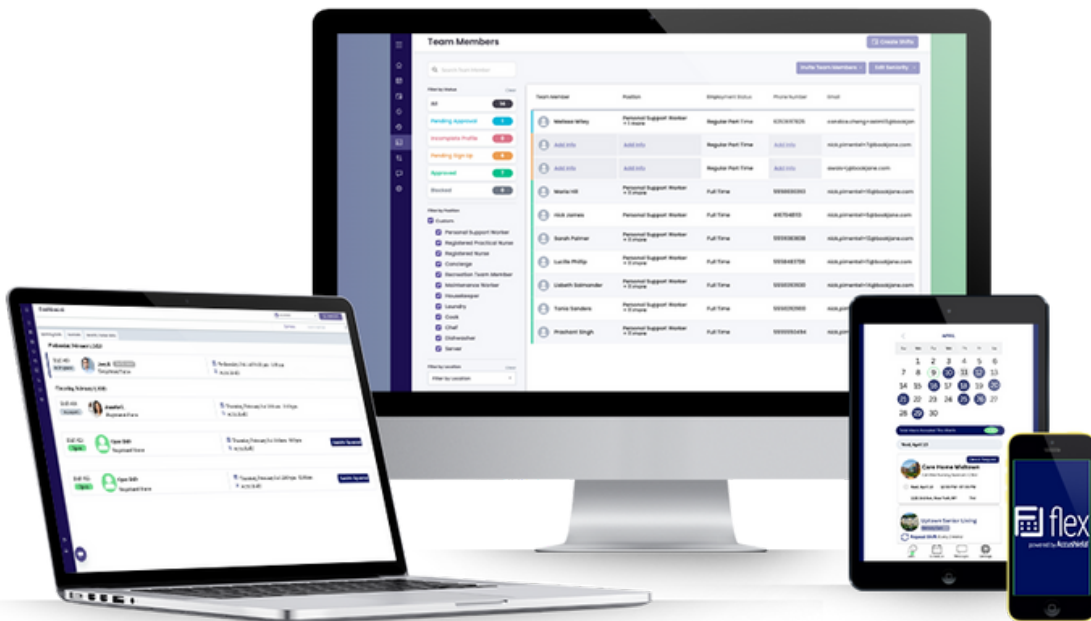
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# Shift Perspective

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unlock your staffing brilliance