



# Workforce Management Software Buyer's Guide for Healthcare

Your guide to making the best WFM  
choice for your healthcare center



# Introduction

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Workforce management (WFM) is an organizational method and approach that helps you maintain a productive workforce. It includes tools for supervising mobile and remote employees, scheduling employees and administering leave. WFM also allows healthcare organizations to make decisions based on labor tracking and job costing, and to leverage document management capabilities to avoid risk.

Genuine workforce management happens when practices and organizations integrate key activities into one platform. Thanks to technology, healthcare centers of all sizes can now deploy workforce management software that supports the entire organization.



# Introduction cont'd

Regardless of the size of your healthcare organization or your role, chances are you're looking for information about how to choose the right workforce management (WFM) software because:



- You are in need of an efficient and accurate way to comply with regulations from the Center for Medicare & Medicaid, including Payroll Based Journaling.
- Health screens for staff are of paramount importance, but you don't have a simple way to capture this essential data.
- Scheduling staff in the status quo is a tedious process that can result in over or under-scheduled shifts.
- Labor tracking for employees that might work multiple jobs, locations or pay scales is a difficult or manual task.

Whatever brought you to this search for a WFM solution, you're in good company. Many healthcare providers are realizing that in order to respond to patient and regulatory demands, they need an elevated healthcare workforce management approach.

# Use Systems to Empower Workforce Management

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Given recent global challenges, agile workforce management systems have become more critical than ever.

“In a remote and hybrid work setting, technology continues to have even more of a direct impact on the day-to-day work of employees and how they collaborate with each other,” states [an analyst from Gartner](#). “Yet it is becoming increasingly important for HR leaders to plan for their technology investments with more caution than in years past.”



Gartner notes five key trends that are crucial for HR leaders to address today's workforce challenges:

Ensuring solutions that enhance and uphold privacy.

Using "anywhere operations" that employees can access regardless of location.

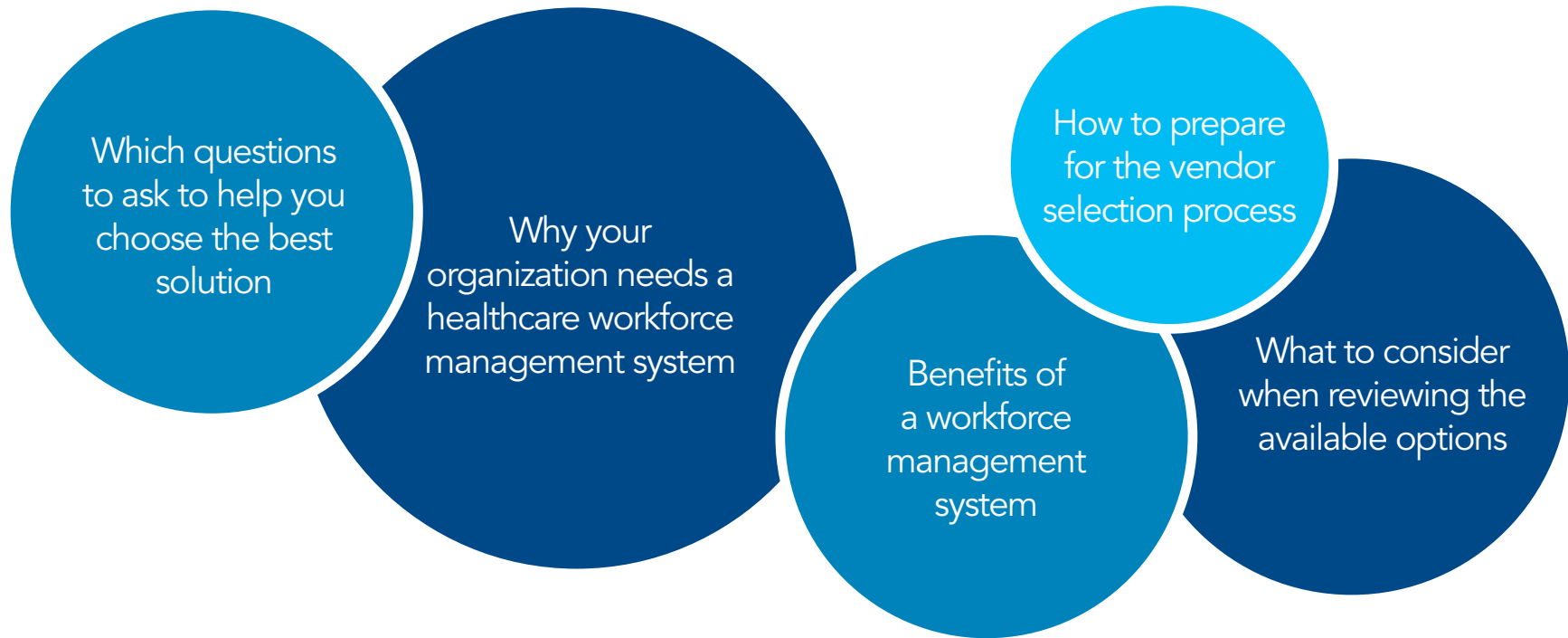
Deploying software that works across various devices.

Establishing cybersecurity and secure digital access

Integrating technologies to enable automation.

You may know your healthcare center has outgrown the current approach but updating your systems or implementing workforce management software can feel overwhelming for the first time. You're also likely feeling the stress of needing to choose the right solution that will meet existing and future needs for hospital, clinic staff or in-home providers. The bottom line: it's tough to know where to start. That's where this guide comes in.

# This buyer's guide will help you understand:



We'll guide you through key steps to help identify what you need to consider and who needs to be involved. Selecting a workforce management solution may seem like an ominous task, but with this guide, you have what you need to ensure you will be prepared for a successful journey.

# Benefits of Better Workforce Management

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You don't need convincing that there's a better way to manage your workforce, but it's likely COVID-19 heightened your awareness that something needed to change.

"COVID-19 accelerated the introduction of scheduling and staffing approaches to create additional flexibility in workforce deployment," [according to a McKinsey survey of the nursing workforce.](#)



# Benefits of Better Workforce Management cont'd

Introducing and maintaining that flexibility is possible with the right technology. Here are some examples of the benefits your healthcare organization can experience when you have effective, efficient workforce management systems:

Digital systems and tools that enable you to track, manage and boost operational efficiency.

Ability to track overtime and "step-up" shifts to stay within budget while maintaining staff-patient ratios.

A leave management process that's simple to track and administer.

Fast, efficient and accurate data transfer to run payroll, including PBJ, that complies with Center for Medicare & Medicaid regulations.

An easy way for schedulers to create, share and update 24/7 shifts based on full-time, part-time and ad-hoc specialist needs.

With these benefits in mind, it's time to take the steps that will help you analyze and review the impact a workforce management solution will have on your organization.



# Why Your Organization Needs a WFM System

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In healthcare organizations, effective workforce management is an essential organizational process that aids administrators, providers and patients. WFM involves the essential activities required to maintain a productive workforce, including communicating with on-the-floor employees, scheduling for 24/7 coverage, processing leave management and managing documents.

If healthcare workforce management is an entirely new undertaking for your organization, our eBook "[Everything You Need to Know About Workforce Management](#)" will help educate you on the terms and definitions involved with workforce management solutions, as well as the challenges WFM will help you solve. Two of the immediate benefits of implementing WFM software are **improved productivity** and **employee empowerment**.

# Improved productivity

In the simplest terms – productivity requires that you’re effectively managing your workforce. For a healthcare center to be successful, its providers and staff must be productive. Unfortunately, according to research, a significant amount of time is wasted in the workplace. [Finances Online](#) reports that:

**60%**



of employees’ tasks include work to organize files and communicate about tasks

**49%**



of American employees openly admit to time theft, which can cost as much as 7% of gross annual payroll

Employees spend up to

**four hours a week**

on unproductive tasks



These issues and others have a significant impact not only by creating unnecessary costs but also by decreasing employee satisfaction. If workforce management software doesn't engage employees, your chances for success are severely limited. According to [technology marketplace advisor G2](#), employee engagement with software has a significant impact on its organizational longevity and success:

**24.06%**



of employees have considered leaving their job because they didn't have the right software

**51.95%**



of employees are unhappy at work because of the software they're using

Thankfully, you can support and enhance employee productivity and organizational effectiveness through a system that enables effective time and attendance, leave management and document management. With the right tools, your healthcare leaders, managers and supervisors have access to the information they need to handle labor and scheduling, manage employee leaves and retain important documents.

# Empowered employees

Workforce management software not only helps streamline management activities in a way that enables you to achieve organizational goals, but the right system also helps your employees work more efficiently and effectively. WFM systems improve transparency by giving employees access to view the hours they've worked, their schedules, leave accruals and other personal information. It also provides healthcare employees with visibility into overtime hours, skill requirements for a shift and any differential pay based on hours.

Not only does employee self-service in WFM software reduce the need for manager or HR assistance but it also empowers employees to review data prior to approval to ensure it's accurate. This level of autonomy is what employees have come to expect from top healthcare employers.



# Reliable data

Managing healthcare labor and data is a complex task. Whether it's tracking shift differential compensation, tracking and managing staff that might work multiple positions, or tracking labor worked in multiple locations, your WFM system can help ensure your labor data is accurate. This level of data also makes it easier to create and assign schedules, as shift-specific requirements can be established within the system.

With a strategic approach that includes clean, reliable data, healthcare organizations can enable their teams with the tools that support the long-term quality and cost improvements, [according to Managed Healthcare Executive](#). Improvements in these areas can have an enormous impact on organizations that operate on slim margins.

With the understanding that your organization needs a workforce management solution that can improve productivity and increase employee empowerment, you're ready to start talking to companies that provide WFM solutions.



# Prepare to Request and Review Information from WFM Providers

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To choose the right workforce management solution, you need to align on “must-have” and “nice-to-have” capabilities and establish comparison criteria to ensure all systems are reviewed fairly.

Before you meet with vendors, define these essential parameters:

- Articulate your healthcare workforce management goals and the issues you want the system to solve.
- Draft a list of system requirements; prioritize each item based on necessity.
- Review your timeline to establish ideal dates for system implementation and go-live.
- Identify who should be involved in the system review and selection process as well as who contributes to the final decision. **Note:** *if your organization has “represented workers,” such as those from a union, make sure they have representation during the system selection process.*

It's essential to identify these parameters before you start requesting system information from vendors. Gather the necessary input and information so that you can explain and inform vendors what you need.

In addition to identifying your parameters, there are questions you must ask to gather the information you need – from your internal stakeholders, as well as your vendors.

## Questions to Ask Stakeholders

- #1** Does our WFM system need to integrate with other systems, such as payroll, enterprise resource planning (ERP) or human capital management (HCM)?
- #2** What system capabilities do we require beyond basic time tracking (e.g., labor tracking, job costing, leave management, document management)?
- #3** How do we want employees to access the system (e.g., via wall-mounted clocks, web-based access or mobile options)? Will all employees use the same access methods, or will it be based on facility assignments?
- #4** What level of detail do we need for labor tracking (e.g., shift differential, overtime, location-based codes, skill-level job codes)?
- #5** Can a solution help support our regulatory reporting, such as for PBJ compliance?
- #6** How do we anticipate employees will react to this change?
- #7** What change management and communication resources do we have to help ensure successful implementation and user adoption?

# Questions to Ask Vendors

- #1** How long will implementation take for an organization of our size and needs?
- #2** What level of customer service does your company provide after implementation?
- #3** If we provide remote access to employees, can we control or limit their access?
- #4** What tracking features exist for mobile-enabled functionality in the system?

- #5** Was your system designed as an all-in-one offering or has it evolved?
- #6** What system integrations do you currently offer?
- #7** Have you worked with other healthcare organizations?





# Consider Important Workforce Management Factors

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Successful healthcare organizations rely on great employees. Those great employees depend on your organization to select and implement the systems that will support and enhance their work.

As you look for the right system to enhance your workforce management for healthcare, keep these factors and considerations in mind.



<b>Factors</b> <hr style="width: 20px; margin-left: 0;"/>	<b>Considerations</b> <hr style="width: 20px; margin-left: 0;"/>
<b>End User</b>	<p>Think about the people who will use the WFM system – leaders, administrators, managers and employees all have different system needs. You need to understand them and identify how the new system specifically meets their needs.</p> <p>Consider creating focus groups with end-users to gather their input and to their needs. This is the first step in an effective change management process.</p>
<b>System levels</b>	<p>Today's systems are highly configurable. Make sure you're considering what level of sophistication you require in your WFM system.</p> <p>For example, do you need basic time tracking or do you need a system that will allow you to add job and cost codes? What type of approvals and visibility do you require for 24/7 employee scheduling?</p> <p>Make sure your future needs are part of the consideration – as your organization evolves, you want your WFM system to grow with you.</p>

<b>Factors</b> <hr style="width: 20px; margin: 5px 0;"/>	<b>Considerations</b> <hr style="width: 20px; margin: 5px 0;"/>
<b>Integration options</b>	<p>Not all systems are created equal, and not every organization or practice has the same needs and strategies. There are wide-reaching WFM systems that cover many functions but don't excel in all of them. At the same time, patching together a system built on the best tool for every function can create an IT stack that is very difficult to manage.</p> <p>As you look at your options, use a "best-of-breed strategy" in which an ERP, accounting/payroll system or HCM, is at the center and can be supported by integrations that will extend the functionality.</p>
<b>Cloud vs. on-premises solutions</b>	<p>Depending on your organization, you may benefit from workforce management software that is cloud-enabled, or you may require an on-premises solution.</p> <p>If you have employees who access critical systems from multiple clinics or locations, a cloud solution is likely the best option. An on-premises or blended solution may be a better option for hospitals or providers with employees who work only at one facility.</p> <p>Make this decision based on your current and possible operational needs which could arise in the future.</p>

<b>Factors</b>	<b>Considerations</b>
<p><b>Budget considerations</b></p>	<p>If you haven't had a healthcare WFM system in place, it's understandable if you're concerned about adding a new expense to your budget. Keep in mind that when you're leveling up your systems there are long-term benefits for both employees and the organization.</p> <p>As you look at the options, consider up-front costs, individual license costs, and additional training or customer service costs. Not every vendor has the same cost model, so make sure you evaluate each offering accordingly.</p> <p>Also, be sure to calculate how your WFM solution will save you money. Whether it's fewer payroll errors, improved job cost reporting, more efficient document management or faster schedule creation, you'll potentially reduce costs with a better WFM system in place.</p>

### Not sure where to start?

Download our Scope of Work comparison tool to easily compare WFM solutions and their capabilities.

[▶ Check it Out](#)



# Gather Input from Trusted Sources

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As the saying goes, you don't know what you don't know. That's why it's essential to gather input from a variety of trusted sources as you consider various WFM system options. Once you have a list of your top choices, it's time to ask for feedback regarding your top vendors.

At a minimum, make sure you cover your bases with these sources:



## Talk to your peers:



- Current and former colleagues
- Fellow members in professional organizations
- Industry groups on LinkedIn

## Refer to software review sites:



- [G2](#): Discover and compare software options.
- [Capterra](#): Find software, compare options and read reviews.
- [Software Advice](#): Get one-on-one help and personalized recommendations about your software options.

## Stay on top of trends:

As of 2021, many experts have cited the following workplace predictions that could influence your decisions about which WFM system is right for you:

- An increased need for biometrics and health screenings.
- Location tracking requirements will remain steady.
- Employee desire for demand-based scheduling is up.
- High demand for mobile apps to use regardless of facility location.
- Ability for timely PBJ reporting is a top priority.

In the final stages of your decision-making, these trusted sources can provide objective insights from people in your industry. Based on the experience of actual users, you can get the answers you need to make a well-informed choice.

## Attend industry conference sessions:

- [HR Technology Conference & Exposition](#):
- [Gartner ReimagineHR Conference](#)
- [SHRM Annual Conference](#)
- [APA Congress Annual Conference](#)



# Conclusion

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Within the healthcare industry, technology trends continue to enhance the patient and provider experience. There are also new technologies dedicated to assisting with crucial workforce processes. Like other leaders in the healthcare industry, you're dedicating valuable time and resources to assess and plan for the introduction of these technologies.

Ultimately, healthcare organizations that optimize their operations, as well as seizing opportunities to be more efficient, will save money based on deeper understanding gleaned from the available data.

As you weigh WFM options and make decisions, stay focused on your unique technology needs and capabilities. Involve a cross-functional team to assist with this decision and ensure it will benefit everyone across the organization. As dedicated healthcare professionals, you can unite to improve employee satisfaction, increase productivity and reduce compliance risks by maximizing all that a workforce management system has to offer.

