

## FACT SHEET

# DT PRACTICE® STAFF MANAGEMENT MODULE

DT PROFESSIONAL SUITE®

## A PRACTICE MANAGEMENT SYSTEM THAT HELPS YOU MANAGE YOUR FIRM'S PERFORMANCE

A leader among professional practice management systems, DT Practice offers a revolutionary "digital dashboard" approach that displays critical, real-time information about your staff, clients, and firm operation. Serving as a workflow hub, DT Practice combines all of the tools and resources you need in one place to ensure that you're in complete control and managing your practice effectively and profitably.

### MANAGE YOUR STAFF AT EVERY DETAIL LEVEL WITH THE STAFF MANAGEMENT MODULE

The Staff Management module for DT Practice enables you to quickly and easily manage and track staff benefits, staff budgeting and targets, and staff scheduling with total control. You can track comp time, accruable benefits, and holidays for your staff, set target work hours and billable amounts for each staff member, schedule staff for various projects, provide real-time schedules, and much more.

### TRACK STAFF BENEFITS

- Maintain staff benefits automatically with program-generated accruals, automated balance reductions via time entry, and automatic adjustments for annual carryover rules.
- Track accruable benefits, comp time, and observed firm holidays.
- Set accrual allowances to be fixed based on months of employment or based on staff levels.
- Allow comp-time accumulations to be based on earning factors that can be set to fluctuate based on the time of year.
- Provide staff with benefit balances, projected accruals, and "to use" hours based on carryover rules directly from the Staff Dashboard.
- Enable supervisors to view time-off requests and approve or deny them directly through the Scheduled Benefit Requests portlet.
- View accrual and used history in detail on the Benefits tab of the Manage Staff screen.

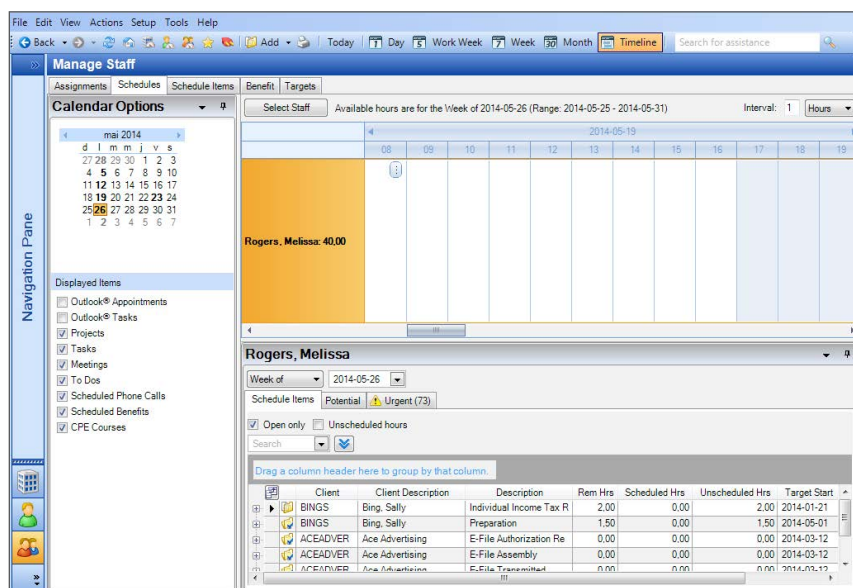


### SET AND MONITOR STAFF PERFORMANCE

- Set up per-staff targets including weekly work hours, billable hours, and billable amounts, in as much detail as your firm requires.
- View targets versus actual results on the Targets tab of the Manage Staff screen. View targets by office, department, or supervisor.
- Monitor actual staff performance against their targets using the Staff Targets portlet on the Firm Dashboard.
- Allow staff to see how they're performing relative to their target billable hours and target work hours using the Time Recap portlet on the Staff Dashboard.
- Track CPE related information for your firm and staff, such as course sponsors and course information.
- Associate CPE courses with activity codes that allow for entry of CPE information during time entry.
- Access CPE reports that allow you to keep track of your staff's ongoing learning progress.

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### MANAGE STAFF SCREEN

Allows you to review unassigned work items along with qualified staff and their current work loads, enabling you to efficiently manage staff and projects.

### AVAILABLE STAFF MANAGEMENT REPORTS

The Staff Management module features reports that provide information about schedule items, staff benefits, staff targets, comp time, and CPE courses.

- Calendar Listing
- CPE Course Credit Listing
- Schedule Item Listing
- Staff Benefits Summary
- Staff Schedule Summary
- CPE Course Cost Analysis
- Schedule Item Detail
- Staff Assigned Summary
- Staff Capacity Analysis
- Staff Target Summary

The Staff Management Module can help firms of all sizes—regardless of the number of employees—to become more efficient and optimize current and future staff performance.

### SIMPLIFY SCHEDULING AND MAXIMIZE STAFF UTILIZATION

- Manage and schedule staff assignments, such as scheduled phone calls, benefits, meetings, and to-do items. Firms licensed for the Project Management module and the Staff Management module will also benefit from project and task scheduling.
- Define staff qualifications for schedule items and work queues. Staff can view only the items for which they are qualified, and they can request additional work from the queue.
- Use the Schedules tab of the Manage Staff screen to view staff workloads and quickly re-assign schedule items for overbooked staff or assign schedule items to staff that have capacity, view items that have not yet been assigned, and identify items that are behind schedule.
- Enable staff to view their schedules, workloads, and items in the work queue by using the Schedule, Schedule Items, and Work Queue portlets on the Staff Dashboard.
- Set reminders for all schedule items, including projects and tasks using the Project Management and Staff Management modules.
- Use the Assignments tab to drag and drop unassigned items to the appropriate staff member to automatically assign them.
- Rank assigned items so that staff can view a prioritized list of assignments on their staff dashboard.
- Use calendar categories to color-code calendar entries.

**LEARN MORE** — For more information about the DT Practice Staff Management Module, contact us at 1 866 653-8629 or email [dt.sales@thomsonreuters.com](mailto:dt.sales@thomsonreuters.com).

