

Assignment Sheet – How to Make Assignments

HOW TO LOAD THE ASSIGNMENT SHEET:

1. Log in to the **Schedule Admin** and from the navigation tabs across the top select **Assignments**.
2. Select **Assignment Sheet** to open the parameter screen.
3. The current date displays in the **Select Date field** by default. Select the **Calendar Icon** to select a different date in the past or future.
4. Your home team displays as the default team. If you have access to more than one team, select the **lookup** to select a different team.
5. The day part of your shift displays as the default. Click the **drop-down** to select a different day part, then select Submit.

HOW TO MAKE ASSIGNMENTS FOR THE ENTIRE SHIFT:

1. Before you begin making assignments make sure that you have made any necessary adjustments to the recommended/required number of staff for each job.
2. Go to the bottom of the assignment sheet and select **Populate Yesterday's Assignments, and then select Submit** to view the assignments in the Current Assignment column. Assignments display for anyone who worked the previous date.
3. **Make new assignments or adjust the current assignments** by selecting the lookup next to Make Assignments for each employee. Current assignments display with a checkbox selected - select each box to assign to employee.
4. Once you have selected assignments for the employee you can use the comment field at the end of the row to enter a comment about the assignment. *If the employee does not have an assignment the comments will not be saved when you select submit.*
5. Repeat the above steps for each employee on the **Assignment Sheet**. You can click **Submit** as often as you want to refresh the data so that you can see the assignments you made in the current assignment column. This is an easy way to view which beds have already been assigned.
6. Below the list of employees is a **General Comments** section. You can use this section if you need to enter comments for the shift. These comments are NOT tied to the employee assignments and will be available when you submitted.
7. To save assignments select **Submit**.
8. A pop-up display with a list of assignments that have not been filled. Review this list and verify that you have not missed any assignments, then select OK to acknowledge the message.

General Comments – Enter comments related to the shift – these comments are not related to an assignment and can be saved with no assignments made.

HOW TO MAKE MULTI-TIME SPAN ASSIGNMENTS This button is located at the end of each row before the comments. The assignments will only be saved if the times are within the day part. For example: 12 HR DAY is 0700-1900, if the shift is scheduled 0645-1915, you must change the times to be 0700-1900 or 0700-new end time. Same for 12 HR NGT, times must start no earlier than 1900 and end no later than 0700.

If you have an employee that is leaving early (sick, canceled, poc) and you need to redistribute their assignments for other employees to cover for the remainder of the shift, you will use the multi-time span feature.

First Edit the Assignment End Time for the Employee Who is Leaving Early:

1. Find the employee who is leaving early and select Multi Time Span next to their assignments.
2. The multiple assignment screen feature opens, and their current assignment is on the top row. Change the end time to the time they are leaving for the shift. Adjust the start time to be within day par 0700/1900.
3. Select Submit and then Close Window.
4. Select the submit button in the top right corner of the Assignment Sheet. The assignment end time is now adjusted to the new end time entered.

Next, Add Assignment(s) to a Different Employee:

1. For each employee, whose assignment is changing, select Multi Time Span next to their assignments.
2. Update the start and end times on their current assignment to be withing the day part 0700-1900 or 1900-0700 and then on the next row select the new assignments and add the start/end times for assignment.
3. Select Submit to save the assignment and then Close Window.
4. Repeat the above steps for each employee who is covering an assignment for the person leaving.
5. Select **Submit** on the assignment sheet to save assignments.

For more information about the assignment sheet, please refer to the Assignment Sheet Overview – Schedule Admin document available from the User HELP Site.