# ASSIGNMENT SHEET OVERVIEW

**This version of the assignment sheet allows you to assign beds or task to employees. The assignment sheet display by jobs. When you select submit you can quickly see assignments that have not been assigned to an employee.**

**HEADER:**

- Your name and the unit displays.
- The Date and Day Part *(which is the shift),* and then PREV or NEXT to load the previous or next shift.
- Select Totals to view the number of staff schedule for each job on the print (PDF) assignment sheet.
- Select Print and a PDF of the assignment sheet displays with an option to print. *The PDF view displays for employees from the Employee Self Service Assignment Sheet selection.*
- Cancel and Submit Buttons and the [BOTTOM OF PAGE] navigation link directly above Submit.

**TOP SECTION:** If your team uses the recommended staffing – the patient census displays & is updated every hour

- **Staffing Adjustments Section**
  - o Displays the total staff scheduled for each job, based on hours scheduled within shift.
  - o Recommended displays the number of staff recommended based on the census at the time. You can select Recommended to adjust the numbers as needed.
  - o *The required number, which is the budgeted number of required staff. You can select Required to adjust the required numbers as needed.
  - o Adjusted displays shaded yellow any adjustment made to the number of staff needed.
  - *Required will displayed if not set up for recommended staffing*
- **Employees On-Call** - Displays employees OnCall or Placed OnCall (POC).
- **Preceptor/Orient Matchup** – Displays preceptor matched with orient.
- **Employees Scheduled for Extra Shifts** – Displays employees that claimed shifts from the billboard.

**ASSIGNMENT SECTION:**

- **Employee Name** -Staff scheduled for the shift are grouped within their scheduled job, then sorted by last name. Their *FTE (full-time equivalency)* displays in parenthesis after their name. If they have floated from another team the employees home team will be listed under their name.
  - o Select employee name to view their assignment their 14-day, and 90-day history.
  - o Mobile Heartbeat numbers display in the box below their name when available. A phone number can be manually entered; however, a manual entry requires an assignment.
  - o The start and end time for the employee's scheduled shift – shift time is shaded blue if shift was claimed through the billboard.
- **Sched Hours** - The total hours scheduled to WRK or CBK timecodes for the week (Sun-Sat) display in this column. Hours above 40 hours are shaded blue to indicate the overtime for the week.
- **Job and Time Code** -Displays the scheduled job and timecode for the shift.
- **Current Assignments** -Displays employee's assignment for the shift.
- **Asn Start and Asn End** – Displays the start and end time for the employee's assignment.
- **Make Assignment** - Displays assignments as selected using the lookup.
- **Multi-Time Span** – Allows you to make multiple assignments for an employee for different time spans throughout their shift.

- **Comments** – Displays comments entered related to the employee's assignment and will only display if assignment is visible
- **General Comments** - Below the list of employees you can enter general comments for the shift.
- **Submit button** – available here and at the top of the page, use either button to save your selections.

**BOTTOM SECTION:**

- **First Off Requests –** Displays employees scheduled for the shift with a first off requests.
- **Employees Scheduled but not listed on the Assignment Sheet** – Displays employees with an expired job–this could be due to an expired license. *These employees do not display in the assignment section, so they cannot be given an assignment.*
- **Employees on Non-Productive Timecodes** - Displays the employees on the home team who are scheduled for a timecode other than WRK. OCN or POC. This includes employees who are scheduled to ORI (orientation), booked off the schedule or approved time off. Confidential timecodes do not display.
- **Cancellation Report** - This link opens the Cancellation Report in a new window
  - o The report displays the cancellation and POC information by hired job, for the employees schedule this shift.
  - o First, displays the employees in descending order by date canceled, and displays the date that they have been booked off and the cancellation time code, and then their future PTO balance for the current fiscal year, per their planned (approved time off).
  - o Employees who have *not* been canceled in the last 12 months display below the employees who have been canceled.
  - o The bottom section of the report displays the scheduled employees booked off to POC (placed on-call time code).
- **Float Rotation Report** - The link opens to the Float Rotation Report in a new window
  - o The report displays float information by hired job, for employees scheduled for the shift.
  - o Displays the employees in descending order by date floated to another team
  - o Their job start date is listed next – this is a way to protect new hires from being floated
  - o Displays N/A if not floated or the date last floated, the date floated and leadership that floated employee
  - o A job displays if the employee was floated to a job other than their hired job.
  - o Employees who have not been floated in the past 6 months display below the employees who have been floated and those with multiple float dates in the last 6 months display next under Staff Scheduled with Additional Floats.

**FOOTER:**

- **Populate Yesterdays Assignments** – Button to copy assignments from the previous day
- **Book Off** –
  - o Dropdown to select employee to book off scheduled for work or on-call.
  - o ABS displays as the default timecode because it is the most used. The drop-down allows for selection of another timecode.
  - o Next, is a blank box for comments, which are optional. Comments entered in this box will display in the ASV details for the shift.
  - o Book Off button  - Select to book off the employee selected to the timecode selected.
- **[TOP OF PAGE] Navigation Link** – Select to go directly to the top of the Assignment Sheet.