Generating Unassigned Shifts for Teams that Do Not Self-Schedule

Information about Shift Templates

- If the employees for your team are on set schedules, Master Rotations, and are booked-off a shift, then a gold unassigned shift is created that can be sent to billboard(s).
- If you are short staff and need additional unassigned shifts for posting to fill your scheduling needs, the WFM team can create a Shift Template
- The shift template is built per team listing:
  - The jobs that your team schedules
  - The shift times for each job
  - The number of employees needed for each job & shift time for each day of the week - the number of employees per job/shift is the <u>total needed</u>, including shifts already filled
  - When the shift template is generated, the system looks at your team schedule and creates unassigned shifts where there is not an employee scheduled
- Copying and generating the Shift Templates creates the unassigned shifts needed

Information about Staffing Requirement Templates (Workload)

- You may or may not have a Staffing Requirement Template listed. Staffing Requirement Templates are budget templates that list the total number employees for each scheduling job for each shift, for each day of the week
- It is a headcount of employees needed per job, per shift, per day of the week and does not include shift times
- Is only updated, if needed, each fiscal year
- Copying and generating the Staffing Requirement Template displays the budgeted number of staff needed on the Draft Printed Coverage Schedule, Assignment Sheet, and Nursing Dashboards

Information about Generating a Schedule Template – Steps to follow are on the next page

There are three pages when you generate a schedule:

The first page displays <u>Unit</u>, where you select the team and the start and end dates for generating shifts

1. You will select a team and <u>do not</u> select Include Sub Units.
2. Last Generated Date – Workload, displays the end-date of the last Sched Req template generated
3. Last Generated Dates – Shifts, displays the end-date of the last Shift template generated.
4. Generation Dates – you will have two options:
   a. <u>Schedule Period</u> is pre-selected with a list of predefined 6-week scheduling periods, select a schedule period using the dropdown - do not enter dates when selecting a Schedule Period
   b. <u>Start & End Dates</u> is used when you want to send shifts to a shorter set of dates, select the radio button next to Start & End Dates, and then select dates to post – the selected dates MUST start with a Sunday and end with a Saturday, even if your area is only open Mon-Fri

The second page displays <u>Template</u>, where you will select the templates to be copied

The unit/team and the dates selected on page one display, next are the two types of templates

1) <u>Staffing Requirement Templates</u> – you will select the checkbox next to the Staff Req (Workload) Template to copy if one is available. Remember, you may not have a workload template
2) *Shift Templates (Shifts)* – you will select the checkbox next to the Shift Template to copy

The third page displays <u>Generate</u> – Where you will generate the templates that you copied, and create unassigned shifts as unpublished shifts

The Generation Parameters selected on the first two pages display, and then you have Generate Options. In generate options section you have three areas that can be selected:

1) <u>Generate Workload based on Staffing Requirements</u> -only select this if you have a Staff Requirement Template listed above in the Generation Parameters
2) <u>Generate unassigned shifts</u> – **this will always be selected**, and you should have a shift template listed above in the Generation Parameters
3) <u>Create as unpublished shifts</u> – **this will always be selected** – if you do not select this button then the unassigned shifts **will not display** on the Advanced Schedule View (ASV).

Steps for Generating Unassigned Shifts to Send to Billboard(s)

Select Scheduling from the blue toolbar at the top of the page, select Schedule Template, and then Generate Schedule

1. Select your team
2. Select the dates to be posted, either a 6-week schedule period or enter start date of a Sunday and the end date of a Saturday for the number of weeks that you would like to generate shifts, then select Next
3. Select the templates to be copied (Staff Requirement Templates and/or Shift Templates), then select Next
4. Under Generate Options – *The shifts MUST BE GENERATED AS UNPUBLISHED SHIFTS*
   - Select Generate Workload based on Staff Requirement Template -if selected on the previous page to copy
   - Select Generate unassigned shifts – should have selected shift template on previous page
   - Select Create as unpublished shifts, and then select Generate

You will see a message: Schedule Template Gen…. message, select Ok to acknowledge

Next load the team's schedule in the ASV for the dates selected and publish the schedule

From the ASV:

1. Select the paper icon (publish button) from the function tools top, right of page
2. A window displays: Stating the Unit and Schedule Period that will be published
   a. Next is a checkbox with an option to send ALL unassigned shifts, which are currently unpublished, to your team's billboard group – *only check this box if you want* to send ALL available unpublished shifts to ALL billboard groups available to your team, <u>if not</u>, <u>do not select the checkbox</u>
   b. Select Submit
3. If there are any schedule compliance warnings on the schedule you will see a warning that lists the employees scheduled to >40 hours for the week (Sun-Sat), review and then Save or Close
4. A publish notification displays, select Ok to acknowledge

You will receive an email in Outlook and a message in WFM when the schedule is published, typically within 60 seconds

Resources:

You can find additional resources on the WFM Help site at www.vumc.org/wfm or from the HELP button available from the blue toolbar at the top of the Schedule Admin page. From the Help page select Schedule Admin Toolbox. There are several categories where you can find documents with more information – From Advanced Schedule View there is a document "Publishing the Schedule-How and Why" and from Billboard is this document and a document, How to send shifts to the Billboard using Mass Edit. Below is our email address and the WFM User Help Site. Please email us if you have any questions.