

Orient – Schedule an Employee to Orientation Shifts

Login to WFM and select Schedule Admin. From the blue toolbar select Scheduling, then Advanced Schedule View

You have a couple of options for loading the schedule

1. Load the schedule by selecting the orient or orients and one or two preceptors using the employee lookup to search, find, and select their names
2. Load the team's schedule by select the Unit

If you choose option #1, select employees, then choose the schedule period or manual dates, up to 6-weeks, for adding the orient(s)' schedule, and then select Load.

If you choose option #2, select the unit and then select dates for two or three weeks for adding the orient(s)' schedule, and then select Load. Loading the unit's schedule for 6-weeks could slow the process because of the volume of data.

When the schedule loads, if you chose option #1, the orient(s) may not display, do not worry, once they have a shift added, their name and information will display. If you chose option #2, you could then filter to the orient(s) and preceptor(s) or to a specific job. Keep in mind the entire team's schedule is still loaded.

The two most common functions to use for adding orientation shifts is using Copy or Duplicate Schedule & Edit Shifts in Mass Edit mode:

Adding Orientation Shifts Using Copy in Mass Edit

1. Select the wand icon, Edit Mode, from the function tools in the top-right corner, then select Mass Edit *A pencil icon, has been added to the beginning of the list of icons*
 2. Select the shifts, from the preceptors' schedules for the dates the orient is to be scheduled, *the selected shifts will be shaded green*
 3. Select the pencil icon, then select Copy, *the copy shifts page displays*
 4. Select the orient's name using the lookup icon, type the last name in the Name box (or use the short-code key of % and type their first name or a few letters of the last name) – if you have the orient's employee id simply type the id number in the employee field, then select the tab key
 5. Copy and Paste employee's ID in the name field for each row
 6. In the Activity column, change WRK to ORI (note do not change MEAL), and then select Save
- The orient's orientation shifts display, and they are ready to match with a preceptor.

Adding Orientation Shifts using Duplicate Schedule in Mass Edit

1. Select the wand icon, Edit Mode, from the function tools in the top-right corner, then select Mass Edit *A pencil icon, has been added to the beginning of the list of icons*
2. Select the shifts from the preceptors' schedules for the dates the orient is to be scheduled, *the selected shifts will be shaded green*
3. Select the pencil icon, then select Duplicate Schedule, a window displays to select the orient and the start date
4. You must enter the start date of the first shift selected, if not the orient's schedule will not match the preceptor's schedule, then select the orient by typing their employee Id and selecting tab, or by using the lookup to find and select their name, and then Save

The orient' schedule display with WRK activity – you must change the WRK to ORI using the **Edit Shifts** function:

5. Select the Orient's shifts that were added, select the pencil icon, and then select Edit Shifts, *the edit shifts page displays*
6. Change the WRK activity to ORI for each row, then click Save

The orient's orientation shifts display, and they are ready to match with a preceptor.

Note: From both the Copy and the Edit Shifts functions you can modify the start and end times, or the position for any date. From the Copy function you can also modify the date.

Steps for Matching an Orient with a Primary Preceptor:

1. From the blue toolbar across the top select Assignments, then select Orientation
2. Type the Orient's last name, select the tab key, then select Submit –
3. The *Orient's name displays with a list of their scheduled shifts. Above the list of shifts is a Primary Preceptor box with a dropdown, select primary preceptor from the list, then select Apply, the primary preceptor displays in the Assigned Preceptor section for all dates they work
4. If there are any blank boxes for Assigned Preceptor use the look up icon to select a preceptor for that shift, then select SAVE at the top right-side of the page – "Your changes saved" displays in red below the list of the orient's shifts or you may see a warning, see below about warning messages.

The preceptor/orient matches saved will display at the top of the assignment sheet for each shift matched. The orient will also display with the preceptor assignments in the printed version of the assignment sheet.

WARNING MESSAGES – then changes are saved, but you receive a warning indicating you may want to change the selection:

- If the preceptor is already matched with a different Orient on any of the matched shifts, the other Orient's name and shift time will display in the Other Orient column and "Preceptor already assigned to other Orient" displays in the Warnings column
- If the selected preceptor's scheduled shift time does not match the Orient's scheduled shift the following warning displays: "Assigned preceptor's shifts (shift time) differs from Orient's shift"

If the Orient's Name Does Not Display in Step #3 Above, Check the Below Information

- That the orient is scheduled to ORI activity, if they are scheduled to WRK they will not display in the select Orient list
- Are the orientation shifts published? If the shifts are unpublished, then the Orient will not be available for you to match with a preceptor. Once the schedule is published the Orient will display for matching. If the orient's team self-schedules, do not publish the schedule until the schedule has been finalized for the scheduling period.
- Verify the spelling of the name from the ASV.