

Schedule Admin Advanced Schedule View (ASV) Instructor-led Training

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THE ADVANCED SCHEDULE VIEW - Log into the Schedule Admin

How to load a schedule

1. Select Scheduling from the blue menu bar, and then select Advanced Schedule View – the ASV selection page displays
2. Select the team to view or you could choose to select an employee or group of employees
3. Defaults to display options of Job, Unit & Activity – you may check or uncheck per your choice
4. Select Load – and the schedule calendar for the above selections displays

The selection page is now closed. Above the schedule calendar are the team and the schedule dates loaded.

- There are navigation arrows to view the previous or next schedule, per dates displayed, respectively.
- If you choose another team or manually change the dates, then you will select Load.
- To the right of the page, a toggle can be selected to switch to the Compact View.
- There is also an expand icon to open the schedule selection page.

See screenshot:



Viewing the Schedule Calendar

Directly above the calendar are view options on the left and function icons on the right. See screenshot:



The default view is Position, which displays alphabetically by job. There are 12 function icons listed in the screenshot above. The pencil icon (Edit) only displays when Mass edit mode is selected. The warning sign icon, second icon listed, only displays if an employee is scheduled >40 hours in a week (Sun-Sat). The paper icon on the end, only displays if the schedule needs to be published. The nine icons in-between these always display.

Shift Display Labels & Legend

Shift Display Labels starts with a letter that indicates the shift for the scheduled start time, examples: D=Days, M=Mid, N=Night. Next is the number of hours in the shift, followed by the start time. When shifts are 6-hours or > there is an assumption that a 30-minute meal break is included, for example D8 0800 indicates the employee starts on day shift at 0800 and works an 8 hour shift with a 30-minute meal break, their scheduled time is 0800-1630. If a number follows the start time, it indicates the meal break minutes are different than the norm of 30-minutes, for example: D8 0800 60 indicates the employee starts on day shift at 0800 and works 8 hours with a 60-minute meal break, their scheduled time is 0800-1700.

D8 0900	8-hour day shift starting at 0900	M10 1430	10-hour mid shift starting at 1430
D10 0645	10-hour day shift starting at 0645	N10 2300	10-hour night shift starting at 2300
D12 0645	12-hour day shift starting at 0645	N12 1845	12-hour night shift starting at 1845
DayOCN	Day shift on call shift	NgtOCN	Night shift on call shift

ADVANCED SCHEDULE VIEW (ASV) LEGEND	
Blue shading	Ad-hoc shift or swapped shifts
Bright Orange shading	Placed on Call (POC)
Clipboard icon	Only displays on unassigned shifts when posted to the billboard
Dark Orange shading	Booked off shift for the length of the shift
Gold shading	Unassigned shifts
Shift information is light gray	Viewing job/shift that is different from schedule, ex: scheduled to job of SL and view job of RN
Teal shading	Booked off shift for part of the shift
Below employee name has MSTR Row#	Name of Master Rotation and row number employee is assigned – employee’s schedule is pre-populated based on a set schedule
Green checkmark	Compliance violation has been acknowledged and approved
Lock by employee name	The employee’s home team is a team that you do not have schedule admin access
Triangle warning sign	Compliance violation, employee scheduled to >40 hours in week

You want to see employee information: Hover the computer mouse over an employee’s name and see their telephone numbers from Workday, their jobs, and skills with expiration dates.

Compact View option, turn on compact view by selecting toggle:

- Employees display with their initials instead of name
- Shift label, start and end time display, & book off codes display
- Hover the mouse over the schedule time to view shifts details

Position View - Unassigned is not automatically expanded

UNASSIGNED					
AJ [0.9]	38.00			D12 0645 6:45-19:15	D12 0645 6:45-19:15
CC [1]	40.00	PNS* 6:45-17:15	PNS* 6:45-17:15		PNS* 6:45-17:15
EP [0.9]	38.00	D12 0645 6:45-19:15	D12 0645 6:45-19:15		D12 0645 6:45-19:15
FJ [0.9]	0.00	APR* 6:45-19:15	APR* 6:45-19:15		APR* 6:45-19:15
GS [0.9]	38.00	D12 0645 6:45-19:15	D12 0645 6:45-19:15	D12 0645 6:45-19:15	
GJ [0.9]	38.00	D12 0845 8:45-21:15	D12 0845 8:45-21:15		D12 0845 8:45-21:15
GD [0.9]	38.00			D12 0645 6:45-19:15	D12 0645 6:45-19:15
GS [0.9]	38.00	D12 0645 6:45-19:15	D12 0645 6:45-19:15		D12 0645 6:45-19:15
HJ [0.9]	38.00	D12 0645 6:45-19:15		D12 0645 6:45-19:15	
HB [0.9]	38.00			D12 0645 6:45-19:15	D12 0645 6:45-19:15

Sara 03/04/2024	D12 0645 6:45-19:15
Shift Label	D12 0845 8:45-21:15
D12 0645	
Activity Unit	
WRK VUH OR	
	D12 0645 6:45-19:15

Filtering the information that displays on the schedule calendar

Using the quick filter function – Examples: filter to job (RN) and shift (Day or NGT):

1. Select the filter from the function icons
 2. In the Job section, select RN – filter options close and schedule displays RN schedules
 3. Select filter icon again, and then in the Day Part section, select 12 HR Day or 12 HR NGT – filter options close and the schedule displays RN schedules for the day part selected
- You can select items from any category listed (we do not use Employment or Work Type).
 - Select multiple items by holding down the control key (Ctrl) when selecting more than one item, for example you have RN selected and want to view SL schedules:
 1. Select filter from the function icons
 2. From the jobs section, find SL, but before you select the job, hold down the Ctrl key, and then select SL
- The schedules for both RN & SL display

Using the filters from the schedule selection page – This section is used to filter prior to loading the schedule. Using the Schedule Status field you filter to display employees scheduled, unscheduled, on leave, or the unassigned shifts. After the schedule has been loaded, expand the schedule select to use the top row of filters. The top row of filters is often used when filtering to multiple items because you can select them without having to reopen the options each time you select a filter choice.

Schedule Coverage

- Select the expand icon located in the right-bottom of the screen
- The schedule coverage expands, displaying the coverage grid
 - By Position (job)
 - By Day Part (shift)
 - By Over/Under

▼ RN	1	-1	-1	-1	-3	-6	-7
12 HR DAY	1	1	1	-	-	-1	-2
12 HR NGT	-	-2	-2	-1	-3	-5	-5

- The coverage above displays total RN coverage for each day of the week (Sun-Sat) and then by shift
 - Dash indicates scheduled=required
 - Blue number indicates overage
 - Red, negative number indicates shortage
- What number is the coverage based on? To view that information, select the 9-point grid, and then select By Coverage in the third column – coverage displays with the number scheduled over the number required, per fiscal year budget. The team in these examples has a 12-hour day part, 1= an employee scheduled for the 12 shift – Sunday day shift has 11 RNs schedule and night shift has 10 RNs scheduled

▼ RN	21/20	23/24	23/24	25/26	23/26	18/24	17/24
12 HR DAY	11/10	13/12	13/12	13/13	13/13	11/12	10/12
12 HR NGT	10/10	10/12	10/12	12/13	10/13	7/12	7/12

What if your staff does not work 12-hour shifts? You will change the display option to view By Shift Count. See information on next page.

Display Coverage <input checked="" type="radio"/> By Position <input type="radio"/> By Day Part <input type="radio"/> By Shift Count	Display Time <input checked="" type="radio"/> By Shift <input type="radio"/> By Hours <input type="radio"/> By FTE	Display Employee Count <input checked="" type="radio"/> By Over/Under <input type="radio"/> By Coverage	Include Shifts <input type="radio"/> All <input type="radio"/> Assigned <input type="radio"/> Unassigned
--	--	--	--

Below are two examples of Display Coverage by Shift Count - this view displays the total number of employees working, then number of employees by job, then by shift time. There is not a required number in this view.

▼ VUH OR	56	248	269	271	263	246	54
▶ Total							
▼ SURGTECH	9	21	29	27	17	26	11
▶ Total							
▼ SURGTECH	9	21	29	27	17	26	11
D10 0645	3	10	13	13	11	18	6
D12 0645	4	2	4	2	-	4	4
D12 0845	-	3	4	2	2	1	-
D12 1045	-	2	2	3	1	1	-
D5 1600	-	-	1	1	1	-	-

Total Coverage	▼ RN	Sunday-Saturday						
D10 0645	-	2	1	2	2	1	-	
D10 0700	-	1	1	1	-	1	-	
D7 0730	-	-	1	-	1	1	-	
D8 0730	-	1	-	1	1	-	-	
D8 0800	-	4	4	3	4	4	-	
D8 0830	-	1	2	2	1	2	-	
D9 0645	-	-	-	1	-	-	-	

What are unassigned shifts? Gold shaded shifts

Unassigned shifts display at the end of the schedule for each job. The unassigned shifts should represent your unfilled shifts. The unassigned shifts are created when:

- The template is generated for self-scheduling
- A shift is booked off with unfilled selected - unfilled is the default
- When a scheduled shift is unassigned
- Manually created by using the Ad-Hoc function

Unassigned **shifts sent to the billboard will display a clipboard icon**

From Display Options (cogwheel icon) select Unassigned at Top to move the unassigned location to display above each job

Assigning an unassigned shift to an employee - Preferred way to add a shift for an employee

1. **Select the unassigned shift** for the job/date/shift, and the details edit panel displays
2. Using the lookup icon to ***select the employee** for this shift -the list will be employees qualified for the job, who are available

3. **Select Save** – if the shift is posted to the billboard a message displays that the shift is currently posted to the billboard and your transaction will cancel the billboard posting, also, if the employee will be in overtime a message displays that they will be scheduled >40 hours for the week, **Select Ok** to acknowledge messages

*You can sort the display of available employees by selecting one of the headers: Employee ID, Employee Name, FTE, Scheduled Hours. You can also use the shortcut key (%) to find an employee by first name or just a few letters of their name. In the second employee field gyp a % followed by a few letters of the name, and then select enter or find

Note: As mentioned above, this is the preferred way to add a shift for an employee. Using an unassigned shift to schedule an employee will accomplish three things – 1) Adds the employee to the schedule, 2) Removes the shift from the Billboard & 3) Removes the Unassigned shift so that you can quickly see any remaining needs.

Removing an unassigned shift that you added in error, select the shift and in the details edit section and then select unassign. If the shift was posted to the billboard, it must be reposted if the need exists

Editing schedules using the Details Edit mode (default mode):

In the Details Edit mode you edit one shift a time. You will select the shift to edit, the edit screen displays. Select a function from the blue tabs, modify the shift as needed and then select Save. The functions vary depending on the type of shift, for example, a booked off shift will have limited functions.

Copy Mark for Swap Delete Float Book-Off Unassign Add Shift Shift History Split Shift Shift Comments

Copy – Preferred method for adding a shift is using Assign from an Unassigned Shift

1. Select the shift to be copied, and the edit panel displays
2. Select Copy, and the shift is now shaded green
3. Select the calendar where you want to add the shift - the added shift is considered an Ad-hoc shift, and is shaded blue

Mark for Swap - Swap shifts of two employees - preferred method is for the employees to use Shift Trade

1. Select the first shift to be swapped, and the edit panel displays
2. Select Mark for Swap and the shift is now shaded green
3. Select the shift for the employee to be swapped, and then select Swap
4. A confirmation displays, select Submit to confirm You are done!

The shifts have been swapped. Both shifts now display shaded blue with an ellipsis (3 dots) in the upper right corner - hover the mouse over the ellipsis to see the employee that they were swapped with and the shift time

Delete - be cautious deleting a shift - this should be used if a shift was added in error

1. Select the shift to be deleted, and the details panel displays
2. Select the Delete function button and then select Save

Shift Comments – Add a comment to an individual shift

1. Select a shift and the edit panel displays
 2. Select Shift Comments and a comment box displays with Add Comment button to the right
 3. Type comments, and then select Add Comment
 4. Comments display below with your user ID, date & time stamp, select Close
- ✓ Shift displays with flag in right-bottom corner (see yellow shading on screenshot above)
 - ✓ To view comments, select the shift and then select Shift Comments – you can add additional comment or delete current comments from this screen

A flag in the corner indicates a comment was added

⚠	D8 0630	⚠	D8 0700*	⚠	D8 0700*	⚠	D8 0700*	⚠	D8 0700*
	WRK		WRK		WRK		WRK		WRK
	VUH OR IR TECH		VUH OR IR TECH		VUH OR IR TECH		VUH OR IR TECH		VUH OR IR TECH

TRY-IT SCENARIOS #1

1. **Load the Schedule for your team for the current week** (page 3).
2. **Filter the schedule to job/position, using the quick filter** (page 5). You must select the icon once for each item to filter.
3. **View the Schedule Coverage and change the view to By Over/Under or by Shift Count** (page 5-6).
4. An employee has asked you to add them to the schedule (page 6). **Use an unassigned shift to add the employee to the shift.**
5. **Add a shift for an employee using the Copy function** (page 7). There are no unassigned shifts to assign to the employee. Remember, it is best to use an Unassigned shift, when possible, instead of using copy.
6. An employee has asked you to swap their shift with another employee's shift (trading shifts). **Use the swap shift functionality** (page 7).
7. **Delete the shift that you added in step 5** above (page 7).
8. **Add a comment to a shift** (page 7).

Float – float an employee to work on another unit

1. Select the shift to be floated, and the details edit displays
2. Select Float, and the Float Wizard displays
3. Select the team to be 'floated to' at the top of the page in the Float to Unit field
4. On the Float to row, the date to be floated displays with the unit to float to. Then there is the job, detail day, start time, and end time – change any, as needed*
5. Create New Shift, enter the shift label for this shift or using the lookup select the shift label or one closest to the employee's shift time
6. Select Next, and the Manage Relief page displays:
 - a. Float Code field – type Float or select using lookup
 - b. RNN is the default status, select Next
7. The confirmation page displays, verify the information is correct and then select Finish – *if there is a Schedule Compliance Violation listed you can check the box next to Approve All, but it is not required*
8. A confirmation message displays, select OK - the shift will display with the name of the team that the employee was floated too.

*Changing information on the Float to row – job if floating to a job different than scheduled; start and end time-if floating after the shift started, change the start time of the float-if night shift and floating after midnight select Next from the dropdown in the Detail Day column (before start time).

Split Shift can be used to assign split an employee's assignment into two jobs or to split assignments for two employees trading partial shift times

First scenario: You have an MR who is leaving work early due to illness. Find a care partner that is qualified to work as an MR

1. Select the employee's shift to split, and then select Split Shift
2. Enter the start time for the split in the Split Shift at box, and then select Submit – the shift displays in two segments
3. Select the segment for the new job assignment and then select or type the job in Position field
4. Select Save – the shift displays with updated job

Second scenario: You have two employee that are trading partial shifts. Employee A and Employee B split two shifts.

1. Select Employee A's shift and the edit panel displays, and then select Split Shift
2. Enter the start time for the split in the Split Shift at box, and then select Submit – the shift now displays in two segments
3. Follow steps 1 & 2 for employee B

Now you are ready to swap shifts – select the segment for A that she is swapping to B, select Mark for Swap and then select the segment that B is swapping to A, select Swap, and then select Submit to confirm

Third Scenario: You want to post a shift in 6 hour or 4 hour segments

1. Select the unassigned shift to be posted, and then select Split Shift
2. Enter the start time for the split in the box, and then select Submit – the shift displays in two segments
3. Change to edit mode to mass edit, select both segments and send to billboard

If you want to divide a 12-hour shift into three, 4-hour shifts – first split the shift at the 4-hour mark and Submit – then select the 8 hour segment and split again at the 4-hour mark and submit. You now have three 4-hour shifts to post to the billboard or assign to employees.

Book Off from the Edit Panel - two scenarios

Booking-off a whole shift:

1. Select the shift to be booked off and the Details Edit Panel displays
2. Select Book-Off, and the Book-Off Wizard displays
3. Select or type the book-off code - comment is optional
4. Click Submit - the shift displays with book-off code and is shaded orange

Booking-off a partial shift:

1. Select the shift to be booked off and the Details Edit Panel displays
2. Select Book-Off, and the Book-Off Wizard displays
3. Select or type the book-off code
4. Modify the time to reflect the time of the book-off code, if the employee is leaving early adjust the start time to when they are leaving, and then select Relief Not Needed in the Send to Relief Queue Column
5. A comment is optional – select Submit and the shift displays shaded teal

Note: Depending on the number of hours the employee will be working you may see a message –related to shortening the break, ignore and select OK to acknowledge-*Meal breaks are done through Kronos*

What if you booked off the wrong employee, time code (book off code) or time? Select the shift, select Cancel the Book-off, and then submit. Then book-off as needed!

Book-Off from Functional tools: Allows you to book off a series of shifts for an employee

1. Select the calendar icon from the function tabs at the top-right and the book-off wizard displays
2. Use the look-up icon to select an employee –enter their last name in the 2nd column (Name field) and then select find, select the name that displays
3. Select the start and end dates using the calendar icon
4. Select Load and a list of the employee's shifts are displayed
5. Select a book-off code in the grey section above the list and the book-off code will be populated to working or on-call shifts - you can change the book-off code for any shift as needed
6. Enter comment is, optional and then, select Submit

Note: *We will not be using the option of 'Book off unscheduled days.'*

Assignment Sheet Book Off – from the blue menu bar select Assignments, and then Assignment Sheet

The assignment sheet parameter page displays:

1. Select Date - Defaults to current date
2. Select Team – Defaults to your team if you only have one
3. Select Day Part – Will default to your shift
4. Select Submit and the assignment sheet displays

Select 'BOTTOM OF PAGE' link located on the right side of the page above the Cancel and Submit buttons - to book off an employee:

1. Select the dropdown next to Book Off Employee to view the alphabetic list of scheduled employees
2. Select the name of the employee to book off
3. The book off code defaults to ABS - may select a differed code, if needed
4. Comments are optional, if entered will display in the ASV edit panel for the shift
5. Select Book Off – a message displays at the top of page that book off was successful

Shift History - do you need to see information about a shift? Who edited the shift or when?

1. Select the shift that you want the view information
2. Select Show History
3. The shift history displays – select the plus sign next to Shift History View to see all - you can expand the dates by changing the Start or End dates in the window and select Go and there is also a Print option

OnCall – how to bring in the OnCall employee for work

TIP – Load the oncall date & filter: Go to Scheduling>Advanced Schedule View then select the team, enter the start, and end dates of the oncall shift, and then select Load – select filter, then select either the employee from the employee list or select ONCALL from the activity list

1. Select the OCN shift for the employee on call, and the Details Edit Panel displays
2. Select Add Work, located below the green on call row (you will not change the green row)
3. In the new row, enter the start and end time the employee is expected to work*
4. Select or type CBK in the Activity field and then select Save

The shift will display with the phone icon shaded black, indicating they are no longer on call.

***If the employee is night shift and is reporting to work after midnight** select Next in Details Day located before the start time **When is the employee expected to arrive for work?** A minimum of 1 hour from the time they were called. Enter 1 hour from the time you called them rounded based on quarter of the hour, for example: you called them at 1005 they should arrive by 1115, you called them at 2340 they should arrive by 0045.

Placed OnCall (POC)– how to bring in the POC employee for work

1. Select the POC shift to be changed and the details edit panel displays
2. Select Cancel Book-Off, and then click Submit button - the working shift is placed back on the schedule
3. Select the working shift and the details edit panel displays
4. Select Book-Off, and then select or type the book-off code of POC
5. Change the End Time to when the employee will report to work - add a comment, if needed
6. Select Submit – the shift is shaded teal and displays the POC activity and the WRK activity with the related times

Changing the job (position) – Examples: CP to MR, RN to SL

1. Select the shift to be modified, and the details edit panel displays
2. Type or select the job the employee will be working in the position field, and then select Save
If the employee does not have the job in their Employee Profile or if the job has expired you will see a message about the Employee Qualifications, if you still want to schedule the employee to this job select Yes to acknowledge. Prior to changing a scheduled for an employee, hover over their name using the computer mouse to view qualified jobs.

Please note: *If the employee does not have the matching job in their employee profile, then they will display at the bottom of the assignment sheet, not in the assignment area. Contact CSL or Manager to update their employee profile with the assigned job.*

Adding a Shift from the Calendar

1. Select the calendar for the employee on the date you want to add a shift. A rectangular box displays
2. Type shift label (note this field is case sensitive), the shift label must be typed exactly as listed, ex: D12 0645, D10 0845, and then select the tab key
3. The edit panel displays, make any additional changes as needed, and then select Save

New Ad Hoc Function – Use for adding shiftsBasic shift to be added:

1. Select the New Ad Hoc icon from the function tools top, right of page
2. Select the date for the shift
3. Select Unit
4. Pre-defined Shift is preselected, select the shift label, or select the lookup to choose a shift label*
5. Select the employee using the look-up and find the employee's name in the right-hand column and their default job is displayed, select a different job if needed
6. Select Add Shift – the shift displays on the calendar shaded blue

*If there is not a shift label for the time needed you will select simple shift – see steps below:

1. Follow steps one -three above
2. Select Simple Shift, a new set of parameters displays
3. Enter the shift start and end times
4. Select the Activity using the lookup – **if the shift is >6 hours, add a meal break****
5. Next, follow steps 5 & 6 above

****To add a meal break, select the plus sign next to Break Activity, select or type Meal enter a start and end time**

NOTE: If creating a new unassigned shift, follow above steps, except leave the employee field blank

Using the Repeat function within New Ad Hoc:

1. Select the New Ad Hoc icon from the function tools top, right of page
2. Select the date for the shift
3. Select Repeat and repeat options display
 - a. Repeat Pattern- daily
 - i. Defaults to Daily - Select the end date
 - ii. Every Number of Days defaults to 1, indicating you want the shift to repeat every day until the end date – change the number to how often you want the shift to repeat, for example, every other day would be 2, every third day would be three, etc.
 - b. Repeat Pattern – Weekly
 - i. Select Weekly from the dropdown and a list of days of the week displays
 - ii. Select the end date
 - iii. Select the day/days for the shift to be repeated
4. Select Unit
5. Select a pre-defined shift or enter simple shift, and then enter start and end times
6. Select employee and their default shift displays, select a different job if needed
7. Select Add Shift - the shift displays on the calendar shaded blue

ERROR Encountered, employee exceeded four consecutive days with 12.0 or more hours.

This is due to a schedule compliance rule (see below for more information on schedule compliance)

Error Encountered

Ztrain110094, Kody exceeded 4 consecutive days with 12.0 or more hours from [06/17/2021 - 06/21/2021].

OK

You will see the above error code if you are adding a shift that would have the employee scheduled to more than four consecutive 12-hour shifts. Change the activity code to APPROVED ON for the shift you are adding or to one of the shifts in the series of dates listed in the error message

ASSIGNING A PRECEPTOR & ORIENT:

1. Select Assignments from the blue menu bar, and then select Orientation
2. Type orient's last name, select the tab key and when name displays select Submit
3. Shifts where the orient is in the ORI timecode display in chronological order – select the lookup in the Assigned Preceptor column for the date to be changed or assigned
4. Select the preceptor from the list and then select Save, if no warnings display, select Exit

Note: The orient will display matched with the preceptor on the assignment sheet

TRY-IT SCENARIOS #2

1. You are overstaffed and your shared unit needs help: (page 8). Use the nurse that you filtered to and **Float that person to your shared unit.**
2. An employee came to you reporting that they are sick and need to leave early (page 9). **Mark the nurse off the schedule for the portion of the shift that she will miss, be sure and add a comment.**
3. **Book off an employee for a series of shifts for a death in the family** (page 10).
4. **View the history and comment for above booked off** (page 10).
5. **Change the position of one of your staff** (page 11).
6. **Split a shift, you need to split a shift into smaller segments, or an employee's job is changing mid shift** (pages 9).
7. **Practice adding shifts in the various ways you have learned i.e., copy, assign, shift label, or new ad hoc** (pages 6-7, 11-12).

MASS EDIT FUNCTIONALITY

Select the Mass Edit icon, the wand, from the function tools, top right of page – a new function icon (pencil) displays as the first tool

Copy shifts:

1. Select shifts from the calendar to be copied, they will display green
2. Select the pencil and then Copy
3. Select the employee or employees to be added for each shift
4. Verify shift information, change as needed, and then select Save

Use copy to ADD AN ORIENTEE to the schedule – follow above steps with one additional step - change the WRK activity to ORI for each shift before saving.

Duplicate shifts:

1. Select shifts from the calendar to be copied, they will display green
2. Select the pencil and then Copy
3. Select the employee or employees to be added, select the start date, and then select Save

Use Duplicate to ADD AN ORIENTEE to the schedule – follow above steps and then use Edit Shifts to change the WRK activity to ORI for each shift.

Assigning Unassigned shifts:

1. Select the unassigned shifts to be scheduled, they will display green
2. Select the pencil and then Assign
3. Select the employee, and then select Save

Edit Shifts:

1. Select the shifts to be edited, the shifts will display green
2. Select the pencil, and then Edit Shifts
3. The list of shifts will be display with details - enter changes as needed, and then select Save

Float multiple scheduled shifts to a new location (unit/clinic) using:

1. Select unassigned shifts for the scheduled dates/shifts/jobs to be floated
2. Select the pencil and then, select Float – the shifts display on the Float Wizard

3. Select the team to be 'floated to' at the top of the page in the Float to Unit field
4. Next, enter or select shift label for each shift
5. Select Next, and the Manage Relief page displays, select or type FLOAT next to Float Code located above the employee names – the Status defaults to RNN (relief not needed), select Next
6. The confirmation page displays, verify the information is correct and then select Finish – *if there is a Schedule Compliance Violation listed you can check the box next to Approve All, but it is not required*
7. A confirmation message displays, select OK - the shift will display with the name of the team that the employee was floated too.

*Change information on the first page, as needed – you can change the job if floating to a job different than scheduled; start and end time-if floating after the shift started, change the start time of the float-if night shift and floating after midnight select Next from the dropdown in the Detail Day column (before start time).

Add Shift Comments:

1. Select the wand icon from the function icons, top-right, and then select Mass Edit
2. Select the shifts you want to add a comment (adding same comment to all shifts)
3. Select the Pencil icon, and then select Shift Comments
4. Type comments and select Add Comment

Comments now display below with your user ID, date, and time stamp, select Close

NOTE: Shifts displays with flag in right-bottom corner - to view comments, change edit mode to Details Edit, select the shift, then select Shift Comments

Book off shifts for an employee or multiple employees for a shift:

1. Select the shifts to book-off. The shifts can be from one employee or multiple employees
2. Select the pencil and then select BookOff
3. Select the book-off code, and then add comment if applicable – you have the option to apply one book-off code to all or select various book-off codes, and then Submit

Change the Position for Shifts (one or more employee shifts):

1. Select the scheduled shifts to update
2. Select the pencil and then, select Change Position
3. Enter new position and Save

Send Shifts to the Shift Billboard:

1. Select the Unassigned shifts for dates you want to post to the billboard
2. Select the pencil and then, select Send to Billboard
3. Select the Billboard Group or Groups that you want to have access to sign up and then, select Submit

The Unassigned shifts will now display with the clipboard icon, indicating they are available to employees for scheduling

TRY-IT SCENARIOS #3

1. **You have an employee that had a baby, book them off for a couple of weeks** (page 12).
2. **An employee resigned, mid schedule, remove them from the schedule** (page 12).
3. **Change the position for several shifts** (page 12).
4. **Add an Orient to the schedule using Copy or Duplicate** (page 12 & 13).
5. **Match the Orient with a primary Preceptor** (Page 13)
6. **Send shifts to the billboard**

Presets - Use this function if you often filter to several teams or specific a job

Presets allow you to create subsets of the schedule that you view frequently.

How to Create & Save a Preset:

1. Load the schedule with the display options of choice, in this example the Current Week
2. Select the expand icon to display the Schedule Selection area and then select filters as needed
3. Select 'Save as Preset' - the Preset Definition window displays
4. Name the preset with a unique identifying name. Ex. VEI Clinic Nurses -do not use characters such as '&'
5. You must select Filters and Sorts & Exclude Off Shifts – If you do not check the filters option, your schedule will load without filters or sort options
6. The Schedule Period section displays your selection of Current Week - can modify as needed, and then select Save and the window closes

How to Load a Schedule Using a Preset:

1. Select Scheduling, from the blue menu bar, and then select Advanced Schedule View
2. From the Preset section, select the preset of choice using the lookup

The schedule will display with the filters and dates set for this preset

How to Create & Save a Preset using Manual Date Selections:

1. Select Save as Preset and the Preset Definition window displays
2. Name the preset, then select Filters and Sorts & Exclude Off Shifts
3. Select the radio button under Schedule selection and Dates
4. Indicate how many days you want to display - for example, to view a 3-day schedule of yesterday, today, and tomorrow - on the first row you will enter 1 in the Days field and select Before in the Current Date field
5. On the next row you will enter 1 in the Days field and select After in the Current Date field
6. Select Save

How to Delete a Preset:

1. Select Scheduling, from the blue menu bar, and then select ASV Presets
2. Select edit by the preset to be deleted
3. Select box in the Del (delete) column, and then select Save

Nursing Scheduling Dashboards – Available by selecting Star Dashboards from the blue menu bar

The adjusted number of staffing displays on the Dashboard as well as the Float Pool and Sitter grids used for floating. *This is also how you indicate Pt Care Attend needs!*

- Adjustments made on the assignment sheet display on the Staffing Dashboard shaded yellow.
- The float pool reviews the staffing dashboard to view needs and adjustments made.
- Leadership can get a quick view of hospital-wide staffing by viewing the entity related dashboard.

Day Shift

	Required	Scheduled	FP	Trav	On Call
SL	1.00	1.00			
RN	10.00	10.04+OC	1	1	
CP	7.00	6.00			
MR	1.00	1.08			
PFN	1.00	0.00			
PT CARE ATTEND	1.00	0.00			

Night Shift

	Required	Scheduled	FP	Trav	On Call
SL	1.00	1.00			
RN	9.00	8.00		1	1.00
CP	7.00	7.00			
MR	0.00	0.33			
PT CARE ATTEND	1.00	0.00			

HELP!

- From the Schedule Admin, select Help from the blue menu bar & from the Employee Self Service, select Quick Links, and then select HELP
 - You must sign in with your VUNet ID & E-password
- Email us at wfm@vumc.org for non-urgent issues
- For urgent issues log a Help Desk Ticket by calling 343-6547 (3 HELP)
 - Select the Clinical Application Team
 - We are on call 24/7, even holidays
 - We do our best to respond within 15 minutes of receiving the ticket
- You can go directly to our Help site, even if WFM is in downtime, go to www.vumc.org/WFM

BOOK OFF TIMECODES WITH DESCRIPTIONS

*Time code is masked on printed schedules and assignment sheets

Book Off (Activity) Codes	Descriptions	Goes to Kronos for Non-Exempt Staff
ABS	Unscheduled Absence - PTO	Yes, as PNS, <i>may need to update PNU in Kronos</i>
ABS-GFS	Unscheduled Absence - Grandfathered Sick	Yes, as SICK
ABS-OCN	Unscheduled Absence for On Call Shift	No
ADJ	Adjustment to Schedule (Master Rotation)	No
APR	Approved Time Off	No
BRV	Bereavement	Yes, as paid time, not PTO
CXM	Canceled Mandatory	No
CXOC	Canceled On Call Shift	No
CXV	Canceled Voluntary	Yes, as PNS
EDEP	Early Departure	No
FLOAT	Float Code Used for Master Rotation	No
FML-ABS*	Employee Call Out – Unsch FMLA PTO	Yes, PNS
FML-NONFMLA*	NonFMLA MUST BE APPROVED by HR	No
FML-PL*	FMLA – Planned Absence	No
HOL-PTO	Holiday-PTO	Yes, PNS
ISV	In-service Hours – does not count toward FTE	No
ISV-EPIC	In-service for Epic Training Code from LMS	No
ISV-WK	In-service Hours – counts toward FTE	No
JRY	Jury Duty	Yes, paid time, not PTO
LTAR	Late Arrival	No
MIL	Military Leave – Unpaid	No
NO-SHW*	No Call No Show	Yes, as PNS, <i>may need to update PNU in Kronos</i>
NR-ISV	In-service – Nurse Residency training	No
PAL*	Paid Administrative Leave	Yes (paid time, not PTO)
PERS	Paid Time Off – Day off, Excused	Yes, PNS
POC	Placed on Call	No
POFF	Preferred Off Day	No
PPL*	Paid Parental Leave	No
PREC-ISV	In-service – Preceptor Training Code from LMS	No
SHG	Shared Governance Hours – does not count toward FTE	No
SHG-WK	Shared Governance Hours – counts toward FTE	No
UNPAL*	Unpaid Administrative Leave	No

VANDYWORKS TERMINOLOGY

Activity codes – These codes account for an employee’s hours. Typical activities are WRK (work), OCN (on call), ISV-WK (in-service time counts toward FTE), ABS (absence), PNS (paid time off, non-exempt staff)

Ad Hoc shift – A manually created shift.

Detail Edit – Default Edit Mode. The details of each shift can be displayed and modified within the Schedule panel.

Hours Per Patient Day (HPPD) – Is the budgeted number of direct patient care hours, compared to the number of patients on the unit.

Mass Edit – Select multiple shifts to modify this group of shifts at one time. When you select this mode, the pencil icon is displayed with the function available.

Master Rotation – A way to assign a repeating schedule to an employee (replacing Shift Patterns).

Preset - Allows you to create subsets of the schedule that you view frequently, which when selected, will load the schedule with predefined parameters.

Recommended Staffing – Provides Shift Leaders with the information needed to make daily staffing decisions based on the patient care needs on the unit, while staying as close as possible to the budgeted staffing targets.

Relief Not Needed – Updates selected shift to RNN status; an unassigned shift will not be created.

Schedule templates – Provide you with a tool for planning your staffing demands for specific periods. The templates are used to create unassigned shifts that can be sent to the real-time self-scheduler and/or to the shift billboard for employees to select and schedule themselves.

Shift billboard – Is a feature allowing employees to claim open shifts that have been posted to a shared area called a “shift billboard.” The billboard displays open shifts that have been posted by managers.

Shift display label – Represents a shift. The display label is used in assigning shifts to a day. Display labels are created for teams, based on their need. The same display label can be used for other teams. Example: The D8 0800 label represents a shift that starts on the Day shift, is an 8-hour shift that starts at 0800. N12 1845 label represents a shift that starts on Night shift, is a 12-hour shift that starts at 1845. There are also shift labels created for Mid shifts, On Call shifts, Late Stay shifts and Orientation shifts.

Split Shift – A feature that allows admin to split a shift into segments.

Swap Shifts – A feature that allows admin to swap shifts between two employees on the ASV.

Workload requirements – Replacing former staffing requirements. The workload requirements let you specify the number of shifts needed for a job (for example, the number of LPNs, PSS) for each shift. These requirements can help you determine if you are overstaffed or understaffed when you view the schedules.