

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
3. Select the blue Load button –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.

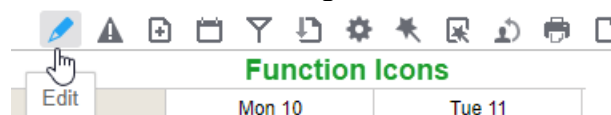
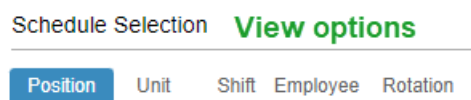
- There are navigation arrows to view the previous or next schedule, per dates displayed, respectively.
- If you choose another team or manually change the dates, then you will select Load.
- To the right of the page, a toggle can be selected to switch to the Compact View.
- There is also an expand icon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

Expand the top section (Schedule Selection section) - You have more options than what we selected when loading the schedule

- There is a Preset option – which allows you to create preset filtered options
- Employee – may select an employee or group of employees to view instead of by unit
- Schedule Period – default to Current Week, you may load the schedule for any date range from one day up to six weeks. Drop down has additional preset dates for the Current Schedule Period, Last Schedule Period, Next Schedule Period, Last Week, Next Week, and Manual Date Range
- The Filters to the right may only be used after the schedule is loaded, except for Schedule Status
- Display Options – preselected are Unit, Activity and Job, you may check or uncheck any options – more information about these options from the Cogwheel function icon

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

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 >30-minutes, for example: D8 0800 60 indicates the employee works an 8 hour shift which starts on day shift at 0800 and has a 60-minute meal break, their scheduled time is 0800-1700.

ASV Legend

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

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. Filter any one or a combination of items from these areas: Unit, Job, Activity, Day Part, Rotation, Employee or Schedule Status. For example, in the Job section, select a job – filter options close and schedule displays for the selected job
 3. Select filter icon again, and then in the Day Part section, select a day part, for example, for inpatient areas select 12 HR Day or 12 HR NGT – filter options close and the schedule calendar displays schedules for the job you previous selected but only for the day part selected
- Select multiple items in each section by holding down the control key (Ctrl) when selecting more than one item, for example you have selected a job, find another job to select, hold the control key down and select the second job

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 scheduled>required
- Red, negative number indicates scheduled<required

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-hour shift – Sunday has a requirement of 10 RNs for each shift day shift has 11 RNs scheduled (11/10) and night shift has 10 RNs scheduled 10/10, which is why the above shows 1 over on days and a dash on nights

▼ 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 or has multiple shift times within a shift? You will change the display option to **view By Shift Count**.

Display Coverage

☒ By Position
☐ By Day Part
☒ By Shift Count

Display Time

☒ By Shift
☐ By Hours
☐ By FTE

Display Employee Count

☒ By Over/Under
☐ By Coverage

Include Shifts

☐ All
☐ Assigned
☐ 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.

▼ 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 unassigned shifts using Mass Edit mode:

1. Select the Edit Mode icon, the wand, from the function tools, top right of page
2. Select the unassigned shifts to be scheduled, will display shaded green
3. Select the employee's name from the schedule calendar to assign the shift
4. Attention Required message displays – "You are about to assign below shift(s) to Employee XYX. Do you want to continue" – verify the shift listed is correct and select Ok to add or Cancel to start over

NOTE: If the unassigned shift is currently posted to the billboard, you will see an additional message that lets you know the billboard postings will be cancelled, select OK

Removing an unassigned shift that you added in error:

1. Select the shift, will display shaded green
2. Select the Edit icon, the Pencil, from the function tools, top right of page
3. Select Unassign from the list, and then select the blue Save button

The Details Edit mode is typically used for editing one shift at a time:

Before we change to Details Edit mode, select the Pencil icon to see the various functions available in Mass Edit mode. In Mass Edit mode you can edit one shift or several at one time and make changes per the list of functions. It is your choice which mode to use.

1. Select the Edit Mode icon, the wand, from the function tools, top right, and then select Details Edit
2. In Details Edit mode, you will select the shift to edit & the edit panel displays.
3. Select a function from the blue tabs, modify the shift as needed and then select Save.

The functions on the edit panel may vary depending on the type of shift, for example, a booked off shift will have limited functions.

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

1. Select the shift to be copied and the edit panel displays
2. Select the blue Copy button 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 once added

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 the blue Mark for Swap button and the shift is now shaded green
3. Select the shift for the employee to be swapped, and then select the blue Swap button
4. A confirmation displays, select the blue Submit button 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

Things to note about swapped shifts:

1. The shifts cannot be deleted or unassigned – you would need to book off the shift to be removed
2. If either shift involved in the trade is modified, they Revert Swap function cannot be used






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 PART 1 ON THE NEXT PAGE

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 3). 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 4-5).
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 the blue Float button 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. 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
5. Select Next, and the Manage Relief page displays:
 - a. In the Float Code field - type Float or select using lookup
 - b. RNN is the default status -at the bottom of the page select the blue Next button
6. The confirmation page displays, verify the information is correct, and then at the bottom of the page select the blue Finish button – *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 the blue OK button - the shift will display with the name of the team that the employee was floated too.

On the first page of the Float Wizard, after you select the Float to Unit, there are shift details with the date to be floated with the unit to float to, the job, detail day, start time, and end time – change any, as needed*

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).

On the row with Create New Shift there is the field for the shift time to be created, this will remain as the original shift time regardless of the hours being floated. Next, is the activity which will default to the activity of the scheduled shift. If the employee is floating for orientation, the activity will be ORI, change if needed.

Split Shift Functionality

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 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 ASV - two scenarios

Booking-off an entire shift:

1. Select the shift to be booked off and the Details Edit Panel displays
2. Select the blue Book-Off button and the Book-Off Wizard displays
3. In the top field, select or type the book-off code
4. Comment is optional, select the blue Submit button - the shift displays with book-off code and is shaded per book-off code selected

Booking-off a partial shift:

1. Select the shift to be booked off and the Details Edit Panel displays
2. Select the blue Book-Off button and the Book-Off Wizard displays
3. In the top field 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 – if bringing into work after the start of the shift, example POC brought into work, change the end time to reflect the time they were POC – ***always think about what time they should be in the time code selected***
5. A comment is optional – select the blue Submit button 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 scheduled shifts for an employee

1. Select the calendar icon from the function tabs at the top-right and the book-off wizard displays
2. In the employee field you can enter the employee's ID or 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, and then *select the blue load button

4. A list of the employee's scheduled shifts display, select the book-off code in the grey section above the list and the book-off code will be populated all scheduled shifts - you can change the book-off code for any shift, as needed
5. Enter comment is, optional and then, select the blue Submit button

Note: Do not select the option to '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

Go to Scheduling>Advanced Schedule View and load the schedule for the week or day of the On Call shift:

1. Select the OCN shift for the employee on call, and the Details Edit Panel displays
2. Select the blue Add Work button, 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 the blue Save button, located to the left

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

***If the employee is schedule for night shift On Call and is reporting to work after midnight,** select Next in Details Day located before the start time on the row where you are entering the start and end time for CBK.

How do I know what to put for the start time? According to the On Call policy an employee has a minimum of one hour from the time they were called to clock into work. Enter one 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.

When the CBK activity is used, a +OC displays in the Scheduled column next to the job on the dashboard, indicating that you have brought in an employee to work that was scheduled an On Call shift.

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 the blue Cancel Book-Off button, and then select the blue Submit button - the working shift is placed back on the schedule
3. Select the working shift and the details edit panel displays
4. Select the blue Book-Off button, 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 the blue Submit button – the shift is shaded teal and displays the POC activity and the WRK activity with the related times

Please Note: *Some areas do not want CBK because the employee was originally scheduled to Work, not scheduled to On Call. If your unit wants the WRK time code to be reflect Callback, then select the shift, change the Activity of WRK to CBK and then select the blue Save button*

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, 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.*

New Ad Hoc Function – Use for adding shifts

Basic 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, and then select the unit
3. Pre-defined Shift is preselected, select the shift label, or select the lookup to choose a shift label
4. *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
5. Select Add Shift – the shift displays on the calendar shaded blue if assigned to an employee or a gold unassigned shift is created if no employee was assigned

** 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.

- An ERROR Encountered messages is due to a schedule compliance rule, 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 and Save for the shift you are adding or to one of the shifts in the series of dates listed in the error message to add the shift. The APPROVED ON activity code overrides the compliance error.

Assigning an Orient a Preceptor:

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. Using the dropdown in the Primary Preceptor field, select Preceptor to be assigned, and then select the blue Apply button
4. The orient's shifts display in chronological order and the preceptor assigned will display for any date that matches the orient's schedule
5. The select a different preceptor for a shift or shifts, use the lookup in the Assigned Preceptor column and select the preceptor from the list and then select Save

Warnings will display if the preceptor is already assigned an orient for the shift or if the orient and preceptors shift times do not match – the match will remain unless modified

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. **Split a shift, you need to split a shift into smaller segments, or an employee's job is changing mid shift** (page 8).
3. 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.**
4. **Book off an employee for a series of shifts for a death in the family** (pages 9-10).
5. **View the history and comment for above booked off** (page 10).
6. **Change the position of one of your staff** (page 11).

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 – Mass edit allows you to perform functions for multiple shifts at one time

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.

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

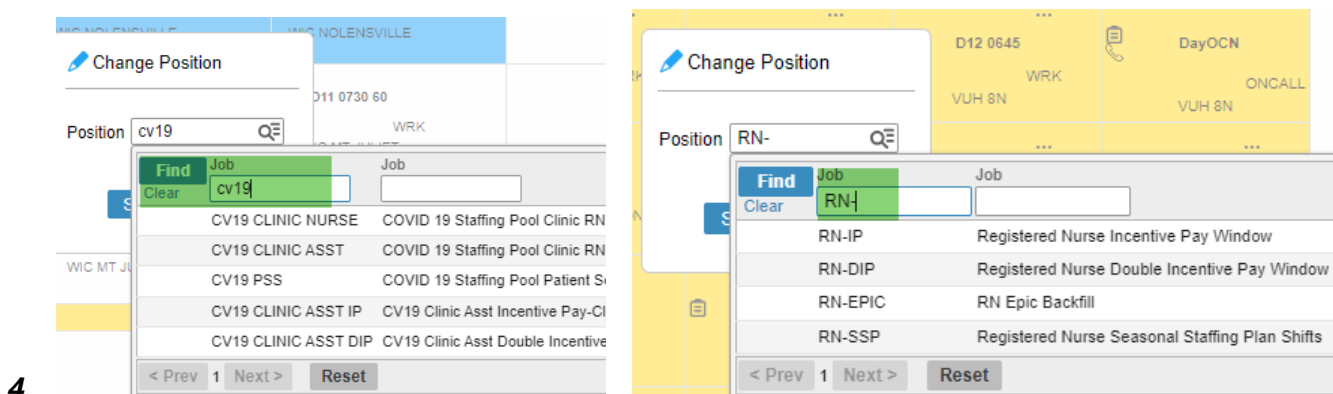
Book off shifts for an employee or multiple employees for a shift:

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 from the list
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 select 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

Tip: You need to change the position but not sure of the exact format in WFM, then type the beginning of the name and then select the tab key, to select from the lists. Examples below: 1st screenshot is changing job to a CV19 job/position by typing cv19 and the 2nd screenshot is changing the job to RN-IP, note entered RN- to find RN jobs with more descriptors



Please Note: Any change to a billboard shift will remove the shift from the billboard postings.

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

Cancel Shifts posted to the Billboard:

1. Select the Unassigned shifts to be removed from the billboard
2. Select the pencil icon and then, from the list, select Shorten
3. Enter 1 in the min (minute) section, leave at End selected, and then select the blue Save button

The shifts no longer display with the clipboard icon since then have been removed from the billboard(s).

To correct the time for the shifts edited above:

1. Select the Unassigned shifts that were changed, they display with a small asterisk after the start time
2. Select the pencil icon and then, from the list, select Lengthen
3. Enter 1 in the min (minute) section, leave at End selected, and then select the blue Save button

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

STAR DASHBOARDS – select Star Dashboards from the blue menu bar**Log in with your VUMC ID and e-Password**

The top of the page displays VUMC logo, then Nursing Scheduling, Inpatient, Outpatient, and Admin

- ☐ **The default is Inpatient** – directly below the heading are the inpatient Staffing Dashboards for each entity – select a hospital to expand and view the schedule data for units within that hospital.
- ☐ The adjusted number of staffing displays on the Dashboard as well as the Float Pool and Sitter grids used for floating.
- ☐ 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			

- ☐ **For Outpatient information, select OUTPATIENT** from the top row. Outpatient Nursing Dashboard uses an Automated Predictive Model as a tool that provides information about the staffing needs of Outpatient Clinics and displays in categories by service line.
- ☐ Select a service line to expand and view the schedule data for clinics within the service line.
- ☐ Ambulator leaders should review the dashboard for the next clinic day to assess clinic volume and staffing and adjust as needed.
- ☐ Adjustments can be made directly from the dashboard by selecting the PM hyperlink in the Scheduled row in the column for date needing adjustment or from the WFM team's daily assignment sheet
- ☐ Most ambulator leaders prefer to make their adjustments from the assignment sheet
 - ☐ To navigate to the assignment sheet from the WFM Schedule Admin, select Assignments from the blue toolbar, and then select Assignment Sheet
 - ☐ The default parameters are the current date, your home team, and PM Clinic – adjust the date as needed, may select another team if needed, and then select Submit
 - ☐ The assignment sheet displays the scheduled staff for this team, their start and end times, scheduled hours for the week, and scheduled job – the top section is a summary of that schedule

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

WFM 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.

Advanced Schedule View (ASV) – View and edit schedules

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 – An ASV feature that 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.

Shift templates – A tool to assist with 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 leaders.

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 represents a shift that starts on the Day shift, is an 8-hour shift that starts at 0800. N12 1845 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. There is an assumed 30-minute meal break included in labels unless otherwise noted, ex: D8 0800 60 represents an 8 hour day shift that starts at 0800 with a 60-minute meal break.

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

Swap Shifts – An ASV feature that allows admin to swap shifts between two employees or an employee and an unassigned shift.

Staffing Requirements Template (Workload requirements) – The workload requirements let you specify the number of shifts needed for a job (for example, the number of LPNs, PSS, etc.) for each shift. These requirements can help you determine if you are overstaffed or understaffed when you view the schedules. For inpatient units we receive workload requirements (budgeted templates) from nursing finance.