WFM Schedule Admin- Inpatient Unit Shift Leader (RSL)

Instructor-Led Training

Login to WFM Schedule Admin and your home page displays – the blue menu bar at the top of the page has links to navigate through the system:

TO DOS– Messages Your VandyWorks Inbox - Types of mail:

Displays messages in your inbox – same as on the Employee Self Service – You will receive a notification regarding expired employee compliance items.

REPORTS: Links to frequently used reports

- **Approved Leave** – Report displays employees with approved time off and book offs, listing actual time code used.
- **First Off Report** – Report displays employees with first off request – employees with first off display at the bottom or the assignment sheet if they are scheduled to work that shift.
- **Verify Employee Information** –Report displays employee information including default hours, default daily minutes, shift time, licensure and competencies for the team selected. Future changes, such as new default shift times (i.e., an employee moving from nights to days) will not be reflected in this report, only the current values that are assigned to the employee. Items highlighted in red indicate that there is a data mismatch between default hours (found in Employee/Employee) and the default daily minutes assigned for the employee - this will need to be corrected for the employee to be able to successfully submit leave requests in WFM.
- **Draft Printed Home Team Schedule** –This schedule shows all published and unpublished shifts for each employee in the home team selected. **Excludes employees floating** to the team(s) selected from other teams. Shifts scheduled for licensed employees that occur AFTER the date of their license expiration will be shaded in yellow.
- **Draft Printed Coverage Schedule** – This is a coverage schedule showing all published and unpublished shifts for employees scheduled to the selected team(s). **Includes floats** from other teams. Shifts scheduled for licensed employees that occur AFTER the date of their license expiration will be shaded in yellow.
  - Select True in the Show Totals Field to view coverage with counts of employees by scheduled hours within the daypart, compared to required and displays variance.
  - Reports Options displays with a dropdown with Schedule Only, Schedule and Coverage Grid and Coverage Grid only – the coverage grid displays the count of employees by individuals (not hours), listing count every 15 minutes, per job.
- **Team Contact List** - Report displays employee information imported from the Personal Data Information in Workday.
- **Assignment History for Staff Scheduled** - Report shows the assignment history for staff scheduled on the selected schedule date. The assignment history is displayed for the selected date range.

LINKS: Links for easy access to other systems or pages

These links open in a new window for your convenience:

- Kronos
- Workday
- TN Board Licensure Verification
- KY Board Licensure Verification
- VUMC Policies
- HR Policies

PROJECTIONS:

Display nurse staffing for the next 14-days – negative red number indicates short-staffed, black number indicates over-staffed, blank cell indicates no needs, and green shading indicates includes staffed with float pool nurse

ASSIGNMENT SHEET – for more information see Assignment Sheet Overview from Help documents

HOW TO LOAD THE ASSIGNMENT SHEET:

1. Select Assignments from the blue menu bar, and then select *Assignment Sheet and the parameters display
2. Select Date field defaults to the current date – select the calendar Icon to select another date
3. Select Team defaults to your home team - select the lookup to select another team
4. Day Part defaults to your shift – use dropdown to select another shift (day part)
5. Select Submit and the assignment sheet displays

*There is an Area Assignment Sheet used by some areas, if your team uses the area assignment sheet, then you will select Area Assignment Sheet in step #1. There are documents on the help site for how to make assignment on the area assignment sheet and an overview of the area assignment sheet.

REVIEW CANCELLATION REPORT, if needing to flex down and nobody will be in overtime for the week

1. Select [*BOTTOM OF PAGE*] link to go to the bottom of the page
2. Select the Cancellation Report link to view which employees have been cancelled or placed on call

REVIEW FLOAT ROTATION REPORT before floating an employee

1. Select [*BOTTOM OF PAGE*] link to go to the bottom of the page
2. Select the Float Rotation Report link to view employees floated within the past 6 months. Report

BOOKING OFF FROM THE ASSIGNMENT SHEET:

1. Select [*BOTTOM OF PAGE*] link to go to the bottom of the page
2. Select the dropdown next to Book Off Employee and select the name of the employee to book off.
3. The book off code defaults to ABS - may select a differed code using the dropdown next to ABS
4. Comments are optional and if entered will display on the ASV in details edit for the shift
5. Select Book Off and the employee is booked off to the time code selected

You will see a message at the top of the page, shaded blue, that the employee has been booked off successfully*. *Only full shifts can be booked off from the assignment sheet. For booking off a partial shift you will go to the Advanced Schedule View (ASV)

CHANGING OR RE-MATCHING 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

SEE BOOK OFF CODES WITH DESCRIPTIONS ON NEXT PAGE

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, *may need to update PNU in Kronos*
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, *may need to update PNU in Kronos*
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

HOW TO MAKE STAFF ADJUSTMENTS USING RECOMMENDED STAFFING:

The ***staffing section displays*** at the top of the assignment sheet directly under the header row. The unit census displays with the number of patients and the date and time of the last update. The census is updated at 15 minutes before each hour.

1. ***Select Recommended*** to display the area for making adjustment to staffing - includes a built-in calculator.
2. Displayed are the jobs, budgeted staffing, scheduled staffing, recommended staffing, adjusted, reason, and comments. Your user ID and date/time stamp will display when adjustment is saved. **In the adjusted column enter the number of staff needed** for patient care per row if different than the recommended.
3. Select **Apply and Calculate** [located at the bottom of the window] to view how your decision impacts the HPPD – this is where the built-in calculator does the math for you!
4. If the *HPPD is too high or too low, **readjust the staffing numbers** until it is something that works for safe patient care and is still fiscally responsible - you can do steps 3 & 4 as many times as necessary until you have the optimal staffing.
5. **Select a reason** using the dropdown for each job where an adjustment has been made (*see table below of reasons with descriptions*).
6. Comments are optional, enter as needed, and then select ***Save***. A message displays stating Staffing Adjustments Saved Successfully, select Close.
7. ***Select Submit on the Assignment Sheet*** to refresh the data and see the changes highlighted in yellow.

*What does HPPD is too high or too low mean? How do I know? The goal is to stay as close to the recommended HPPD listed for the current census. Using your clinical judgement and personal experiences in making staffing decisions is important in achieving a balance between quality, safety, labor costs and staff satisfaction. The HPPD presented on the assignment sheet should be used as a resource for understanding how your decisions impact the budget. You are the expert, and you have the autonomy to make staffing decisions.

See Reason codes for recommended staffing adjustment with descriptions on the next page.

Nursing Scheduling Dashboards – *Available by selecting Star Dashboards from the blue menu bar – for more information about the dashboards, see page*

The adjusted number of staffing will display 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			

REASON CODE	DESCRIPTION	REASON CODE	DESCRIPTION
Acuity-H	They acuity is higher (H) than predicted	**Acuity-L**	The acuity is lower (L) than predicted
Vol-H	Changes in volume higher (H) than expected. For use by ED & PACU	**Vol-L**	Changes in volume lower (L) than expected. For use by ED & PACU
BHOBS	Behavioral Health Observation needing sitter or patient care attend, 1:1 constant observation	**Other**	Used for any reason not listed in dropdown. Will need comment added for description
Pend-DC	Pending Discharge (DC)	**Pend-ADM**	Pending Admission (ADM)
Model	Confirming the recommended value is accurate for current patients (no acuity or admission/discharge adjustment needed)	**Census**	DO NOT USE

HOW TO MAKE ASSIGNMENTS FOR THE SHIFT:

Before you begin making assignments make sure that you have made any necessary adjustments to the recommended/required number of staff for each job.

1. Go to the bottom of the assignment sheet and select ***Populate Yesterday's Assignments, and then* select *Submit*** to view the assignments in the Current Assignment column. Assignments display for anyone who worked the previous date.
2. **Make new assignments or adjust the current assignments** by selecting the lookup next to Make Assignments for each employee. Current assignments display with a checkbox selected - select each box to assign to employee.
3. Once you have selected assignments for the employee you can use the comment field at the end of the row to enter a comment about the assignment. *If the employee does not have an assignment the comments will not be saved when you select submit***.**
4. Repeat the above steps for each employee on the ***Assignment Sheet***. You can click ***Submit*** as often as you want to refresh the data so that you can see the assignments you made in the current assignment column. This is an easy way to view which beds have already been assigned.

5. Below the list of employees is a ***General Comments*** section. You can use this section if you need to enter comments for the shift. These comments are NOT tied to the employee assignments and will be available when you submitted.
6. To save assignments select ***Submit***.
7. A window displays with a list of assignments that have not been filled. Review this list and verify that you have not missed any assignments, then select OK to acknowledge the message.

General Comments – Enter comments related to the shift – these comments are not related to an assignment and can be saved with no assignments made.

HOW TO MAKE MULTI-TIME SPAN ASSIGNMENTS This button is located at the end of each row before the comments.

First Edit the Assignment End Time for the Employee Who is Leaving Early:

1. Find the employee who is leaving early and select Multi Time Span next to their assignments.
2. The multiple assignment screen feature opens, and their current assignment is on the top row. Change the end time to the time they are leaving for the shift. Adjust the start time to be within day par 0700/1900.
3. Select Submit and then Close Window.
4. Select the submit button in the top right corner of the Assignment Sheet. The assignment end time is now adjusted to the new end time entered.

Next, Add Assignment(s) to a Different Employee:

1. For each employee, whose assignment is changing, select Multi Time Span next to their assignments.
2. Update the start and end times on their current assignment to be withing the day part 0700-1900 or 1900-0700 and then on the next row select the new assignments and add the start/end times for assignment.
3. Select Submit to save the assignment and then Close Window.
4. Repeat the above steps for each employee who is covering an assignment for the person leaving.
5. Select ***Submit*** on the assignment sheet to save assignments.

The assignments will only be saved if the times are within the day part. For example: 12 HR DAY is 0700-1900, if the shift is scheduled 0645-1915, you must change the times to be 0700-1900 or 0700-new end time. Same for 12 HR NGT, times must start no earlier than 1900 and end no later than 0700.

If you have an employee that is leaving early (sick, canceled, poc) and you need to redistribute their assignments for other employees to cover for the remainder of the shift, you will use the multi-time span feature.

TRY-IT SCENARIOS #1

USE THE CURRENT ASSIGNMENT SHEET FOR #1,2 & 3

1. You have too many nurses. **Book off a nurse to POC (Placed On Call)** **(page 5).**
2. A preceptor has called out for their shift where they are matched with an orient. **Book off the employee from the assignment sheet** **(page 5).**
3. You have an orient whose preceptor has called out. **Match the orient to a different preceptor for the shift** **(page 5).**

Go back to past date given to you by instructor

USE PAST ASSIGNMENT SHEET for #4 & 5 below:

4. You need to adjust staffing coverage on the assignment sheet**. Practice with the 'Recommended link,' making sure you know how & why you adjust staffing and the rationale** **(page 7).**
5. Make assignments. **From the past assignment sheet use the "Populate Yesterday's Assignments" function at the bottom of the page to populate assignments and then make a couple of assignments or change a couple of assignments for the next shift** **(page 8).**

The Advanced Schedule View (ASV)

How to load the schedule

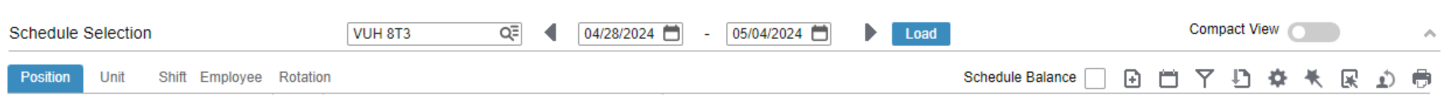
Select Scheduling from the blue menu bar, and then select Advanced Schedule view – the selection panel is displayed

1. From Unit - select your team
2. From Schedule Period – defaults to current week, can change selection using dropdown
3. Start and End date – defaults to the current week, will change based on schedule selection
4. Display Options: defaults to selection of Job, Unit & Activity - check or uncheck any listed
5. Select Load to view & edit shifts on the schedule calendar

Viewing the Schedule Calendar

Using the default selections above, the schedule for the current week is displayed. The schedule panel is closed.

- The team and the schedules dates display at the top with navigation arrows to load the previous or next schedule period, respectively.
- There is a toggle to turn on/off the Compact View and then there is an expand icon to the right of the page to open the selection panel, if needed.



Next, are the schedule view selections on the left and function icons on the right. Use the mouse to hover over the function icons to see the name

View Selections with descriptions:

- Position - the default, displays schedules by job, and then list employees alphabetically by last name
- Unit – displays schedules divided by team (Unit)
- Shift – displays schedules by shift label, i.e., APR, D12 0645, D8 0900, N12 1845, POFF
- Employee – displays schedules alphabetically by last name, regardless of job, shift, etc.
- Rotation – displays schedules for master rotations first and then schedules for non-master rotations

Function with descriptions: If you hover your computer mouse over an icon, you will see the description

- Schedule Balance checkbox – We are not using this feature
- Schedule Compliance (warning icon) – Indicates compliance violations in schedule if displayed
- New Ad Hoc (paper with plus sign) – adds an ad-hoc shift to the schedule
- Book Off (calendar) – book off a series of shifts for an employee
- Filter – filters the sched information using the same filter criteria that is available within categories
- Sort By (paper with down arrow) – sorts for primary & secondary sort
- Display Options (cogwheel) – Provides options for displaying additional information in the shift cells
- Edit Mode (wand)- Edit Mode selection: Details edit (default) & Mass Edit
- Next two icons are for Auto Assignment & Relief – we do not use
- Print (printer) – is a way to print the screen; has limited width depending on display options
- Publish (blank paper) - the Publish icon will only display if publish is needed

What is Publish? When staff self-schedule, shifts are unpublished. For the schedules to display on employee home page & printed schedules and be eligible for trading or requesting time off, they must be published by a member of the management team.

Shift Labels are created with a letter for when the shift starts, D (day), M (Mid), & N (night), the hours in the shift, and then the start time of the shift. All are presumed to have a 30 meal break unless the shift is less than 6-hours. A number displaying after the start time indicates a meal break time other than 30 minutes.

Examples of Shift Display Labels:

D8 0800	8-hour day shift starting at 0800	M10 1430	10-hour mid shift starting at 1430
D8 0900 60	8-hour day shift starting at 0900 with a 60 min meal break	MidOCN 1300	OnCall starting on mid shift at 1300
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 as 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 your computer mouse over an employee's name and see their telephone numbers from Workday, their jobs, and skills in WFM (VandyWorks).

How to use 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 is filtered to schedules for RN
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 calendar now displays RN shifts for the day part chosen

You can filter to any of the categories listed (we do not use Employment or Work Type). You can also select multiple items within a category, for example you have RN selected, to add SL schedules:

1. Select filter
2. From the jobs section, find SL, but before you select the job, hold down the Ctrl key on the keyboard and then select SL

You have now filtered to two jobs, RN & SL schedules to the schedule view. The control key allows you to add multiple items from each section to the filter.

What are unassigned 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

What is the Shift Billboard?

Shift billboard – Is a feature allowing employees to claim open shifts that have been posted to a shared area called a "shift billboard." This is a way to fill needs or 'open' shifts. Shifts are posted to the billboard by management.

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:

Details Edit mode is the default and allows you edit one shift at a time. Select the shift to edit, then select from the functions available in the details edit panel, or select Add Work, make necessary changes, and save.

The functions may be different depending on the actions previously taken, for example below are the functions for a shift that was swapped:

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

1. Select the shift to be copied, and the details 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*

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).

TRY-IT SCENARIOS #2

1. **Load the Schedule for your team for the current week (page 10).** Scheduling>Advanced schedule View

2. **Filter the schedule to what you want to view (page 12).** Use the quick filter. You will have to click on the icon once for each item you filter.

3. **An employee has asked you to add them to the schedule (page 13)**. Use an unassigned shift to add the employee to the shift.

4. **Unassigned the shift that you added in #3 above (page 13).** You assigned the shift to the wrong employee, unassign the shift to remove.

5. **You are overstaffed and your shared unit needs help: (page 14).** Float an employee to one of your shared units.

Book Off – 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 chosen, 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. Entering 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!

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.

RY-IT SCENARIOS #3

1. One of your nurses just came to you reporting that she is sick and needs to leave early. **Mark the nurse off the schedule for the portion of the shift that she will miss** **(page 15).**

2. You are looking at staffing for the next shift & you need to bring in the on-call nurse for the entire shift. **Bring the on-call nurse into work for the next shift** **(page 15).**

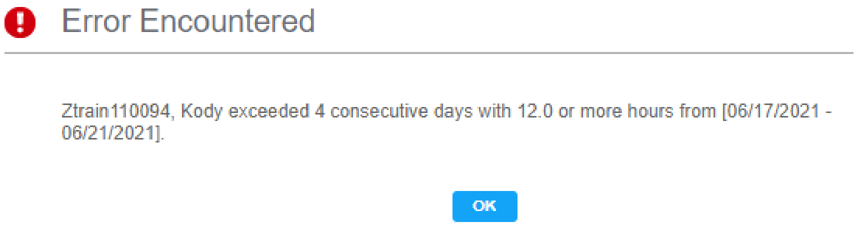
3. Use another on call shift. **Bring in the on-call nurse coming into work after the shift has started** **(page 15).**

4. The shift is getting busy, and you are filling all your beds, you placed a nurse on call earlier. **Bring in the nurse that was placed on call (POC) for the remaining hours of the shift** **(pages 16).**

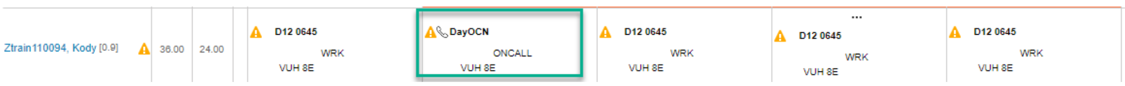
5. The shift leader for the next shift has called out. **Change one of the schedule RNs to the job of SL** **(page 16).**

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

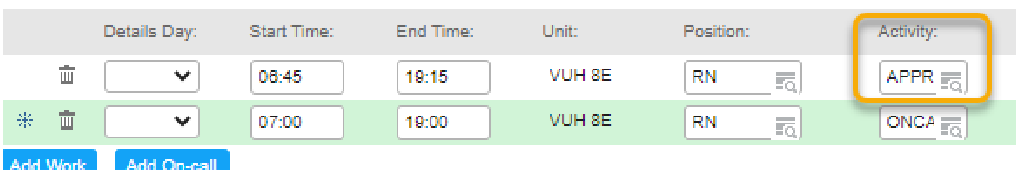
This is due to a schedule compliance rule (see below for more information on schedule compliance)

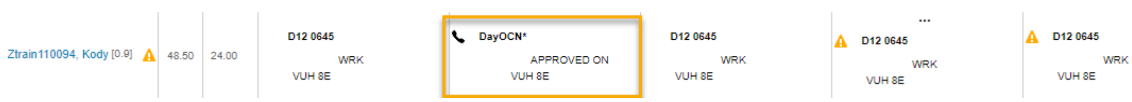


You will see the above error code if you are adding a shift that would have the employee scheduled to more than four consecutive 12-hour shifts. This could happen if you have an employee scheduled on-call in the middle of several scheduled 12-hour shifts – what do you do? The Activity code needs to be changed to Approved On – see example below:



1. You called the above employee that is on call into work
2. You followed the steps for bringing the on call employee into work, however you receive the Error Encountered message – Select Ok to acknowledge
3. Select shift and change the CBK to APPROVED ON and select Save again
4. The shift is now added. If your team wants the CBK to remain, then change another shift in the series to Approved On and then go back to the CBK shift and change the Approved On to CBK





ADDITIONAL INFORMATION BELOW – *PLEASE CHECK WITH CSL OR MANAGER ABOUT WHAT YOU ARE ALLOWED AND NOT ALLOWED TO DO IN THE ASV!

Schedule Coverage

- Click on the expand icon, located in the right-hand bottom of the screen
- This expands the coverage – The grid displays coverage:
  - By Position (job)
  - By Day Part
  - 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 and then by shift
  - – with no number indicates no needs or overage
  - 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 needed:

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

How to use the filter function in the Schedule Selection section

Unlike the quick filter function used within the schedule, filtering from within schedule selection section allows you to select multiple filters at one time. Filtering from this section only works after a schedule has been loaded

1. Select the expand icon, located above the function icon and the schedule selection displays
2. The same filter options display however, you can select as many as needed at one time

More functions for editing schedules using the Details Edit mode:

***Mark for Swap – two scenarios**

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 details edit panel displays
2. Select Mark for Swap and the shift is now shaded green
3. Select the shift for the employee that is 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 and display with an ellipsis in the upper right corner - hover your mouse over the three dots to see the employee that they were swapped with and the shift time

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

1. Select the shift to be deleted, and the details edit panel displays
2. Select Delete, and then select Yes to confirm

***Other editing scenarios**

Adding a partial shift for an employee:

1. Select the unassigned shift for the job/date/shift, and the details edit panel displays
2. Modify the Start & End time to reflect the hours that the employee will be working
3. Select the employee lookup, and then select the employee to work
4. Select Save - *the added shift is shaded blue & there is a small asterisk beside the time to indicate that it was adjusted.*

Note: *If the shift is going to be less than 6 hours you must delete the meal break by selecting the trashcan beside the Break 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 CPs shift and the edit panel displays
2. Select Split Shift and the details of the shift displays
3. In the box next to Split shift at: Enter the start time for the new job, and then select Submit -the shift displays in two segments
4. Select the segment for the new job assignment and select or type the job in Position field
5. 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
2. Select Split shift and the details of the shift displays
3. In the box next to Split shift at: Enter the time Employee B will start the shift (cover for A), and then select Submit – the shift displays in two segments
4. Select B's shift, select Split Shift and enter the time A will start the shift (cover for B), and then Submit.

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

SCHEDULE COMPLIANCE

What is Schedule Compliance?

- Schedule Compliance is a module in WFM that flags shifts if they are in violation of established rules.
- There are rules based on Patient Care Services: Scheduling Policy, VUMC Policy.
- There are also Minimum FTE rule; HR-Hours of Work Policy,

Why is Schedule Compliance important?

Patient Safety   Employee Safety   Compliance with VUMC policy

Patient Safety – What does research tell us?

- "Working overtime, whether at the end of a regularly scheduled shift (even an 8-hour shift) or working more than 40 hours in a week, was associated with a statistically significant increase in the risk of making an error" (Rogers AE, et al, 2004).
- "Fatigue can be exacerbated with increased numbers of shifts worked without a day off, working more than four consecutive 12-hour shifts is associated with excessive fatigue and longer recovery times" (Rogers AE, 2008).
- Prolonged periods of wakefulness (17 hours without sleep) can produce performance decrements equivalent to a blood alcohol concentration (BAC) of 0.05 (Institute of Medicine, 2004).This BAC level is defined as alcohol intoxication in most of the U.S (Institute of Medicine, 2004).
- Studies show that the longer shifts length, an inadequate amount of sleep, or insufficient quality of sleep over an extended period can lead to problems, including lapses in attention, memory lapses, irritability, diminished reaction time, impaired communication, and compromised problem-solving (Hughes RG & Rogers AE, 2004).
- Nurses suffer high rates of occupational injury when working shifts more than 12 hours (Trinkoff AM, et al, 2007).

Schedule Compliance Rules:

- Did not meet their FTE requirement for the pay period (Warning) – currently turned off
- *Consecutive shift rules:
  - *Exceeded 4 consecutive 12-hour shifts (Error)*
  - *Exceeded 5 consecutive 10-hour shifts (Warning)*
  - *Exceeded 6 consecutive 8-hour shifts (Warning) – currently turned off*
- *Max Hours Per Week 40 (Warning)*

**To provide safe patient care, if an employee exceeds the consecutive day rule as noted above or is scheduled to more than 60 hours in seven consecutive days, the employee should have at least one 24-hour period at the end of those worked hours with no direct patient care obligations.*

Advanced Schedule View (ASV) with Warning:

- A warning sign will display next to the employee's name if there is a schedule compliance violation. The person finalizing the schedule is responsible for reviewing all violations and resolving issue before approving the schedule.

What do I need to do when I see a warning sign on the schedule?

- You have the option to resolve or approve the violation – check with CSL on unit procedures

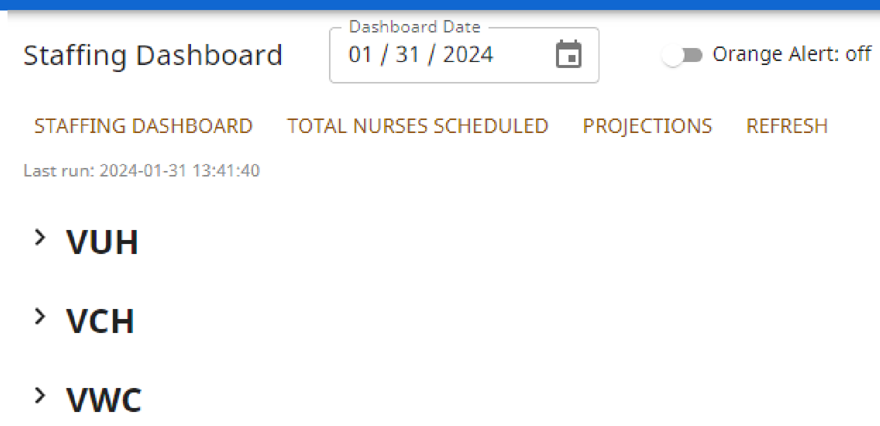
Bibliography for Schedule Compliance References

- Hughes RG, Rogers, AE: Are you tired? Sleep deprivation compromises nurses' health – and jeopardizes patients. *American Journal of Nursing*, March 2004;104(3)
- Institute of Medicine (2004). *Institute of Medicine: Keeping patients safe: transforming the work environment of nurses.* Washington, DC: National Academy Press, November 3, 2003, Retrieved from http://iom.edu/Reports/2003/Keeping-Patients-Safe-Transforming-the-Work-Environment-of-Nurses.aspx
- Rogers, A. (2008), The Effects of Fatigue and Sleepiness on Nurse Performance and Patient Safety. *Patient Safety and Quality: An Evidence-Based Handbook for Nurses.* AHRQ Publication No. 08-0043. Agency for Healthcare Research and Quality, Rockville, MD.
- Rogers, A. E., Hwang, W., Scott, L. D., Aiken, L. H., Dinges, D. F. (2004). The working hours of hospital staff: Nurses and patient safety. *Health Affairs,* 202-212.
- Trinkoff AM, et al: Work schedule, needle use, and needlestick injuries among registered nurses. *Infection Control and Hospital Epidemiology*, February 2007;28:156-164

What is the Nursing Scheduling Dashboard?

The Nursing Scheduling Dashboard is a tool in WFM that provides information about the staffing needs of all entities. **Select Star Dashboards from the blue menu bar**, then **log in** with your VUNet ID & e-Password. **Select the hospital/area to view** and you can quickly see the needs for staffing resources in each unit for the current day, Day Shift & Night Shift.

Additionally, this tool is used to track and understand trending changes in the staffing needs of each unique unit. This data is used to help predict upcoming staffing demands and improve the accuracy of budgeting for the future.



The Header Row

The date for the dashboard data displays as the current date, the date can be changed to view date of choice

Last Run Date/Time displays the last time the staffing dashboard information refreshed per time line below:

Item	Frequency
Employee Schedule Detail – added shifts, book offs, etc.	Every 5 minutes
Staffing Adjustment – adjustments from inpatient Assignment Sheets	Every 3 minutes
Workload (Staffing Requirements Template) changes	Every 4 hours at 03:35, 07:25, 11:25, 15:25, 19:25, 23:25
Custom Team Settings (Unit Phone Number)	Twice per day at 03:20 and 15:20
Staffing Adjustments made on Starpanel OP Projections dashboard back to VW Assignment Sheets	Once per day at 10:01am
All other data files	Once per day at 03:00

Enable Orange Alert defaults to off, select toggle to on as needed. See more information on next page about the Orange Alert mode.

Dashboard Scheduling Data

Information included on the Dashboard, number of staff **Required** for the shift, the number of staff **Scheduled** for the shift

The ‘Required’ number indicates how many employees are budgeted. *This number can be modified from the inpatient assignment sheet to indicate that the staffing needs for that shift are above or below budgeted.*

The ‘Scheduled’ number indicates how many employees are scheduled. This number includes published and unpublished shifts.

The scheduled and required numbers are based on the hours worked in a shift. For example: In VUH the typical inpatient unit shift is 12 hours (D12 0645-1915 and N12 1834-0715). If an employee is scheduled to work the entire shift, then the number displayed is 1.00. An employee scheduled to work 8 hours of that shift, for example 2245-0715, the number displays as 0.67 (8 out of 12 hours or 8 divided by 12 = 0.67). If the employee works a portion of each shift the number displays for the ratio worked on each shift.

FP column indicates the number of Float Pool staff floated. Trav indicates the number of External Agency staff scheduled to your unit. You can hover the computer mouse over the number of FP or Travelers and view the name of the employee floated to the unit.

On Call indicates the number of staff scheduled to the on-call timecode.

Pink shading indicates unit is short-staffed, while **blue shading** indicates unit is over-staffed, **yellow shading** indicates the 'required' number has been adjusted. Hover the computer mouse over the yellow shaded number to view the original value, comments, VUNet ID of person that entered changes, with the date and time stamp.

Bolded numbers indicate Float Pool and/or Travel staff are included in the Scheduled number.

+OC indicates that an on-call employee is now scheduled to work.

ORANGE ALERT FEATURE AVAILABLE FROM THE STAFFING DASHBOARDS:

How can you help the Command Center view staffing during an Orange Alert?

This feature will help our command center know how many of your staff scheduled have clocked into your unit through our Kronos feed.

This mode of the Dashboard gives a quick color reference to the Command Center for each unit to know whether quotas for staffing have been met, aiding in decision making for releasing the previous shift.

Updating the Dashboard:

Please follow the five steps below to show a quota for your area, on staff that will need to be clocked in before the prior shift can be released.

1. Follow steps on page 20 for loading the dashboard
2. Select the toggle next to Orange Alert: off – displays shaded orange when on.
3. Remain on the current day's screen to update tonight's night shift or select tomorrow using the calendar icon at the top of the page and select the next date
4. A column for 'Clocked In' displays in your team section, select 'Clocked In' and in the 'Clocked in Quota for Release' column displays
5. Enter the **minimum number of staff needed** to be clocked in by each job*, before releasing the prior shift, and then select Save.

*The jobs listed are employee's hired jobs. We pull in Kronos clock-in punches, which are based on the employee's hired job. You may have scheduling jobs/roles that are not in Kronos, for example, SL, PFN, RN-TRG, RN-RSC. The number of RN's will be the total number of RN jobs/roles needed, except for any scheduled CSL. CSL's do not clock in and out in Kronos therefore if you are expecting a CSL for the role of SL, then do not count them in the Clocked in Quota because they will not be clocking in.

To see the red/green designation based on the minimum you entered, select 'Refresh Now.'

Note: You will still follow your current process for flexing required staffing (which aids the Float Pool in floating decisions) through the Assignment Sheet. This quota you are entering on the Dashboard in Orange Alert Mode is to give a minimum of staff clocked in to release prior shift.

Clocking-in during an Orange Alert staffing event is now more important than ever! We are depending on this information to green light/red light your areas to release the prior shift – so, we depend on your staff clocking in when they arrive to work for this feature to work correctly. Please remind your staff not to miss their punches!

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

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.