

**Schedule Admin-Processing Requests & More
Instructor-Led Training**

Infor Workforce Management Schedule Admin Processing Requests & Action Items

Processing Requests & More Training

Pages 2 TABLE OF CONTENTS

Page 3 Employee Self Service – Employee Side of the system)

- Schedule Calendar – Home Page
- Navigation
- How to View PTO & Sick balances
- Understanding Balances

Page 4 Employee Self Serviced, continued

- How to request time off
- Time Code (Types) list with descriptions

Page 5 Employee Self Serviced, continued

- Time Code (Types) list with descriptions, continued
- How to Request Time Off for Part of a Shift

Page 6 Employee Self Serviced, continued

- View My Recent Requests
- How to view approved time off
- How to cancel approved time off
- Where to get Help

Page 7 Schedule Admin Home Page & Processing Leave Requests

- **TRY IT SCENARIOS #1**
- To Dos
- Messages & Inbox

Page 8 & 9 Requests Messages & Other Types of Requests

- How to Process a Leave Requests
- Employee notifications, continued
- Other types of Requests – Shift Trades, Post/Take Shifts

Page 10 Reports

- **TRY-IT SCENARIO #2**
- Team Access & Requests Routing

Page 11 More Reports & More

- First Off Report
- Requests Submitted Verify Employee Information
- How to Update an Employee's Default Shift

Page 12 Scenario and HELP

- **TRY-SCENARIO #3**
- Where to find HELP

Page 13 Terminology

We will start as an employee from your team. The instructor has set up a Proxy for you to log in as the employee.

1. Select WFM-Quick Links from the black navigation bar, and then select Self Service Portal
2. Select the menu (horizontal lines next to Workforce Management
3. Select Proxy and then select the employee assigned to you
4. Select WFM-Quick Links and then select Employee Self Service

Employee Self Service

Schedule Calendar

- Scheduled displays your home page with the schedule calendar displaying the current month. Listed are the employee’s scheduled shifts with the start and end time, the job, and the team
- The current date is shaded green
- VUMC holidays have the date in orange type
- Approved days off, display the time code used, in purple font
- Days employee is not scheduled to work states OFF
- The navigation tabs at the bottom left and right allow you to navigate by month
- You can view a single week by selecting Week, located top-right

You will navigate through the system by clicking on the labeled tab on your menu bar:

Home	Messages	Leave Requests	Shift Trade	Post/Take Shift
First Off Request	Print My Assignments	Print My Schedule	Quick Links	Balance Report

How does an employee check their PTO or Grandfathered Sick balances?

1. Select **Balance Report** from the navigation links
2. Select the lookup under Balance Type, select PTO-BAL and SICK-BAL, and then select Submit
3. The Start and End Dates default to the current date. Change the End Date to the end of the fiscal year (June 30)
4. Select Go and your balance reports displays for PTO & SICK balances

If you want to view updates from Workday, change the start date to a previous month or date of your choice. Updates from Kronos sent to Workday will import on Tuesdays and display as HR_REFRESH in the comments.

There are two documents available from our user Help site, **“Understanding flex PTO & SICK Balances in WFM.”** Select Quick Links from the navigation links and then select WFM HELP – our help site displays.

Select Employee Toolbox – documents are found by selecting the related topic – in this case, select Leave Requests and available documents related to Leave Requests display. Select Understanding flexPTO & SICK Balances in WFM to view the document

How the employee request time off:

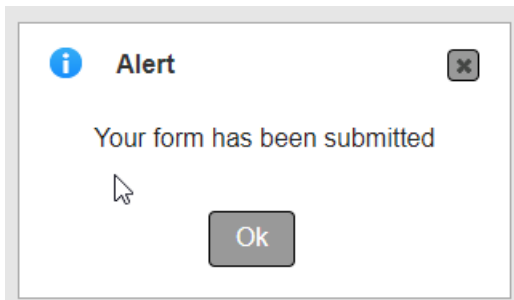
1. Select Leave Requests from the navigation links across to top and the Leave Requests form displays
2. Select the calendar icon for Start Date and select the first day for time off

3. If requesting off more than one day, select the calendar icon for End Date and select the end date for time off, within the same week as the start date. You will not change the end date if requesting off one day!
4. Next, at the end of the row, select the Schd icon to view how many employees have approved time for the week you are requesting. The schedule for your team will display for the week you have requested, plus the previous week and the next week. After reviewing, close the schedule and go to the next step.
5. Select Choose and the balance selection area displays on the right-side listing the total hours requested in the Required Hours and Hours Left field.

Note: *The required hours are the total hours requested off and are the total scheduled work hours when requesting dates that you are scheduled. For teams that self-schedule and requesting dates in the future where you are not scheduled, the hours are based on your default hours (12, 11, 10, 9, etc.), Example: 12hrs x 3days =36, 12hrs x 7days=84 hours, 10hrs x7 days=70.*

6. Enter the number of hours in the box next to each balance type you want to use, PNS for PTO time, SNS for sick time. You can only use paid time off up to your hired hours any remaining hours enter next to APR for approved time off (only use APR after you have met your hired hours). For exempt staff, use PES and SES, see list of active time codes in the bottom section of the list.
7. Hours left must equal zero before you can save your balance choice.
8. Select Save Choice, then OK to acknowledge message, and then select Submit

A message displays that your form has been submitted, select Ok to acknowledge!



If you get a message the below message, then you do not have the hours for the time code selected for the date(s) requested, go back to the form using the button in the message and choose a different time code to use for your time off and then Submit again

[Leave Requests](#) [Quick Links](#) [Print My Assignments](#) [Print My Schedule](#) [Time Details](#)

Validation Error:

__Your request for 12.0 SNS hours exceeds your projected balance of 0.0 hours on 04/27/2024. __Please modify your request and try again.__(Encoded)

[Go Back to the form](#)

SEE TIME CODES WITH DESCRIPTIONS ON NEXT PAGE!

TIME CODES AVAILABLE ON THE LEAVE REQUEST FORM – For Non-Exempt Employees

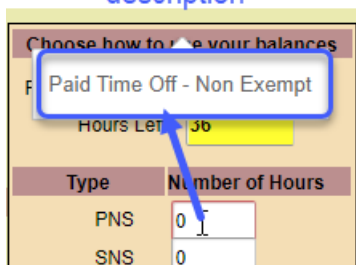
Description	Feeds to Kronos
flexPTO (Paid Time Off) - Non-Exempt Staff	Yes, to PNS
Grandfathered Sick (Sick Time) - Non-Exempt Staff	Yes, to SNS
Bereavement - Non-Exempt Staff	Yes, to BRV (paid time, not PTO)
Jury Duty - Non-Exempt Staff	Yes, to JRY (paid time, not PTO)
Paid Parental Leave - Non-Exempt Staff	No

TIME CODES AVAILABLE ON THE LEAVE REQUEST FORM – For ALL Employees

Time Code	Description	Feeds to Kronos/Workday
POFF	Preferred Day Off – <i>use to indicate a day(s) off, will be working to FTE (hired hours)</i>	No
APR	Approved Time Off – <i>use to indicate time off not covered by benefited time</i>	No
ISV	In-service - <i>does not count towards hired FTE (hours worked)</i>	No
ISV-WK	In-service - <i>counts toward FTE (hours worked)</i>	No
SHG	Shared Governance – <i>does not count toward hired FTE (hours worked)</i>	No
SHG-WK	Shared Governance - <i>counts toward hired FTE (hours worked)</i>	No
MIL	Military Duty	No
FMLA-UP	FMLA Unpaid time - <i>This can be used with approved FMLA once all benefited time has been used</i>	

You can see the time code description from the leave requests form:

Hover mouse over box next to type to see description



SEE THE DOCUMENT, *Leave Requests Overview*, from the User Help site, if you have questions, for example: How do I know who my request went to? How do I add more rows?

How to request time off for part of the shift:

1. **Check the box next to Enter Partial Dates.** This will allow you to enter a start and end time
2. Select the date for the shift that you need time off
3. Enter the time that you expect to be away starting with the start time and then the end time. The times must be in military form, i.e., 1300 for 1pm. If you do not know military time you can type P after the time for any time after noon, example: You are leaving at 1pm so you type 1p as the start time
4. Select the Schd icon, to view how many employees are approved off during the week of your request
5. Select Choose to indicate how you plan on being paid for your time away
6. Enter the number of hours next to each pay type
7. The hours left must be zero. Select Save Choice, and then select OK to acknowledge
8. Comments are optional – Select Submit

REMEMBER: Saving your balance choices is **NOT** the last step. You must click **Submit Request** for the request to be routed to an approver!

View My Recent Request from the Quick Links

My Recent Requests:

1. Select Quick Links from the navigation links
2. Select View My Recent Request and the Forms page displays
3. Click the View button next to the request to see the form that was submitted - the most recent request will be displayed at the top
4. The employee can cancel their leave request if it has not been processed - they would select Cancel and then select OK to confirm

The Forms page also displays the status of the request, how many days since it was submitted, and the Approver(s) that it has routed to for processing

Verify Approved Days Off

- On their schedule calendar, the time code for the time approved off and the word 'Off' display on the approved day(s) off
- From a new leave request form in the Existing Approved Days Off section, located at the bottom of the page, approved time for the future displays
- On the team printed schedule shaded green with the *time code they plan to use
- On the assignment sheet for the date of their approved time off, their name and the planned *time code display at the bottom of the page in the section labeled, 'Employees On Non-Productive Time Codes'

*Confidential time codes do not display on any forms or reports viewable by other staff.

How to Cancel an Approved Day or Days Off:

1. Select **Leave Requests tab** from the navigation links
2. Scroll down to the 'Existing Approved Days Off' section and select the box next to the date(s) to be cancelled, and then select Submit Request
3. A message displays reminding them that they are about to cancel approved leave time then they select OK to acknowledge and process the requests

If they were previously scheduled to work on a date that they canceled approved leave, they will immediately be placed back on the schedule to work that date, for the time, job, and location previously scheduled. The approver will see this cancelation request in their messages, to be acknowledged.

STOP AND COMPLETE TRY-IT SCENARIO #1

1. You are going to request time off and want to check the employee's PTO & Sick balances for the fiscal year. Please run the report to see the balances (Page 3)
2. Enter a request for time off, for one week and a couple of days the following week (Page 3-4)
3. Enter a request for a few hours off for a day that you are working (Page 6)
4. Did both of your requests go to the approver, check to verify that the request was routed, to you as expected (Page 6)?

You will change the proxy back to you and then select Schedule Admin

1. Select Self Service Portal black navigation bar,
2. Select yourself
3. Select Schedule Admin from the black navigation bar

SCHEDULE ADMIN**To Dos:**

- If you have any interactions (leave requests, shift trades, etc.) that need action, you will see yellow shading with a message listing the number of these items in your WFM Inbox
- Select Messages from the blue menu bar to view your inbox

Messages > Inbox – Types of mail:

- Interactions – Requests from staff that need processing & Posted billboard shift claimed – if you posted shifts to the billboard and an employee claimed one of the posted shifts, you will receive a message displaying the employee that claimed the shift, the shift date & times
- Alerts – Notifications from Workbrain Support related to compliance expirations, new employees added to your team, self-scheduling window opening and closing alerts, schedule publish status and PTO balance issues
- Notifications are also sent to your Vanderbilt email

More Inbox information:

- The number next to the message tab indicates the number of unread messages in your box
- Unread requests from employees display with a full color tiny head icon next to the message - if the request has been opened the icon is gray
- Unread mail from the system displays with a red color closed envelope - if the mail has been opened the envelope will display as a blue color open envelope
- The inbox displays up to 50 messages per page - if more than 50 messages you will have a next button at the bottom of the page
- The messages display, with the most recent message entered at the top
- There is a header row with a Delete button, All button, and sort options of From, Subject, Date and Type
- To change the order messages display, select Date from the header to place mail in chronological order, oldest request at top

To review deleted mail, next to Browse Folder use the dropdown and select Deleted – the deleted items display

How to Process a Leave Request – go to Messages

1. To open the form, select the name of the employee – the leave form displays
2. Select the Choose to view how the employee plans on being paid for their time away
3. Select *Schd* to view how many employees already have approved time for the dates requested
4. Select the box in the Aprv column to approve a request
5. Select the box in the Reject column to reject a request
6. The comment section is at the top of the page above the Submit button - it is recommended that you type a comment to the employee whenever a request is rejected
7. Select Submit to process the request

You will see a message stating, 'Your form has been Submitted,' click OK to return to your messages

NOTE:

- Requests are approved/rejected per row within a form.
- If you want to reject all requests on the form, select Reject by each row and change the response to Reject All – No First Off before selecting Submit.
- When Schd is selected, the schedule displays all staff scheduled for the requestor's day part -if your team self-schedules you will only see employees on master rotations or approved time off.

Will the employee be notified when their request is processed? Yes, they will receive an email:

- If the form is processed as expected the employee will receive an email in their Vanderbilt Email from the approver *stating that: Your is processed. A checkmark in the Aprv box next to dates requested indicates approval. PTO approval is conditional based on employee's available hours.
- If there is an exception (the form could not be processed) because the employee no longer has the balance available for the time code chosen, they will receive a message from VandyWorks Support those subject states "The Leave Request submitted by HOXXG has been rejected due to balance. See an example of the message below:

DO NOT REPLY: System Generated Message The Leave Request submitted by H [redacted] G on 2/10/2021 for the dates of 06/16/2021 - 06/17/2021 was approved by N [redacted] K. Since the date the request was submitted, the balances have changed which have resulted in an insufficient number of hours to approve this request, therefore it has been rejected by the system and is not approved in VandyWorks. **The leave request form was not processed therefore all dates requested on this form have been rejected.**

- In the above scenario (Exception due to balance) the approver will immediately receive a message in WFM when submitted. The subject will state, "The Leave Request submitted by HOXXG has been rejected due to balance. See an example of the message of this email.

DO NOT REPLY: System Generated Message

The Leave Request submitted by HC [redacted] G on 2/10/2021 for the dates of 06/16/2021 - 06/17/2021 was approved by NU [redacted] K. Since the date the request was submitted, the balances have changed which have resulted in an insufficient number of hours to approve this request, therefore it has been rejected by the system and is not approved in VandyWorks.

The leave request form was not processed therefore all dates requested on this form have been rejected.

- Another possible Exception is due to an unpublished schedule, the employee will receive a message that states, "You are requesting leave on a date that you have either self-scheduled to work or has been assigned to you. Because the schedule is unpublished currently, your leave request is generating an error. Please check with your manager."

Differences with the Shift Trade, Post a Shift, & Bid on a Shift Requests and How to Process

Shift Trades are requests entered by employees requesting to trade their shift with a co-worker:

- You will see shift trades if it is a one-way shift trade, an employee is giving their working or on call shift, or part of the shift, to a co-worker.
- You will also see two-way shift trades, employees are swapping shifts or part of their shifts, if either employee is in overtime for the week, they are trading
- You will not see shift trades if employees are swapping shifts or part of their shifts and there is no compliance violation
- Employees can enter shift trades at any time, up to two hours before the start of the shift
- Both employees must agree to the trade before the shifts are changed on the schedule
- Shift Trades will **reroute** to Approver 2 **on day 7**

Post a Shifts are requests from employees to post their shift (working or on call) for the entire shift time only

- Postings, if approved, will display on the Take a Shift board
- Posting always route to Approver 1 for processing

Take a Shift – Extended Bid on a Shift are requests from employees that have 'taken' a posted shift

- The form will say Shift Trade at the top, but instead of a substitute the co-worker requesting to take the posted shift is listed as the Bidder
- All bid shifts route to Approver 1 for processing
- If approved, it then routes to the employee that originally posted the shift for Yes/No response
- If the employee confirms the request, then the shifts will be changed on the schedule
- The posted shift will remain on the 'take board' until the employee that posted the shift agrees to a take request or bid on the shift
- Bid on shift forms **reroute** to Approver 2 on **day 3**

On All of these forms:

- There will be three radio buttons: Yes, No, & Reroute
- The other buttons and comment field are the same as on the leave request form
- If the trade or bid on a shift will cause a schedule compliance violation or if one already exists for either employee, then the warning will be displayed at the top of the form
- Shift trades will display a substitute (the co-worker)
- Bid Shifts will display a bidder, the employee that submitted the requests
- If you agree with the request, you will leave it on Yes and select submit.
- If you do not agree with the request, you will select No, type a comment, and then select submit
- Routing
 - Shift trades, if approved, will route to the co-worker (substitute) for processing
 - Post shifts, if approved, will be added to the 'take board' where employees that are on your team, off on the date posted, and can work the job posted can view and take
 - Takes shifts, if approved, route to the employee that posted the shift for processing. There could be multiple employees requesting to take a posted shift (hence bidder)

TRY-IT SCENARIO #2

1. Go to messages and sort by Date and then change to by From
2. Process the two leave requests that you entered as the employee (Page 8):
 - a. Make sure you know how to view the schedule for the dates requested off
 - b. How to view the balance(s) the employee plans to use
 - c. Reject at least part of the request that you have two rows – do not forget to add a comment
 - d. Submit
3. Any questions about processing requests or about staff entering a request?

Reports

- **Security Groups and Team Roles:** Run this report to view WFM Schedule Admin Access for your team(s)
 - This report lists the employees who have access to the Schedule Admin side for your Team
 - The Security Group determines what menu options are available
 - The Team Role determines what alerts & emails are received, as well as the workflow routing for Leave Requests, Shift Trades, etc.
 - The role listed is not necessarily the employee's job, but related to their function in WFM
- **Workflow Routing Report:** Run this report to view the approvers for your team(s) & jobs and types of requests associated to each
 - This is the routing setup for requests submitted on the team(s) selected
 - Requests are routed based on the approver's assigned Role
 - In the Workflow Name column, you will find the Job associated with the routing
 - If only numbers and asterisks are in the field, then that is the Default Routing for any job without specific routing
 - To view the employees assigned to the roles in the workflow, go to the Security Groups and Team roles report (listed above)

Email sent from WFM on the first Wednesday of the month, with the subject: Team Security & Request Routing Report. Please review and email WFM@vumc.org with change requests.

Reports – Frequently Used Report links available from the Home page:

First Off Report – Run this report to view employees on the First Off list

- Leave requests have been processed with a row or rows rejected will automatically populate to the first off list - comments will display as Leave Request Denied
- Displays in chronologic order based on the requested date.
- Information displayed includes the start and end time of the shift, date created, employee, status of request, and comments if entered.

Requests Submitted – View employees' requests that have been submitted in VandyWorks.

- This report is used to research request that have been submitted by employees.
- Displayed will be the requests that were submitted by the employee selected in the initiator field.
- There are two buttons at the end of each row: Details and History.
 - Details display the form.
 - History lists the workflow of the form, including dates and employee IDs related to form.
- Other parameter fields that all default to ALL:
 - Request: Use to narrow to a specific type of request, i.e., Leave Request, Shift Trade, Post a Shift, Bid on a Shift.

- Initiator: The employee that submitted the request.
- User: The last person that acted on the request.
- Status: Use to narrow to a specific type of status: ALL, Accepted, Cancelled, Exception, Pending, Rejected (Resend Requested and Resent not used)
- Period: Narrow to a smaller period, requests submitted: All, Today, Last 3

Verify Employee Information Report – Run this report to ensure everyone has a default shift

- Select the team in the Team field and then, click the blue Go button
- All full-time employees must have a Default Shift
- For new employees, the Default Shift will list CHANGE ME, shaded pink

Updating the Employee's Default Shift

Go to Employees > Employee Basic Information - Override

1. Type the **last name** of the employee in the Employee ID box and click enter or tab then, click Go.
2. Add the ****Default Shift (Change Me)**.
3. Scroll to the bottom of the page and click on the Save and Continue or Submit Button to save *changes*.

****Default Shift:** *If the employee is new to Vanderbilt, the default shift will display "Change Me." If the shift time is not correct or says 'Change Me' click on spyglass next to Default Shift and select the employee's shift or type the time using the format in these examples (07:00-15:30, 08:00-16:30, 06:45-19:15).*

STOP AND COMPLETE TRY-IT SCENARIOS #3

1. Run the report to see employees with rejected leave requests (Page 10)?
2. Run the report to see the status and information about a request that was processed (Page 10-11)
3. Run the report and find an employee that needs a Default Shift added (Page 11)
4. Adding a Default Shift for an employee (Page 11)

HELP!

- Select the Help button from the blue menu bar & from the employee side within the quick links
- Email us at wfm@vumc.org for non-urgent issues
 - For urgent issues log a Help Desk Ticket by calling 343-6547 (3 HELP) - *We do our best to respond within 15 minutes of receiving the ticket*
- If WFM is down, you can go to our user Help site and access downtime documents without being logged into WFM - go to www.vumc.org/WFM

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) etc.

Ad Hoc shift – A manually created shift.

Advanced Schedule View (ASV) – The new, updated schedule view in VandyWorks.

Billboard Group Team field - A unit/team added to this section allows ALL employees on that team to view and select shifts posted to this group.

Billboard Shift Team field - Adding a team to this section allows management on that team to post shifts for this group to view and select

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

Float Code FLOAT – A code used when floating an employee to another 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.

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 common 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.

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, etc.) for each shift. These requirements can help you determine if you are overstaffed or understaffed when you view the schedules.