

WFM Schedule Admin Reports & Staffing Information Instructor-Led Training

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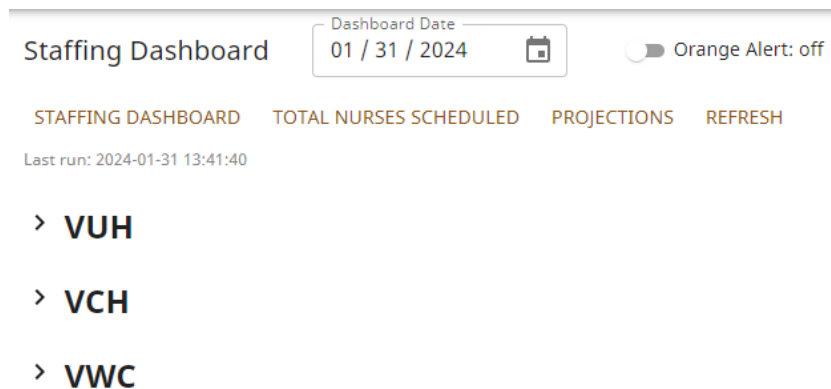
WFM SCHEDULE ADMIN REPORTS & STAFFING INFORMATION

What is the Nursing Scheduling Dashboard?

The 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.

Opens to the staffing dashboard, 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 below about the Orange Alert mode.

Dashboard Scheduling Data

- This dashboard is divided into two 12-hour shifts each day: Day Shift (0700-1900) & Night Shift (1900-0700)
- Displayed are Patient Care Centers with the respective units listed
- Each unit is listed on the left side of the page and unit and shift leader cell phone number are listed on the right side of the page

- There are typical two shifts for inpatient units, Day Shift (0700-1900) & Night Shift (1900-0700) and then Scheduled Jobs
- The Required number displays for each scheduled job
 - The Required number indicates how many employees are budgeted per job for the shift
 - Can modify the 'required' number to indicate that the staffing needs for the shift are above or below budgeted from the team's assignment sheet - a reason for this decision must be selected
 - When the 'Required' number is modified, the number displays shaded yellow, you can hover the mouse over the yellow number to see the original value, comments entered, and then the employee that entered the change with a date & time stamp
- Next is the number of staff Scheduled to WRK for each job
 - The number displays a count of employees scheduled to work during the timeframe of the shift i.e., a 12-hour shift=1.00, any hours <12 will be a ratio of that number, 8 hours=0.67
 - The number of staff scheduled, book offs, billboard shifts claimed, floats and any other adjustments to the schedule will be updated every five minutes
 - +OC indicates the on-call employee has been called into work and their hours have been added to the scheduled hours for that job
 - Pink shading indicates a staffing shortage per budget and blue shading indicates over staffing per budget
- FP Column indicates the number of Float Pool Staff floated & Trav indicates the number of External Agency staff scheduled to that unit - You can hover your mouse over the number of FP or Traveler and view the name of the employee
- On Call indicates the number of staff scheduled to the on-call timecode (activity)

ORANGE ALERT FEATURE AVAILABLE FROM THE STAFFING DASHBOARD

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 (to aid in decision making for releasing the previous shift).

Updating the Dashboard with Orange Alert information:

1. Remain on the current day's screen to update tonight's night shift or select tomorrow's date to update the next day shift
2. At the top of the page, select the toggle next to Orange Alert: off – displays shaded orange, wait for the data to refresh while the system is loading information
3. The dashboard now displays a column for 'Clocked In:' when employees clock into Kronos for their shift the number of staff for their hired job will increase by one. Until the quota that you enter is met the number will be shaded red, once met it will be shaded green, select 'Clocked In' and the adjustment page displays.

4. Enter the minimum number of staff needed to be clocked per job* in the column for Clocked In Quota for Release, and then select Save. You may wonder why the jobs are limited - only hired jobs for your team display because employees clock into Kronos, which only has their hired job, not scheduling jobs the clock-in column numbers will only be updated per the hired job.

*The jobs listed on the adjustment page do not include jobs referred to as scheduling jobs. We pull in Kronos clock 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 needed to release the current staff needs to include all jobs that require an RN license, except for any scheduled CSL. CSL's do not clock in and out in Kronos so you must not count them in the Clocked in Quota because they will not display in the number of staff clocked in.

Note: Shift leaders will follow their current process for modifying the required staffing from the team's assignment sheet.

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 –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!

Inpatient Projections – The Inpatient Projections is a tool in WFM that provides staffing needs for the 14-days. Select Star Dashboards from the blue menu bar, then log in with your VUNet ID & e-Password.

Select Projections on the row below the date – each Entity displays with choices of Critical Care or Acute Care

Select acute or critical care for your responsible unit(s):

- Data for day shift and night shift display separately.
- On the first row data displays projections based on scheduled versus budgeted nursing data.
- The second row displays the number of on call nurses available.
- Anything less than 12 hours will be a ratio of 12 • For example $0.33 = 4 \text{ hours } (.33 \times 12 = 4)$. In this case you have a nurse scheduled for 8 hours, when the budget indicates you need a nurse scheduled for 12 hours. Another example, if a nurse is scheduled to work 0645-1500 instead of 0645-1915, you have a staffing shortage of 0.33 or 4 hours of a 12 hour shift.
- A blank cell indicates that staffing meets the budget.
- Green shading indicates that at least one Float Pool nurse has been floated to your team and is included in the number.
- Variance without Float Pool staffing displays the total of staffing needs
- VUH HW Staffing displays the number of HW Staff currently scheduled and available to cover needs
- VUH Float Pool Staffing displays the number of FP Staff currently scheduled and available to cover needs
- Variance with Float Pool Staffing displays the number of needs left after adding HW & FP Staff (does not include on call for teams)

Outpatient Projections with Automated Predictive Model

Select Star Dashboards from the blue menu bar, then **log in to the Nursing Scheduling Dashboard** with your VUNet ID & e-Password. On the top row across from Vanderbilt University Medical Center, **select OUTPATIENT**

Staffing Dashboard

Dashboard Date
05 / 15 / 2024 Orange Alert: off

STAFFING DASHBOARD TOTAL NURSES SCHEDULED PROJECTIONS REFRESH

- 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 schedule data for clinics within the service line.
- The data displays for the current date plus an additional six days.
- You can select a date and the system displays data for the selected date plus an additional six days.
- You will see a list of the clinic names and a column that displays Epic information and then schedule information by job.
- This dashboard is divided into two shifts each day: AM Clinic (0530-1200) & PM Clinic (1200-1830).
- Scheduled & Predicted rows (based on Epic data):
 - These columns will be shaded green or red when the number of visits has exceeded the maximum (Red) or dropped below the minimum (green).
 - The Predicted numbers come from an algorithm. The algorithm is in place to calculate predicted volume by department.
 - Each Team defines their parameters for the red/green functionality and is entered by the WFM team.
- *The number displayed in the gray column, on the row for each job, is the 'Ideal' number of staff needed:
 - Modify the 'Ideal' number of staff by selecting AM for that day if there are reasons the number needs to change.
 - Changing the 'Ideal' number shows that the number of staff scheduled is too many/too little.
 - If the 'Ideal' number is changed the number will be shaded yellow and you can hover your mouse over the number to see the original value, employee that changed the number along with the date & time changed and comments entered.
 - For example, DOT 7 has five docs out at a conference – the EPIC visits, would of course, show that there are less patients scheduled – but there might be a few scheduled for nurse visits, etc. Therefore, you might adjust the ideal to show you still need 1 RN and 1 PCT.
 - Comments are added for the float pool to view, examples of comments: Critical Need 1 RN, Need 1 RN to backfill for transfer, Need 2 Lab RN, or LPN, 1 Need LPN or MA. Sometimes a name of an employee is requested in the comments.

***Clinic Float Pool reviews this information to fill openings!**

- The second number displayed for each job is the number of staff scheduled:
 - The number displays a count of employees scheduled during the timeframe of the shift.
 - The number of staff scheduled will change with book offs and floats, any adjusted schedule will display per timeframe noted below

- Pink shading indicates you have a staffing shortage and blue shading indicates that you are overstaffed – comparing your 'ideal' number to the number scheduled.

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

Timeline: VMG clinic leaders update their staffing adjustments on Assignment Sheet or OP Projections dashboard daily by 9:30am. At 10:00am, the staffing adjustments from the OP Projections dashboard update the Assignment Sheets. At 10:45am, the VMG Float Pool team huddles to review the needs on OP Projections and begin Float Pool allocation. By 2pm, Float Pool assignments are made and floated in WFM.

Running Reports in VandyWorks:

You will find that the parameter pages vary from one report to another. Always select parameters to narrow the scope to display what you want to view.

- The Output Format will also vary. For some reports there is a dropdown menu with the choice of PDF, Default (html) or Excel. If there is not a choice, then you still can choose an output format using the icons that will display (see below).
- Once you select go for a report to run you will have four icons that display in the upper, right corner of the page directly under the black menu bar. You can select one of the icons to change the output format.



- The above icons are a back button (we know it points forward), HTML, Adobe PDF, EXCEL.

What reports are in WFM that will help me reconcile Kronos for payroll?

Approved Leave – Available from your Home Page Reports

- Displays a list of employees, by date, with scheduled time off. Does not include WRK, OCN, ORI or ISV time codes.
- This report includes time off approved from a leave request form or from a book off.
- Will display the actual time code, for example: FML-PNS, FML-ABS, & PAL.

Draft Printed Home Team Schedule – Available from your Home Page Reports

- Displays schedules for **your team members only**, on one row regardless of scheduled team, job, or shift, working, on call, approved time off timecode and booked off time codes. *Will not display confidential timecodes such as FMLA or PAL.*
- Shifts for an employee scheduled to work something other than their default job, team, or shift will be shaded gray with the variance listed.
- Run for Time & Attendance is an option to view the schedule in alphabetic order by last name. *This will match the order of names displayed in Kronos.*

Kronos-WFM (VandyWorks) Reconciliation Report - Available from Tableau – in WFM select the Time Mgmt Reports link on the blue menu bar – log into Tableau with your VUNet UD & E-password

- Tableau requires VPN
- Permissions to view this report in Tableau are based on leadership job codes in Workday
 - AAs, CSLs, Assistant Nurse Managers, Managers, ANOs, CNOs
 - *If there are additional job codes who need access, please let us know*

Using dropdown per category

- Select Pay Period
- Select Home Department and then Apply
- Employee defaults to all – can deselect or select employees
- Team Variance defaults to all – can modify to Yes to see just those with a different scheduled team than clock punch team
- Timecode Variance defaults to All – can modify to Different Code to see entries where the scheduled time code differs from the Kronos time code (example: scheduled as ORI, forgot to enter ORI code at timeclock).

Daily Labor Management Report are now in Tableau!

The Daily Time Management Report from WFM is now available in Tableau, select **Daily Time Mgmt Report** from the blue menu bar – log into Tableau with your VUNet UD & E-password

This report will display the number of employees for each of the below categories and then detailed information for the employees that fall into one or more of the below categories:

- Scheduled but missing clock data
- Unscheduled with clock punches
- Call outs
- Clocked in earlier than scheduled start time
- Clocked in later than scheduled start time
- Leaving earlier than scheduled end time
- Clocked out later than scheduled end time

Non-Exempt Staff - What you need to do?

- Review daily reports and manage scheduling issues, Example: Staff member is scheduled to start at 6:45 and clocks in at 6:30 – need to understand why they are clocking in at the wrong time

Schedule Management:

1. Scheduling of Non-Exempt staff should be in VandyWorks
2. Scheduled Staff should have a start and end time in the system at least 24 hours before their scheduled start time
3. Staff should have a start and end time at one of the 4 quarters
 - a. On the hour, 15 minutes past the hour, 30 minutes past the hour or 45 minutes past the hour
 - b. Kronos Clocking System rounds staff to one of these 4 quarters depending on when they clock in – this is part of harmonizing the two systems so we can manage schedules more effectively
4. Staff should be getting their meal breaks
5. Managers should be monitoring daily reports and following up on non-conformance

Report data available:

- Call Outs Report*

- Clocked in Earlier Than Scheduled Start Time
- Clocked in Later Than Scheduled Start Time
- Clocked Out Later Than Scheduled End Time
- Leaving Earlier Than Scheduled End Time
- In Early/Out Very Late Rollup
- Scheduled Employees Missing Clock Data
- Unscheduled Employees With Clock Punches

*FMLA book offs on the Call Out Report are visible only by the employee's leaders as per the Workday hierarchy and hidden from all others to protect employee privacy

A document is available with the steps for how to Subscribe to a Tableau View, if you prefer to have it pushed to your Outlook inbox on a regular cadence.

The Time Management Reports - Do you need to look at one employee that has been having issues or want to see hours over budgeted or lost time per pay period, month, quarter, etc.?

These reports are now available in Tableau with more options for trending and analyzing this important data!

Select **Time Mgmt Reports** from the blue menu bar – log into Tableau with your VUNet UD & E-password

Tableau requires the VPN. Permissions to view these reports in Tableau are based on leadership job codes in Workday. If you have questions about access to the dashboard, please let us know.

What about lost time; time where employees did not work to their FTE:

- **Call Outs Report* (Absences)** – View absences for specific employee or employees.
- **Clocked In Late Report (Tardy)** – View tardiness for team for a pay period or for specific employee for a designated date range. See total lost time with totals per job & team.
- **Clocked Out Early Report** – View individual employees that have left early, total hours per job & total hours per team of employees clocking out early, indicating lost time.
- *FMLA book offs on the Call Out Report are visible only by the employee's leaders as per the Workday hierarchy and hidden from all others to protect employee privacy

Looking for Paid Time Over Budgeted Hours:

- **Clocked In Early Report** - View hours/minutes of paid time over budgeted hours.
- **Clocked Out Late Report** – View the number of minutes late based on rounded clock times to see the amount of time you are paying above budgeted hours.

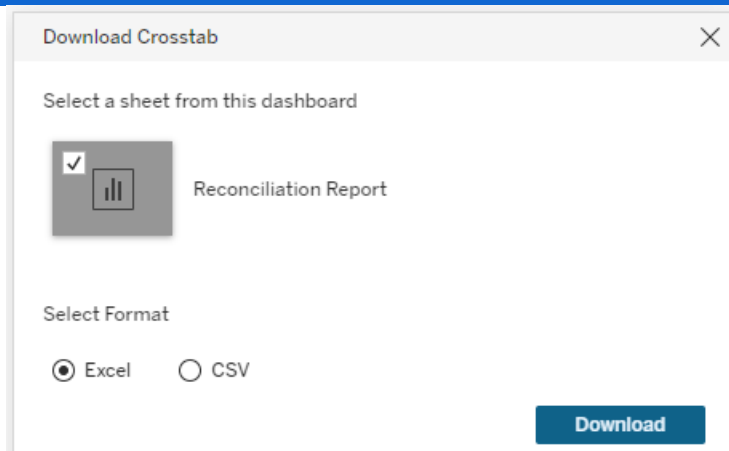
Other Reports:

- **In Early/Out Very Late Rollup**
- **Schedule Employees Missing Clock Data** – Run for a pay period for your team prior to payroll Monday to see any **messed clock punches**.
- **Employees No Scheduled with Clock Punches** – they have Kronos clock punch data but no corresponding scheduled start and end time in WFM. Watch out for called staff meetings, unscheduled in-service or shifts being changed to your cost center correctly.

If you want to export the data to Excel, you can select this button in the top right of the toolbar, then choose Crosstab and Select Format = Excel. Then Download.



Continued next page...



Staffing Reports:

Draft Printed Coverage Schedule - Available from your Home Page Reports

- Displays schedules for any employee scheduled to your team, including float staff, travelers, VTS and others.
- Displays alphabetically by last name within each job. After each employee's name is their FTE and if this is not their home team an (F) in parenthesis will display prior to the FTE.
- At the end of each shift is a listing of home team employees that have been scheduled to another team, listing the employee's name, job, sending team, receiving team, date, and start and end time floated.
- Parameter options for the coverage schedule
 - Show Totals – if TRUE is selected three green rows display below each job
 - The first row displays the number of employees scheduled per job within the day part (12 HR Day or 12 HR Ngt)
 - The second row displays the required number of staff, based on the fiscal year budget,
 - The third row the variance between rows 1& 2. This gives you a quick look at staffing for the date range selected.
 - The employee count is based on a 12-hour work shift counting as 1 and any employee scheduled less than 12 hours of work time will display in a ratio of the hours/12 hours, for example: an 8 hour shift will display as 0.67; $8/12=0.67$
 - Extra Rows to Print – a dropdown with number 0-5, zero is the default, selecting a number will display that number of blank rows below each job above the green rows. This allows you to write in a schedule or notes about your adjustments
 - Report Options of Schedule Only-the default, Schedule, and Coverage Grid, and Coverage Grid Only
 - What is the Coverage Grid? The grid will display the number of employees scheduled, per job, during the shift. It is a head count of employees scheduled, not by hours.

Budgeted vs. Adjusted Staffing Report – My Reports>Schedule and Staffing Reports

- Displays the midnight census, budgeted staffing number, and the number of staff scheduled per job, per day, per shift for the selected team and date range selected.
- Allows managers a quick way to see how often the budgeted staffing numbers are being adjusted and the reason for the adjustments.

- **To run this report:**

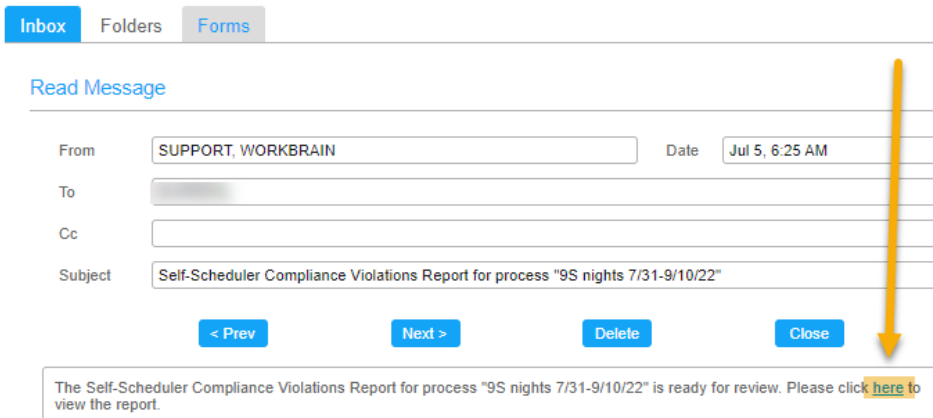
- Team – Select the team to view
- Job – Defaults to all, can narrow to a specific job(s)
- Only show adjustments checkbox – Check this box if you only want to see shifts with adjusted staffing.
- Start & End Date – Defaults to the current date, select the dates you want to view.
- Group By – Defaults to by Shift, can change report to group by Date.
- Click Go to run report.

Scheduled Time Code by Team Report – My Reports>Schedule and Staffing Reports

- The report displays scheduled time codes (excluding WRK and TRANS) for a specified date range.
- **To run this report:**
 - Employee - Defaults to ALL, you can select employee(s) to view using the looking glass.
 - Team – Select the Team to view.
 - Time Code - Type or select specific time code(s), such as, ABS, FMS, FML-PTO, FML-UP, UNEX, etc. You can also use time codes such as ONC (on call) and CBK (callback).
 - Job – Defaults to ALL, you can select job(s) to view.
 - Start & End Dates – Defaults to current date, select date range to view.
 - Click Go.

Self Scheduler Compliance Violations Report – You will receive an Outlook email and a message in WFM after a self-scheduling process has closed:

Select the message and you will see “Please click [here](#) to view the report.” The word ‘here’ is a link to run the report (see below screenshot):



- This report lists staff that submitted their final schedule through the Self-Scheduler with outstanding schedule compliance violations.
- Remember: Self Schedule Compliance Violations are your team rules! EX. You must select 2 On Call Shifts, and You must select 4 weekend shifts.

You can also manually run the report by going to My Reports>Schedule and Staffing Reports:

- Select Self Scheduler Compliance Violations Report
- Select the self-schedule process to review
- Click Go to run the report
- Report can only be viewed on processes that have closed!

Employee Skills Report – My Reports>Schedule and Staffing Reports

- Displays employee information including home team, default job and skill(s) selected with expiration date. Skills include float skills, license and competencies.
- To run this report:
 - Employee - Defaults to ALL, you can select employee(s) to view using the looking glass.
 - Team – Select the Team to view.
 - Include Sub Teams – Only teams that have child teams under the parent will check box.
 - Job – Defaults to ALL, you can select job(s) to view.
 - Skills – Defaults to ALL, you can select a specific skill(s).
 - Show Expired Only checkbox – Allows you to review only employees with and expired skill(s).
 - Output Format – Defaults to HTML, can choose PDF or EXCEL from the dropdown menu.
 - Click Go to run the report.

BENEFITED TIME – PAID TIME OFF AND GRANDFATHER SICK BALANCES – How can I view these for my employees?

Balance Report – select My Reports from the blue menu bar, select Time and Attendance, and then select Balance Report

1. The parameter display, defaults to your employee ID, All Teams, All Balance Types, Start & End Date of the current date. Select ALL or select the lookup, find, and select employee or employees
2. Select the team and then select the Balance Type of PTO-BAL and SICK-BAL
3. You can change the start date if you need to see past dates, always change the end date to June 30 (end of fiscal year) or later in the year, and then select Go

The screenshot below is an example of the report. You will only need to change the start date if you are looking for past updates. The start date was changed to 09/17/2023 so you could see an update. Notice the manual adjustment on 09/26/23 by HR, where 24 hours was added back to the employee’s PTO balance. Mary Sue did not need to use the approved 24 hours for 9/18 & 9/19, so she cancelled it in Kronos. If she had cancelled the approved dates in WFM the hours would have immediately been added back to her PTO balance. Since it was cancelled in Kronos, the adjustment was sent to WFM on the following Tuesday night, 9/26/2023.

NOTE: Employees who work in areas that are marked as closed on VUMC recognized holidays will see their scheduled hours, up to one year in advance, subtracted from their PTO balance.

Test, Mary Sue	PTO-BAL	09/17/2023	INITIAL BALANCE	171.98 HOURS	
		09/18/2023	-12.00 HOURS	159.98 HOURS	
		09/19/2023	-12.00 HOURS	147.98 HOURS	
		Manual Adjustment (SET)	09/26/2023	24.00 HOURS	171.98 HOURS Created by HR refresh
		11/17/2023	-12.00 HOURS	159.98 HOURS	
		01/08/2024	-12.00 HOURS	147.98 HOURS	
		01/09/2024	-12.00 HOURS	135.98 HOURS	
		01/10/2024	-12.00 HOURS	123.98 HOURS	
		01/15/2024	-12.00 HOURS	111.98 HOURS	
		01/16/2024	-12.00 HOURS	99.98 HOURS	
		06/30/2024	FINAL BALANCE	99.98 HOURS	
Test, Mary Sue	SICK-BAL	09/17/2023	INITIAL BALANCE	60.36 HOURS	
		06/30/2024	FINAL BALANCE	60.36 HOURS	

Balance and Accrual Report available from My Reports>Time and Attendance

This report displays employee balances, any adjustments applied during the date range selected, and time code used. To run the report:

1. Select employees or All
2. Select the Team
3. Dates default to today –select a start date (if needed) and then select the end date of June 30th for the fiscal end-date for the balances – may extend past June 30 if needed
4. Output format defaults to PDF, can use dropdown to select HTML or EXCEL and then select Go

Team	Job	Employee	Type	Initial Balance	Adjustment Date	Comment	ADJUSTMENT	Balance	
VUH	RN	Gl	B	PTO	116.75	05/02/2022	Balance Deduction Timecode: PNS	-12.00	92.75
						05/03/2022	Balance Deduction Timecode: PNS	-12.00	80.75
						05/11/2022	PeopleSoft Adjustment	-36.00	44.75
						05/19/2022	Balance Deduction Timecode: FML-ABS	-12.00	32.75
						05/25/2022	PeopleSoft Adjustment	2.25	35.00
						07/01/2022	Projected Accrual	272.00	272.00
						07/01/2022	PeopleSoft Adjustment	237.00	272.00
						07/01/2022		-272.00	272.00
						09/12/2022	Balance Deduction Timecode: PNS	-12.00	260.00
						09/16/2022	Balance Deduction Timecode: PNS	-12.00	248.00

Cancelation Report available from My Reports>Schedule and Staffing Reports

This report was intended to view employee shifts that were cancelled or placed on call, which is still good for that information, however we discovered that it is a quick and clean way to see staffs’ remaining PTO Balances – to run this report:

1. Select ALL for employees and then select your Team
2. Change the end-date to the end of the Fiscal Year -June 30
3. Output format defaults to PDF, can use dropdown to select HTML or EXCEL and then select Go

Employee Related Reports

Team Contact List – Available from your Home Page Reports

View employees’ personal information, i.e., phone numbers, address, emergency contact – all from Workday.

- This report displays employee information imported from the Personal Information in Workday. *If an employee updates their information in Workday, it will be displayed on this report the next day.*
- Information from Workday includes (if not listed in Workday the field will be blank):
 - Employee name
 - Default job
 - Home address
 - Home phone number
 - Mobile phone number
 - Other phone number
 - Emergency contact’s name & primary number

Verify Employee Information – Available from your Home Page Reports

View VandyWorks Employee Information

- Report displays employee information including default hours, default daily minutes, shift time, licensure and competencies for the team selected

- Also displays WFV access level. Any access above employee is entered upon email request to us at wfm@vumc.org
- 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 display
- Mismatched data will be shaded pink
- New employees will have a default shift of change me, shaded pink

New Employee Checklist

You may have received an alert "Employee has been added to your team" because a new hire for your department has been added WFM. Below are items that must be reviewed and updated for every new employee and transfer to your team.

From Employees > Employee Basic Information – Override

- Add employee's default shift (will say 'Change Me' for new employees)
- Verify default daily minutes, update if needed
- Verify auto break minutes, update if needed

From Employees > Employee

- Add Employee Default Shift if your team self-schedules
- Confirm default hours, update if needed
- Add any additional jobs and skills for the employee, if applicable*
- Add any additional teams, if applicable**

***Scheduling jobs and skills** – jobs that require a specific license, RN, LPN, RT, etc., must have a corresponding skill listed in the Employee Skills section on the employee page. After adding the additional job, be sure to also add a corresponding skill, for example: SL, CN, RN-SD, RN-CC

- If a scheduling **job is used by employees with varying licenses**, example RN & LPN, RN & Paramedic, LPN & Med Asst, then a corresponding **skill is NOT needed**, i.e., Nurse MedSurg, Clinic Nurse, Clinic Assist, EMER Nurse
- If your team is what we call a Child of a Parent team. This is for teams that have one cost center and multiple home departments where employees are hired to the same Home Department but work various teams – you will have a separate document for your team with specific steps for your team.

Employees on Set Schedules

- If an employee will be on a set, repeating schedule (Master Rotation) – enter data into the Master Rotation Template for Set Schedules, available from the WFM Help site landing page. Send the document to our email at wfm@vumc.org and in the Subject type 'Master Rotation.' Include the following information on the template: Employee's name, employee ID, enter their schedule with the shift time (start/end times), job to be scheduled, location, on the dates to work, entering the schedule until it repeats, *must be any multiple of a 7-day repeating schedule.*

If your area self-schedules – this step is also required:

From Scheduling > Self Scheduling > Group

- Add employee Self-Scheduling group

Besides WFM, information needs to be entered in Workday:

- Add **license and certification** information is entered in **Workday!** The information will be sent to WFM overnight, which will update the skill, certification, and job end dates.

The document, **Employee – ‘Updating Employee Information’** has the steps for updating the above information.

STEPS FOR UPDATING EMPLOYEE INFORMATION

Select **Employees** from the blue menu bar, and then select **Employee Basic Information – Override - Setting the employee’s Default Shift and confirming the Default Daily Minutes & Auto Break Minutes from the Employee Basic Information - Override**

1. Enter the employee’s last name, and then press tab. When the name is displayed in the employee field, select Go
2. The employee’s record displays, verify the Default Daily Minutes, update if needed. *The minutes should be the employee’s work hours x 60 minutes, ex: 8x60=480, 10x6=600, & 12x60=720*
3. Verify the Auto Break, update if needed. *The auto break minutes should be set based on the employee’s meal break (i.e., 30-minute break, 60-minute break).*
4. Verify the Default Shift field, update as needed. Enter the start-time and end-time using 4 digits with a colon between the hours and minutes followed by a single dash (no spaces) then the end-time, (ex: 07:00-17:30, 08:00-16:30, 06:45-19:15) and then press tab to lock it in. You can use the lookup to find & select the shift time, if preferred.
5. At the bottom of the page select Save and Continue or Submit to save changes – Save and Continue takes you to the top of the current page & submit takes you back to the employee selection page.

Confirming Default Hours, add Scheduling Jobs, Skills/Competencies for the employee, and Employee Default Shift for Self-Scheduling Quick Select functionality: From the blue menu bar, select Employees, and then Employee (the second employee option)

1. Enter the last name of the employee in the Employee field and select Find or enter.
2. Select Edit on the row with their name
3. When the employee record displays, use your mouse to hover over three dots (ellipsis), at the top of the page, *next to Employee – View*, and click on Employee Data, to jump to that section.
4. Verify the data in the *Default Hours field is correct, update as needed. *The value should be set to the number of hours the employee works in a day, excluding the meal break. Typical hours 6, 8, 9, 10, 11, 12. The hours must be a whole number. If an employee works 11.5 hours, then round up to 12. If an employee works different shift times, enter the hours for the longest shift.*
5. Scroll down to select Save.

Adding scheduling job(s):

1. Scroll down until you see the section labeled, Employee Job
2. Below the list of jobs, select the plus sign (+) to add a new row
3. Type the *job name in the new row or select the lookup icon to find & select the job add – *the system will add the default start and end date of 01/01/1900 to 01/01/3000 once saved*
4. Select Save

Scheduling jobs and skills – jobs that require one specific license: RN, LPN, RT, etc., must have a corresponding skill listed in the Employee Skills section. After adding the additional job, be sure to also add a corresponding skill. Example: SL, CN, RN-SD, RN-CC (see next section for steps)

If a scheduling **job is used by employees with varying licenses**, example RN & LPN, RN & Paramedic, LPN & Med Asst, then a corresponding **skill is NOT needed**, i.e., Nurse MedSurg, Clinic Nurse, Clinic Asst, Nurse Emer

To add a compliance/skill/job:

Note: the end date for the job will be updated in WFM with the actual license expiration with a daily import from Workday. The Point of Care (POC) team may enter competencies for your employees.

The skills that must be added are for scheduling jobs that require one license, as noted above, and any unit specific competency:

1. Scroll down to the Employee Skills section, and then select the plus sign (+) to add a new row
2. Type the name of the Compliance/Skill (job) in the Skill box or select the lookup to find & select the competency/skill (job) to add – **add only skill and license information that is not in Workday**
3. If you are entering a unit-based compliance that requires renewal, enter the Expiration Date in the End Date field. If you are entering a skill (additional job), do not enter a start or end date – the system will populate the start and end date as 01/01/1900 and 01/01/3000, respectively, and then select Save

Note: all licenses and certifications should be entered into Workday as the source of truth. The information will come to WFM daily from Workday

Adding Employee Default Shift for Self-Scheduling

1. Scroll down to the Employee Default Shift section, and then select the plus sign (+) to add a new row
2. In the Team field, enter the employee’s Home Team. In the Job field, enter the job the employee will schedule to. In the Shift field, enter the shift label for the employee’s shift. *For example, Team VUH 11S, Job RN, Shift D12 0645*
3. Add new rows for any jobs and/or shifts the employee may self-schedule, example:
Team VUH 9N, Job RN, Shift D12 0645 - Team VUH 9N, Job RN, Shift DayOCN - Team VUH 9N Job SL, Shift D12 0645
4. Click on the Save button to save your changes.

These Employee Default Shift settings will allow the employee to utilize one-click Quick Select during self-scheduling for each of the team/job/shifts listed. When a default fault shift is selected, the self-scheduling calendar displays a flag on the dates where the shift is available for scheduling.

Adding an employee to a Self-Scheduling Group

If your staff self-schedules, they must be added to a Self-Scheduling Group. Select Scheduling from the blue menu bar select, Self-Scheduling, and then Group.

1. Find the group and select Edit
2. Select the plus sign (+) at the bottom of the list of employees to add a new row
3. Type the employee’s last name in the box and press tab key; the employee’s full name will be displayed
4. Select Save

Assigning an employee a Set Schedule (Master Rotation)

1. There is an Excel template for master rotations available from HELP within WFM. Using this template ensures that we receive the information needed to create the employee’s schedule – from the blue menu bar, select HELP
2. Select Schedule Admin Toolbox, and then select Master Rotations. Select the Master Rotation Request Template. When the spreadsheet opens, select Enable Editing at the top of the spreadsheet and enter the required information, including the schedule for the employee until it repeats. Save the document.
3. Email the saved spreadsheet to WFM@vumc.org with Master Rotation in the subject line

4. Master Rotation schedules are manually managed by the WFM team. Please notify us if an employee transfers to another team, leaves VUMC, or their schedule changes.

The template can be used for new employee schedules and to request modifications.

HELP!

- Select the Help button located on the blue menu bar & from the employee side in the quick links.
 - 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)
 - We do our best to respond within 15 minutes of receiving the ticket
- If WFM is down, you can go to our user guide 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.