

INFOR WFM SHIFT BILLBOARD Instructor-Led Class

Table of Contents

Page 3 Shift Billboard Getting Started

- What is a shift billboard?
- What are Billboard Groups?
- How to View & Create Billboard Groups

Page 4 Schedule Coverage

- Viewing and Understanding Coverage

Page 5 What are unassigned Shifts & Steps for Generating a Template

Page 6 How to Publish a Schedule

Page 7 Publishing Facts & Sending Shifts to the Billboard using Mass Edit

Page 8 Book Off – Three Options

Page 9 Book Off Codes with Descriptions

Page 10 How to Create Unassigned Shifts

Page 11 How to Edit Billboard Shifts

Page 12 Where to get HELP

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 terrific way to fill your needs or 'open' shifts.

You will post "unassigned" shifts to the billboard for staff to select. You can also post shifts to different teams or individuals from other teams to pick up shifts in your department. For employees, the billboard will display shifts that do not conflict with other scheduled shifts and for which the employee is competent to work - matches jobs and skills in their WFM employee profile

From the team schedule within the Advanced Schedule View (ASV) published, unassigned shifts are selected and sent to a selected billboard.

What are Billboard Groups?

The billboard group is a group of employees that can see and select shifts sent to the billboard.

Our team creates a billboard group for each team that includes all the team's employees. Employees hired to your team(s) will automatically be added to the billboard group for their home team.

Viewing and Creating Billboard Groups:

View your billboard group or groups:

1. Select Scheduling from the blue menu bar
2. Select Shift Billboard and then Billboard Group
3. Select Edit next to the billboard group to view

There are four sections in the billboard group:

1. **Billboard group** - name of the group and description, description is not mandatory
2. **Billboard Group Employee** – list individual employees that can view and select shifts posted to this group – employees are only added if they are not in a billboard group team associated
3. **Billboard Group Team** – all employees in the team or teams listed will be able to view and select shifts posted to this Shift Billboard
4. **Billboard Shift Team** – Team or teams listed will be able to post shifts for employees to claim in this Shift Billboard

Creating a Billboard Group:

1. Select Scheduling, from the blue menu bar, then select Shift Billboard, and then select Billboard Group
2. Select the Create New Entry button (shaded blue)
3. In the top section, name the group, be sure to include the team's name, copy & paste the name in the description field and select Save
4. Next, it is easiest to start at the bottom and work your way up: Add team or teams to the **Billboard Shift Team** section that can post shifts to this billboard group, enter today's date as the start date and 01/01/3000 for the end date, and then select Save
5. From the **Billboard Group Team*** section add team or teams that can posted shifts to this billboard group, and the select Save
6. From the **Billboard Group Employee*** section select the plus sign next to Save to add a row
7. In the new row add employees, excluding employees in teams listed in the Billboard Group Teams section, which can access this billboard's posted shifts and enter the dates as you did above. Continue with step 6 & until all additional employees have been added and then click the blue Save button

*You must have security access to add the team or employee-if not listed in search, email wfm@vumc.org and indicated the team or employee to be added and to which section(s)

NOTE - Creating a PRN Group – If creating a PRN group or a group of staff withing a team you will leave the Billboard Group Team section blank and add the individual employees to the Billboard Group Employee section

Schedule Coverage

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

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

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

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

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

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

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

▼ VUH OR	56	248	269	271	263	246	54
▶ Total							
▼ SURGTECH	9	21	29	27	17	26	11

▶ Total							
▼ SURGTECH	9	21	29	27	17	26	11
D10 0645	3	10	13	13	11	18	6
D12 0645	4	2	4	2	-	4	4
D12 0845	-	3	4	2	2	1	-
D12 1045	-	2	2	3	1	1	-
D5 1600	-	-	1	1	1	-	-

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

What are unassigned shifts? Gold shaded shifts

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

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

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

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

How to Generate a Requirement and Shift Template

From the schedule admin toolbar select **Scheduling > Schedule Template > Generate Schedule** -The parameter screen displays:

1. Select your team
2. Select the schedule period using the dropdown and then select Next - if you want to post shifts for two weeks instead of 6-weeks, select the radio button next to Start & End Dates and enter the dates of your choice - Start Date must be Sunday and End Date must be Saturday
3. Select the checkbox next to the Staffing Requirement Template if one is available
4. Select checkbox next to the Shift Template to be copied, then select Next
5. Under Generate Options
 - Select the checkbox next to Generate Workload based Staffing Requirements, *if a Staffing Requirement Template was selected on the previous page*
 - Select the checkbox next to Generate unassigned shifts – this will generate the shifts based on the Shift Template selected on the previous page
6. You MUST select the radio button next to Create as unpublished shifts – *you will NOT have any unassigned shifts if you do not check this area*, then click Generate

You will see a message: Schedule Template Gen... Workload Generated, Unpublished shifts created
 Next, you will load the schedule in the ASV for the team, for dates that include the unassigned shifts. You can load a week at a time, two weeks, or an entire 6-week schedule period, your choice.

As mentioned earlier, the unassigned shifts will be unpublished. What does this mean, *Publishing is the term used to make the shifts available for sending to the billboard. Published is needed one time, per schedule period.

*Self-scheduling teams publish once staff have self-scheduled and they are ready to finalize the schedule – publish for staff to see.

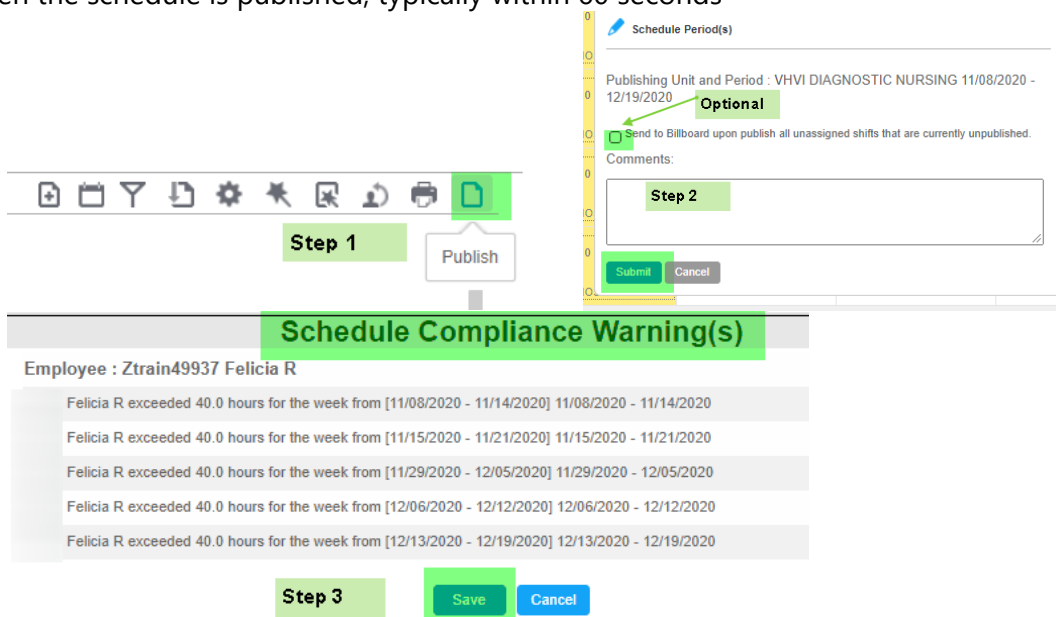
Published shifts are outlined with a solid line and Unpublished shifts are outlined with dotted lines around the shift - see screenshots below

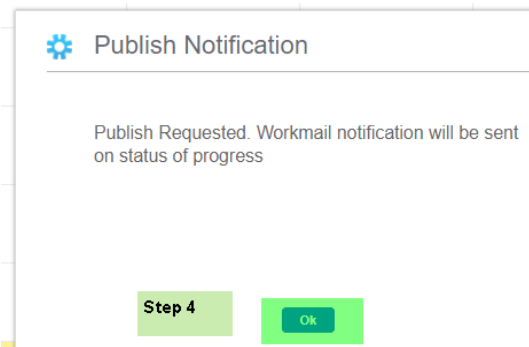


How do I publish the schedule?

From the ASV:

1. Go to the function tools on the far-right side of the page and at the end of the row select the 'paper' icon, (publish button)
2. A window displays:
 - a. Stating the Unit and Schedule Period that will be published
 - b. Next is a checkbox with an option to send ALL unassigned shifts that are currently unpublished, to your team's billboard group – **typically this is not checked -only check this box if you want to send ALL the unassigned, unpublished shifts to the billboard for your team**
 - c. Select Submit
3. You will see a warning if there is anyone in overtime on the schedule, review and then select Save
4. A publish notification displays, select Ok - you will receive an email in Outlook and a message in WFM when the schedule is published, typically within 60 seconds





PUBLISH FACTS:

- Reload the schedule – if the publish icon (paper) is no longer display in the row of function tools, then the schedule is published & the shifts will no longer be outlined with a dotted line
- The schedule only needs to be published once per schedule period– if you only have one day loaded on the ASV and publish the schedule, it will publish the schedule for the entire schedule period
- Publishing process can last up to one minute
- You will receive an email in Outlook & a message in your WFM inbox that the schedule has been published
- If the message states there were exceptions or shifts that did not publish, please forward that message to WFM@vumc.org, so that we can research why and resolve any outstanding unpublished shifts
- If you send shifts to the billboard from publishing, then the shifts will only be posted for your team's billboard group – if you have multiple billboards, you want to send them to the billboard using the mass edit feature
- Shifts sent to the billboard will display with a clipboard icon

Send Select Shifts to the Shift Billboard using Mass Edit

1. Go to the function tools in the top-right corner of the page and click on the wand icon, then select Mass Edit
2. Select the Unassigned shifts for dates you want to post to the billboard – selected shifts will be shaded green
3. Select the pencil icon and then Send to Billboard
4. Select the Billboard Group or Groups that you want to have access to sign up – to select more than one group hold the control key down on the computer key and select the groups, then click Submit
5. You will receive a message that they have been posted

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

BOOK OFF OPTIONS

Book Off from the Edit Panel - two scenarios

Booking-off a whole shift:

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

Booking-off a partial shift:

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

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

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

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

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

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

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

The assignment sheet parameter page displays:

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

Select 'BOTTOM OF PAGE' link located on the right side to book off an employee:

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

How do I send booked off shifts to the billboard?

If you booked off several shifts using Mass Edit, stay in the Mass Edit mode, select the unassigned shifts created through the book-off, they will be shaded green as selected, select the pencil, and then Send to Billboard (at the bottom of the lists, select the billboard or billboards where you want to make shifts available to staff

Detail Edit (one shift), select the book-off created unassigned shift and then select Send To Billboard, you will then select the billboards you want to make the shift available *Note- you can only send future shifts to a billboard.*

BOOK OFF TIMECODES WITH DESCRIPTIONS

*Time code is masked on printed schedules and assignment sheets

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

How to Create Unassigned Shifts to be Sent to the Billboard

You are having a surge in patient volume and need to send additional shifts to the billboard, how to add unassigned shifts:

Copy an unassigned shift using Detail Edit Mode

1. Select an unassigned shift to be copied, and the details edit panel displays
2. Select Copy, and the shift is now shaded green
3. Select a blank cell for the date you want to add the shift - *the shift is added*
4. Select the newly created unassigned shift and then select Send to Billboard
5. Choose the billboard(s) and then select Submit

Copying multiple unassigned shifts using Mass Edit Mode

1. Change the edit mode to Mass Edit
2. Select the unassigned shift for the job(s) & dates(s) to be added
3. Select the pencil and then select Copy
4. Leave the employee field blank
5. Edit any dates or jobs, if needed and then select Save
6. Select all the newly created unassigned shifts
7. Select the pencil, and then Send to Billboard
8. Select the billboard or billboards and select Submit

Creating an unassigned shift using the Ad-Hoc function –



1. Select the New Ad hoc function icon, above schedule on the right-hand side
2. The parameters display, select the Date for the unassigned shift
3. Select the Unit
4. Pre-defined Shift is the default, select the shift label from the lookup – or, if the shift label is not available select the Simple Shift radio button and a new set of parameters display
5. Simple Shift –parameter options:
 - a. Shift Times – enter start and end time for shift
 - b. Activity – select activity from the list or type activity, ex: WRK, ONCALL, LATE STAY
 - c. +Break Activity – if shift is >6 hours, add a 30-minute meal break place holder (remember employee will clock in and out for meal when time allows)
6. Skip to Job, select or type job for this shift
7. Select Add Shift button
8. Select the newly created unassigned shift, and then select Send to Billboard
9. Choose the billboard(s) and then select Submit

Editing Billboard Shifts

How to remove several shifts from the billboard

If a billboard shift is changed in any way it is removed from the billboard - from the team schedule in the ASV

1. Change the Edit Mode to Mass Edit and select the unassigned billboard shifts that need to come off the billboard
2. Select the pencil icon and then select Shorten
3. Enter 1 in the minutes box (min) & leave the Apply to button selected to End & Save - a message will display. "Attention Required –shift label on date is currently posted to billboard. Proceeding with the transaction will also cancel the billboard posting," select Ok to acknowledge the message- you have just shortened all the end time of all shifts by one minute and removed them from the billboard

How to Update Job to DIP or other position i.e., Clinic Nurse, Clinic Asst

From the team schedule in the ASV

1. Change the Edit Mode to Mass Edit and select the unassigned shifts that need to be offered as DIP
2. Select the pencil icon and then select Change Position
3. Enter the position needed i.e., RN-DIP, CP-DIP & select Save

Sending updated shifts back to the billboard

If a billboard shift is changed in any way it is removed from the billboard - to send the changed shifts to the billboard you will resend them

1. Select the unassigned shifts that have been changed (still in Mass Edit mode) **Note shifts already on the billboard will have the clipboard icon; the shifts you changed will not have the icon until you send them back to the billboard*
2. Select the pencil and then select Send to Billboard
3. Select the billboards to display the shifts and select Submit

Sending posted billboard shifts to another billboard group

1. Select shift or shifts
2. Select send to billboard
3. Available billboard groups will be displayed – choose the groups to see shift postings and select Save

Messages about Billboard Shifts

- If the shift is manually assigned to an employee from the ASV a message will display:

 **Attention Required**

N12 1845 on 02/15/2024 is currently posted to billboard. Proceeding with the transaction will also cancel the billboard posting.
Tan, France S exceeded 40.0 hours for the week from [02/11/2024 - 02/17/2024].



- When a shift is selected by an employee the person that posted the shift will receive a message in their Outlook email and in WFM:

Del	All	From	Subject	Date	Type
<input type="checkbox"/>	<input checked="" type="checkbox"/>	SUPPORT, WORKBRAIN	Posted billboard shift claimed	Feb 8, 3:40 PM	Interaction Reply
<input type="checkbox"/>	<input checked="" type="checkbox"/>	SUPPORT, WORKBRAIN	Posted billboard shift claimed	Feb 8, 3:39 PM	Interaction Reply
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Support, VandyWorks	IMMEDIATE ACTION IS REQUIRED: Expired Employee compliance Item	Feb 8, 2:15 AM	Alert

[Return](#)[Show History](#)[Print](#)[See History for any comments on the above form](#)

✔ Posted billboard shift claimed

Your posted billboard shift in VUH 9S has been claimed by Sumner, Mary Claire (0175164).

Post Shift to Billboard Request

Employee: Unassigned

Date: 02/12/2024

From: 6:45p

To: 7:15a

Comments:

HELP!

- Select the Help button from the blue menu bar & from the employee side in the quick links.
 - You must sign in with your VUNet ID & E-password
 - Select Schedule Admin Toolbox link, at the top of the page
- Email us at wfm@vumc.org for non-urgent issues
- For urgent issues log a VUMC 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

If the system is down, you can go to our user guide and access downtime documents without being logged into the system - go to www.vumc.org/wfm