Schedule360® Nursing Supervisor Guide - Closing The Schedule

Administrator's Reference Guide
Closing the Schedule

Administrator's Guide - Overview and Purpose

This document provides administrators or super-users on Schedule360 advanced training and scheduling procedures not found in the companion guide; Supervisor Reference Guide. Administrators need to master the staffing and scheduling concepts found in the companion Supervisor's guide prior to using this reference guide.

Administrators or super users on Schedule360 are defined as those individuals who are accountable for producing a schedule, e.g. Unit Manager, and support individuals to the person accountable, e.g. unit scheduling coordinator(s).

This Administrative guide will assist super-users in their utilization of reports, creating strategic staffing patterns, and administrating adjunct scheduling tools for optimizing and measuring staffing resources quantitatively and with economic consideration. Moreover, the Administrative guide covers approval of Pending time off requests, Credentialing/licensure tracking, class scheduling, enhanced messaging and dispatching functions.

Closing the Schedule – Overview

As you are aware, Schedule360's web-based real-time environment provides staff members' continual 24 x7 access to qualified shifts remaining in the current and future released schedules. Therefore, the **scheduling never closes** if open shifts remain in the schedule.

With that stated, a unit's ability to effectively manage the continual staffing process is determined by two factors:

1. <u>Schedule Release Dates</u> set up as it relates to Staff Types – Unit Based, PRN, and Unassigned Staff. The release dates set forth in the scheduling period provides the basis for determining a Unit's cut-off dates for Staff members to complete their schedule and achieve their scheduling targets for a future period.

   For example, if unit based employees begin self scheduling 6-weeks prior and PRN 4-weeks prior, an administrator may require Unit Based Staff and PRN staff to achieve their targets 3–weeks before the schedule commences. Staff members failing to achieve their staffing targets at 3 weeks prior should anticipate the administrator will 'schedule" them into open shifts without regard to their preferences for target compliance.

2. <u>Staffing Policies and Guidelines</u> defined outside of Schedule360. As it relates to number one; a unit, department, and facility's Policy and Procedures are critical to the success of Schedule360. These should be written in accordance with Schedule360 set-ups and communicated to all staff members. The release dates and staff Profiles creates the compliance to written Policies and Procedures set forth.

These two factors coupled together provide staff with clear direction and accountability for self scheduling, cutoff dates, and ramifications for failed target compliance. Most facilities can easily adapt existing staffing policies and guidelines to the Schedule360 vernacular. Your Schedule360 account representative is available to assist you in developing these written guidelines if they do not currently exist.

Closing the Schedule – Steps

<u>STEP ONE</u> – Schedule Balance

At the "cut-off" date established above, administrators will utilize the schedule balance feature to lock the self scheduling process. This will allow them to begin balancing the schedule without staff making changes.

What is it?

The Schedule Balance link under the Unit level Daily Schedule provides schedulers the ability to lock self scheduling, messaging, and trades for a specific 4 week period.

Schedule Balance Navigation

From the Unit Daily Scheduling Tab click on the Schedule Balance link. The current and future 4 – week schedule periods will display with options to lock self scheduling, messaging, and trades.

Using the Schedule Balance link

Click on the checkboxes to Lock and Unlock the features for each scheduling period. Then click submit to confirm your selections. Note, these selections can be changed at any time.

Once a schedule is locked a note will appear on the daily schedule in red showing that self scheduling is currently locked for the date. When staff attempt to self schedule a shift the shift will display as locked in red.

<u>STEP TWO</u> - Gaps Grid

At the "cut-off" date established above, administrators require effective procedures for proficiently determining openings or gaps in the schedule. To that end, the gaps grid offers the most comprehensive and summarized view of a 4-week scheduling period.

What is it?

The Gaps Grid found under the Unit level Daily Schedule is a highly useful report for seeing a snapshot view of all filled and remaining opening in a 4 week period. The Gaps Grid allows the Scheduler to see where problems or gaps exist far into the future.

Gaps Grid Navigation

From the Unit Daily Schedule Tab click on the sub tab GAPS GRID. The current 4 – week schedule will display with a green ban on today's date with the A-P schedule listed first and the P-A schedule directly

below. Click on the toggle buttons to the right or left of the dates to advance to the next 4-week Gaps Grid. Note, the calendar dates and day of the week are listed across the top of the gaps grid. Click on any date to pop-up the Unit Daily Calendar for the date you wish to view in detail.

Using the Gaps Grid
The Totals listed at the bottom of the A-P and P-A tables are the key to reading and using the Gaps Grid. The number Totals in Red are Openings and the Black are filled shifts. The largest Red number found in the Totals row depicts the greatest shortage of staff in the 4-week schedule. Find the largest Red total number and clicking on the date at the top of column will provide an in-depth look at the openings from the daily schedule.

Optimizing Staff from the Gaps Grid
Click on the job type in the left column to pop up a report of all staff who are qualified for the open roles with that type. The qualified staff will display along with their schedules. Total hours scheduled for each week will display directly below each employee's name. Those highlighted in yellow indicate an employee who has not met their required hours for the week. Click on the employee's name to open their calendar and schedule them to their required hours for each week.

STEP THREE - Overtime Pending and Hot Shifts
The completion of step two ensures all staff are optimized and in compliance to their required targets, i.e. 36hrs x 1 week, 24hr x 4weekends. If all staff members are optimized and no additional resources exist for filling remaining openings, the only alternative for filling these shifts is through overtime or PRN members below 40hrs per week.

Overtime Pending Requests
Staff members may request overtime shifts at any point in the self scheduling process. Administrators may reserve their approval or denial of overtime shifts until target compliance achieved for all staff members in Step Two. From the Scheduling tab, select OT/Spec. Overtime requests are viewed and approved or denied.

The overtime pending shifts are shown under the blue OT sub link on the Pending report. If pending shifts are requested the OT sub link will be shown with a number to the right of it, e.g. OT/7, you will find 7 overtime pending requests under this link. Note, for OT/0 there is no need to click on the link since there are zero overtime requests.

Each overtime request found on the report displays the following information:
- Date and time overtime request was made by staff member
- Date and shift time
- Hours staff member is confirmed to work at present
- Number of regular hours for this shift, e.g. 36hr confirmed, will display 4 regular hours and require 8 overtime hours.
- Number of overtime hours this shift will require, e.g. 36 hours confirmed, will display 4 regular hours and require 8 overtime hours.

Important Note: The schedule date on the report is a link to the daily schedule allowing the administrator to view the schedule for need prior to approving or denying this shift. Moreover, the staff member's name is a link to their calendar.

Click on the Approve or Deny after evaluating the information. If more than one staff member has applied for the same overtime shift, the report will chronologically post the staff member who applied for the shift first on above the other individual on the report. After approving the shift, the staff member who was not awarded the shift will receive a message that another member applied first. The "awarded" staff member will always receive a confirmation message on the Message Board. In addition, the actual overtime shift for this employee on the daily schedule will read in Red "OT Shift Approved".

Overtime Reviewed
Overtime reviewed is a method for communicating with staff a later point in time the overtime shift will be approved or denied. Overtime Reviewed allows the administrator to place a cut-off date for approving or denying a requested overtime shift. Since staff may apply for overtime shifts far in advance, "Overtime Reviewed" is a useful way to communicate to staff that their OT request is being considered and it will be approved or denied by a specified date. This information is communicated to the staff's Message Board.

Multiple HOT Shifts
To change the an Open Shift you may click on the Open Shift time, 0700-1930 and select Make HOT found on the left side of the screen. This procedure is effective but time consuming if multiple open shifts in a 4-week require a change to HOT.

For a more efficient method, select the Admin tab, select Setup sub tab. The "Make Multiple HOT" link found here allows you to change multiple Open shifts into HOT shifts. Select the openings with the select box to the right of each shift and submit. All the shifts selected through a 4-week scheduled are now HOT.

Time-Off Requests Approval

Staff members can request Time off request from their login. All Time off requests from staff members are automatically "Pending" for the administrator's approval.

From the Scheduling tab, select Time off Pending. The default sort for the report is closest upcoming Time off request in relation to the current date. A sub-link , Alpha Sort at the top of the screen, allows the administrator to search for Time Off requests by an employee's last name.

Approving/Denying Time Off Requests
To approve a time off request for a staff member click on the Approve button to the right of the request. To deny, click on the Deny button to the right of the request.

Schedule360 will ask you if you want to approve ALL Time Off requests for the employee when you click on the Approve button. This allows you to process and approve or deny multiple requests for the same employee quickly. The multiple approval screen provide a Select all button for Approve or Deny.

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When the Time Off request conflicts with a previously scheduled date for the employee, Schedule360 will display a select box in the column; Remove Employee from Scheduled Shift. As the Time Off request is approved, Schedule360 will automatically remove the employee from the scheduled shifts and re-open the shift for others to pick up.

Time Off Reviewed
Time-Off Reviewed is a method for communicating with staff a later point in time the request will be approved or denied. "Time-Off Reviewed" allows the administrator to place a cut-off date for approving or denying the request; i.e., everyone requesting Spring break off.

Since staff may apply Time-Off requests far in advance, "Time-Off Reviewed" is a useful way to communicate to staff that their PTO request is being considered and it will be approved or denied by a specified date. This cut-off information chosen by the administrator is communicated to the staff's Message Board.

Time-Off Requests – Additional Information for evaluating

To assist the administrator with equitable decisions for approving and denying Time-Off requests, each Time-Off pending requests in Schedule360 displays the following information:
- Date and time Time-Off request was made by staff member
- Number of Pending Requests on this date – click on the number displayed
- Hours staff member is requesting
- Hours being approved, notes this can be adjusted prior to approval
- Number of Time-Off Requests approved YTD for this employee – click on number to display a detailed report.
- Any additional notes employee offered for the request, e.g. "my wedding anniversary"
- A place for the administrator to add a note during the approval/deny. This note is communicated with your decision back to the staff member.

Important Note: The schedule date on the report is a link to the daily schedule allowing the administrator to view the schedule for need prior to approving or denying this Time Off request. Moreover, the staff member's name is a link to their calendar.

View Time-Off Calendar
At the top right of the Pending report, a View Time-Off Calendar provides the administrator with calendar views of all approved and pending time-off requests for the unit. This report is useful to print prior to approving numerous time off requests. Moreover, the calendar month links at the bottom of the Time-Off report, i.e. July/38, are similar links to the Time-Off Calendar. The number displayed refers to the number of time-off requests previously approved in the month.

Special Consideration Pending

![Schedule360 logo]

Special considerations requested by staff members during self scheduling process, e.g. "I can only work 7a-3p on this 7a-7p Shift" display under the [Pendings - OT/Spec](#). Here you can [review and approve any OT shifts or special considerations](#).

Schedule360 will automatically prompt the administrator to create a new shift after a special consideration is approved. For example, a new shift may need to be created a special consideration shortens a shift, e.g. "I can only work 7a-3p on this 7a-7p Shift", the administrator may want to create a new 3p-7p shift opening to account for the shortened shift.