Schedule360® Administration Scheduler Guide

Schedule360™ Administrator User Guide

<u>SCHEDULING – Main Tab</u>

STAFF - Main Tab

HR - Main Tab

ADMIN - Main Tab

Schedule360
We Know Scheduling

Scheduling – Unit Level – Daily Tab:

Where is the Scheduling Tab?
The Scheduling Tab is the first tab found on the Menu bar and serves as the default tab for the entire application. After login, the user will be defaulted to the Facility-level Schedule tab with today's schedule displayed.

The first shot shows the location of the Scheduling Tab at the Facility-level.

The second shot shows a view of the Scheduling Tab at the Unit level.

In this section we will focus on features and tasks for schedule-management at a Unit/Dept. Level.

Facility Level
Unit Level

Unit – All

This link on the Daily displays All Shifts, Open and Filled as well as Productivity Reporting and any notes at the bottom of the screen. The All Screen is the default schedule view for the current day at any Unit Level.

Unit – Filled
This link on the Daily displays Filled Shifts for the current day as well as Productivity Reporting and any notes at the bottom of the screen. This screen is useful if the user wishes to remove from view **Open** Shifts and view/manage only those shifts that are Filled.

Unit – Open

This link on the Daily displays **Open** Shifts for the current day as well as Productivity Reporting and any notes at the bottom of the screen. This screen is useful if the user wishes to remove from view **Filled** Shifts and view/manage only those shifts that are **Open.**

Note: Notice on our view that we have one **Open** shift. By clicking on the Open Shift, the User will see a list of Employees who are both qualified and available to work this shift. We will review under Shift Management Tasks how the Admin User can utilize this report to fill the **Open** shift.

Scheduling an Open Shift

Unit Task Management

Reports/Documents Drop Down Task List

Similar to the Task Box found at the Facility Level for Daily Report, the Unit-Level Task box contains links that allow the Admin user the ability to manage shifts and shift information at any Unit Level.

Click on links (of Task Box) below to see what each option does.

Print Versions – Unit Level:

You begin at any Unit Level. Click on "Print Versions." A pop-up window will appear from which you can choose four options for printing, depending upon the amount of detail you wish. The main difference between the Unit-level Print Versions and the Facility-level Print Versions is the amount of detail shown, specific to the Unit level. Print Daily with Documentation shows all shift-related information plus Supervisor notes and any shift changes. The 4 Week and Custom report allows the Admin User to print reports for specified periods other than the current Daily Schedule.

Supervisor Notes – Unit Level:

This link allows a Supervisor to enter a free-text note up to 2500 characters to document any information for the Unit that cannot be addressed with existing drop-down boxes. An example might be "Unit had 3 total care patients. Higher acuity required that we kept all employees"

The note is entered and then displays on the bottom of the Unit Daily Screen and will also display under Print Versions – Print Daily with Documentation.

Flex/Float/Cnxl Report – Unit Level:

The Supervisor/Admin User can use the Flex/Float/Cancel report to determine which employees were Flexed/Floated/Cancelled last to provide fairness. The report can be run at the Unit level and will show all employees who have been Flexed, Floated Cancelled during the last 30 days. The Supervisor can select from the open "From" and "To" boxes to create a report for a larger time period.

The pop-up nature of this report allows the Supervisor to show the report alongside the Daily Schedule to view scheduled employees, compare the report, and make decisions.

On Call Report – Unit Level:
The On-Call Report allows the Admin user to see those Unit-level employees who have been placed On Call for a 30-Day rolling time period. The report can run any "From" and "To" dates as desired by the user to see a larger time period.

Detail Daily – Unit Level:
This report provides the User with more detailed information about each scheduled shift with licensure and unit location

Shift Details:
The Shift Details link provides the user with a pop-up report that shows all information pertinent to each shift for the current day: Employee Name, Shift Time, Shift Creation Date, Shift Scheduled By, and Date that Shift was originally scheduled. This information is helpful as a back-up document to shifts, especially in an environment of self-scheduling should an employee have a question as to how a shift was created or scheduled. Shifts that are self-scheduled by an employee will show the employee's username under the "Scheduled By" column. Shifts scheduled by an Admin user will show the Admin User's name under "Scheduled By." Shifts that are "Set Schedule" or recurring will display as: Set Schedule Shift."

Add a Note to Multiple Shifts:
This link allows the Admin user to add any free-text note to a specific shift. The note will display on the Daily Schedule and on the Employee's Calendar (if checked "Yes" by the Admin user.)

MODIFY PREFERRED UNIT
This link allows the Admin user to update the scheduled unit for all scheduled staff on a specific day to quickly optimize resources across multiple units within a department.

Unit Daily – Live Links and Schedule Management

The Daily Schedule at both the Facility and Unit levels contains live links to each Employee and Shift scheduled. Starting at the Facility Daily Screen, you can access a specific Unit/Department by either selecting that Unit from the drop-down box or clicking directly on the Unit. By clicking on the Employee's name, the User is taken to the Employee's Calendar for Macro schedule view.

By clicking on the Shift Time, the User is taken to a Shift Management Screen.

We will display and describe details for shift management below.

Scheduling – Unit - Shift Management Tasks:

By clicking on the Shift time, the User is taken to the Management Shift Management Screen that provides a variety of options for modifying the shift and/or documenting information specific to the shift.   The below screenshots and explanation show in detail specific tasks for shift management from the Daily Calendar.

Replace/Swap an Employee:

Step 1 – **From the Daily, click on the time of the shift to manage**
Step 2 – **Click on "Replace/Swap Employee" and Submit**
Step 3 – **Select the Employee, Click the "Swap" button and Submit at bottom of the screen.**
Step 4 - **Click Swap again on the next screen (employee calendar) to complete the process.**
Step 5 – **Employee has been swapped and shows on Daily Calendar.** Both employees receive messages to their respective message boards notifying of the swap.

Float Employee to another Unit for Entire Shift (No Split):

Step 1 - **Click on the time of the shift to document.**
Step 2 – **Select Float Employee/Split Shift and "Submit" to manage**
Step 3 – **Select Yes to Float for Entire Shift**
Step 4 – **Select the Unit to which you will send the employee, hit Submit at the bottom**
Step 5 – **The Employee has been floated.**
The shift is now gone from the original unit and displays under the floated unit as "Float Staff Into Unit."

Note: You may want to delete the open shift you were floating to fill as Schedule360™ adds the extra shift. (First screenshot below). There is also a note at the bottom of the original unit and the floated unit documenting the Float.

Additionally, the employee received a message to their message board documenting the float.

Float Employee to another Unit - Split Shift:
Steps 1 & 2 are the same as above.
Step 3 - Select "No" to not float the Employee for the entire shift. You can keep the employee for part of the shift and float for the remainder.
Step 4 – Begin by selecting the time that will be worked in the first area. Always check the drop-down to see if the partial shift time is available as an option. If not, you can enter any custom shift time in the Shift Start-Shift End boxes, then select which schedule (e.g. A-P) that you want the shift to display.
The next step is to select the Unit on which the employee will work first. In this example we will keep the employee on MS1 for 5 hours (7p – 11P) and will float her to M/S 2 for the remaining 7 hours (11P-7A). The shift is split, the times are changed, the employee receives a message to her message board, and each unit receives a note on the Daily Schedule detailing the Float and Shift Time modification.
Step 5 – **The Employee has been floated.**
The shift is split, the times are changed, the employee receives a message to her message board, and each unit receives a note on the Daily Schedule detailing the Float and Shift Time modification.

Change to OnCall / Called In / Document OnCall:
Step 1 - **Click on the specific shift to document.**
Step 2 – **Click on "Change to OnCall/Called In.." and Submit**
Step 3 – Selecting "Yes" will make the entire shift an On-Call shift.
Step 4 – **Select On Call from Drop-Down, Add Note if desired, and Click Submit**
Step 5 – **The shift has been changed to On Call.** It has been documented on the Daily Calendar as well as in the On-Call report. The Employee receives a message at the top of their message board regarding the shift change.

Call Back Employee after Placed On Call:
Step 1 – **From the Daily, click on the time of the On Call shift to manage**
Step 2 – **Click Change to OnCall/Called In…to Document the Callback**
Step 3 – **Click "No"** and Document the hours On Call and the hours worked for Call In
Step 4 – **Document the Hours On-Call and the hours worked.** You can select the Unit or Units worked as well as select hours that have been pre-loaded from the drop-down boxes. If you can't find the hours, go ahead and enter manually in the shift Start and End time boxes. In this example, the employee was placed On-Call from 7A-11A and was called in to work from 11A-7P all on Med-Surg.
Step 5 – **Select the reason for the shift modification.**
In this example, select "Call Back" since the employee was called in from the On Call shift.
You can add a note to the notes section if you wish. Click Submit.
Step 6 – **The Shift has been modified** and shows on the Daily Schedule with documented On Call and Called In hours.

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Remove and Employee/Reopen Job:
Step 1: Click On the Shift Time to Manage
Step 2: Select Remove Employee/Reopen Job and Click Submit
Step 3: The Job has been removed and the Shift is now open

Remove and Employee/Delete Job:
Same Process as above with Shift Removed from Daily schedule at end.
Change Step 2 only

Flex Off Remove Shift:
To be used for Low Census or Other reasons when an Employee needs to be Flexed.
This feature allows the Admin User to Flex for the Entire Shift or Flex for Part of the Shift with the Employee working part of the shift.

Step 1: Select the Radio Button "Flexed Off Remove Shift" and Click Submit
Step 2: Select Yes if you wish to Flex for Entire Shift or "No" if you wish to split the shift into hours worked and hours flexed.
Step 3: Select the Reason from the Drop-Down, Add a Note if desired and click "Submit"

Call-Off:
To be used when an Employee Calls Off for the Shift due to illness or for various personal reasons. The shift is removed, the call-off is documented, the employee receives an automatic message to his/her message board, and the incident is documented under the HR Tab for future Admin review.

Step 1 - **Click on the specific shift to document.**
Step 2 – Select Call Off and "Submit" to remove the shift and document.
Step 3 – Select the type of Call Off from the drop-down menu. You can add a note to the shift if desired. This will show both on the Daily Schedule as well as on the HR Report that can be queried by Management. Click Submit to complete the process.
Step 4 - If you would like to **create a hot shift** for others to pick up, in this case we will just have an open shift.
Step 5 – The shift is now removed from the Daily and remains as an open Core shift. You can go out to the Facility Level to view the house and find someone to float or you can click on the open shift and see a list of employees who are both qualified to work the shift and are unscheduled.

HR Incident:

An HR incident allows you to document an HR occurrence for a scheduled employee. The scheduled employee will REMAIN on the unit daily schedule and the HR incident will be documented at the bottom of the schedule. Examples for an HR Incident might be "Tardiness", "Medication Error", "Patient Complaint", etc. The shift and the scheduled employee will remain on the schedule and the incident will be documented in the notes section below the unit daily schedule.

The employee receives a message on their message board documenting the incident. The Incident is also tracked at the aggregate level under the HR Tab at both the Unit and Facility levels.

Step 1 - From the unit daily schedule, click on the shift time, e.g. 0645 – 1915, for the employee you wish to document an HR incident.
Step 2 - Select HR incident, then, click Submit.
Step 3 - A drop down box lists the common HR incidents. Click the drop down box and select the reason. You may enter additional documentation in the Optional field to the right of the drop down box.

Change a Shift Time:
Step 1 – **From the Daily, click on the time of the shift to manage**
Step 2 – **Click on the shift to make changes**
Step 3 – **Modify the shift time.** If the new shift is available in the drop-down box select and submit, if the shift is not available, manually enter the shift in the Start and End boxes. If you need to create an open shift on the front or back end of the new shift, click on "Submit and Create New Shift." If you do not wish to create a new shift, click on "Submit and Return to Schedule"

In our example, we shift the time from 6A-6P to 6A-430P from the drop-down and select "Low Census" as the reason. We will "Submit and Return" as we do not want to create an open shift.

HOT Shifts – How to create:
Critical Open shifts can be designated as "HOT", "Premium" or "HOT & Premium.
"HOT" shifts are those that have been pre-approved for Overtime pay, assuming that the employee is at the threshold for overtime hours during the given work week. A shift that is designated as "HOT" will show on an employee's calendar as an **H** and will allow an employee in overtime to self-schedule the open shift immediately without the shift going to a Pending Status for Manager approval. By clicking "HOT" the Supervisor has pre-approved the shift for overtime.

Note: An employee who is not in overtime will not be paid overtime for the shift as Schedule360™ tracks scheduled hours. The shots below illustrate how to make a shift "HOT."

Step 1 – Click on the OPEN shift.
Step 2 – Click Make Hot Job
Step 3 - Job Shows as Hot

Premium Shifts – How to create:

What is the definition of a PREMIUM shift?
Schedule360™ does not define Premium. **Premium** is defined by you or within your pay and policy definitions. An example for Premium Shift could be a "Differential." When a unit or facility uses a Premium-type shift this feature allows you to label the shift as Premium to the employees.

Employees will see the acronym PREM on the calendar date for the Premium shift. The functionality of this feature is limited to labeling the shift as Premium. Typically, a Premium shift is also made into a Hot shift allowing the shift to be pre-approved for OT as well as a Premium pay. Pay policies need to be defined outside of Schedule360 for Premium Shifts.

Step 1 – Click on the OPEN Hot shift.
Step 2 – Click Make Premium Job
Step 3 - Job is Now Hot and Premium

Dispatching an Open Shift to Available Employees:
When trying to fill an open shift, the Supervisor has the option to Dispatch a message out to all available Employees who are qualified to work the shift. On the Unit Daily Schedule any unfilled shift will display with the word OPEN e.g. Open-Core. To view qualified employees for an Open shift or to SCHEDULE an employee into an Open shift, click on the underline words Open-Core. All qualified employees will display in the table.

Step 1 - **Click on the Open- Core Shift**
Step 2 - **Click on the sub-link, DISPATCH.**
The available employees will appear with their phone listed and check boxes are available for their email, cell phone, and pager. To the left, the pertinent information related to the open shift is displayed. You may Select All next to the email, cell phone, and pager to dispatch to all employees OR you may select only those employees from the list. A record of the dispatch will appear after completion.
Step 3 - **Type a message if desired in the Message Box and Click Dispatch**
Step 4 - **The Message has been sent to All Qualified/Available Employees.**

Scheduling Unassigned Employees:
Who does "Un-Assigned" refer to on Open Shifts?
Un-Assigned are employees qualified for an opening who are assigned to another unit or facility. For example, if an ICU employee Profile has the Clinical Qualifications for the Emergency Department the ICU assigned-employee is considered un-assigned to the emergency room but qualified.

To review an employee's assigned unit and their corresponding clinical qualifications, go to the Staff Tab.
Click on Active Employees
Click on the employee's name.
Click on the Green Assignment link towards the top of the screen.
See the clinical qualifications checked for this employee.

An employee must be clinically qualified to match to shift openings in each respective department.

This employee is considered Assigned to Med/Surg 1 and Unassigned to the other M/S units and the OR: Example

Using Un-Assigned – finding employees outside your unit who are qualified The Un-Assigned link is found by clicking on an Open shift, e.g. Open-Core, on the unit daily schedule. The Un-Assigned link is located at the top of the table listing qualified employees. Click on the Un-Assigned link to view qualified employees not assigned to the unit. (Illustrated below)

Step 1: Click on the Open Shift
Step 2: Click on the Dispatch/Avail Staff Drop Down
Step 3: Click on Unassigned Staff
Step 4: A list of Unassigned, Clinically Qualified Staff is shown

Note: The unassigned employee names are underlined. Clicking on their name allows you to see their assigned unit and the employee's contact information. Schedule360™ displays this information to allow you to contact an employee who is outside of your supervision. If desired, the Supervisor can Dispatch a Text, Pager, or E-mail message to Unassigned Employees notifying of an open shift.

Scheduling – Unit Level - Gaps Grid
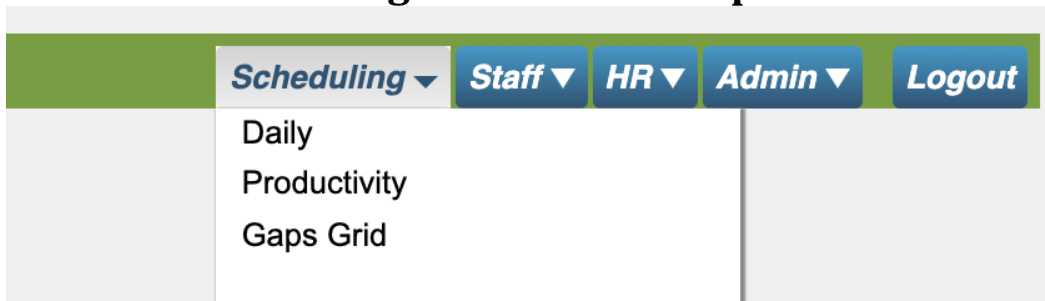
Gaps Grid - Defined

The Gaps Grid sub tab is found under the Main Scheduling Tab at the Unit/Department Level for a specific Unit and at the Facility Level for Dept. Gaps Grid.   The Gaps Grid defaults to the current 4-week schedule for the Unit and displays all Employee Job Types on the left-hand column as well as Filled/Open Core and Core+ Shifts by Day, with a summarized report of Filled/Open on the right-hand column. (Please see Admin-Master Schedule Section for more information on Core and Core+ shifts). (See below screenshot).

The report contains live links to each Job Type as well as top each day allowing the Scheduler/Manager easy access to fill open shifts and close the schedule. The Gaps Grid allows the Scheduler to see where problems or gaps exist far into the future.

Filled Positions are shown in **Black** and Open Positions are shown in **Red**. The below screenshots display examples of how this report can be used.

Gaps Grid Navigation – By Date Link

From the Unit Daily Schedule Tab click on the sub tab GAPS GRID. The current 4 – week schedule will display with a green ban for today's date with the A-P schedule listed first and the P-A schedule directly. 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. As an example, we will select 12/12/21 - 01/08/22.

Step 1: Click on the date you're looking to schedule. We will select 12/25/21.
Step 2: The Schedule for 12/25/21 is shown as a pop-up report displaying Filled and Open Core and On Call Shifts. Click on one of the open shifts.
Step 3: A roster will display all qualified employees, their work targets (if applicable) and their respective status for the day.

Gaps Grid Navigation – By Employee Type

On the left-hand margin of the report notice the Employee Types listed in descending order by Licensure. These links when clicked will open a pop-up report that displays all Scheduled Employees by day, with links to each Employee's calendar as well as tracked work targets by week for the 4-week period. As an example, click on the P-A Staff link for the CNA Job Type.

Step 1: Click on the Employee Type

Step 2: The report opens for the scheduled employees and displays work targets as well as filled and open shifts for the scheduling period. Each piece of information is a live link for schedule management.

Step 3: Let's look at Unscheduled Employees at the bottom of the report. The Employee Harvey displays in yellow as he is non-compliant with his weekly work targets. The Admin user has an option to click on the Employee's Calendar to schedule dates for open shifts.

Gaps Grid Additional Reports/Links

There are two types of Print Versions for Schedules that can be accessed from the Grid for different employee types. You can email a version or send a PDF.

Print PDF

Export to email will export a CSV file that can be imported into excel or other spreadsheet file type.

The report is time-stamped upon generation.

Scheduling – Unit Level - Pendings - Tab:
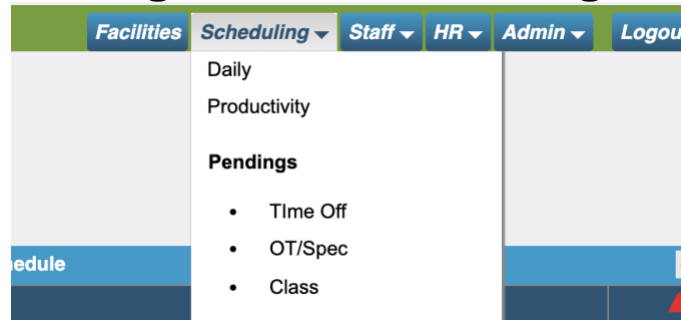
The Pendings Submenus at the Unit level contains all Employee requests within Schedule360™ that require Management Approval.

You can access the Pending menu under the Scheduling Tab.

Depending upon Manager preference, the "Pending" requests can be managed at the Facility level or at the Unit/Department level.

This report compiles All Requests from every Department for an Admin User.

Pendings Submenu includes:
Time Off,
OT/Special Considerations (e.g. Modification of an Open Shift)
Class (signing up for a posted class).

These requests are "Pending" Management approval. In this section we will illustrate and explain each link for Pending Request management.

Pendings – Time Off:
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. The Pendings submenu is the 4th item under Scheduling drop down at the Unit level. The below screenshot displays a macro view of Pendings. The report always defaults to the Time-Off screen and displays time-off requests listed by Date the time off will occur.

The report can be sorted by Employee name if desired.

The second and third shots provide a closer view of the sorts by Date and by Employee

Default View – Time Off
Time-Off – Sort by Date
Time-Off – Sort by Employee

Managing Time-Off Requests – Approve a Request:
To approve a time off request for a staff member click on the Approve 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 provides a Select all button for Approve or Deny.

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.

The Admin user has several options for managing Time Off Requests. The first step is to click on the link for the Day the time off will be taken to ensure adequate coverage for the shift.

Step 1: Click on the Date
Step 2: Review the Daily Schedule to determine if adequate coverage exists to Approve the request.
Step 3: Select "Yes" if you wish to remove the Employee from the shift and create an open position. Clicking "No" will approve the Time Off and leave the employee scheduled.
We will select **"Yes"** in this example.
Step 4: The process is complete and the Employee's Time off has been approved and the Employee has been removed from the shift. The Time Off Approval is documented on the Daily Schedule and the Employee has received a message to her message board confirming the approval.

Managing Time-Off Requests – Deny a Request:
Step 1: Select the date and click on the "Deny" button
Step 2: Select "Cancel" as we will only Deny this one request.
Step 3: The process is complete. The request has been denied and the Employee receives a message to her message board notifying of the Denial.

Managing Time-Off Requests – Review a Request:
This feature allows the Admin user to defer making a decision on the request until a later date. The User can add a note to the decision as well as date the User will approve or deny the request. This information is communicated to the Employee via his/her message board.

Step 1: Select the date and click on the "Review" button
Step 2: Select "OK" as we will Review both dates requested.
Step 3: Click the "Review Select All" box to check multiple days. Enter a date in the "Review Decision Date" box. Add a note if desired and then click "Submit." The request has been reviewed and the Employee receives a notification message to her message board.

Step 4: The Reviewed dates are now placed in the Time Off Reviewed Section under Pendings. The Admin user is prompted every 24 hours upon login with a pop-up box that notifies of any new requests within the last 24 hours as well as any "Reviewed" requests with "decision-on" dates. The Admin User will return to this screen and select "Approve" or "Deny" to complete.

View Time Off Reports
Step 1: Select Time Off Calendar View
Step 2: See Calendar
These links are located at the top left part of the Pendings – Time Off Page and display for the Manager all approved Time Offs on a Pop-up, Macro-view Calendar, that can be toggled month-to-month. These reports are helpful in making decisions on Time-Off approval.

View Time Off Report – Enterprise
The Enterprise report shows all approved time offs for All Departments. The pop-up report can be expanded and contains links to each Employee's time off information in full detail.

Enterprise Time Off Report by License Type
This will show time off by license. Click on one license type or select multiple.

View Time Off Report – Unit Level
Similar report to Enterprise but with Time Off Info for Specific Unit.

View Time Off Report - Approved Hours
Similar but with hours requested

Pendings - Special Considerations Shift Management:
Special considerations requested by staff members during the self scheduling process, e.g. "I can only work 11P-7A for this 7P-7A Shift" display under the Scheduling Tab > Daily, Pending sub-link.

Click on the OT/Spec, to approve or deny the special considerations pending.
Schedule360™ will automatically prompt the administrator to create a new shift after a special consideration is approved. As an example a new shift may need to be created if a Special Consideration shortens a shift; 11P-7A approved would leave an open 4-hour 7P-11P shift, if desired by the Manager. In the below example, we Review and Approve the Special Consideration and opt to not create and Open Shift on the front end.

Step 1: Click on OT/Spec
Step 2: Approve the Shift
Step 3: Enter New shift from drop-down of pre-entered shifts. If the shift does not display on the drop-down, manually enter the shift in the "Start" and "End" boxes. Click "Submit" to finish.
Step 4: The shift has been modified and displays on the Daily Schedule along with a note documenting the shift change. Additionally, the Employee receives a message to her Message Board confirming the approved "Special Considerations" shift.

Pendings - Overtime Shift Approval:

To approve an Overtime request, click on the OT/Spec link under Pendings. The link opens to show shifts that have been requested by Employees for OT. The report contains a link to the Daily to make sure the OT is warranted. Once decided, the Manager can Approve, Deny, or Review which are identical processes to how we managed vacation requests above.

Step 1: Click on the OT/Spec Link:
Step 2: Review the shift request, determine if it is warranted and Approve, Deny or Review.
In this example we will approve the shift for OT.
Step 3: The shift has been approved for Overtime and displays on the Daily Schedule with OT noted. Also, the shift is documented within the Shift Details link. Lastly, the Employee receives a message to her Message Board confirming the approval of the OT Shift.

Pendings – Class Review and Management:
Employees sign up for classes that have been entered in Schedule360™ and must receive Management approval before they can attend the Class. The Class link shows the number of Employees who have requested approval for a specific Class. Click the link to access and approve or deny the Class request.

Scheduling – Unit Level - Targets

The Targets Report allows the Admin User the ability to track all Unit Employees by work targets; Weekly, Weekend, Daily, and On-Call. The Work Targets are built within each Employees Profile upon set-up, if applicable. Find Targets in the Scheduling Dropdown.

Weekly - ALL
Weekly – Non-Compliant
DAY – ALL
DAY - Non Compliant
On-Call – Current 4-week schedule can be toggled forward or back as desired.

Scheduling – Unit Level - Weekly

Select the Shifts dropdown

Standard View:
The Standard Weekly view displays Filled and Open Shifts in a straightforward manner and can be toggled between weeks for viewing. The report defaults to A-P and P-A schedule views. The user can select just A-P or P-A if desired.

Detailed View:
The Detailed Weekly report displays all shifts by day for the current week with live links to each Employee and Shift. The Detailed view is an interactive report that allows the Admin user the ability to change and manipulate schedule information as desired. The report selections include
- Open & Filled Shifts
- Open Shifts
- Filled Shifts

Scheduling – Unit Level - Open

The **Open Tab** displays all Open Shifts for the current 4-week period. The report allows the user to search both 4-week and Daily. The report allows for the selection and printing of shifts.

4 Week – ALL Shift Types Report
Daily Report
Shift Menu

Scheduling – Unit Level - Filled Tab:

The **Filled Tab** displays all Filled Shifts for the current 4-week period via 4 separate reports:
- **Unit Filled**
- **Unit Open and Filled**
- **Enterprise Filled**
- **Enterprise Open and Filled.**
   The report allows the use to search both 4-week and Daily, plus select and print shifts.

Scheduling – Unit Level - Sets:

The **Sets menu** displays all Unit Employees on a "Set" recurring schedule. Recall under the Staff tab how we build "Set" schedules for employees…this tab provides a shortcut for viewing and managing changes if desired.

Sets Sub Tab: Click on the employee name to access their set schedule template.
Build Sets Template: See building sets under Staff Tab section

Unit Level - Staff Tab

Overview
The Unit-level Staff Tab provides the Admin User a link to a roster for all Employees at a specific unit level.

<mark>**Note:**</mark> **The Staff Tab can also be accessed at the Facility-Level and displays the list of all Employees in Alphabetical Order for All Departments.**

Staff Tab - Active Staff : The Staff tab will default to Active Facility Directory if you are at the Facility level. From a Unit Level the Staff Tab will default to the Active Unit Directory. The default screen for the Staff Tab is a list of **Active Employees** with phone numbers and live links to each Employee's Profile and Calendar. Click on the Staff Tab to view the current list of <u>Active</u> employees. You can also search employees by **licence or category type**, more on that below.

Employee Contact Screen: Each Employee's name is a live link to that Employee's profile. The User can access other Screens, specific to the employee from this Contact Screen by clicking on the live links directly: **Profile**, **Assignment**, **Summary**, etc. We will view each of these links later in this section.

Employee Calendar Link: To the right of each Employee are <u>live links</u> to the Employee's schedule for the next three months. Across the top of this list are letters; A,B,C, etc. that allow the User to access an employee by last name. The Calendar view also contains links to other areas specific to the Employee.

Sort Employees by Type "Category" – Option #1: As an example, the user wants to view only employees with "Charge Nurse" a special scheduling type, so they select **Charge**.
Sort Employees by License Type – Option #2: A second way to sort Employees is by a Table that is located under the <u>staff totals link</u>, in the upper right corner of the staff list. This table shows all License and Special Scheduling designations as well as the number of each type within the Unit.

Active Staff Tab Sub links – Directory
The sub-links under the Active Directory provide additional staff directory views.

Enterprise Directory: The ENTERPRISE DIRECTORY sub link is useful for finding an employee within the enterprise who is not currently assigned to your unit. This view is useful when you are trying to locate an employee who you know is the system but not showing up on your unit. When this occurs, go to the Enterprise Directory, find the individual, click on their name, then, and go to the Assignment screen to update their unit assignment. The employee will now appear in your Staff directory.

Enterprise Unit : The Enterprise Unit sub-link displays all the assigned units for each employee – All Depts.

Staff Assignment: The STAFF ASSIGNMENT sub-link is extremely useful for updating multiple profiles. This sub tab allows the User to access Contact, Profile, and Assignment Screens for each employee and saves time without having to access each area by Employee, individually. This link is reviewed in the Set-up guide that is provided prior to launch and go-live of Schedule360™.

Employee Profile Links – Definition and Illustration: To view an employee's profile from the Staff Tab, click on the employee's name found on the Staff Directory.

The employee's Profile will open to the contact screen with the other **Profile links** above, **Summary, Contact, Profile, Assignment, Special Credentials, Skills, Calendar, User Acct,** and **Set Schedules.** Note, if you wish to update numerous employee profiles, see section above, Staff Assignment sub link found under the Staff tab.

Summary Screen: This Screen summarizes all Information for the Employee: Contact Info, Skill Level, Job Types worked, FTE, Day/Night Shift, Assigned Units, and Specialty Areas Qualified to work, Credentials, and Work Targets.

Contact: Shows all Contact Information for the Employee.

Profile: Shows all License, Scheduling, Skill Level, Shift Preference, Skill Level, Work Targets, Credentials, and Licensure for the Employee.

Assignment: Shows Employee's Home Unit, Clinical Units Qualified, and Assigned Units.

Special Credentials and Skills: These links display any additional Credentials or Skills (if applicable) that allow the Employee to match to a certain Department for Shift Scheduling.

Employee Calendar: This link takes the Admin User to the Employee's Calendar for the Current Month for viewing and Shift Management, as needed. Recall, the Admin User can also access the Employee's Calendar from the Staff Home Page by clicking directly on the Month desired. The Calendar can be used to view Employee Shifts or to Schedule future shifts.

Using the Employee Calendar – How to book multiple shifts: As needed, an Admin User can book multiple shifts for an Employee from the Calendar.

Step 1: In the upper left corner of the Employee's Calendar, Click on the Search Drop-down box. Example: S. Acosta - M/S 1 Nurse.
Step 2: Select **CORE** from the drop-down. Schedule360™ will now find open shifts and display these shifts by day.
Step 3: Check the boxes in the right-hand corner for each day selected (the box will turn blue) and click the "Submit" button above Saturday.
Step 4: Review the shifts and if okay, click "Accept All.
The Process is now Complete. The Employee is booked in the shifts and has received a message to his Message Board notifying him that Management has scheduled him for the shifts.

Employee Messages – Where are they?

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Employee Messages are accessed by admins in two different areas. You can see pending messages and reviewed messages in this area.
Option 1 All Staff - Select the drop down next to their name
Option 2 Individual Contact Record - Select the drop down next to their name

User Acct: Accessed via the dropdown, allows the user to see the Employee's Username and Password that were generated by Schedule360™ upon set-up. Should the Employee forget his/her Username and Password, The Admin User can access this link and print the information for the Employee. The Employee also has access to his/her User Acct through the Employee Portal.

Set Schedules: This link allows a Manager to build for an Employee a "Set" or "Recurring: schedule that locks down each time shifts are created by the Department's Master Schedule. Set Schedules can be changed at any time for future schedules as needed by the Dept. Manager.

Step 1 - From the staff list, go to the employee delta located to the right of the employee's name. Select the set schedule link.
OR, from the Scheduling tab dropdown at the unit level select Set Schedule. From the sets/select drop down select "employees not on a set schedule". Then select employee's name.
Step 2 – Click on the Set Schedules link
Step 3 – In the drop-down box above Sunday, Select the Profile, Job Type, and Shift.
Then click "Go"
Step 4 – Select the days of the week the employee works by checking the "Select" box in the lower left-hand corner of the Day. When finished, select the time frame in which the schedule recurs in the box above Sunday. When complete, select "Go and Review All Schedules"

Example: Kathleen works Monday-Wednesday Week 1. Week two she works Wednesday - Friday 7A -7P. We check Monday, Tuesday, Wednesday week 1 and Wednesday, Thursday, Friday week 2. Then select "Recur Every 2 Weeks" from the drop-down and then click Go and Review.

Step 5 – A Macro-calendar showing all future 4-week schedules is shown with the jobs we selected for Kathleen being displayed in Blue. We review for accuracy, click Submit at the top of the page, then click "OK" in the pop-up for **creating a template**.

Step 6 – The shifts are now Green. Click Return to Set Schedule
The process is complete. The Set Schedule shifts for the Employee will "lock down" and be scheduled every time Schedule360™ releases to the Batch shifts for the Master Schedule for future scheduling periods.

Employee Dashboard for Scheduling "Summary"
Each Employee has a Dashboard for labor-related information. This Dashboard is called a "Summary" screen and can be accessed as follows: Staff > Active > Employee Calendar > Summary. The below screenshots illustrate how to access.

Step 1: From the Active list, click on Summary
Step 2: At a glance by month of the employees shifts. You can select the shift to see detailed information. From here select specific dates. Default is YTD. Then select Summary Totals
Step 3: The Report Shows Labor-related information, specific to the Employee. All links shown on the report in **blue** provide specific details for the Admin user.

Staff - Add New
How do I add new employees to my Staff list?
Staff Tab > Add New sub tab link
Click on the Add New sub tab link under the Staff tab and complete the profile information for Contact, Profile, and Assignment. Fill in the information and hit "Submit" at the bottom of each screen.

Staff - Inactivate
Inactive Staff - Inactivating an Employee who no longer works for our facility
Staff Tab > Employee Name
Step 1: On the upper right portion of the Contact screen in the Employee's profile to the right of the employee's name click on Inactive and SUBMIT at the bottom of the screen.
Step 2: Read the inactivation notice and click "Inactivate Now" followed by OK on the pop-up question.
Step 3: The inactive employee will now appear under the inactive link found under the Staff tab. If you need to Reactivate, simply click on the Reactivate Button.

Important Note: If the employee who is being inactivated has future scheduled shifts, Schedule360™ provides alert during the inactivation Submit notifying you that the filled future jobs will be removed from this employee's calendar and reopened for others to pick up.

Never inactivate an employee who is moving to another department.

An employee who is moving to a new department or a new unit requires adjustment to their profile and Assignment. See Profile information.

Staff – Unscheduled
This link provides a list of Employees who are Assigned to the Unit, but not scheduled on the Unit for the current scheduling period. The employees are listed with links to their respective calendars for schedule management, if desired. If there are no employees "Unscheduled for the period, this report will list no names.

Staff - Pending
This link would show any Employees who are "Pending" Activation in the system.

Unit Level - HR Tab – Incident Reports

Overview
The Unit-level HR Tab provides the Admin User a link to various reports that track Employee and Scheduling Information at a specific unit level.

<mark>Note:</mark> **The HR Tab can also be accessed at the Facility-Level and displays the same information for the Entire Facility.**

HR Tab - Components
In this section we will illustrate and define the following components within the HR Section:
- **Incident Report**
- **Credentials**
- **Special Credentials**
- **Skills**
- **Licensure**

HR – Incident Reports - ALL
The Incident report provides the Admin use with several views to see, search, and print all document incidents within a Unit for any time period. The first report is the "ALL" report that provides a Summarized format by Employee and Month for easy access and viewing. The report provides links to Individual Employees to view All Incident Types, YTD as well as links to each Month to view ALL Incident types for ALL Employees. The default time period for the report is Year-to-date from January 1st. Custom reports can be generated for longer periods of time by entering "From" and "To" dates in the open boxes at the top of the report.

Employee Drill-down view:
Click on any Employee link to view YTD Incidents. This report is print-formatted.

Unit-Monthly Drill-down view:
Click on any Month to view All Incidents – All Employees. This report is print-formatted and can be queried by Date and Alpha Sort.

HR – Incident Reports – Detail All
The Detail-All report provides in-depth detailed explanation for every documented Incident within the Department for a rolling 30-day period. This report can be queried for other periods using the "From and "To" boxes. The below screenshots illustrate detailed examples for every type of Incident.

Reports Include: Incident Report, Vacation Report, Cancellation Report, Flexed-Off Report, On Call Documentation, Special Requests, Float Shifts, Supervisor Notes, Agency Filled Job Cancellations, and Agency Filled Jobs with tallied hours.

HR – Incident Reports – Call-Off, HR-Incident, Incidents by Day
Finally, this report also allows the User to view Specific Incident types such as "Call-Offs" and "HR Incidents." A final view allows the User to query specific "Incidents by Day."

Unit Level - HR Tab – Credentials Reports
The Credentials report tracks all Unit-Level Employee Credentials that are time-sensitive by an expiration date. Schedule360™ can track an unlimited number of credentials. 60 Days prior to a credential expiring, the credential turns yellow on the report. Additionally, the Employee begins to receive messages to his/her message board notifying them of the expiring credential. The Employee is required to click through the message in order to access his/her calendar.

The report provides several easy-to-read reports that can be sorted by ALL and EXPIRED. Additionally, the report provides a live link to each Employee's Profile allowing the Admin user to access and update the expired credential once it has been renewed.
Note: **The HR Tab can also be accessed at the Facility-Level and displays the same information for the Entire Facility, allowing an Admin user to plan accordingly for in-house continuing education for credential recertification.**

Track Credentials in Employee Profile

Unit Level - HR Tab – Special Credentials and Skills
Similar to the Credentials Report, "Special Credentials" and "Skills" track specific credentials and skills required for an Employee to work on a Unit. Examples may be "ANCC, TNCC, etc." Any Special credential specific to the Unit can be tracked and managed through this report.

Special Credential Report
Skills Report

Unit Level - HR Tab – License
License Tracking: Employee Profile
Schedule360 also provides a specific field for tracking license numbers and expirations in the employee profile.

License Reports
The HR > License sub-tab provides reports similar to the credential reports. Schedulers can quickly track expired licenses at the unit, facility, or enterprise levels.

Unit Level - Admin Tab

Scheduling ▾ Staff ▾ HR ▾ Admin ▾ Logout

The Admin Tab is the fourth tab found on the Menu bar. This tab is found at both the Unit and Facility Levels and contains eleven Sub-Tabs that function to assist the User with "Administrative" tasks.

Admin Job Request Form

The Job Request form allows the User to enter open shifts for the Unit by Employee Profile, Type, Schedule type, and time from drop down boxes. Once selected, the Admin User then clicks on each day of the Calendar that she wishes to add a shift and then submits and confirms this request. The open shifts will then display on the Daily Calendar for the respective days.

The below screenshot shows the first page that the Admin will use the enter shifts.

Step 1: Select the specific information, select the days, and click "Submit" to create the open shifts. In this example we will select an ED-RN, Unit Staff Employee, CORE Shift, from 7A-7P for March 18, 19, 20, and 21.
Step 2: If finished, click "Complete Process." You can add additional shifts from the drop-down as needed as well as a free-text note to any/all shifts.
Step 3: The Open Shifts will display on the ICU Daily Calendar for 3/15, 3/16, 3/17.
These shifts are live links to qualified/available employees for booking. (See Scheduling Booking Open Shifts for more information on how to schedule).

Admin Master Schedule

The Master Schedule (MS) is considered the epicenter of the entire Schedule360 application. In summary, the MS is a template schedule comprising the mix of employee types and the number of shifts required to run the unit on a daily basis. A separate MS is created for each day of the week to allow for differences in your daily scheduling requirements, e.g., Monday's are always busy then Saturday due to surgery admissions.

The system uses the MS to determine what jobs and their respective shift times will be created during a release period. (We will examine "Release Dates" in this section). The system also uses the MS to function as the source for shifts to be used for the set-scheduling of individual employees. When a Set Schedule search criteria is performed for an employee, the system accesses the MS to determine if the search criteria exits within the MS.

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The search displays the number of remaining openings for the specified criteria. During the release period, set schedule jobs are immediately filled and remaining shifts are created as openings.

Where is the Master Schedule located?
Go to Unit > Admin tab > Master Schedule subtab > Sunday (default)
A Master Schedule exists for each day of the week – Sunday through Saturday.

Modifying the Master Schedule?
To change the MS, change the criteria and submit an Update. Because a MS exists for each day of the week, if your changes affect each day of the week you will need to Update the data on each day – Sunday through Saturday.

Troubleshooting:
Why will the Master Schedule not update when I try to reduce the number of shifts?
An alert message displays "cannot update MS, you must remove set schedules …"
The MS has a fixed number of shifts for each day and job type. Recall that Employee Set Schedules are directly linked to Shifts in the MS. If the specific shift and job type are 100% used by employees in Set Schedules, e.g. 2/2 100%, the application has stored these set schedule position(s).

Therefore, if you try to reduce the MS below the number of Set Schedules that exist, the system will not be able to create the stored Set Schedules during the release date. To resolve this issue, you must remove employees from the set schedules impacted by the change you are trying to make to the MS or increase the number of shifts in the MS.

Admin Release Dates

The Release dates tab displays for the Admin User all future dates for the creation of schedules. Recall the shifts for each Unit are created based upon that Unit's Master Schedule by a Batch Release that is displayed under this tab. Employee's have a link through their respective Schedule360™ portals to release dates so they can be aware of the first opportunity to self-schedule shifts.

The above screenshot shows the release dates for future schedules. The next release (creation of shifts) for Unit-Based Employees will occur on 8/8/21, six weeks prior to the first day of the Schedule Period that begins on 9/19/21. Unit-based Employees are given a 2-week preferential scheduling period to self-schedule shifts before these shifts are made available to PRN and Unassigned Employees. PRN Employees will be allowed to see and schedule shifts for the 9/19 schedule on 8/22/21 and Unassigned (Clinically Qualified, but Assigned other Units) Employees will be given access to self-schedule on 9/05/21.

Admin Set-Up

The Setup Link is available at the Facility and Unit Levels and provides links to schedule management tasks…essentially shortcuts for the Admin User.

Facility Links: Facility level links provide more general setup features for the Facility (adding codes, adding shift times, etc.)
Unit-Level Links: Unit Level Links pertain to specific Unit tasks for schedule management with one overlap in Create Shifts. These links allow the Manager to quickly complete tasks like removing multiple open shifts without the need to access each individual shift and removing or messaging all Employees each month with a reminder to enter/update contact information.

Admin Messaging

The Messaging Tab functions to allow communication directly to Employees via Schedule360™. The Admin User can type a free-text message and then select any/all Employees to receive the message via Message Board, E-Mail, and Text. This feature is available at the Facility Level as well. If granted appropriate access, The User can access Unit, Facility, or Enterprise from this screen.

Step 1: Fill out the messaging form and select the staff list you would like to message.
Step 2: Select all employees from the staff list or select individuals to message. Also check boxes next to each person's name if you wish to send the message via email or text message and click send message.
Your Message Has Been Sent: The message is displayed on the Employee's Message Board upon login to Schedule360™.

Admin Events

The Events Tab allows the Admin User to enter any upcoming "event" that requires the attendance of Employees within Schedule360™. Example: "ICU Staff Meeting." The Event is posted on the calendar for all Employees as a reminder.

<mark>Note:</mark> **Events, unlike Classes or Vacation do not require an Employee to sign-up and gain approval from management.**

Add an Event
To add an Event, fill in the boxes, determine occurrence, determine the level (e.g. Unit, Nursing, and Enterprise) and Submit.

Event Display
Once you have submitted the event it will display on the Events page and will post to Employees' Calendars for the level in which it was submitted.

Admin Class

The Class link allows the Admin User to create future classes for continuing Employee Education and Recertification. This feature is often used in conjunction with the HR-Credentials tab to build future classes based upon the number of upcoming Certification expirations to help ensure JCAHO compliance.

<mark>Note:</mark> **Classes, unlike Events, require an Employee to sign-up and gain approval from management before attending. The class request will be displayed under the Scheduling-Pendings tab for approval by an Admin User.**

Add a Class
To add a Class, fill in the boxes, Class Description, Date, Start-End Times, Location, Employee Eligibility, Units, and Max Class Size. A Note can be added if desired.

Class Display
Once you submit the new class information it will appear under the class sub-tab.