Kronos Workforce v8.1
Advanced Scheduler

Creating and Managing Advanced Schedules

Course Guide v.4

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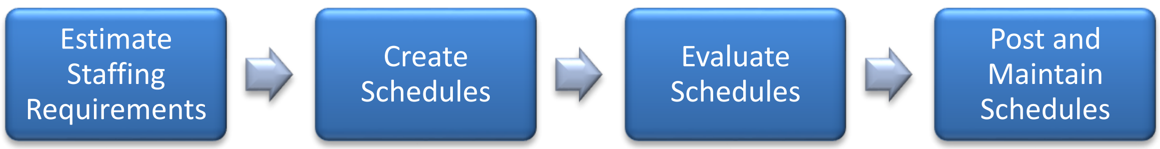
Scheduler Overview

Purpose

Scheduler is a common system that allows multiple schedulers in different areas to create, maintain, and view schedules for their area. Workforce Scheduler also allows a Staffing Office and Schedulers to review the staffing levels for each shift and make adjustments as necessary. Employees can make requests that can impact the schedule.

Phases of Scheduling



Staffing Requirements (Workload Planner)

In order to schedule the correct number of employees in a location, you need to know the required staffing levels for each job. The number of employees required can be different for each location. In some locations, the staffing requirements may be based on census and acuity while the staffing requirement for other locations might be based on the number of tests they need to perform. This is called the workload. The workload is defined for each job in a location for a specified time span.

Job	Time period	Sun	Mon	Tues	Wed	Thurs	Fri	Sat
RN	0700-1500	3	3	3	3	3	3	3
	1500-1900	3	3	3	3	3	3	3
	1900-2300	2	2	2	2	2	2	2
	2300-0700	2	2	2	2	2	2	2

Scheduling Strategies

Scheduling strategies and processes vary depending on the needs of the department. In some departments, employees may enter their shift preferences while in other departments; the employees' schedules may be solely created by the scheduler. Some employees' schedules change each week, while other employees' schedules rarely change.

If an employee generally works the same schedule each week, you can schedule the employee using a pattern. Some patterns are already created and saved in Scheduler. This is called a pattern template. If the employee works different days and times each week, you can schedule the employee as needed by entering the shift start and end times.

Employee	Job	Scheduling Strategy	Week	Sun	Mon	Tues	Wed	Thurs	Fri	Sat
	MA	Add a pattern template	Week 1		0630-1500	0630-1500	0630-1500	0630-1500		
			Week 2		0630-1500	0630-1500	0630-1500	0630-1500		
	RN	Add a pattern	Week 1	0645-1915	0645-1915		0645-1915			
			Week 2		0645-1915	0645-1915			0645-1915	
	RN	Enter a schedule as needed	Week 1	0645-1915				0645-1915		
			Week 2		0645-1915		0645-1915			

Evaluating the Schedule

Scheduler analyzes how many employees are scheduled to work in a specified time span and compares that number to the workload. Schedules can be viewed and adjusted for appropriate coverage at any point in the process.

Employee	Job	Week	Sun	Mon	Tues	Wed	Thurs	Fri	Sat
	RN	Week 1			0645-1915	0645-1915	0645-1915		
	RN	Week 1	0645-1915	0645-1915		0645-1915	0645-1915		
	RN	Week 1	0645-1915				0645-1915	0645-1915	
	RN	Week 1		0645-1915	0645-1915			0645-1915	
	RN	Week 1	0645-1915				0645-1915		0645-1915
	RN	Week 1				0645-1915		0645-1915	0645-1915
Total RN's for 0700-1500 Zone			3	2	2	3	4	3	2
Workload			3	3	3	3	3	3	3
Coverage			Fully staffed	Under staffed by 1	Under staffed by 1	Fully staffed	Over staffed by 1	Fully staffed	Under staffed by 1

In addition to coverage, Scheduler also analyzes the employee's schedule for violations of organizational policies. The violations can be at the employee level. For example, employees that are scheduled for more than forty hours in a week can have a violation. The violations can also be at the location level. For example, a location has to have a Charge Nurse for each shift.

Employee	Job	Skills	Sun	Mon	Tues	Wed	Thurs	Fri	Sat
Sally	RN	Charge		0645-1915	0645-1915		0645-1915		
Joan	RN	Charge	0645-1915					0645-1915	0645-1915
Sara	RN		0645-1915	0645-1915		0645-1915	0645-1915		
Location Violation						No Charge Nurse for the shift			
Employee Violation			Sara is over 40 hours in a week						

Scheduling Building Blocks

Once you decide on a scheduling strategy, Scheduler has a number of tools to help you create your employees' schedules. These tools also help you maintain accurate schedules when an employee deviates from his or her schedule. Use the following table to assist you in scheduling employees. These tools are available in the Scheduler.

Tool	Description	Possible Use
Pattern Template	Used to create an employee's schedule using a predefined pattern of days and shifts. A pattern can repeat forever or can have an end date. A pattern assignment is the method used to define the employee's standard schedule.	Create a schedule for a new hire to work Monday through Friday from 7:00AM to 3:30PM.
Pattern Editor	Used to create an employee's schedule for selected days and shifts; unlike pattern templates they are not predefined. A pattern can repeat forever or can have an end date. A pattern assignment is the method used to define the employee's standard schedule.	Create a schedule for an employee that works every other Saturday.
Shift Template	Used to update an employee's schedule by adding a pre-defined start and end time to a day they are expected to be at work.	Add an additional shift to one or more employee's schedule to work on Sunday.
Pay Code Edits	Used to add non-worked time to a schedule.	Replace an employee's shift with Jury Duty.
Schedule Quick Actions	Contains short cut icons to various scheduling building blocks.	Add the same shift to several employees' schedules.
Self-Schedule	Used by employees to select shifts, request open shifts, and shift swaps.	Employee selects a shift to work, or requests a day off.
Staffing Widget	Gives you quick access to your daily staffing plan.	Make adjustments when unforeseen events occur. I.E. Call In, Census Change, etc.

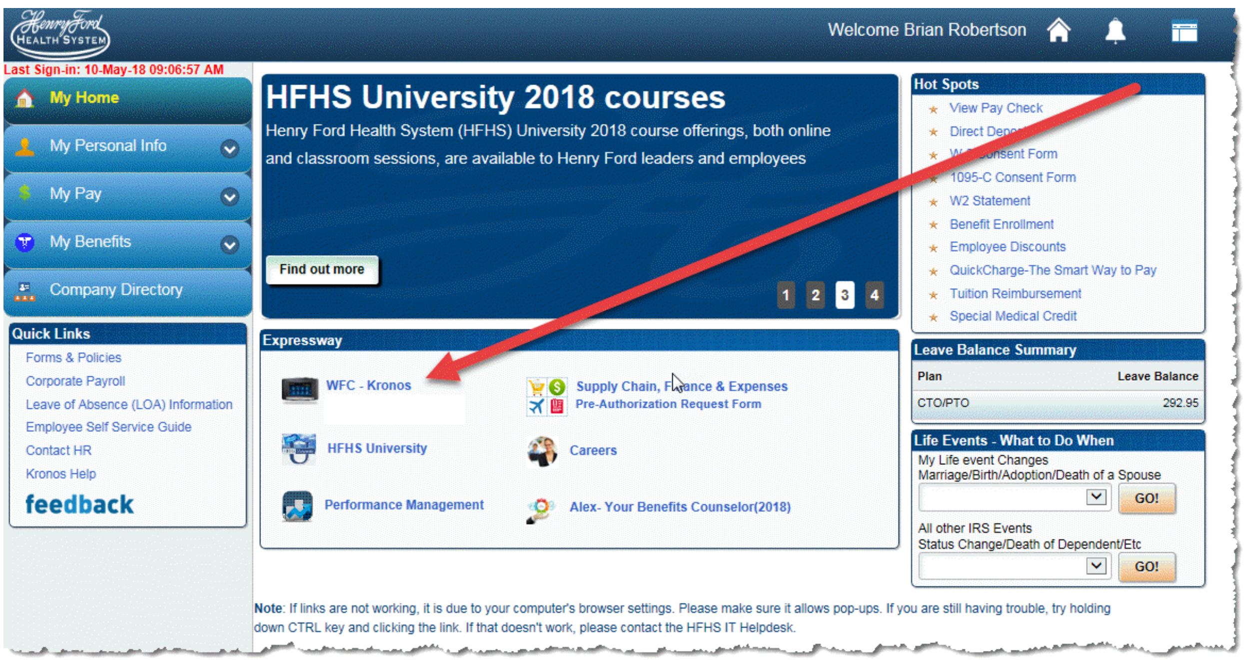
Logging On – Single Sign-On

Purpose

Workforce Central is accessed via the Expressway in Manager/Employee Self-Service. There is no additional ID/password needed for Kronos Workforce Central where you to perform your time and attendance tasks.

Example

You, as the department Manager, log on to the Workforce Timekeeper application at least once a day to review and work with your employees' timecards and scheduling data.



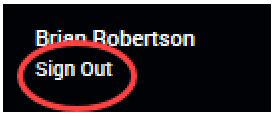
Steps	
1	Access the Employee and Manager Self-Service log in page.
2	Enter your user name and password in their designated fields.
3	Click the **WFC - Kronos** link in the *Expressway*.

Business practice

If you or an employee using Kronos forgets your Employee and Manager Self Service user name or password, contact the IT Help Desk at 248-853-4900.

Logging Off

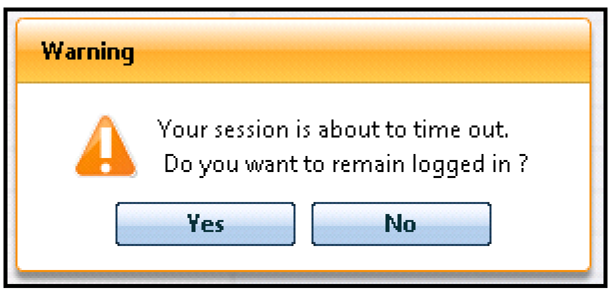
Upon completion of your tasks, you must log off Kronos to ensure that your employees' information is kept confidential.



Caution
Clicking the Close (X) button without first logging off might leave your connection to Kronos open, making it possible for unauthorized people to view and edit information.

Timing Out

If Kronos doesn't detect activity within a specific amount of time, it will automatically "time out" to protect sensitive information. Shortly before the system times out, you will be prompted to click **Yes** to continue working or No to log out.



Caution
If you select **No** or the system times out, you will lose any unsaved changes.

Business practice
The inactivity timeout screen appears if there is no activity for 29 minutes.

Navigating Kronos

Navigating

The key areas of Kronos

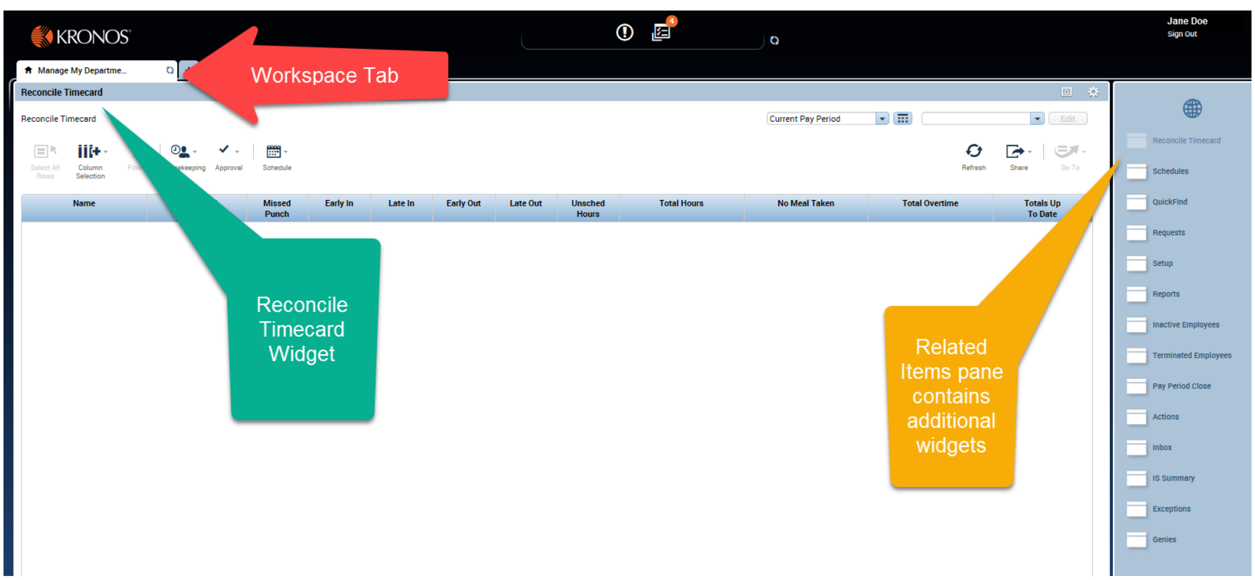
Tabs at the top refer to a workspace. A workspace contains a set of tools related to a certain aspect of your job. Additional workspaces can be displayed in the workspace carousel. Within a workspace are widgets. A widget contains information and/or functionality for you to perform tasks in Kronos.

The Genies widget displays by default in the Manage My Department workspace. The name of the Genie reflects a common task, such as Reconcile Timecard

Additional widgets are stored in the Workspace's Related Items pane. Select a widget for it to display as its own tab. Click the X in the tab to close it. The default workspace, Manage My Department, cannot be closed.

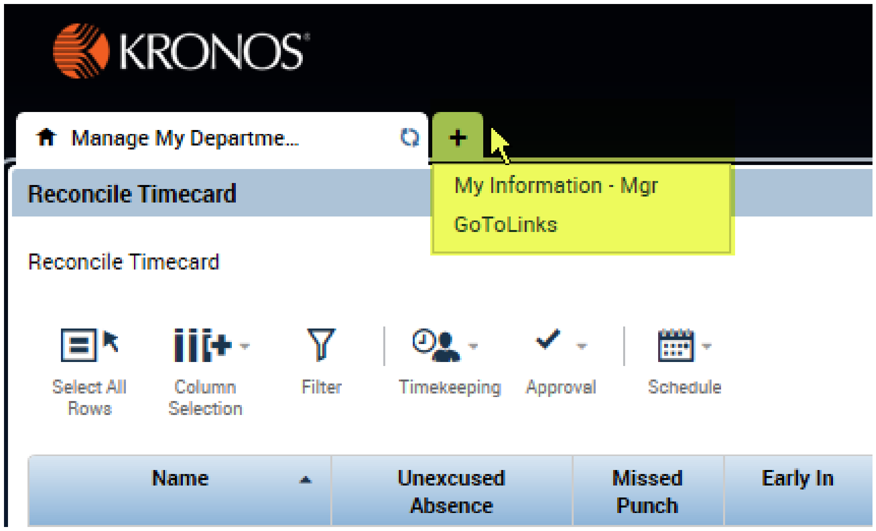
Collapse the Related Items pane for additional real-estate by clicking its arrow. Hover over any item to display its name

Refresh any workspace by clicking the double arrows...

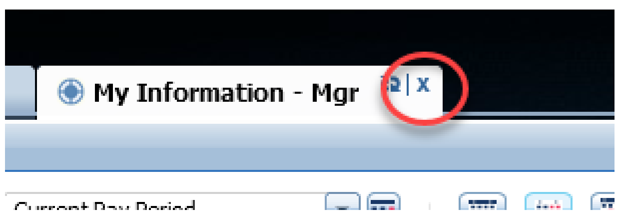


Using the New Workspace Menu

You can navigate to additional workspaces using the New Workspace Menu. When you click the + (plus sign) tab, available workspaces display. Click one to open it.



Use the X in the tab of a workspace to close it.



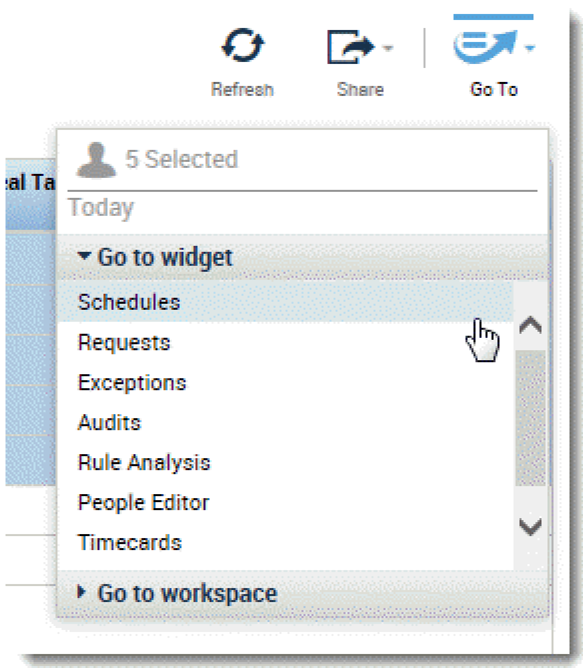
Using the Tools within the Workspace

The **Show** box (unlabeled) allows you to display a group of employees. When you log on, the default setting for the Show box is All Home, which displays all employees in your cost center(s). You can use the Show box to refine your selection further to include employees in a specific group, such as only those employees who work in a particular area or on a particular shift.

The **Time Period** box (unlabeled) allows you to specify the timeframe you want to view, such as the current pay period or a particular timeframe in the past, present, or future. The time period you select controls what you will see on that page.

Refresh, Share, and GoTo buttons are located at the top right of most workspaces. Use the Share button to print or export the current workspace to Excel.

Use the GoTo button to access information specific to one or more employees. For example, you can select one employee and click the Timecard item in the GoTo list. to access his or her timecard. Or, you can select multiple employees and click the Schedule item in the GoTo list to view schedules for just those employees whom you selected.



On Your Own – Structured Practice – Navigating Kronos

- Click the Refresh button in the Workspace tab
- Click the New Workspace Menu carousel
- Select the Scheduling Manager item
- Collapse the Related Items pane
- Hover over the 2nd item and read the name
- Expand the Related Items pane
- Select the Staffing Widget item in the Related Items pane
- Close the Staffing Widget workspace
- Set the Time Period box to Next Schedule Period
- Set the Show box to All Home Locations
- Click the Quick Actions button (displays additional action buttons)
- Read the names of the Quick Actions buttons
- Click the Quick Actions button (hides additional action buttons)
- Sign Out of Kronos

Schedule Build Processes

Scheduling Process with Self Scheduling

Purpose

The following list describes the scheduling process for departments that self-schedule:

1. Pre-schedule tasks completed. These are typically one-time tasks:
   Unique selection locations created, if necessary
   Employees assigned to group(s), if necessary
2. Patterns, if used, are entered in the schedule
3. Individual shifts for individual employees are entered in the schedule if patterns are not used.
4. Non-standard events such as orientation, education, jury, funeral, , or on-call time are entered in the schedule
5. Self-scheduling is opened
6. (Optional) Schedules are locked and unlock to allow for self-schedule in groups
7. Self-scheduling is closed
8. Schedule is evaluated for rule violations and coverage
9. Schedule is balanced
10. Schedule is posted

Scheduling Process without Self-Scheduling

Purpose

The following list describes the scheduling process for departments that do not self-schedule:

1. Pre-schedule tasks completed. These are typically one-time tasks:
   Unique selection locations created, if necessary
   Employees assigned to group(s), if necessary
2. Patterns, if used, are entered in the schedule.
3. Individual shifts for individual employees are entered in the schedule if patterns are not used.
4. Non-standard events such as jury, training, orientation, or on-call time are entered in the schedule

5. Schedule is evaluated for rule violations and coverage
6. Schedule is balanced
7. Schedule is posted

Setup Tasks

Navigating the Scheduler Widget

Purpose

The Scheduler widget is the primary tool for creating and managing upcoming schedules.

The key components the Scheduler

Adjusting the Schedule Planner View

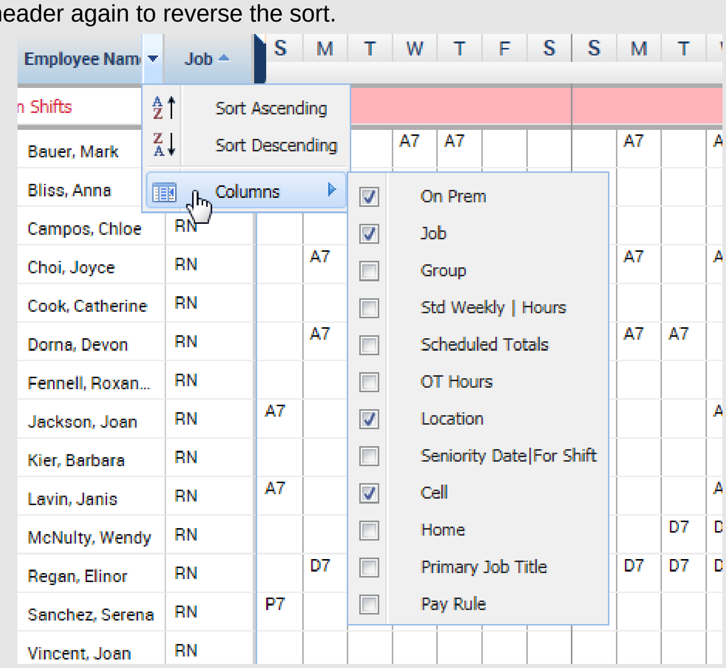
Purpose

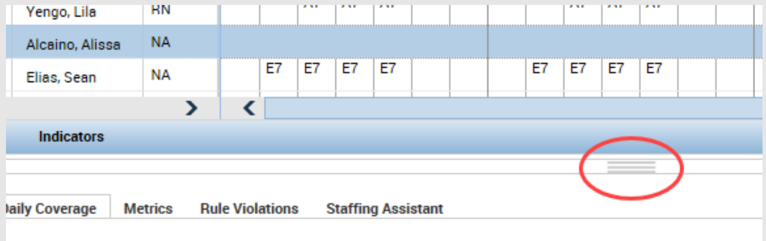
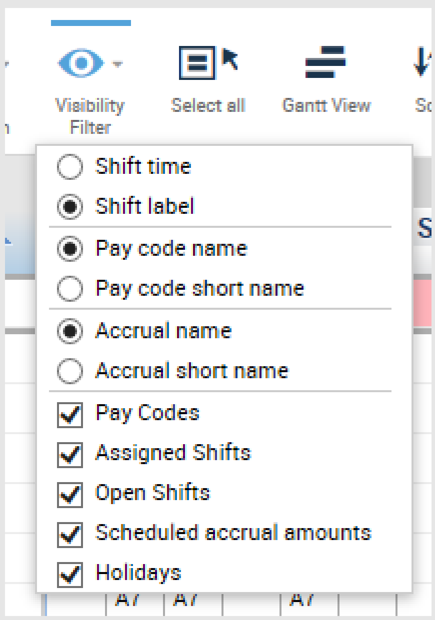
You have the following options for manipulating how data appears in the Schedule Planner:

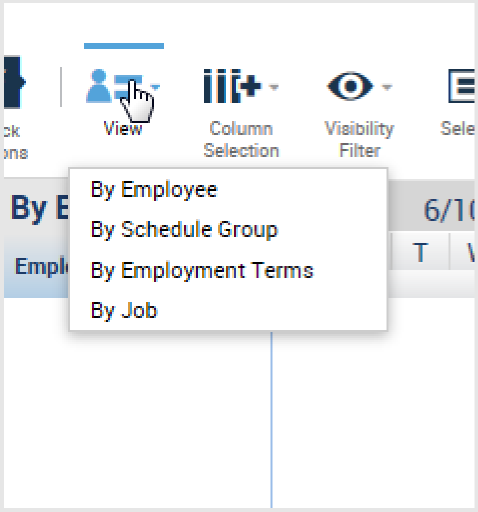
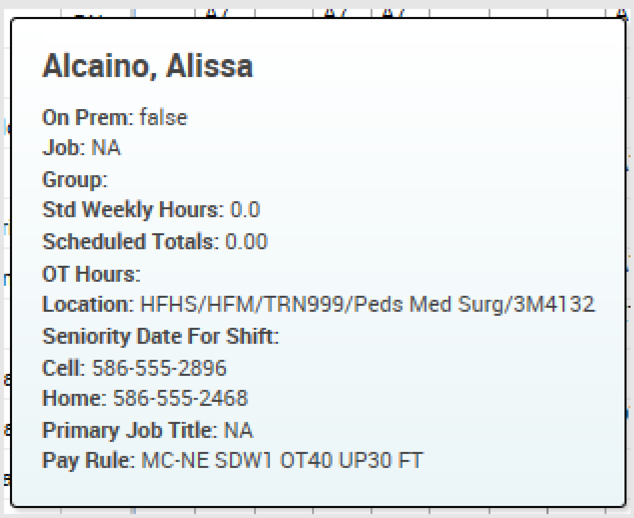
- Sort the data by certain columns; for example, by the Job column
- Resize areas of the workspace
- Use options in the View menu to change time intervals, show shift times or shift labels, and show and hide data
- Use the Schedule Planner top tabs for different views of schedule data and employees: By Employee, By Group, and By Job
- View additional data about employees in tool tips
- Zoom in and out on date columns in the schedule grid area

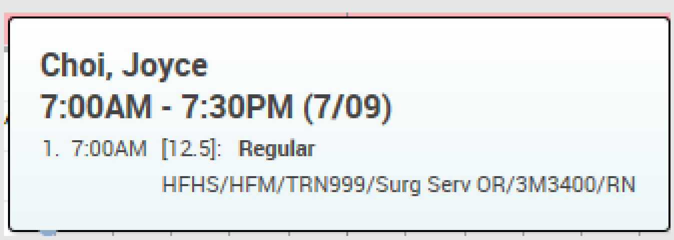
Example

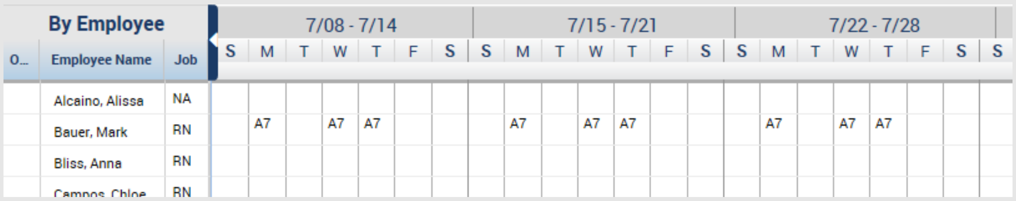
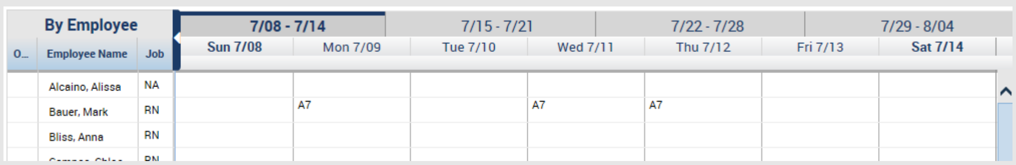
You want to review schedules for the next schedule period to locate RN's with the fewest scheduled hours. To easily see the data you want, sort employees by Scheduled Totals and Job.

<table>
<tr><th>Feature</th><th>Description</th></tr>
<tr><td>Sorting and Displaying columns</td><td>Every column header has a drop down menu to sort by that item and to select the visible columns. An arrow appears in the column header to indicate that the column is sorted. Click on the column header again to reverse the sort.

</td></tr>
</table>

Feature	Description
Resizing workspaces	You can resize individual workspaces in the Schedule Planner to see more or less of the information they contain. For example, you can move the divider between the employee rows and bottom tabs up or down to display more or fewer employee rows. 
Using Visibility Filter options	Use the options in the Visibility Filter menu to adjust how data appears in the Scheduler, including: • Whether shift labels or shift times appear • Whether and How pay codes appear • Whether several items appear (see image below) 

<table>
<tr><th>Feature</th><th>Description</th></tr>
<tr><td>Using the View drop down menu</td><td>Use this menu to display schedule data by employee, by group, by employment terms, or by job.

</td></tr>
<tr><td>Tool tips</td><td>Use tool tips to display data about scheduled employees and shifts.



</td></tr>
</table>

Feature	Description
Zoom	Click any **week** column header to view that week only. Click and **day** column header to view that day only. Click any **week** day column header to toggle back. **Before**  **After** 

Saving a Personal Location (Search Query)

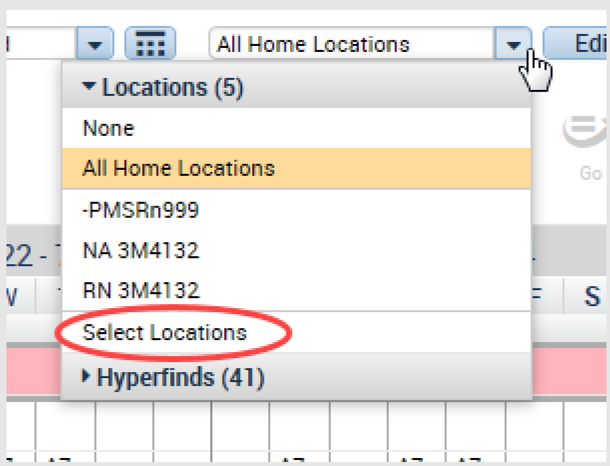
Purpose

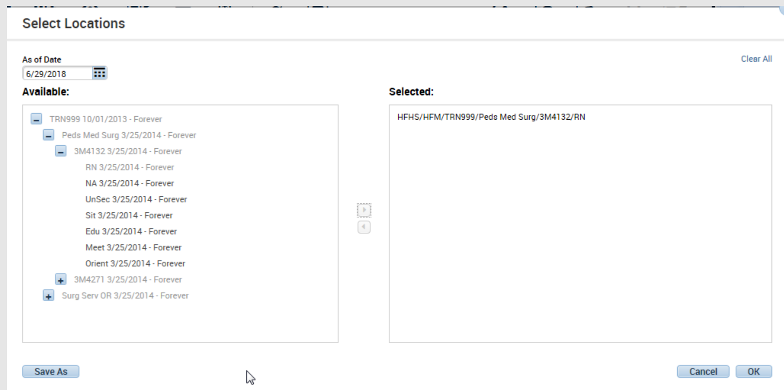
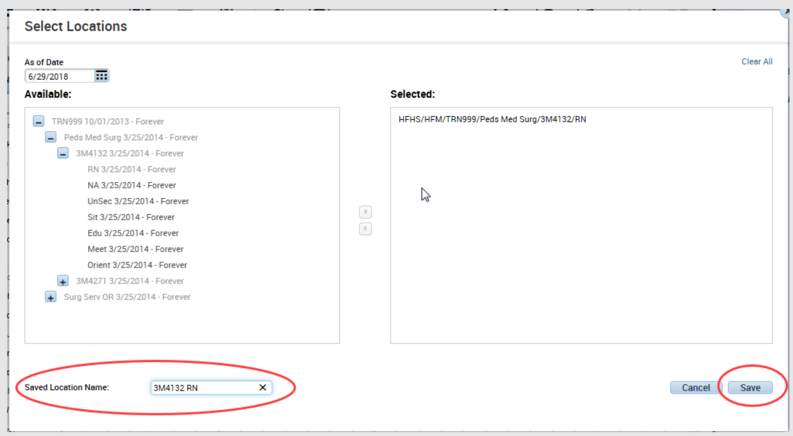
For employees in departments and jobs that you view frequently, you can save a set of locations or jobs as a reusable query that appears in the Show drop-down list. Personal location queries are not the same as HyperFind queries; they relate only to locations and jobs in an organizational map.

> **Note**
> The **All Home Locations** query DOES let you evaluate coverage, review rule violations, or view open shifts.
>
> The **All Home** hyperfind limits Workforce Scheduler functionality. For example, it DOES NOT let you evaluate coverage, review rule violations, or view open shifts.

Example

You need to frequently work schedules for nurses in Department 3M4132. A custom location makes this task easier.

Steps		
1	Access the Scheduler.	
2	From the **Location** drop-down list, choose **Select Locations**. The **Select Locations** dialog box appears and all locations that you have access to are selected by default.	

Steps		
3	Expand the organizational map by clicking the **plus (+) signs** until the appropriate locations and/or jobs appear. Select the job and use the arrow to move to the **"Selected"** box.	
5	Click **Save As**. Enter a name. Click **Save**	
	The Scheduler displays scheduling data for the selected employees and time period.	
Note: Use the **Edit** button to **Delete** an existing location.		

Practice:

1. Create and save a new location for NAs in 3M4132
2. Create and save a new location RNs in 3M4271.
3. Create and save a new location RNs in 3M3400.
4. Create and save a new location that displays all RN's regardless of which department.

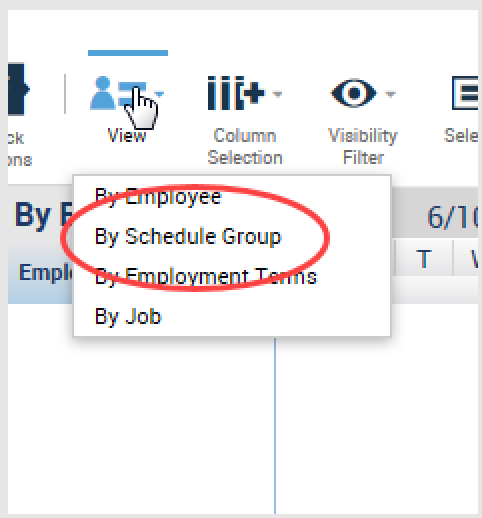
Assigning Schedules Groups

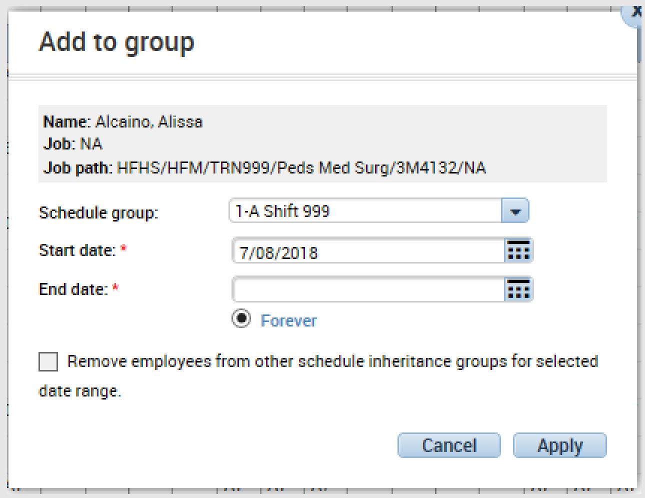
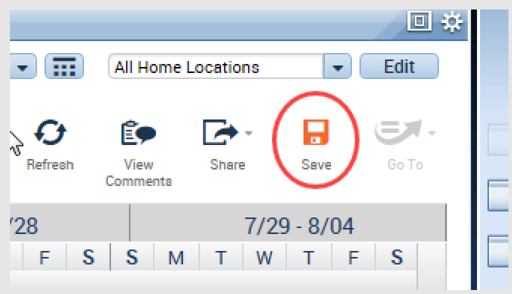
Purpose

A schedule group is a collection of employees who work the same or similar shifts. You assign employees to schedule groups to facilitate creating and editing their schedules. Employees can be assigned to more than one schedule group.

Example

When evaluating and building your schedule, you find it helpful to view employees by their preferred shifts and jobs. You group your employees by assigning them to their preferred times. A new employee prefers to work days. You assign her to the 2-Day schedule group.

Steps		
1	Access a Scheduler.	
2	Select the specific set of employees and the specific time period.	
3	Select the **By Schedule Group** from the **View** button.	
4	Do one of the following: • Right-click the employee that you want to assign to a schedule group. • Select multiple employees by holding the **Ctrl** key and single-clicking each employee's name. Then right-click one of the selected employees	
5	Select **Add to Group**.	

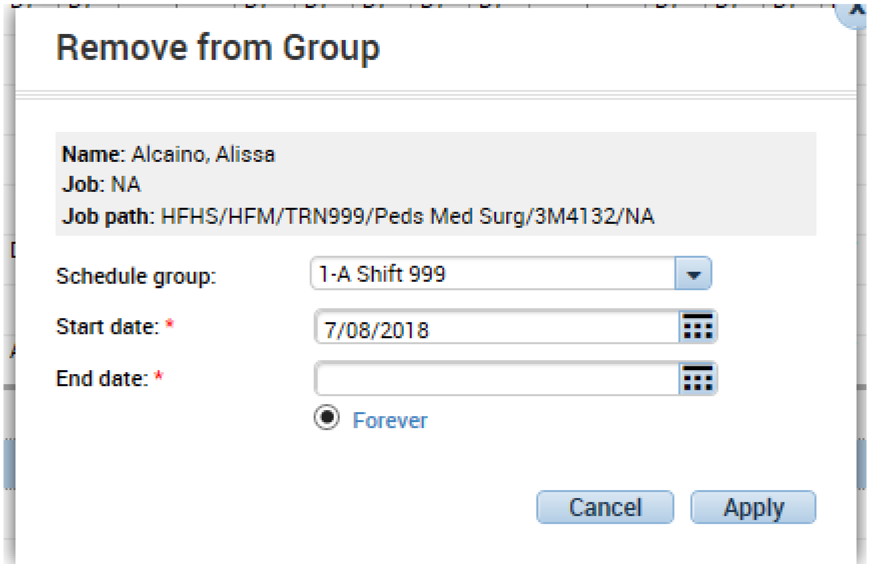
Steps		
6	From the **Schedule Group** drop-down list, select the name of the schedule group to which you want to assign to the employee(s).	
7	From the **Start Date** drop-down calendar, select the effective date for the schedule group assignment.	
8	From the **End Date** drop-down calendar, select one of the following: • Last date the schedule group assignment will be in effect. • **Forever** for the assignment to be in effect with no end date.	
9	Click **Apply**.	
10	Click **Save**.	

Business practice

Contact Employee Services at:
employeeservices@hfhs.org or 855-874-4100 to have a new schedule group created.

Tip

To remove an employee from a schedule group, repeat steps 1 – 4. Then select **Remove from Group**. Select the schedule group from which you are removing the employee and the start and end dates during which the employee will no longer be a member of the group. To remove the employee from the schedule group indefinitely, select **Forever**.



Shift Times vs. Shift Labels

Purpose

Scheduled shifts are displayed using one of two different formats:

- Shift Times: Start Time through End Time (i.e. 7a-730p)
- Shift Labels: A pre-defined code that represents the length of a shift and when it starts.

The Scheduler display Shift Labels by default. Use the Visibility Filter button to display Shift Times.

Shift Label Examples

First Character (Abbreviation)	Shift Duration	Shift Label Example	Shift Time
A	12 Hour (12A-12P)	A5	5a-530p
P	12 Hour Night (12P-12A)	P5	5p-530a
D	8 Hour Day (5A-3P)	D7	7a-330p
E	8 Hour Eve (3P-11P)	E3	3p-1130p
N	8 Hour Night (11P-7A)	N11	11p-730a
B	2 Hours	B11a	11a-1p
C	3 Hours	C7p	7p-10p
F	4 Hours	F6p	6p-10p
V	5 Hours	V1130a	1130a-430p
S	6 Hours	S7a	7a-130p
L	7 Hours	L9a	9a-430p
R	9 Hours	R7a	7a-430p
T	10 Hours	T7a	7a-530p
H	11 Hours	H530a	530a-5p
K	13 Hours	K2a	2a-3p
Y	14 Hours	Y5p	5p-730a
W	15 Hours	W330p	330p-7a
G	16 Hours	G330p	330p-8a
J	17 Hours	J630a	630a-1130p
Z	24 Hours	Z6pnl	6p-6p

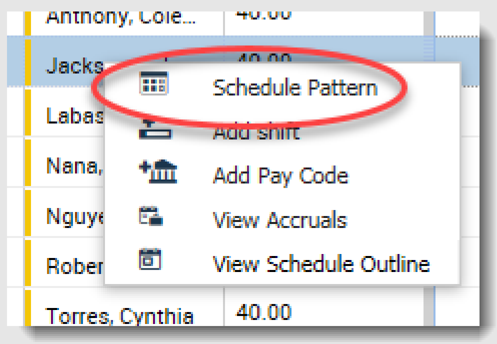
Creating Schedules Using Pattern Templates

Purpose

Schedule patterns let you quickly apply a set of shifts to employees who work the same shifts on a regular basis. A schedule pattern consists of one or more shifts that repeat over a specified time period. When you create schedules for employees who have a schedule pattern, you can add the shift days and times manually or use a predefined pattern template. The pattern template defines the pattern of the shifts' days and times and makes it easier and faster for you to create the employees' schedules.

Example

You want to schedule an employee to work 8:00 A.M. to 4:30 P.M. Monday through Friday every week, starting Sunday of the next schedule period. You know that a pattern template exists that defines this schedule pattern, so you will use it because it is easier and faster than adding the schedule manually.

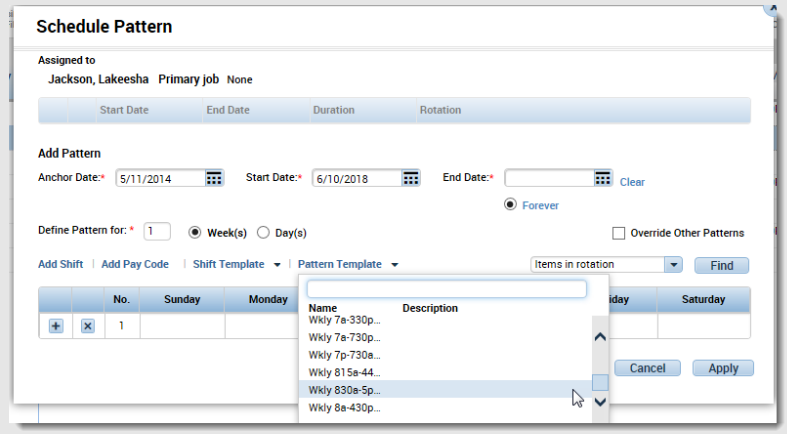
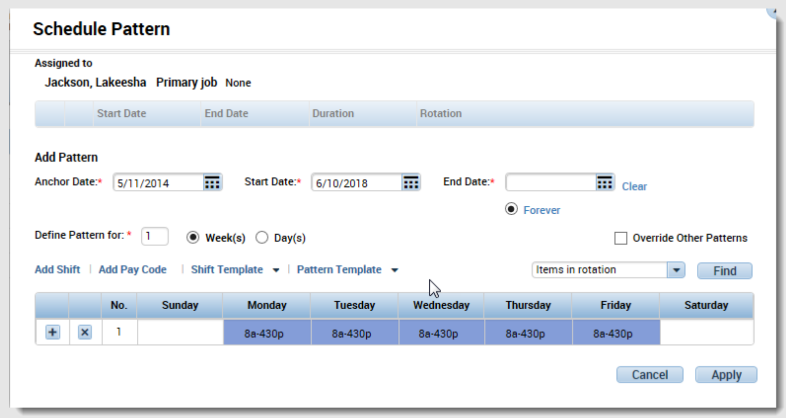
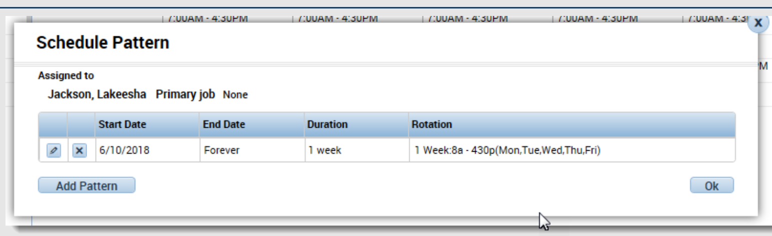
Steps		
1	Access the **Schedule**.	
2	Select the specific set of employees from the **Show** drop-down list. Select the specific time period from the **Time Period** drop-down list.	
3	Right-Click the name of the employee who you will schedule using a pattern template.	
4	Select **Schedule Pattern**.	

Define the following terms:

Shift: ____

Pattern: ____

Template: ____

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>5</td><td>Click Pattern Template.</td><td rowspan="2">
</td></tr>
<tr><td>6</td><td>Select a pattern from the list.</td></tr>
<tr><td>7</td><td>From the Start Date calendar icon, specify the date on which the employee(s) starts working the pattern.</td><td rowspan="3">
</td></tr>
<tr><td>8</td><td>From the Anchor Start calendar icon, specify the date on which the pattern starts.</td></tr>
<tr><td>9</td><td>From the End Date calendar icon, specify the last date that the pattern will be effective. To have the pattern in effect with no end date, select Forever.</td></tr>
<tr><td>10</td><td>Click Apple and then click OK.</td><td rowspan="2">
</td></tr>
<tr><td>11</td><td>Click Save.</td></tr>
</table>

Business practice

Always look for a pattern template first when scheduling employees with schedule patterns. If a pattern template is not available, contact your administrator.

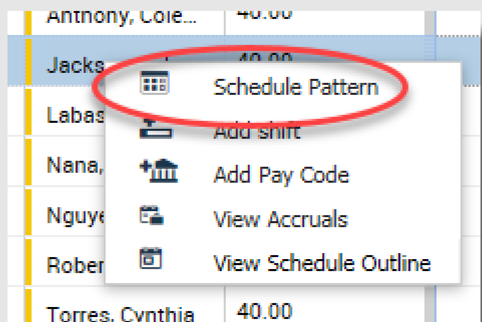
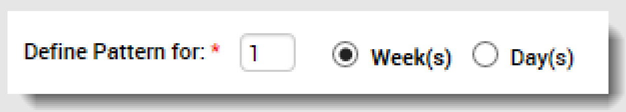
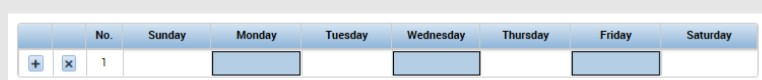
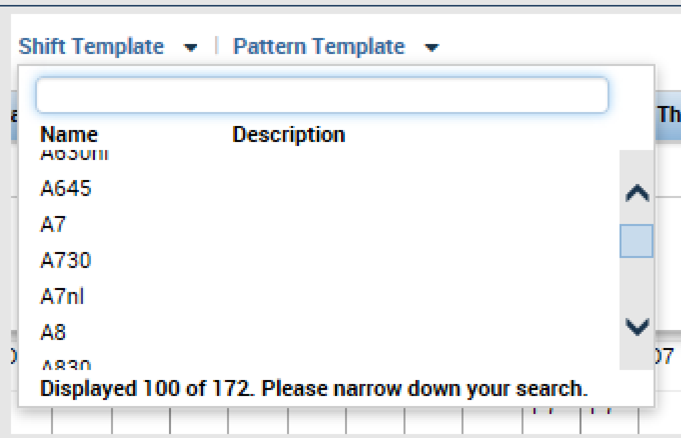
Creating Schedule Patterns without Pattern Templates

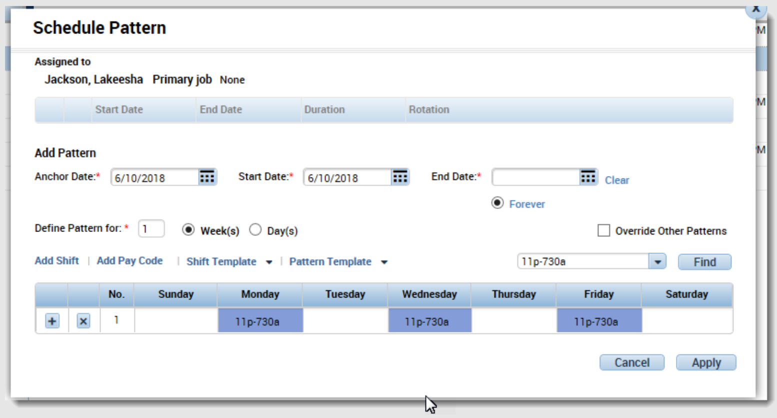
Purpose

If a pattern template does not exist, you can create a schedule pattern manually and apply it to one or more employees as you create it. The application, however, does not save the schedule pattern as a pattern template, so you cannot assign it to employees later. You would need to create it again manually.

Example

One of your employees is scheduled to work Monday, Wednesday, and Friday from 11:00 P.M. to 7:30 A.M. Even though there is no pattern template for this schedule, you know that it is quicker to create the schedule using a schedule pattern than to schedule each day separately.

Steps		
1	Access the **Schedule**.	
2	Select the specific set of employees from the **Show** drop-down list. Select the specific time period from the **Time Period** drop-down list.	
3	Right-Click the name of the employee who you will schedule using an ad-hoc pattern.	
4	Select **Schedule Pattern.**	
5	Set the **Define Pattern for** field to the correct interval, for example, days or weeks, and the number of days or weeks the pattern repeats.	
6	Click the cell of the each day that applies to the schedule pattern. To select multiple days hold the **Ctrl** key and click the appropriate cells.	
7	Click **Shift Template**.	
8	Select the appropriate shift. Use the **Search** box to shorten the list.	

9	From the **Anchor Date** calendar icon, specify the date when the pattern starts. Note: this should be a **Sunday**.	
10	From the **Start Date** calendar icon, specify the date when the employee(s) starts working the pattern. Note: this should be a **Sunday**.	
11	From the **End Date** calendar icon, specify the last date that the pattern is effective. To have the assignment in effect with no end date, select **Forever**.	
12	(Optional) To replace all other assigned schedule patterns with the new schedule pattern, select the **Override other patterns** check box.	
13	Click **Apply, OK** and then click **Save**.	

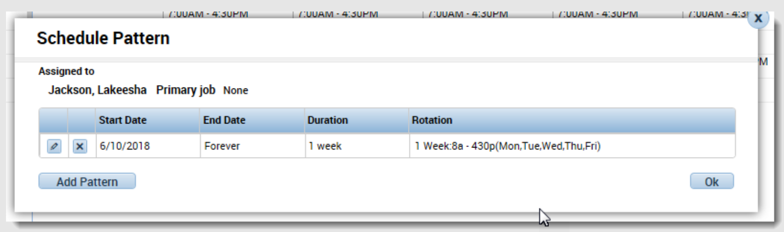
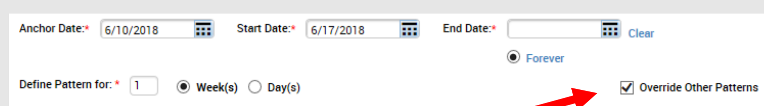
Updating Schedule Patterns

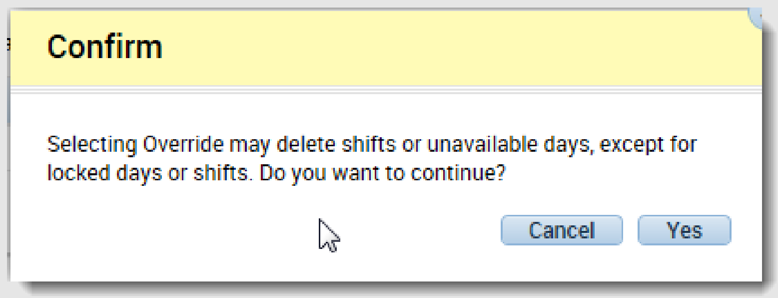
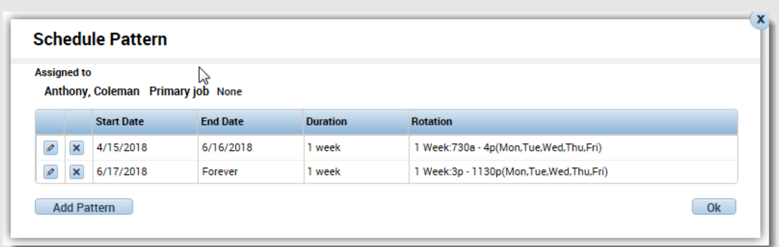
Purpose

From time to time, employees' regular schedule patterns might change for reasons such as workload changes, status changes, or terminations. When you need to change an employee's schedule pattern, you can override the existing pattern(s) to adjust for the changed circumstances.

Example

An employee will now be working 3:00 P.M to 11:30 P.M. on Monday - Friday. You assign the new pattern and override the old pattern as of the 2nd Monday of the next schedule period.

Steps		
1	Access the **Schedule**.	
2	Select the specific set of employees from the **Show** drop-down list. Select the specific time period from the **Time Period** drop-down list	
3	Right-Click the name of the employee whose schedule pattern is changing and choose **Schedule Pattern**.	
4	Select **Add Pattern**	
5	From the **Anchor Date** calendar icon, specify the date when the employee(s) starts using the new schedule pattern. Note: this should be a **Sunday**.	
6	From the **Start Date** calendar icon, specify the date when the new schedule pattern starts. Note: this should be a **Sunday**.	
7	From the **End Date** calendar icon, specify the last date that the pattern is effective. To have the assignment in effect with no end date, select **Forever**.	
8	Select the **Override other patterns** check box.	

Steps		
6	Use one of the following options to enter the new shift pattern: • Enter the shift start and end times in each applicable cell. • Click the applicable cells, click **Shift Template** and select the shift template. • Click the applicable cells, click **Add Shift**, define the shift attributes, and click **Apply**. • Click **Pattern Template** and select the pattern.	
7	Click **Apply**.	
8	Click **Yes** when you see the message about Confirming 'Override.'	
9	Click **OK.** Then click **Save**.	

Tip

To update a pattern, it's easiest to follow the steps as if you were going to assign a new pattern and select the **Override other patterns** check box. The old pattern will be overridden as of the new work start date.

To end an employee's pattern without replacing it with a new pattern, right-click on the the employee's name and select **Schedule Pattern**. Use the **Pencil Icon** next to the pattern that is ending to edit that pattern. Select **End Date** and enter the last date the pattern will be active.

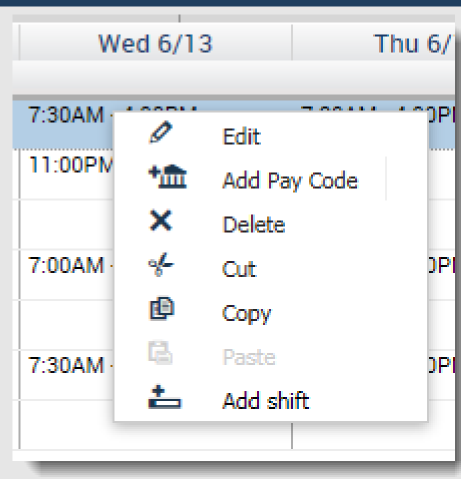
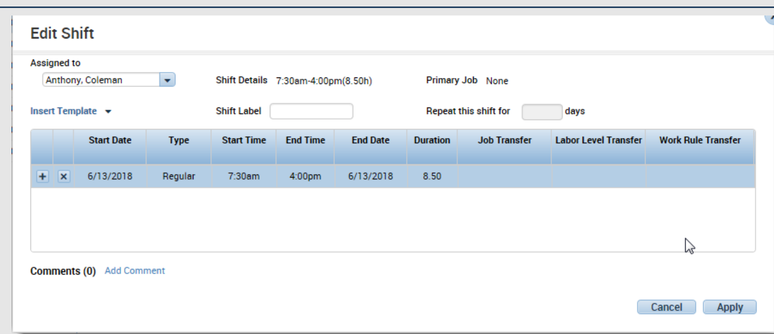
Adding/Editing Shifts with (Full Day) Transfers

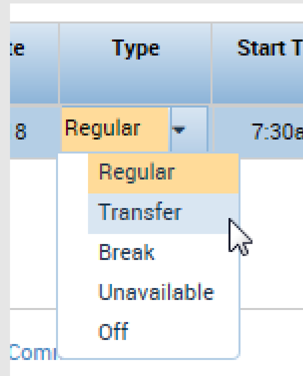
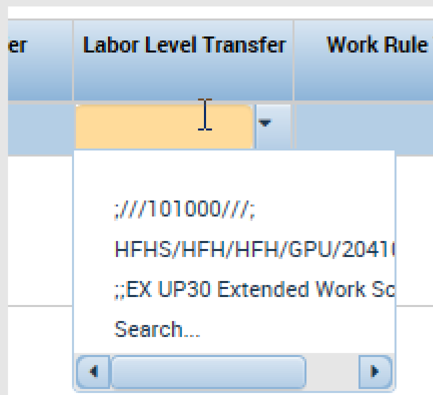
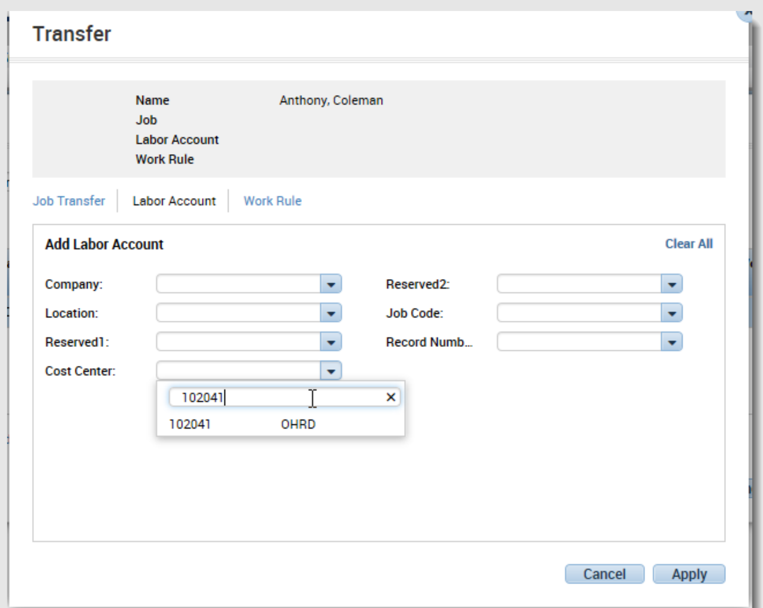
Purpose

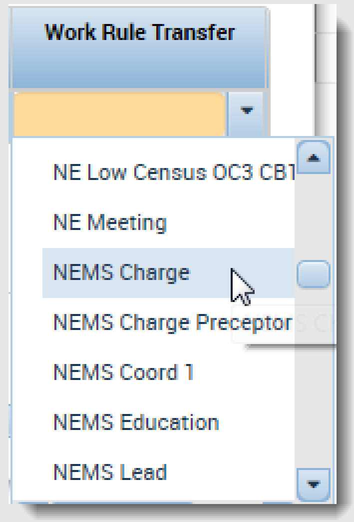
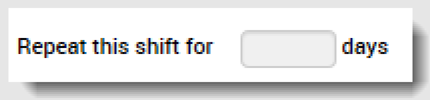
Each employee is assigned a primary labor account and default work rule. During the normal workday, all worked and non-worked hours are charged to this assigned labor account. Occasionally, you may need to transfer the employee to another labor account or work rule. You need to record the transfer in the application so that the right labor account is charged and the right work rule is applied. Transfers can be made when either adding a new shift or editing an existing shift.

Example

On Wednesday of the next schedule period, you need an employee to work her entire shift in a different cost center. Schedule the employee to work in the other cost center from 7:30 A.M. to 4:00 P.M. on Wednesday of the next schedule period.

Steps		
1	Access the **Schedule.**	
2	Select the specific set of employees from the **Show** drop-down list. Select the specific time period from the **Time Period** drop-down list.	
3	**Right-Click** the employee's cell in the row and below the date where you want to add/edit a shift that requires a transfer.	
4	Select **Edit** when changing the transfer settings of an existing shift. Select: **Add Shift** when adding a new shift that is a transfer.	
5	In the Edit Shift window: Confirm/enter the correct date in the **Start Date** field.	

6	From the **Type** drop-down list, select the Transfer shift type.	
7	In the **Start Time** field, confirm/enter the time the shift starts and press **Tab**.	
8	In the **End Time** field, confirm/enter the time the shift ends and press **Tab**.	
9	Confirm/enter the correct date in the **End Date** field. If the shift crosses a day divide, change the shift's end date to the following day.	
10	What kind of transfer(s) do you want to perform? • Transfer hours to another labor account (i.e. Cost Center): Click the **Labor Level Transfer** drop-down list and select **Search.** • Enter a value in the appropriate **Transfer** level field or select a value from the level drop-down list. • Then click **Apply**. (Note: **Job Transfer** is utilized by Advanced Scheduling units, typically inpatient nursing.)	 

	• Transfer hours to another work rule (i.e. Charge Nurse, Preceptor, Orientation, OnCall etc.): • Click the Work Rule Transfer drop-down list and select the appropriate value.(See Prefixes below)..	
11	Click **Apply**.	
12	(Optional) In the **Repeat this shift for [blank] days** field, enter the number of consecutive days that you want the transfer to last.	
13	Click **Save**	

Visual Indicator	Definition
(x)	Labor account transfer associated with a shift
(work rule)	Work rule transfer associated with that shift

Prefixes to Alternate Work Rules	
EX UP30	Exempt, unpaid 30 min lunch
NEMS	Non –exempt, Market Sensitive, Inpatient Nurse
NENSNW	Non-exempt, No shift, No weekend
NE	Non-exempt, with weekend/shift premiums
NENS	Non-exempt, No shift

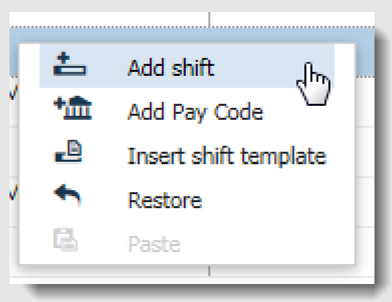
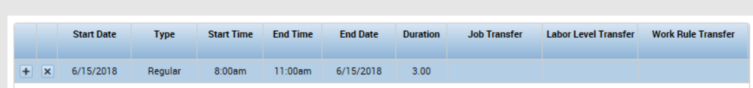
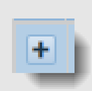
Adding Shifts with (Partial Day) Transfers

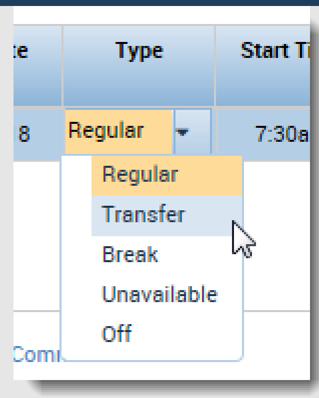
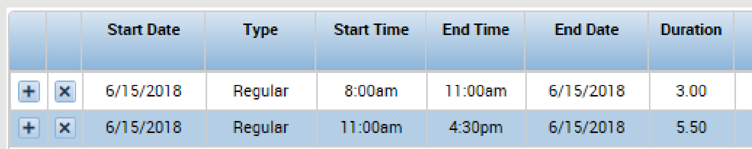
Purpose

Each employee is assigned a primary labor account and default work rule. During the normal workday, all worked and non-worked hours are charged to this assigned labor account. Occasionally, you may need to transfer an employee to another labor account or work rule for part of his or her shift. You need to note the transfer in the application so that the right labor account is charged and the right work rule is applied. Transfers can be made when either adding a new shift or editing an existing shift.

Example

You need to schedule an employee to work hours in two different cost centers on Friday of the next schedule period. You want the employee to work in her home cost center from 8:00 A.M. to 11:00 A.M. and then the other cost center from 11:00 A.M. to 4:30 P.M. Schedule an employee to work part of her shift (from 8:00 A.M. to 11:00 A.M.) in her home cost center and then the remainder of her shift (from 11:00 A.M. to 4:30 P.M.) in the other cost center on Friday of the next schedule period.

Steps		
1	Access the **Schedule**.	
2	Select the specific set of employees from the **Show** drop-down list. Select the desired time period from the **Time Period** drop-down list.	
3	**Right-Click** the employee's cell in the row and below the date where you want to add/edit a shift that requires a transfer.	
4	Select **Add Shift**.	
5	In the Edit Shift window, confirm the correct date in the **Start Date** field.	
6	For the hours that the employee is scheduled to work before the transfer, fill in the **Start Time** and the **End Time** fields.	
7	Click the **Insert Row** icon.	

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>8</td><td>From the Type drop-down list, select the Transfer shift type.</td><td>
</td></tr>
<tr><td>9</td><td>In the Start Time field, confirm the time that the shift transfer begins and press Tab.</td><td rowspan="3">

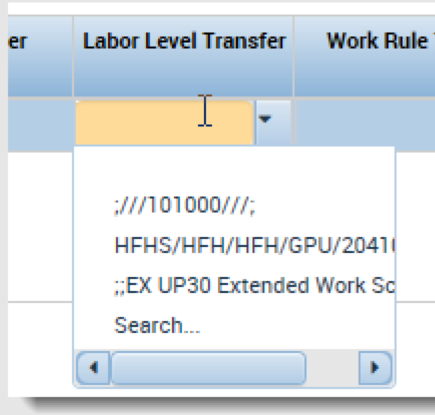
		Start Date	Type	Start Time	End Time	End Date	Duration
+	×	6/15/2018	Regular	8:00am	11:00am	6/15/2018	3.00
+	×	6/15/2018	Regular	11:00am	4:30pm	6/15/2018	5.50
</td></tr>
<tr><td>10</td><td>In the End Time field, enter the time that the shift transfer ends and press Tab.</td></tr>
<tr><td>11</td><td>Confirm that the date in the End Date field is correct. If the shift crosses the day divide, change the shift’s end date to the following day.</td></tr>
</table>

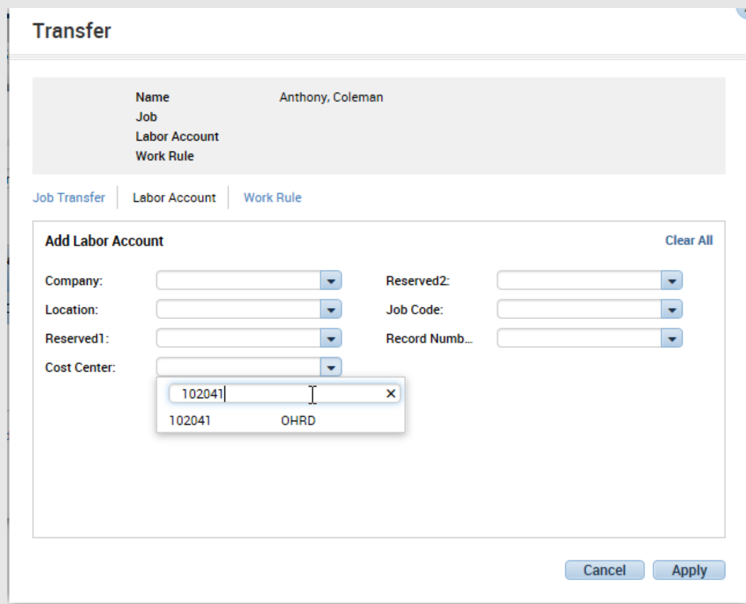
Steps

12 What kind of transfer(s) do you want to perform?

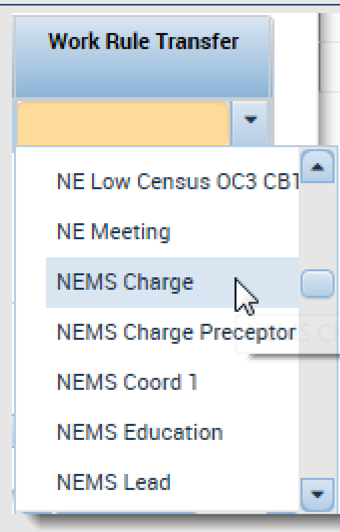
- Transfer hours to another labor account (i.e. Cost Center): Click the **Labor Level Transfer** drop-down list and select a value from the list or select **Search.**
- Enter a value in the appropriate **Transfer** level field or select a value from the level drop-down list.
- Then click **Apply**.

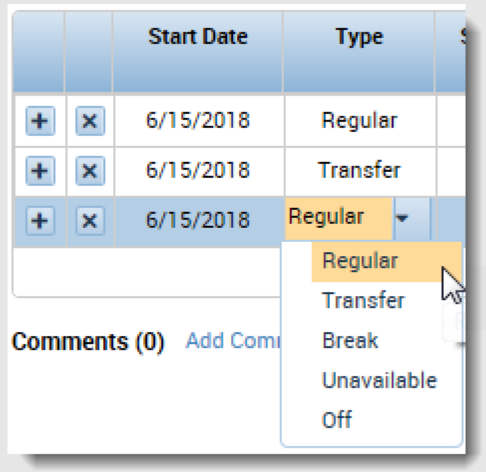
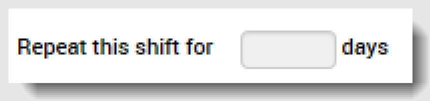
(Note: **Job Transfer** is utilized by Advanced Scheduling units, typically inpatient nursing.)





- Transfer hours to another work rule (i.e. Charge Nurse, Preceptor, Orientation, OnCall etc.):
- Click the Work Rule Transfer drop-down list and select the appropriate value.



Steps		
15	If the employee is scheduled to work hours after the scheduled shift transfer, click the **Insert Row** icon and select the correct type from the **Type** drop-down list.	
16	In the **End Time** field, enter the time that the shift ends and press **Tab**.	
17	(Optional) In the **Repeat this shift for [blank] days** field, enter the number of consecutive days that you want the transfer to last.	
13	Click **Apply**.	
18	Click **Save**.	

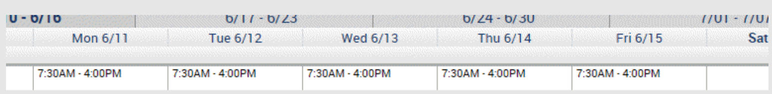
Editing Scheduled Shifts

Purpose

When events in employees' lives require them to take time off and when your workload requirements vary, you will need to change employees' schedules. You need to keep the schedules accurate to reduce the number of exceptions that might appear in employee timecards.

Example

Your workload requirements have changed on Wednesday of the next schedule period, so that you need to change an employee's schedule to satisfy the new requirements.

Steps		
1	Access the **Schedule**.	
2	Select the specific set of employees from the **Show** drop-down list. Select the time period from the **Time Period** drop-down list.	
3	Locate the employee's row and click the cell in the row and below the date that contains the shift that you want to edit.	
4	Edit shift start and/or end times and press **Tab**.	
5	Click **Save**.	

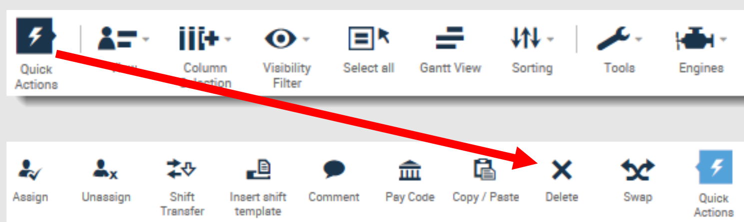
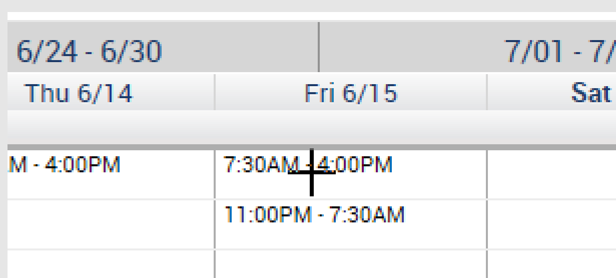
Deleting Shifts from Employees’ Schedules

Purpose

Employees sometimes are unable to work a scheduled shift. When this happens, you need to delete the shift from the employee’s schedule to prevent the application from flagging the employee as absent without an excuse.

Example

An employee mentioned that she will be unable to work Friday of the next schedule period because she needs to attend her brother’s funeral. Access the Schedule and delete the employee’s schedule for Friday of the next schedule period.

Steps		
1	Access the **Schedule**.	
2	Select the specific set of employees from the **Show** drop-down list. Select the time period from the **Time Period** drop-down list.	
3	Click the **Quick Actions** button and select the **Delete** button.	
4	Locate the employee’s row and click the cell in the row and below the date that contains the shift you want delete.	
5	Click **Save**.	

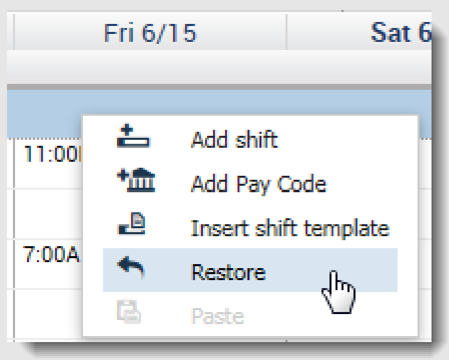
Restoring Deleted Shifts

Purpose

If an employee's plans change or a shift was deleted in error, you can restore the shift if it belongs to a pattern. Use the Restore feature on the Right-Click menu to insert the original shift into the employee's schedule.

Example

An employee's plans have changed so she will be able to work the Friday of the next schedule period after all. Access the Schedule Editor and restore the shift in the employee's schedule for Friday of the next schedule period.

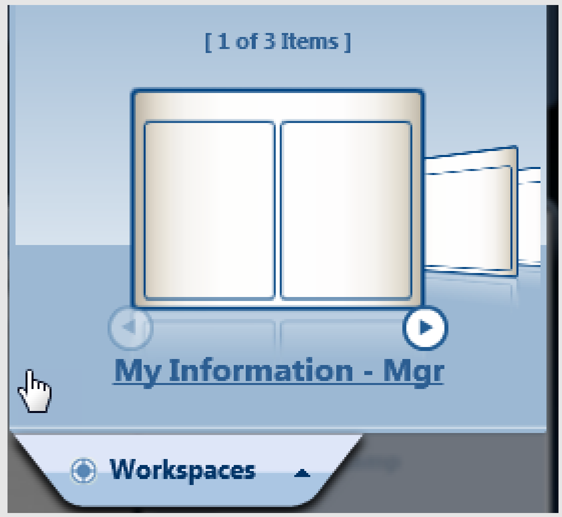
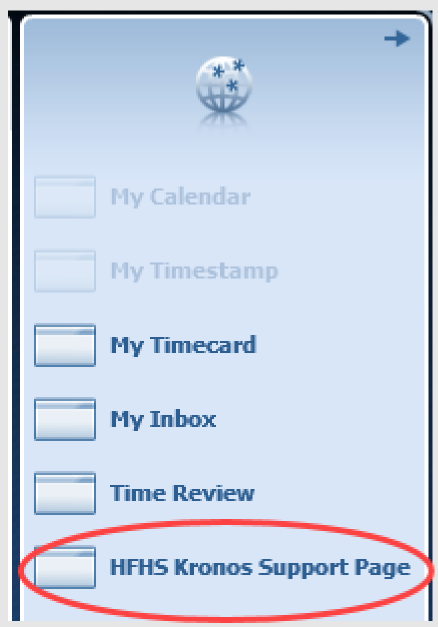
Steps		
1	Access the **Schedule**.	
2	Select the specific set of employees from the **Show** drop-down list. Select the time period from the **Time Period** drop-down list.	
3	Locate the employee's row and click the cell in the row and below the date where you want to restore the shift.	
4	Select **Restore**.	
5	Click **Save**.	

Using Online Help

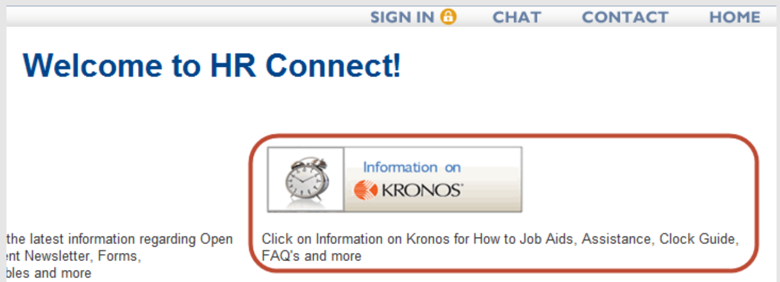
Purpose

Kronos contains a link to the HFHS Kronos Support Page to help you perform scheduling tasks. It contains tip sheets and other resources.

Kronos Support Page

Steps		
1	Use the **Carousel** to open the **My Information Manager** workspace.	
2	Select **Kronos Support Page** from the **Related Items** list on the right.	

Kronos Support Page on OneHENRY

Steps		
1	Navigate to the HR Connect page. Click the **Information on Kronos** link.	

Pre-Schedule Build

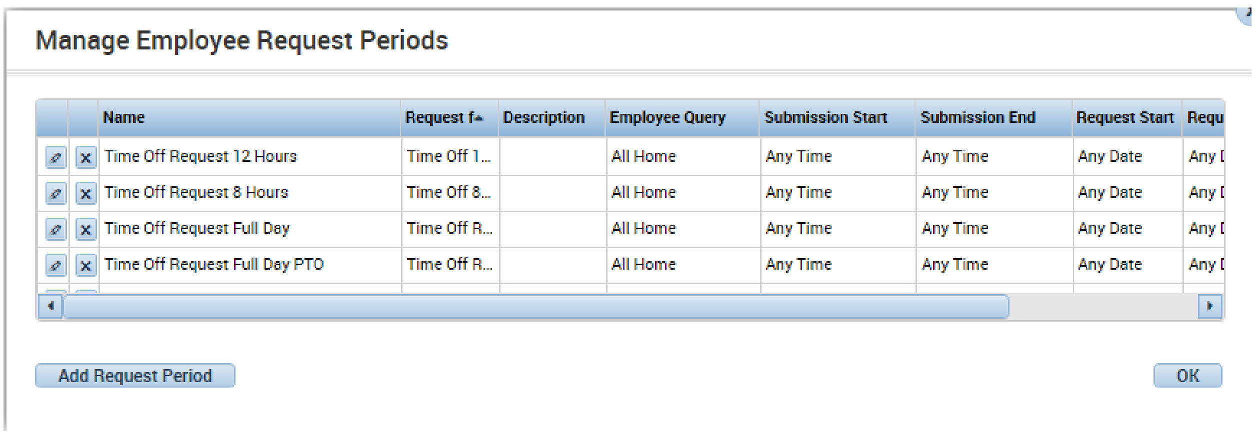
Managing Employee Request Periods for Time-Off

Purpose

To allow employees to submit time-off requests in self-service, a request period must be opened. An Employee Request Period defines who can submit a time-off request, when the employee can submit a request, and the dates that can be requested off.

Business practice

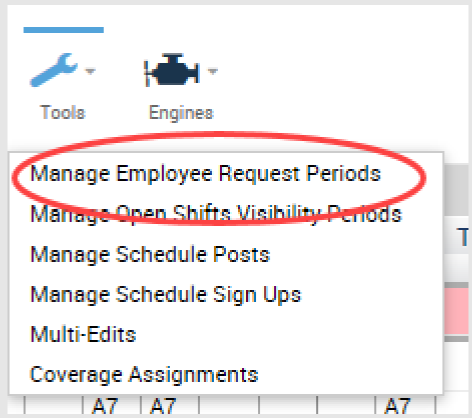
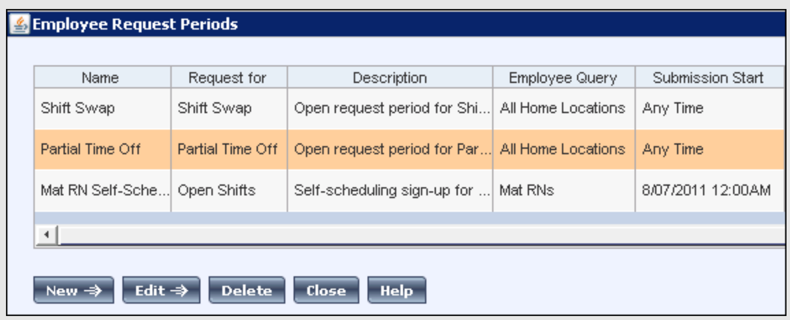
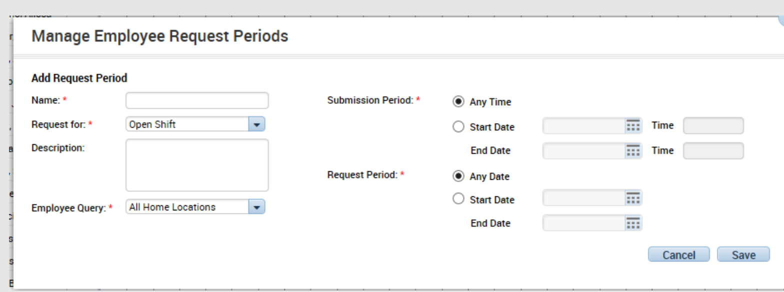
By default, a universal Time-off request period is left open to allow employees to submit a time-off request for any time period.



Employee Request Periods	Description
Name	Name of the employee request period.
Request For	Type of request.
Description	Description of the request.
Employee Query	HyperFind query that identifies the employees who can make a request.
Submission Start and Submission End	Beginning and ending dates and times that define the time period during which employees can submit requests. This option can also be set to Any Time for unlimited request submissions.
Request Start and Request End	Beginning and ending dates and times, which define the time period for which employees can make requests. This option can also be set to Any Date for unlimited request submissions.
State	Status of the request period.

Example

You want to open a time off request period so that employees in can submit requests for the next schedule period.

Steps		
1	Access a Scheduler.	
2	Select **Tools > Manage Employee Request Periods**. The **Manage Employee Request Periods** window displays.	
3	Do one of the following: • If an employee request period does not exist, click **Add Request Period**. • If an employee request period exists, select the **Pencil Icon** of the period to edit.	
4	In the **Name** field, enter a descriptive name. In the **Description** field, enter explanatory text about the employee request period. **Note**: An employee request period must have a unique name.	
5	From the **Request For** drop-down list, select the request type.	
6	From the **Employee Query** drop-down list, select the specific set of employees who will be entering requests not to be scheduled.	

Steps		
7	In the **Submission Period** area, select one of the following: • Specific **Start Date** and **Time** and **End Date** and **Time** to identify a specific timeframe when employees can submit requests. • **Any Time** to allow employees to submit requests any time without restrictions.	
8	In the **Request Period** area, select one of the following: • Specific **Start Date** and **End Date** to identify the timeframe that the employee can request to be off of work. • **Any Date** to allow the employee to request to be off of work on any date.	
9	Click **Save**.	

Business practice

Time-off requests can be submitted online or via the Kronos terminal (clock). Regardless of which method is used by the employee, the approval process is the same.

Business practice

Because Scheduler does not limit employees to the number of requests they can submit, you will need to tell your employees how many requests they can submit.

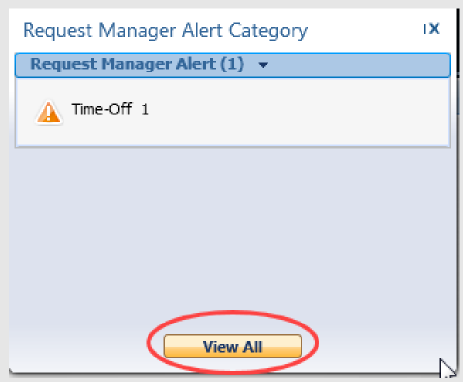
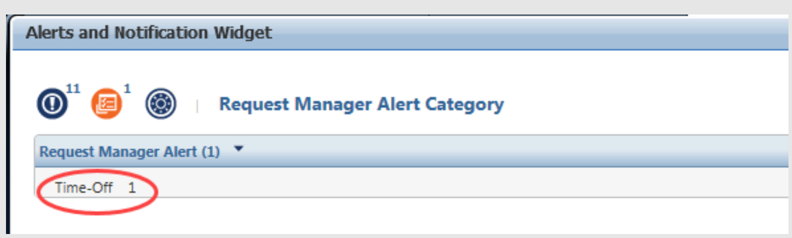
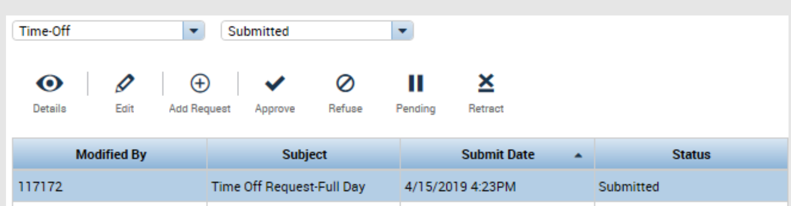
Responding to Time-Off Requests

Purpose

The Requests widget summarizes all employees' requests in one window and provides all supporting information to process requests from the same screen. If you approve a request, the change is automatically made to the schedule and the employee is notified automatically. If you reject a request, the employee is notified automatically.

Example

An employee submitted a time-off request. You want to review and respond to the request.

Steps		
1	Select the **Requests Widget** tab.	
2	From the **Request Widget**, select **View All**.	
3	From the **Alerts and Notifications Widget**, select a request.	
4	From the **Requests** widget, select a request and click the appropriate button to take action. Details of the request appear at the bottom of the page. Accruals for the employee are also visible at the bottom of the page.	

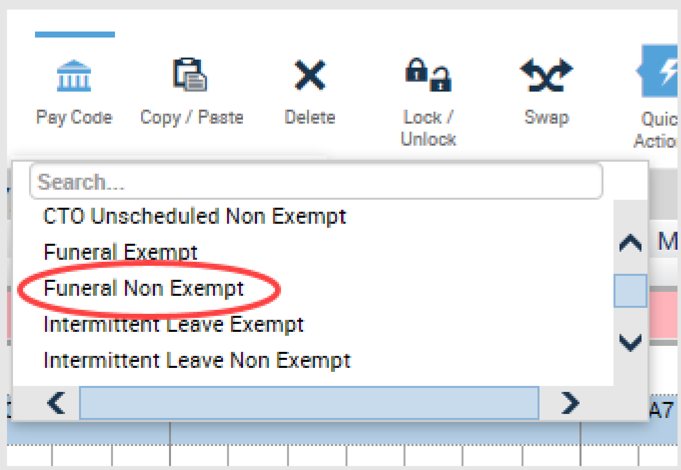
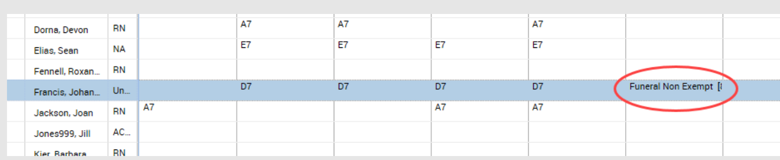
Replacing a Shift with a Pay Code

Purpose

Frequently, a scheduled shift needs to be replaced with a pay code edit, such as when an employee scheduled to work is called for jury duty or has a death in the family. The Quick Actions Toolbar includes a button to perform pay code edits that replace shifts with minimum clicks.

Example

Employee is scheduled to work this Friday but will be using a funeral day. You want to schedule the funeral time as a pay code edit. You know that you will need to create an open shift to find a replacement for the employee, so you use the Quick Actions Toolbar's Pay Code button.

Steps		
1	On the **Quick Actions Toolbar**, click the **Pay Code** button, roll over a list, and select the appropriate pay code to apply. **Tip**: Use the Search box for a shorter list.	
2	Click the date cell of the shift you want to replace with the pay code edit.	
3	(Optional) Click additional date cells to replace the shifts with the selected pay code.	
4	Click **Save**. **Note**: If you want to make other edits to the schedule before saving, be sure to click the **Pay Code** button again to turn it off.	

Tip

When you use the Quick Actions Pay Code button, Scheduler automatically creates an open shift.

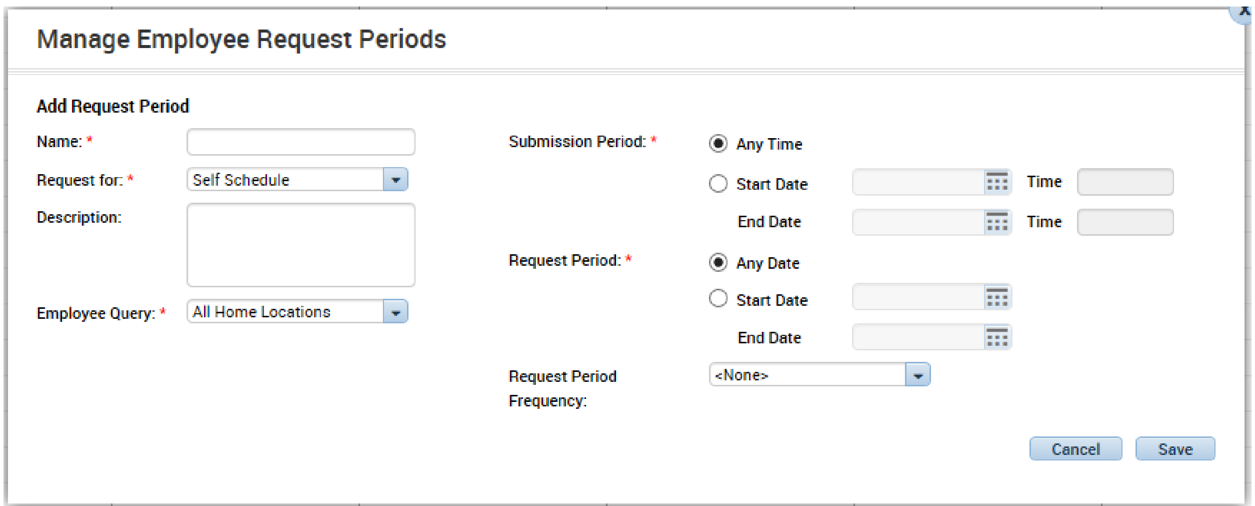
Building a Schedule: Managing Self-Scheduling

Managing Employee Request Periods for Self-Scheduling

Purpose

To allow employees to self-schedule, a request period must be opened. An Employee Request Period defines who can submit a self-scheduling request, when the employee can submit a request, and the dates that can be requested to work.

You need to create a hyperfind to identify the correct employees as locations do not work for request periods.

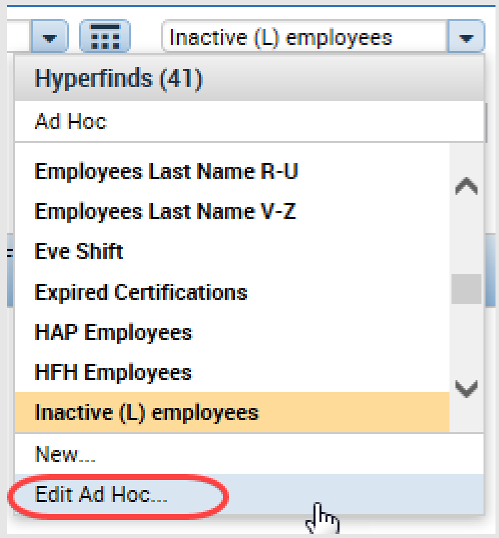
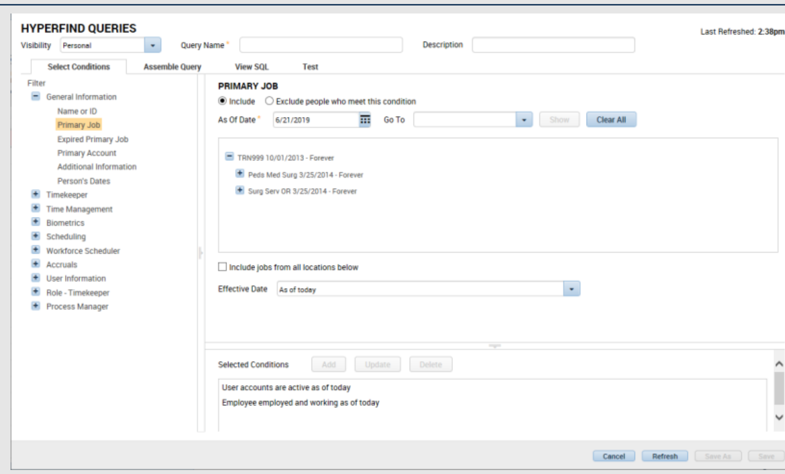


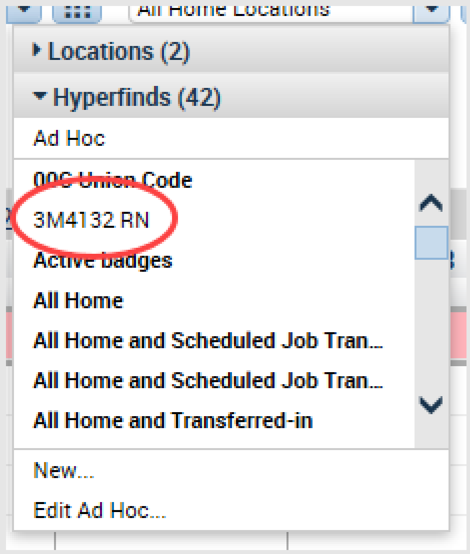
Employee Request Periods	Description
Name	Name of the employee request period.
Request For	Type of request.
Description	Description of the request.
Employee Query	HyperFind query that identifies the employees who can make a request.
Submission Period	Beginning and ending dates and times that define the period during which employees can submit requests.
Request Start and Request End	Beginning and ending dates and times, which define the time period for which employees can make requests.

Example

You want to open a time off request period so that employees in can self-schedule for the next schedule period.

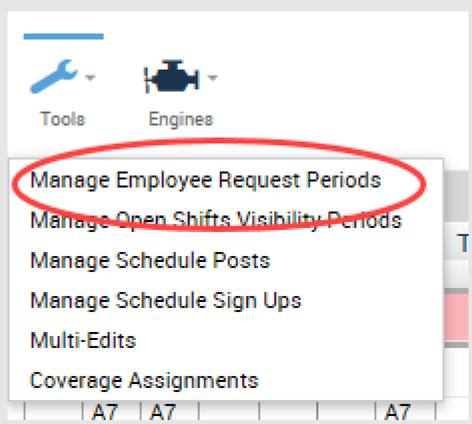
First, Build a Hyperfind

Steps		
1	Select **Edit Ad Hoc** from the Hyperfinds drop-down list on any Genie.	
3	Change the **Visibility** to **Personal.** Enter a Query Name. Select **RN in 3M4132** from the **Primary Job** filter. Click **Add** to select the condition. Repeat steps 2 through 5 to add additional conditions, if necessary.	
4	Click **Save As**.	

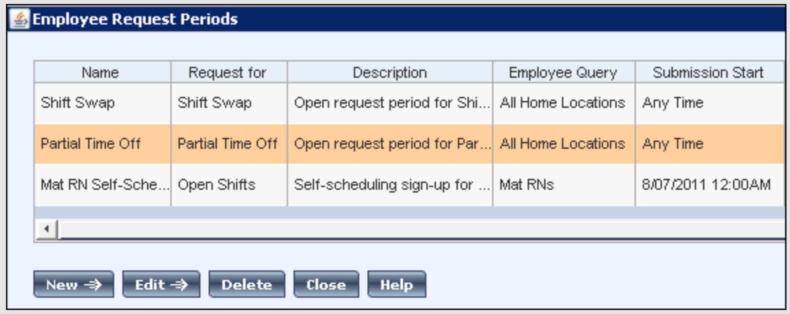
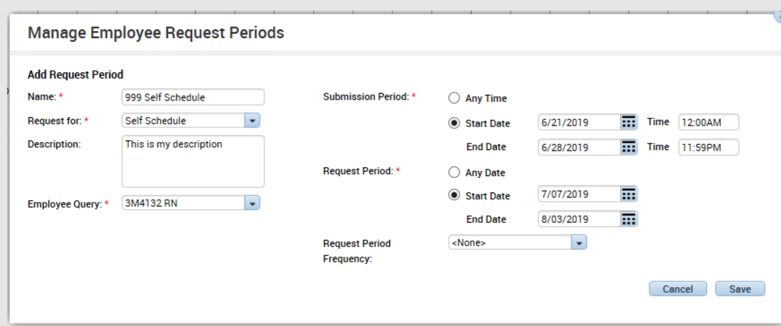
Steps		
5	If you created a Personal query, you will be able to view it in the **Hyperfinds** list.	

Second, Create the Request Period

Once the hyperfind is created you can use it when creating your self-scheduling request period.

Steps		
1	Access a Scheduler.	
2	Select **Tools > Manage Employee Request Periods**. The **Manage Employee Request Periods** window displays.	

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>3</td><td>Do one of the following:

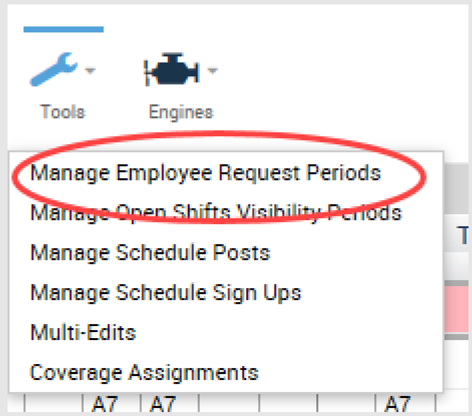
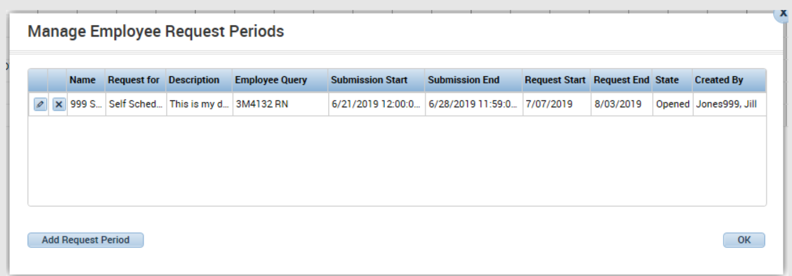
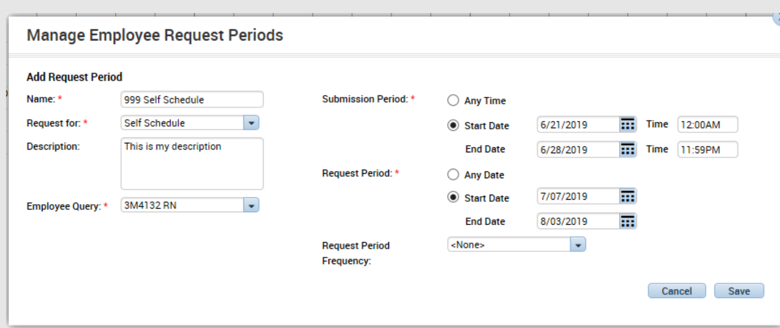
If an employee request period does not exist, Add Request Period opens automatically.
If an employee request period exists, select the Pencil Icon of the period to edit.
</td><td>
</td></tr>
<tr><td>4</td><td>In the Name field, enter a descriptive name. In the Description field, enter explanatory text about the employee request period.
Note: An employee request period must have a unique name.</td><td rowspan="5">
</td></tr>
<tr><td>5</td><td>From the Request For drop-down list, select the request type.</td></tr>
<tr><td>6</td><td>From the Employee Query drop-down list, select the hyperfind you created for self-scheduling.</td></tr>
<tr><td>7</td><td>In the Submission Period area select the following:

Specific Start Date and Time and End Date and Time to identify a specific timeframe when employees can submit requests for self-scheduling.
</td></tr>
<tr><td>8</td><td>In the Request Period area select the following:

Specific Start Date and End Date to identify the timeframe that the employee can request shifts to work (the Next Schedule Period).
</td></tr>
<tr><td>9</td><td>Click Save.</td><td></td></tr>
</table>

Example

You want to use an existing request period to open up self-scheduling for the next schedule period.

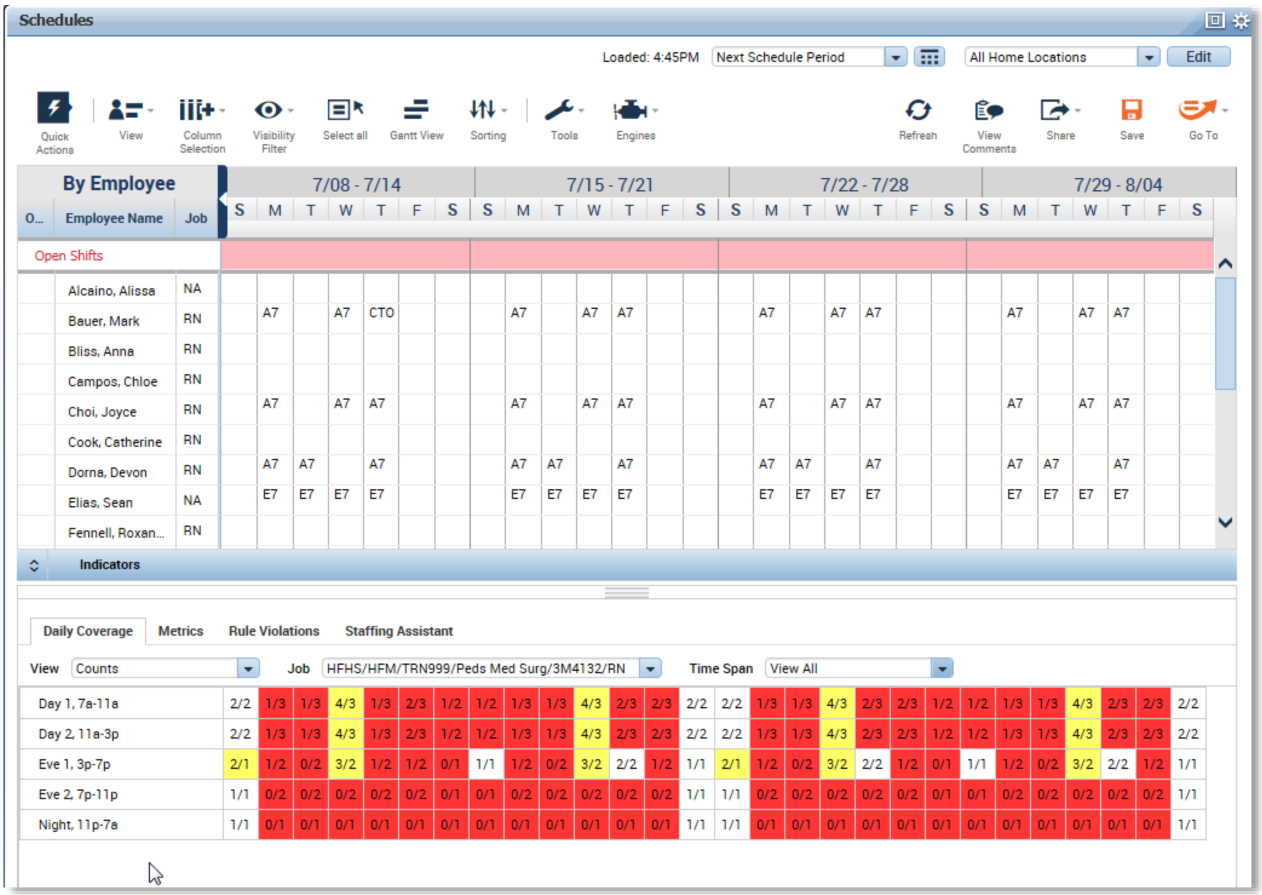
<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>1</td><td>Access a Scheduler.</td><td></td></tr>
<tr><td>2</td><td>Select Tools > Manage Employee Request Periods.
The Manage Employee Request Periods window displays.</td><td>
</td></tr>
<tr><td>3</td><td>Select the Pencil Icon of the period to edit.</td><td>
</td></tr>
<tr><td>7</td><td>In the Submission Period area select the following:
Specific Start Date and Time and End Date and Time to identify a specific timeframe when employees can submit requests for self-scheduling.</td><td rowspan="2">
</td></tr>
<tr><td>8</td><td>In the Request Period area select the following:
Specific Start Date and End Date to identify the timeframe that the employee can request shifts to work (the Next Schedule Period).</td></tr>
<tr><td>9</td><td>Click Save.</td><td></td></tr>
</table>

Building a Schedule: Evaluate and Update

Overview

Purpose

After the schedule is built by schedule patterns, self-scheduling, or a combination of the two, it is then reviewed for schedule rule violations, coverage, and finally balanced.



Evaluating Schedule Rule Violations

Purpose

Several scheduling policies and guidelines have been incorporated into the application as schedule rules. When your schedule violates any of these rules, the application calls attention to the violation on the employee row in the Scheduler and also on the Rule Violations tab.

Example

As you finalize your schedule, you want to check to confirm whether the schedule is violating any schedule rules. If so, you want to make adjustments and recheck the rules.

Steps		
1	Access a Scheduler.	
2	Select the employees and the specific time period.	
3	Select the **Rule Violations** tab if necessary.	
4	Click a row in the Rule Violations tab to highlight the applicable employee row in the Schedule Planner.	

Rule Violation Indicators	Description
Warning	(!) Warning — You can correct or ignore a Warning rule violation. A Warning rule violation is saved in the database.
Informational	(i) Informational — a guideline has been broken, but one with the lowest level of severity.
No Save	(x) No Save — Employee Rule Violation that prevents you from saving the schedule. No record of this type of violation is saved.

Tip

An icon appears next to name of the employee with the rule violation. Select the employee's name in the Schedule Planner to highlight his or her name in the **Rule Violations** tab. Click the **Name** column header to sort the data by the employee name. If an employee has more than one rule violation, sorting by the Name column will list the violations together.

Note

You do not have to save the schedule to have rule violations display.

Caution

A maximum of 50 rule violations appear in a Schedule Planner. A message in the Rule Violations tab tells you if you have reached the limit. To view all rule violations, select a smaller group of employees and or a smaller time period.

Evaluating Coverage Using Daily Coverage

Purpose

You need to evaluate coverage often to determine whether the schedule satisfies your core-coverage requirements. The Schedule Planner provides a Daily Coverage view to help review coverage.

You can also evaluate and address coverage using the following Schedule Planner tabs:

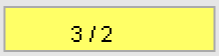
- Coverage
- Metrics

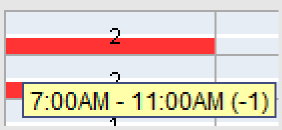
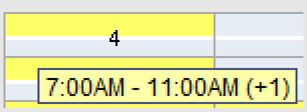
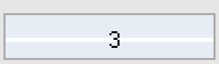
Example

You want to validate that you scheduled enough nurses in the department 3M4132. If you discover that there are too many or too few employees scheduled, you can modify the schedule by adding or deleting shifts to meet the workload plan.

Steps		
1	Access a Scheduler.	
2	Select the employees and the specific time period	• Select the custom location for department 3M4132 • Select the next schedule period
3	Select **Daily Coverage**.	
4	From the **View** drop-down list, select one of the following: • **Counts** • **Coverage**	
5	From the **Job** drop-down list, select one of the following: • Specific job • **List All Jobs**	
6	From the **Span** drop-down list, select one of the following: • Specific span • **View All** • **Day**	

Daily Coverage View Option	Description
Counts	Displays planned and scheduled coverage data numerically in the form of X/Y, where X is the number of people scheduled and Y is the number of people planned. If you select Total Jobs from the Job drop-down list, a plus (+) sign indicates over-scheduling and a minus (-) sign indicates under-scheduling.
Coverage	Displays planned and scheduled coverage data graphically using a shaded bar graph. Tool tips display variances between scheduled and planned workloads.

Counts View Examples	Description
	This example shows two persons scheduled for the RN job and three people planned. You are understaffed by one RN. The color red indicates that you are understaffed.
	This example shows three people scheduled for the RN job and two people planned. You are overstaffed by one RN. The color yellow indicates that you are overstaffed.
	This example shows three people scheduled for the RN job and three people planned. You are scheduled to the planned amount. The color white indicates that you are staffed to plan.

Coverage View Examples	Description
	The number 2 indicates how many people are scheduled. The red bar below the white line indicates that the job is understaffed. The information in the tool tip indicates that between 7:00AM – 11:00AM you are short by one person.
	The number 4 indicates how many people are scheduled. The yellow bar above the white line indicates that the job is overstaffed. The information in the tool tip indicates that between 7:00AM – 11:00AM you are overstaffed by one person.
	The number 3 indicates how many people are scheduled. The white line with no colored bars indicates that you are scheduled to plan.

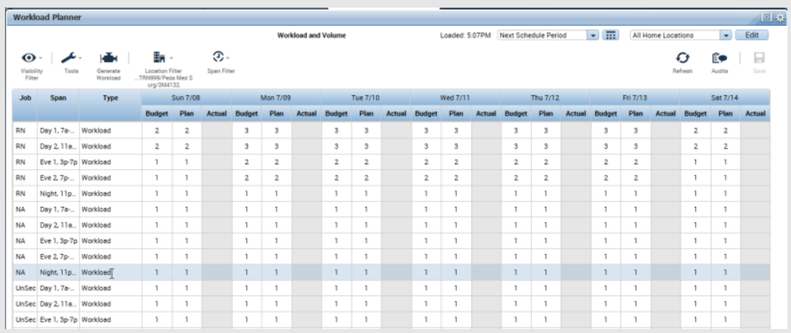
Viewing/Editing the Workload Planner

Purpose

In Scheduler, your staffing requirements are referred to as workload requirements and are stored in the Workload Planner.

Example

The department census tends to vary from the value used to determine the budgeted workload. You can change the planned workload daily.

Steps		
1	Access the **Workload Planner**.	
2	From the **Show** drop-down list, select the specific location. From the **Time Period** drop-down list, select the specific time period.	
3	From the **Visibility Filter** drop-down list, select one of the following: • **Budget** • **Plan** • **Actual** • **Volume** • **Workload**	
4	Edit a number.	
5	Select **Save**.	
6	Note the change to your Daily Coverage values in the Scheduler.	

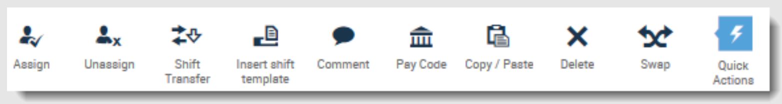
Reviewing the Quick Actions Toolbar

Purpose

The Quick Actions Toolbar helps you to streamline schedule tasks and minimize the number of mouse clicks to perform a task.

Example

When balancing your schedule, you note several employees with over- and under-minimum scheduled hour amounts. You use the Quick Actions Toolbar to perform several shift swaps between employees.

Steps		
1	Access a Scheduler.	
2	Select **Quick Actions**.	
	The Quick Actions Toolbar displays on the menu bar.	

The following table describes the functions available on the Quick Actions Toolbar.

Name	Description
Assign	Click the Assign button, then click an open shift in the schedule, and then click on the date cell of the employee that you want to work the shift.
Unassign	Click the Unassign button, and then click the shift of the employees you want to remove from a scheduled shift. The shift becomes an open shift for you to fill.
Shift Transfer	Click the Shift Transfer button to view a list of possible jobs you can reallocate employees to in your cost center. Select a job from the list, and then click a shift in the schedule to perform the reallocation.
Insert Shift Template	Click the Shift Template button to view a list of shift templates you can apply to employees. Select a shift template from the list, and then click a date cell to add that shift to an employee’s schedule.
Comment	Click the Comment button to view a list of comments you can apply to employees. Select a comment from the list, and then click a shift to add that comment to an employee’s schedule.
Pay Code	Click the Pay Code button to view a list of pay codes you can apply to employees. Select a pay code from the list, and then click a date cell to add that pay code to an employee’s schedule.
Copy/Paste	Click the Copy/Paste button to copy and paste a shift or pay code. The first click copies the item; subsequent clicks paste the item.
Delete	Click the Delete button, and then click the shifts or pay codes in the schedule to delete them.
Lock/Unlock	Click the Lock/Unlock button and select the shifts to lock/unlock.

Name	Description
Swap	Click the Swap button, click the shift of the first employee whose shift you want to swap, and then click the shift of the second employee.

Balancing the Schedule

Purpose

You should review the schedule to confirm that each employee's scheduled hours match his or her expected weekly hours and that the department hours are in budget.

If employees' schedules and department hours for the schedule period do not match their expected or required hours, you will need to edit the schedule. Edits can include inserting shifts, copying and pasting shifts, deleting shifts, or swapping shifts to balance the schedule.

Inserting a Shift Template

Purpose

You can add a shift to an employee's schedule by entering the start and end times directly into the date cells of the Schedule Planner. If the shift times are standard, you might have a shift template that you can use. Shift templates define the start and end times of standard shifts that employees work regularly. A shift template does not include specific days or dates. You can use the Schedule Toolbar to insert a shift template. These tools list the shift templates in alphabetical order.

Example

An employee agreed to work an additional eight-hour shift on Tuesday beginning at 3:00 P.M. This is a common shift, so a shift template exists. You can use a shift template to insert the shift into the employee's schedule.

Steps		
1	Access a Schedule Planner.	
2	Select the employees and the specific time period.	
3	On the **Quick Actions Toolbar**, click the **Insert Shift Template** button and select a shift template.	
4	Click the date cell for the employee you will schedule using the shift template.	
5	(Optional) Click additional date cells to add the shift template to additional days or employees.	

Steps		
6	Click **Save**. **Note**: If you want to make other edits to the schedule before saving, be sure to click the **Insert Shift Template** button again to turn it off.	

Adding a Shift Using In-Cell Editing

Purpose

When there is no shift template for a shift, you can add the shift by entering the shift start and end times into the date cell.

Example

An employee can work only from 7:00 A.M. to 12:00 P.M. on the first Wednesday of the next schedule period. This is not a typical shift, so there is no shift template available to add to the schedule. Add the shift to the employee's schedule using in-cell editing.

Steps		
1	Access a Scheduler.	
2	Select the employees and the specific time period.	
3	Click the date cell for the employee who will work the shift.	
4	Enter the shift start and end times separated by a hyphen; for example, 7-12. **Note**: The application considers all times from 0:00 to11:59 as A.M. and all times entered from 12:00 to 12:59 as P.M. If you are entering other times using the 12-hour format, be sure to enter the "a" or "p" as applicable.	
5	Click **Save**.	

Tip

Always look for a shift template to use in place of adding a shift using in-cell editing. When you add a shift via in-cell editing, the shift label displays the shift's actual start and end times. Right-click on the shift and select **Edit** to change its shift label if necessary. Shift labels appear in many reports instead of actual start and end times. When shifts are edited or manually entered, these reports display shift start times rather than shift labels.

Copying and Pasting Shifts

Purpose

You can copy and paste shifts and pay code amounts from one day to another, or from one employee to another, to speed up the scheduling process.

Example

An employee can also work from 7:00 A.M. to 12:00 P.M. on the second Wednesday of the next schedule period. Since you added this shift to the first Wednesday of the next schedule period, you can use the Schedule Toolbar to Copy and Paste the shift.

Steps		
1	Access a Scheduler.	
2	Select the employees and the specific time period.	
3	On the **Quick Actions Toolbar**, click the **Copy/Paste** button.	
4	Click the date cell of the shift or pay code you want to copy.	
5	Click the date cell into which you want to paste the shift or pay code.	
6	(Optional) Click additional date cells to paste the shift or pay code to additional days.	
7	Click **Save**. **Note**: If you want to make other edits to the schedule before saving, be sure to click the **Paste** button again to turn it off.	

Tip

To save time, use the copy-and-paste function for more complex shifts that involve transfers to jobs and or work rules.

Editing a Shift

Purpose

You can change the start or end time of a scheduled shift so that you know when the employee will be arriving and leaving work. Accurate schedules will allow you to track and report on attendance violations.

Example

An employee discovers that he can work until 2:00 P.M. on the first Wednesday of the next schedule period. You want to edit his shift to change the end time.

Steps		
1	Access a Schedule Planner.	
2	Highlight the portion of the shift in the date cell that you need to change.	
3	Enter the new time.	
4	Click **Save**.	

Tip

When you edit the shift's start or end time, the shift label displays either the original shift label or the shift's actual start and end times. Right-click on the shift and select **Edit** to change its shift label if necessary. Shift labels appear in many reports instead of actual start and end times. When shifts are edited or manually entered, these reports may display the incorrect shift label.

Deleting a Shift

Purpose

When an employee is scheduled for a shift by mistake, you can delete the shift so that it does not count towards coverage requirements. Accurate schedules will allow you to track and report on attendance violations.

Example

Employee is mistakenly scheduled to work a shift on the first Sunday of the next schedule period. Right now, you know that you do not need someone else to fill that shift.

Steps		
1	Access a Scheduler.	
2	Select the employees and the specific time period.	
3	On the **Quick Actions Toolbar,** click the **Delete** button.	
4	Select the shift you want to delete.	
5	(Optional) Click additional shifts to delete those shifts.	
6	Click **Save**. **Note**: If you want to make other edits to the schedule before saving, be sure to click the **Delete** button again to turn it off.	

Tip

You use the Schedule Toolbar's **Delete** button to remove a shift when:

- A shift has been added in error.
- You do not plan to find a replacement for the shift.
- The employee will not be paid non-worked time in place of the shift.

Applying Pay Code Edits (Using Pay Code Editor)

Purpose

In addition to adding pay codes with the Schedule Toolbar you can add them using the Pay Code Editor. Use this when the pay code is applied to an unscheduled day, when the amount you want to add is less than the shift length, or when you would like to define something other than the default logic of the Schedule Toolbar's pay code button. The default logic is to replace the employee's full shift, create an open shift, and mark the employee to be unavailable for 24 hours beginning at the employee's scheduled start time.

Example

Employee has jury duty the first Thursday of the next schedule period. You want to add the jury duty to the schedule so that the time is tracked and the employee is not scheduled to work a shift on that day. You add a pay code edit using the Jury pay code.

Steps		
1	Access a Scheduler.	
2	Select the employees and the specific time period.	
3	Right-click the date cell in which you want to add a pay code edit, and then select **Add Pay Code.**	
4	Confirm the date that appears in the **Effective Date** box.	
5	From the **Pay Code** drop-down list, select the pay code.	
6	In the **Amount** field, do one of the following: • Enter a specific number of hours • From the drop-down list, select a value.	

Steps		
7	Select **Override Shift** if the pay code amount should replace the shift and then select one of the following: • **Whole Shift** to replace the entire shift with the pay code amount. • **Partial Shift** to replace a segment of the shift. **Note**: If you select Partial Shift, the override begins at the **Start Time** and ends when the **Amount** is reached.	
8	From the **Start Time** box enter the effective time for the non-worked hours. **Note**: If the employee has a scheduled shift, the shift start time appears as default text.	
9	In the **Repeat for (D)** field, enter the number of consecutive days for which the pay code applies.	
10	(Optional) Select **Create Open** shift to create an open shift.	
13	Click **Apply**.	

Business practice

Pay codes are for Non-Worked time only!

Some of the common situations in which you will apply a pay code edit are CTO, Funeral, or Jury Duty

Caution

When creating open shifts and partial shifts from pay code amounts, split shifts might occur and might require editing or deleting.

Tip

To view your employee's accrual amounts, right-click the employee's name and select **View Accruals**.

The employee's accrual benefits appear.

When you are finished reviewing the employee's accrual information, click **OK**.

Assigning Comments

Purpose

Comments provide additional useful information about a shift or a pay code edit.

Example

On the first Tuesday of the next schedule period, an employee picked up an additional shift that might bring her into overtime. Add the OT Shift comment.

Steps		
1	Access a Scheduler.	
2	Select the employees and the specific time period.	
3	On the **Quick Actions Toolbar,** click the **Comment** button and select the comment you want to add.	
4	Select the shift you want to add the comment. Note the **Comment Indicator**. View comments with by hovering on the shift.	
5	(Optional) Click additional shifts to add the comment.	
6	Click **Save**.	

Removing Comments

Purpose

Comments entered by mistake can be removed from the system. You can delete a comment that you no longer want to appear in the Schedule Planner's Comments tab or the Comments By Employee report because it is no longer valid.

Example

You mistakenly added a comment to the wrong employee's shift. You remove the comment so it will no longer appear in the Schedule Planner.

Deleting comments attached to shifts or pay codes

Steps		
1	Access a Scheduler.	
2	Select the employees and the specific time period.	
3	Right click the shift and select **Edit.**	
4	Click the **X** next to comment you want to remove.	
5	Click **Apply**.	

On Your Own

1. Create and save 4 personal location search queries:
   All jobs at 3M4132
   All jobs at 3M4271
   All jobs at 3M3400
   RNs at all locations
   (pg. 21)

2. Assign Anna Bliss a reoccurring schedule using a pattern template. You choose the template.
   (pg. 27)

3. Assign Joan Vincent a reoccurring schedule without a pattern template. You make up the pattern.
   (pg. 29)

4. Use Insert Shift Template to schedule Jill Jones for shift on one day
   (pg. 66)

5. Replace a shift with a Jury Duty Pay Code.
   (pg. 71)

6. View daily coverage with a 4 hour span for at least 2 different jobs.
   (pg. 62)

7. Edit a shift for a full day transfer to another cost center.
   (pg. 33)

8. Edit a shift for a part day transfer to another cost center.
   (pg. 36)

9. Edit a shift for a full day transfer to a Charge Nurse Work rule.
   (pg. 35)

Finalizing the Schedule

Posting a Schedule

Purpose

In Scheduler, posting a schedule saves a copy of the schedule to the database and creates an audit trail log entry. It is important to mark a schedule as posted in order to track the number of changes made to a schedule after it has been completed. It is also important to mark a schedule as posted in order for employees to request shift swaps.

Example

You have just completed your schedule for the next schedule period. You post the schedule in Workforce Scheduler before making a hard copy to post on the wall.

Steps		
1	Access a Scheduler.	
2	Select the employees and the specific time period.	
3	Select **Tools > Manage Schedule Posts**, **Post**	
4	Click **Yes** to confirm the posting.	
5	When the system displays a message confirming that the schedule has been successfully posted, click **OK**.	

Business practice
Most teams post their schedules two weeks before the start of the next schedule period.

Caution
Schedule sign-up cannot be opened after the department's schedule has been posted.

UnPosting a Schedule

Purpose

If you have posted a schedule in error, or note something needs to be changed in a posted schedule, you can unpost it. After making the correction(s), post the schedule again. Kronos only keeps one copy of a posted schedule, the latest, to compare to how the schedule looks now.

Example

You have just completed your schedule for the next schedule period. You post the schedule in Scheduler before making a hard copy and notice a mistake.

Steps		
1	Access a Scheduler.	
2	Select the employees and the specific time period.	
3	Select **Tools > Manage Schedule Posts**	
4	Select 1 or more items from the list of posted schedules. Then click **Unpost**.	
5	Click **Yes** to confirm the unposting.	
6	When the system displays a message confirming that the schedule has been successfully unposted, click **OK**. Then click **Done**.	

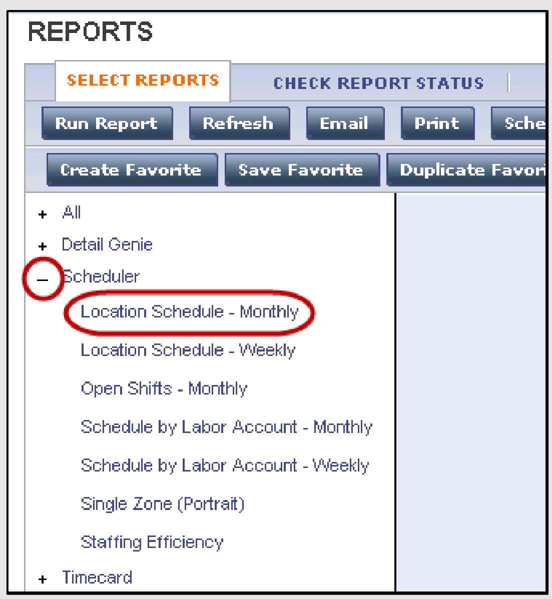
Generating a Printable Schedule

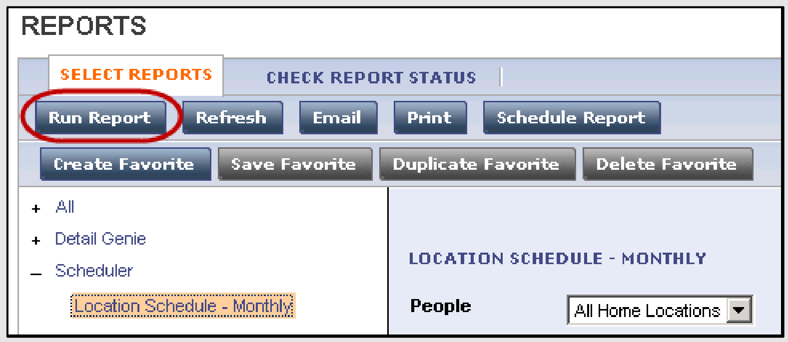
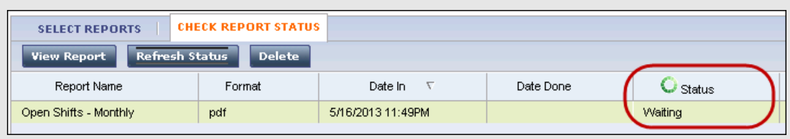
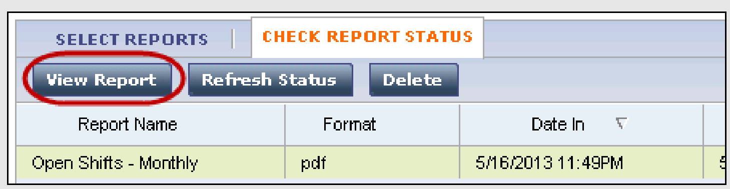
Purpose

Scheduler reports include several schedule formats that can be printed or e-mailed as a PDF attachment. Several reports are useful for printing and posting on a wall; the most commonly used schedule report is the *Location Schedule – Monthly*.

Example

After posting the schedule electronically, you want to print out a copy that you can post on the wall.

Steps		
1	Do one of the following: • To run a schedule for all of your employees, select **Reports** from the Related Items pane in the default workspace. • To run a report for selected employees, use the **GoTo** button and select the **Reports** link.	
2	On the **Select Report** tab, click the **plus (+) sign** to display a category's contents and select the report.	
3	If you did not select employees in step 1, from the **Show** drop-down list, select the specific set of employees.	
4	From the **Time Period** drop-down list, select the specific time period.	

<table>
<tr><th colspan="3">Steps</th></tr>
<tr><td>5</td><td>From the Schedule drop-down list, select Current or Posted.
Note: A copy of the schedule is saved when you post the schedule electronically in Workforce Scheduler. Select Posted to view the schedule as of the date and time of the locations last post. Select Current to display the schedule as it appears in the Schedule Planner at the time you generate this report.</td><td></td></tr>
<tr><td>6</td><td>Click Run Report.</td><td>
</td></tr>
<tr><td>7</td><td>On the Check Run Status tab, click Refresh Status.
Note: A refresh icon will display on the Status column heading until the report status changes to Complete.</td><td>
</td></tr>
<tr><td>8</td><td>Click View Report.
Note: The report might appear as a separate tab in the browser.</td><td>
</td></tr>
</table>

Tip

Other reports that are useful as schedules include:

- Location Schedule – Weekly
- Location Schedule with Coverage
- Employee Schedule – Monthly
- Employee Schedule – Weekly
- Staffing Sheet – Daily

Creating Open Shifts for Open Shift Requests - Zones

Purpose

The Schedule Generator automatically creates open shifts needed for coverage. The Schedule Generator deletes any open shifts in the Schedule Planner, and then calculates how many open shifts are needed by comparing current scheduled shifts to workload requirements in the Workload Planner. This option is available only for locations using zone sets for coverage.

To allow employees to submit open shift requests, it is a two-step process. Create open shifts using the Schedule Generator and then create an open shift request period.

Example

After completing self-scheduling for the upcoming schedule, you want to generate open shifts that still need to be filled for the department. Because the department uses zones, you use Schedule Generator to create those open shifts, starting with the RN job.

Steps		
3	Select **Engines > Run Schedule Generator**.	

Caution
The Schedule Generator is used only for locations assigned to zone sets.

Tip
The recommended practice is to run the Schedule Generator for one job at a time. To do this, select a single job from the Show drop-down list.

Creating Open Shifts for Open Shift Requests- Shift Set

Purpose

The Calculate Open Shifts feature automatically creates open shifts needed for coverage for departments that use shift sets for coverage. Workforce Scheduler calculates how many open shifts are needed for coverage by comparing current scheduled shifts to workload requirements in the Workload Planner.

To allow employees to submit open shift requests, it is a two-step process. Create open shifts using the Calculate Open Shifts feature and then create an open shift request period.

Example

The department wants to generate open shifts. Because the department schedules according to shift sets, you can use the Calculate Open Shifts feature.

Steps		
1	Select **Engines > Calculate Open Shifts**.	

Caution
Calculate Open Shifts is used only for locations assigned to shift sets.

Managing Open Shift Request Periods

Purpose

When you are ready to have your employees request open shifts, you can open the open shift request period. Employees can then log on to self-service and request open shifts.

Opening an open shift request period is a two-step process that involves opening the visibility period and then managing the request period.

Example

With open shifts in the schedule, you want to open the request period for employees.

Steps		
1	From the **Scheduler**, Select **Tools > Manage Employee Request Periods**.	
2	Do one of the following: • If an open shift employee request period does not already exist, click **New**. • If an open shift employee request period does exist, select the request period **Edit** button (pencil).	
3	In the **Name** field, enter a descriptive name. In the **Description** field, enter explanatory text about the employee request period. **Note**: An employee request period must have a unique name.	
4	From the **Request For** drop-down list, select the request type.	
5	From the **Employee Query** drop-down list, select the specific set of employees who will be entering be self-scheduling. **Tip**: Select the same employee query that you selected in the Open Shifts Visibility Editor.	

Steps		
6	In the **Submission Period** area, select one of the following: • Specific **Start Date** and **Time** and **End Date** and **Time** to identify a specific timeframe when employees can submit requests. • **Any Time** to allow employees to submit requests any time without restrictions. **Note**: Select the same dates and time range entered for the open shifts visibility period.	
7	In the **Request Period** area, select one of the following: • Specific **Start Date** and **End Date** to identify the timeframe containing the open shifts that will be visible to employees. • **Any Date** to allow all open shifts to be visible to employees. **Note**: Select the same date range entered in the Open Shifts Visibility Editor for open shift period.	
8	Click **Save**. Then **OK**	
9	Select **Tools > Manage Open Shifts Visibility Periods**.	
10	Do one of the following: • If no open shifts visibility period exists for open shift requests, click **New**. • If an open shifts visibility period exists for open shift requests, select the **Edit** button (pencil). .	
11	In the **Name** field, enter a descriptive name. In the **Description** field, enter explanatory text about the open shifts visibility period. **Note**: Open shifts visibility periods must have a unique name.	
12	From the **Employee Query** drop-down list, select the specific set of employees you want to include.	

Steps		
13	In the **Open Shifts Visibility Locations** area, select the locations and jobs that will be available for employees to select.	
14	In the **Visibility Period** area, select one of the following: • Specific **Start Date** and **Time** and **End Date** and **Time** to identify the timeframe when employees can submit requests. • **Any Time** to allow employees to submit requests any time without restrictions.	
15	In the **Open Shift Period** area, select one of the following: • Specific **Start Date** and **End Date** to identify the timeframe containing the open shifts that will be visible to employees. • **Any Date** to allow all open shifts to be visible to employees.	
16	Click **Save**.	
17	Click **OK**.	

Tip

Instead of creating new open shift employee request periods for each schedule period, edit the dates when the schedule period changes.

Managing Shift Swap Request Periods

Purpose

When you are ready to have your employees request shift swaps, you can open the shift swap request period. In addition to managing the shift swap request period the schedule must be posted for the time period they are requesting the swap. Employees can then log on to self-service and request to swap shifts with their co-workers.

Note

For additional help, reference the steps for in *Managing Employee Request Periods for Time-Off* topic located earlier in this guide

Handling a Shift Swap or Reassignment Manually

Purpose

The Quick Actions Toolbar's Swap button helps you to make schedule changes quickly, including shift swaps and shift reassignments.

Example

Two employees inform you that they would like to swap their Monday and Wednesday shifts for the first week of the next schedule period. Rather than send them into self-service to make the swap, you can make it yourself using the Schedule Toolbar.

Steps		
1	Access a Scheduler.	
2	Select the specific set of employees and the specific time period.	
3	In the **Quick Actions Toolbar**, click the **Swap** button.	
4	Select a shift to swap or reassign.	
5	Do one of the following: • If you want to swap the shift, select the other shift in the swap. • If you want to reassign the shift, select the empty date cell for the employee to which the shift is being reassigned. The shift will be "swapped" with the empty day.	
6	When you are done swapping or reassigning shifts, click the **Swap** button to turn it off.	

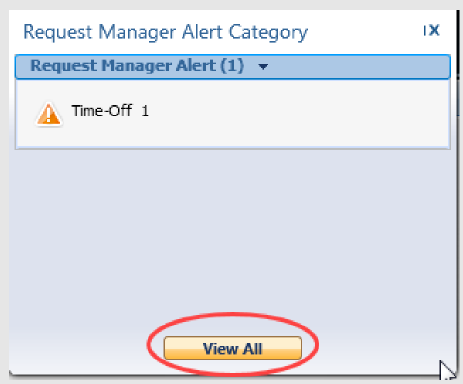
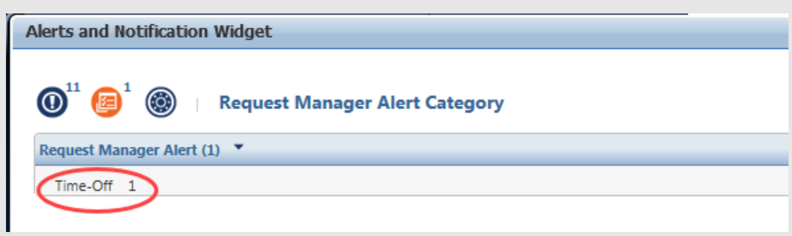
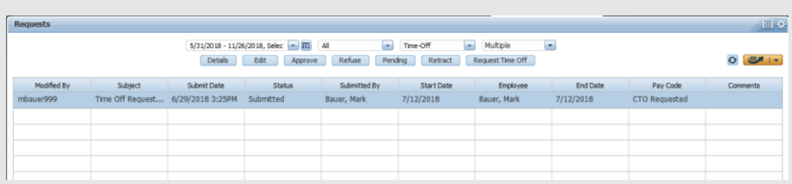
Responding to Open Shift and Shift Swap Requests

Purpose

The Requests widget summarizes all employees' requests in one window and provides all supporting information to process requests from the same screen. If you approve a request, the change is automatically made to the schedule and the employee is notified automatically. If you reject a request, the employee is notified automatically.

Example

An employee submitted an Open Shift or a Shift Swap request. You want to review and respond to the request.

Steps		
1	Select the **Requests Widget** tab.	
4	From the **Request Widget**, select **View All**.	
5	From the **Alerts and Notifications Widget**, select a request.	
6	From the **Requests** widget, select a request and click the appropriate button to take action. Details of the request appear at the bottom of the page. Accruals for the employee are also visible at the bottom of the page.	

Assigning an Open Shift Manually

Purpose

The Schedule Toolbar's Assign button helps you quickly assign an open shift to an employee.

Example

An employee can fill one of the open shifts in your schedule.

Steps		
1	Access a Schedule Planner.	
2	From the **Show** drop-down list, select the specific set of employees. From the **Time Period** drop-down list, select the specific time period.	
3	In the **Quick Actions Toolbar**, click the **Assign** button.	
4	Select the open shift to be assigned.	
5	Select the date cell for the employee to whom you want to assign the shift.	
6	(Optional) Repeat steps 3—4 for additional open shifts you want to assign.	
7	When you are done assigning open shifts, click the **Assign** button again to turn it off.	

Caution

If you add a shift to an employee's schedule by inserting a shift template, using in-cell editing or copying and pasting, then you will need to delete the open shift. A recommended practice is to always assign the open shift with the Quick Actions Toolbar, which will assign it to the employee and remove the open shift from the schedule.

Call Offs and Shift Replacements

Entering Call Offs

When an employee calls in for their shift, the missed time must be accounted for in the schedule. You can add the applicable time via a pay code. Hours entered into the schedule will flow to the timecard to be paid accordingly.

Note

For additional help, reference the steps for in *Replacing a Shift with a Pay Code Edit* task located earlier in this guide

Using the Staffing Assistant to Find Shift Candidates

Purpose

The Call List is your primary tool for identifying employees to potentially fill openings in your schedule. The list displays candidates to fill an open shift, sorted according to employees' worthiness to fill the shift. Employees who are not worthy candidates are not listed.

Example

You still have openings for the Day shift tomorrow. You can select each open shift and use the Call List to identify candidates that you can call to offer the shifts.

Steps		
1	Access a Schedule Planner.	
2	From the **Show** drop-down list, select the specific set of employees. From the **Time Period** drop-down list, select the specific time period.	
3	Select the **Staffing Assistant** tab.	
4	Select an open shift from the list.	
5	From the **Sorting and Matching Procedure** drop-down list, select the appropriate procedure.	
6	Click **Load**.	
7	To assign an employee to the open shift, select the **Assign** button for that person.	

Sorting and Matching Procedure	Description
01 – Primary Job, Not Working	Open shift candidates are determined by staff skills, primary job only, available, not scheduled for the day, allow overtime.
02 – Job Transfer, Not Working	Open shift candidates are determined by staff skills and weekly scheduled hours, JTS, available, not scheduled for the day, allow overtime.
03 – Primary Job, Partially Available	Open shift candidates are determined by staff skill, weekly scheduled hours, primary job, already scheduled, allow overtime.
04 - Job Transfer, Partially Available	Open shift candidates are determined by staff skills, weekly scheduled hours, JTS, already scheduled, allow overtime, allow overtime.

Business practice

Select Sorting and Matching procedures in numeric order to choose the best match using the pre-defined rules.

Reports

Staffing Reports

Purpose

There are several staffing reports available in Workforce Scheduler. These reports can help you make scheduling decisions, identify and track issues, and evaluate your scheduling success.

Tip
You can generate any report using the same process described in a previous report topic. Note that the options available under Set Options will be unique to each report (and some reports have no options).

Other common reports

Report	Description
Single Zone - HFHS	This report shows multiple departments for a single schedule zone, and shows actual staffing levels as compared to planned, scheduled, target and budgeted staffing levels for that department. Customized Single Zone report in landscape format, Removed Open shift from existing report
Staffing Sheet – Daily - HFHS	Customized Report by HFHS to meet daily staffing needs.
All Zone	This report shows a single department for multiple schedule zones, and shows actual staffing levels as compared to planned, scheduled, target and budgeted staffing levels for that department.
Staffing by Zone	Displays the scheduled employees by zone for one or more locations or dates. Provides a space for writing comments or patient assignments. The end of the report lists the employees with time pay codes.
Staffing Efficiency	Measures how effectively the staffing plan was executed.
Staffing Sheet - Weekly	Shows weekly staffing for selected locations. This report lists the schedule and variance from the plan within each shift or schedule zone. You can use this report to determine if the schedule meets the planned coverage requirements.
On Call - HFHS	Provides a list of employees who are scheduled as On Call. This report includes a comments area for any handwritten notes about the shift. Customized On Call report with Shift Label
Open Shifts – Monthly	Displays all open shifts for the month for the selected location.
Float	Displays all float activity for one or more locations and dates. The report only shows transfer activity for the selected locations. It summarizes the In, Out, and Net hours for each location.
Comments by Location	Lists, by location, the comments associated with shifts or pay code edits.
Comments by Employee	Lists, by employee, the comments associated with shifts or pay code edits.
Staffing Efficiency	Measures how effectively the staffing plan was executed. This report is typically used for TJC (The Joint Commission) inspections.

Report	Description
Actual vs. Schedule by Job	Displays a summary of individual employees and groups actual, scheduled, and projected hours for the selected period, sorted by job.
Coverage Weekly	Shows scheduled coverage, with variance from the staffing plan, by location for each job and shift or schedule zone. Can be used to manage coverage by location, job, or time period. It displays 7 days per page and prints on 8.5x11 paper.
Location Schedule with Coverage	Combines data from the Location Schedule and coverage reports. Displays schedule and staffing coverage numbers for a location regardless of primary job. This report groups shifts by location, zone, and then by primary job.
Holiday Credits	Displays holiday credits issued or denied for each employee.

Locking Shifts and Days

Purpose

Locking a day for an employee prevents anyone from modifying the scheduled contents of that day for the employee, including both the shifts and pay code edits.

Locking Days Example

An employee is not required to work the upcoming holiday. You lock the day to ensure that the employee is not accidentally scheduled for a shift that day.

Locking Shifts Example

Because of an employee's ACLS skill, his services are needed in ICU on the first Monday of the next schedule period. You lock his Monday shift to ensure that the employee is not accidentally floated elsewhere.

Steps		
1	Access a Schedule Planner.	
2	From the **Show** drop-down list, select the specific set of employees. From the **Time Period** drop-down list, select the specific time period.	
3	Do one of the following: • To select one employee, click the employee's name. • To select multiple employees, hold the **Ctrl** key and click all applicable employees' name.	
4	Right click and select **Lock**	
5	From the **Start Date** drop-down calendar, select the first date to lock.	
6	From the **End Date** drop-down calendar, select the last date to lock.	
7	Click **OK** and confirm the locked shifts/days in the Schedule Planner.	
8	Click **Save**.	

Tip

If you need to lock only a single shift, you can right-click the shift and select **Lock**. Or, using the Schedule Toolbar, you can select the **Lock** button and then select the specific shift.

Tip

To unlock shifts, use **Actions > Unlock**. The Unlock list provides the same options as the Lock list. Or, using the Schedule Toolbar, select the **Unlock** button and then select the locked shift.

Assigning Notes

Purpose

When you add a comment to shift or pay code you can also add a note. A note is free-form text to provide additional details.

Example

On the first Tuesday of the next schedule period, an employee picked up an additional shift that might bring her into overtime. Add the OT Shift comment and an applicable note to her Tuesday shift.

Steps		
1	Access a Schedule Planner.	
2	From the **Show** drop-down list, select the specific set of employees. From the **Time Period** drop-down list, select the specific time period.	
3	Click the shift that requires a comment and select **Shift > Edit**.	
4	From the **Comments** drop-down list, select the applicable comment.	
5	(Optional) Repeat step 4 for additional comments.	
6	In the **Notes** section, click **Add**. **Tip**: If the **Add** button is not active (blue), select a comment to activate it.	
7	In the **Note** field, enter free-form text.	
8	Click **OK**.	
9	Click **OK**.	
10	Click **Save.**	
11	A comment icon appears in the date cell. Click on the **Comments** tab to view the comment(s) and note(s).	

Removing Notes

Purpose

If you add a note and then need to delete, you will need to edit the shift or pay code.

Example

You mistakenly added a note to the wrong employee’s shift. You remove the note so it will no longer appear in the Schedule Planner.

Deleting a note attached to shifts

Steps		
1	Access a Schedule Planner.	
2	From the **Show** drop-down list, select the specific set of employees. From the **Time Period** drop-down list, select the specific time period.	
5	Click the shift and then select **Shift > Edit**.	
6	Select **Delete** in the **Notes** section and then click **Yes** to confirm the deletion.	
7	Click **OK**.	
8	Click **Save**.	

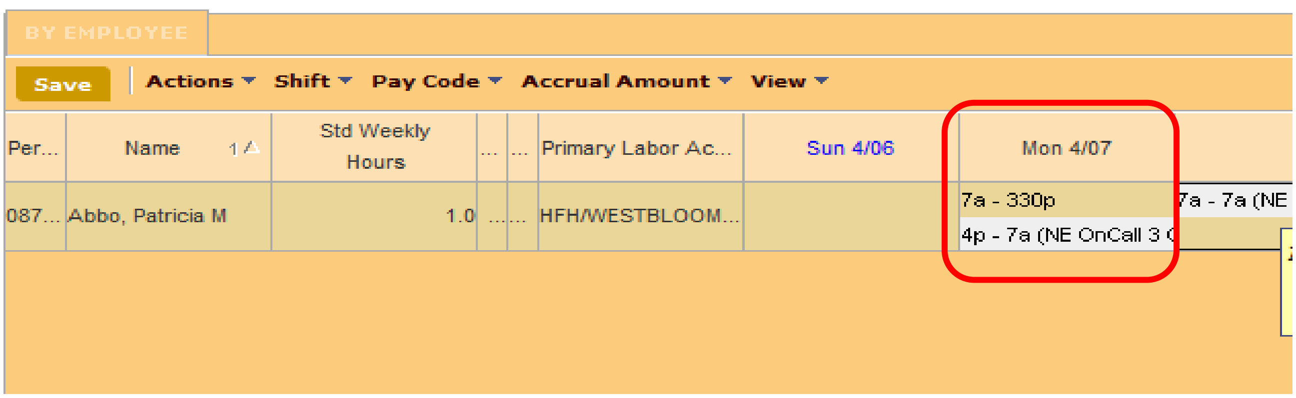
Transferring to an On Call Work Rule

There are special considerations when transferring an employee to an On Call work rule and they are also scheduled for regular work ON THE SAME DAY.

Employee Scheduled for Regular BEFORE On Call

When an employee is scheduled for Regular time BEFORE their On Call time on the same day, you must create **TWO** separate shifts on the same day. This results in **TWO** separate rows in your scheduler.

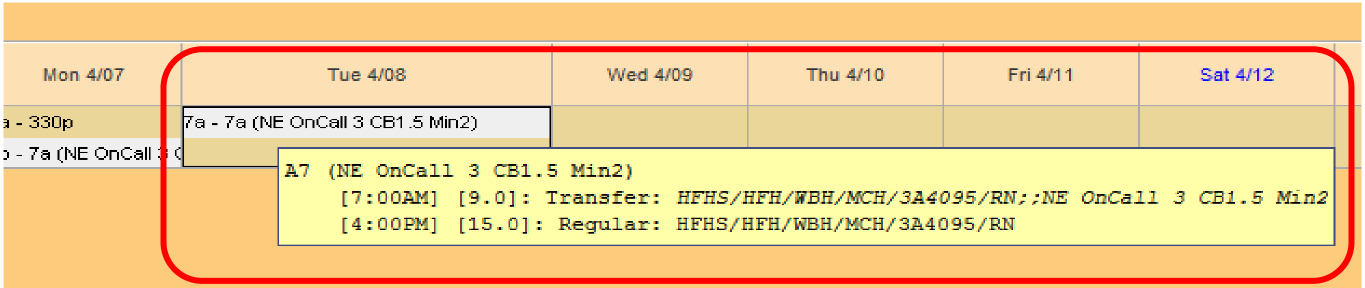
Notice how **Monday, 4/07** in the screen shot below has the Regular time on one row and the On Call time in a SEPARATE row. Also notice that the Regular time is BEFORE the On Call the time.



Employee Scheduled for Regular AFTER On Call

When an employee is scheduled for Regular time AFTER their On Call time on the same day, you must create **ONE** shift for that day that includes both the On Call time and the Regular time. This results in **ONE** row in your scheduler.

Notice how **Tuesday, 4/08** in the screen shot below has both On Call time and the Regular time included in a single shift. Also notice that the Regular time is AFTER the On Call time.


Mon 4/07
Tue 4/08
Wed 4/09
Thu 4/10
Fri 4/11
Sat 4/12
a - 330p
7a - 7a (NE OnCall 3 CB1.5 Min2)
A7 (NE OnCall 3 CB1.5 Min2)
[7:00AM] [9.0]: Transfer: HFHS/HFH/WBH/MCH/3A4095/RN;;NE OnCall 3 CB1.5 Min2
[4:00PM] [15.0]: Regular: HFHS/HFH/WBH/MCH/3A4095/RN