



**UVA**Health

**Kronos**

**Advanced Scheduling**

**Course Guide**

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# MODULE 1: COURSE ESSENTIALS

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**MODULE OBJECTIVES:**

- Describe the content within the instructor-led course.
- Discuss the format of this course.
- Understand the layout of the reference guide.

## ABOUT THIS COURSE

The instructor-led course is delivered in several short modules. The content of the course is delivered in the same order in which you perform your scheduling tasks. As you proceed through the course, the Facilitator explains the concepts of each task and then guides you through hands-on practice exercises. Below is an outline of the instructor-led modules that are covered in this class:

- Module 1: Course Essentials
- Module 2: Navigating Kronos
- Module 3: Introduction to Advanced Scheduler
- Module 4: Using the Workload Planner
- Module 5: Working with Schedule Groups
- Module 6: Working with Schedule Patterns
- Module 7: Managing Time Off Requests
- Module 8: Working with Shifts
- Module 9: Working with Transfers
- Module 10: Generating the Schedule
- Module 11: Evaluating and Balancing the Schedule
- Module 12: Finalizing the Next Schedule
- Module 13: Using the Staff Management widget

## COURSE CALLOUTS

Certain elements of the Kronos Advanced Scheduling application require special attention. The course identifies those elements by using one of the callout boxes displayed below.

### WARNING

The warning callout identifies potential problems or issues to consider.

### POLICY

The business policy callout outlines specific policies that need to be followed for specific tasks.

### ADDITIONAL INFORMATION

The additional information callout provides helpful hints regarding certain tasks.

# MODULE 2: NAVIGATING KRONOS

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**MODULE OBJECTIVES:**

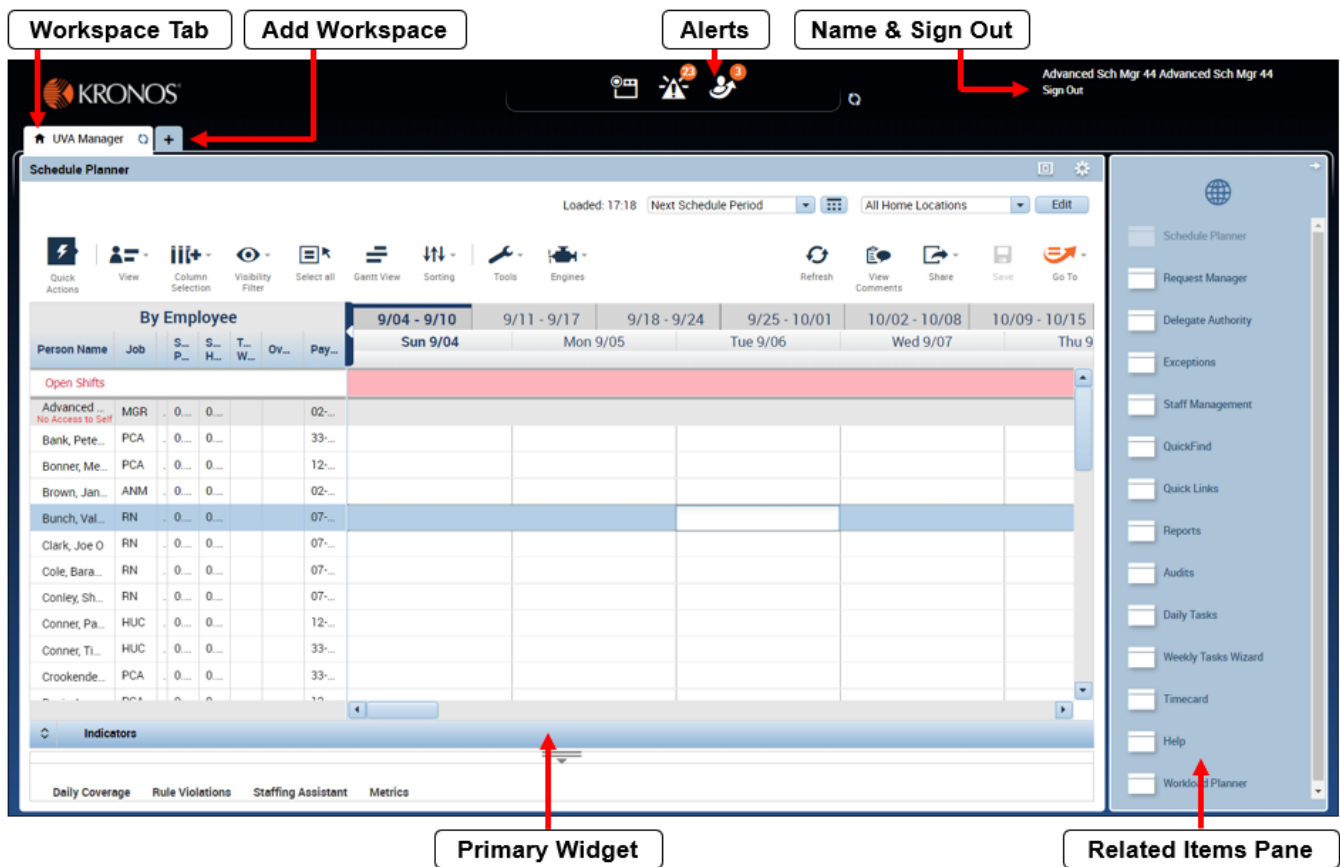
- Identify the components of Navigator.
- Navigate widgets and genies.
- Search for team member information.
- Access and navigate genies.
- Use GoTo navigation.

## NAVIGATING KRONOS PAGES

Kronos uses role-based views that include functionality and tasks specific to each user type. The content and components contained on the page vary and are based on the user's role within the application. The page that displays after you log on is called the Navigator. The Navigator provides quick and easy access to the tasks you perform on a regular basis.

## THE KEY AREAS OF NAVIGATOR

The Navigator page contains many different parts. Each part of a navigator displays information or provides tools to perform a task.

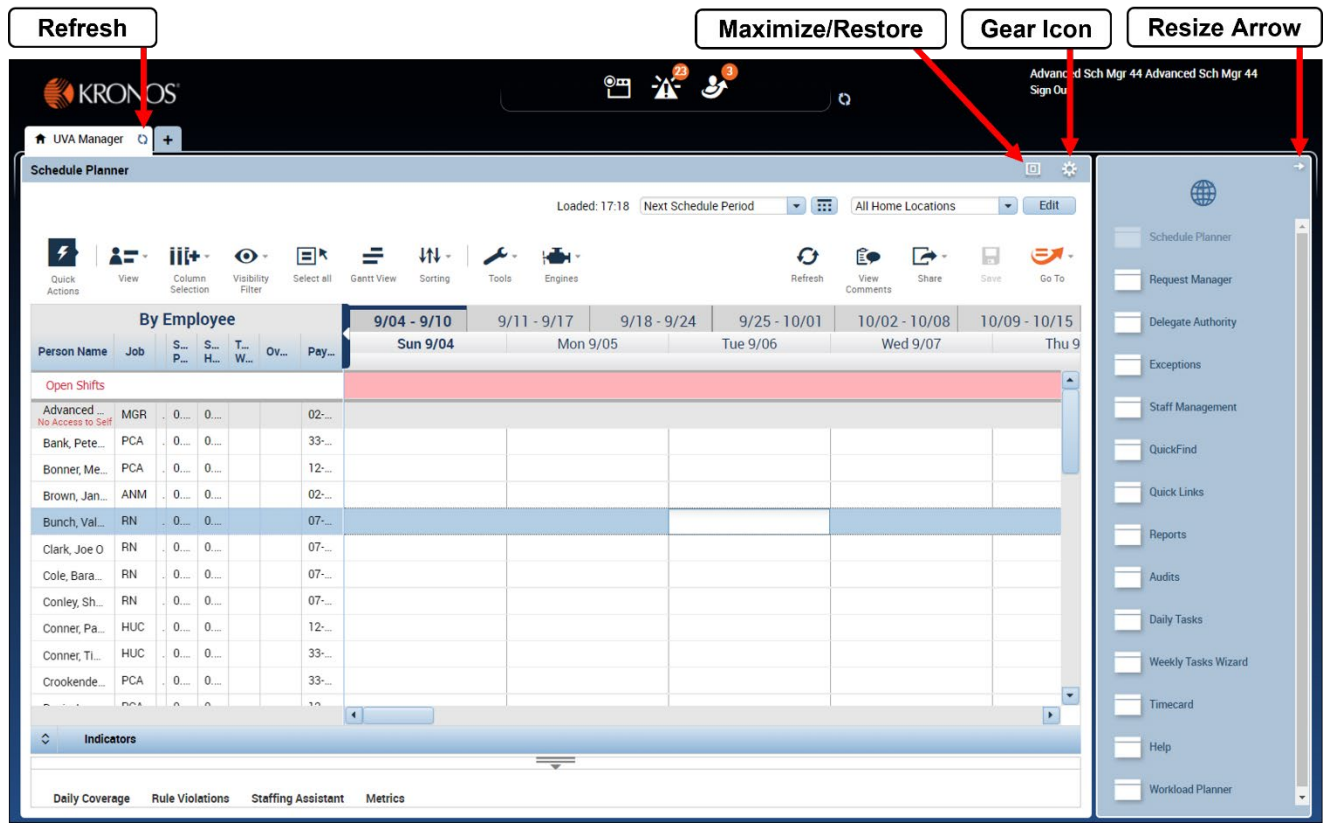


Element	Description
<b>Workspace Tab</b>	Each active workspace is identified with a tab. Switch between workspaces by selecting the tab you want to view.
<b>Add Workspace</b>	Contains inactive workspaces. A workspace can be opened by selecting it from the list or clicking an item from the Related Items pane. Users assigned additional functionality within Kronos are able to access their individual timecard from a separate workspace.
<b>Alerts</b>	Displays actionable items that require your immediate attention. The numeric value identifies the number of alerts that currently exist.
<b>Name &amp; Sign Out</b>	Identifies the user and provides a link to log out of Kronos.
<b>Primary Widget</b>	There is one primary widget for each workspace to perform common tasks.
<b>Related Items Pane</b>	Inactive widgets, wizards and genies are located on the right side of the primary workspace in the Related Items pane. An inactive item can easily be opened at any time by clicking the item from within the list.



## NAVIGATING THE ACTIVE WORKSPACE

Widgets contain different types of functionalities depending on the task you are trying to accomplish. When a widget is activated, the workspace updates to include information and functionality specific to the widget. Each active workspace gets its own tab. You can switch back and forth between workspaces by selecting the tab you want to view.



Element	Description
<b>Refresh</b>	Reloads the workspace with its default information.
<b>Maximize &amp; Restore</b>	Maximizes the active workspace. Click the maximize button a second time to return to the normal screen view, this enables you to view any other inactive widgets.
<b>Gear Icon</b>	A drop-down menu provides options to move the widget. Unavailable options are greyed out.
<b>Resize Arrow</b>	Minimizes the Related Items pane. Click the arrow a second time to open the Related Items pane.

## USING KRONOS GENIES

A genie is a summary view that organizes information according to common tasks you perform on a regular basis. Each genie contains a toolbar with access to perform different tasks specific to the genie selected. From a genie you can:

- Review summarized information for analysis.
- Locate team members and access their timecards.
- Generate reports for one or more team members.
- Export genie data to a Microsoft Excel spreadsheet.

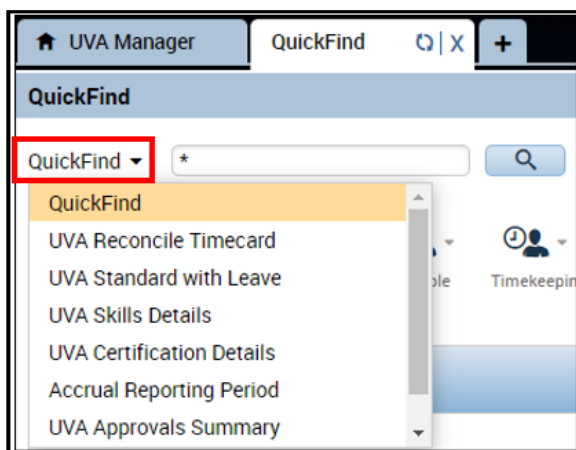
The screenshot shows the Kronos Genie interface for 'UVA Certification Details'. The interface includes a toolbar with icons for 'Select All Rows', 'Column Selection', 'Filter', 'People', 'Timekeeping', 'Approval', and 'Schedule'. A table below the toolbar lists certification details for various staff members. A 'Totals' label points to the bottom of the table.

Person Name	Certification Name	Certification Abbreviation	Certification Number	Certification Grant Date	Certification Expiration Date	Certification Expired
Advanced Sch Mgr 44, Advan...						
Bank, Peter R						
Bonner, Melissa N						
Brown, Janelle M						
Bunch, Valory S						
Clark, Joe O						
Cole, Barack O						
43						

Indicator	Description
<b>Genie Name</b>	Displays the name of the active genie. Click the active genie name to select a different genie to display.
<b>Toolbar</b>	Contains action icons that provide quick access to filters and processes in the genie.
<b>Context Selector</b>	Allows you to determine the time period and team members you want to view in the workspace. These selections determine what you see in the workspace.
<b>Totals</b>	Displays the team member count or total hours for each column, based on the time period and team member selections.

## USING QUICKFIND

The QuickFind genie is found in the Related Items pane. Click the QuickFind drop-down arrow to access the rest of your genies. To complete a search in QuickFind, type the team member’s last name, partial name (before the asterisk) or ID of the team member you are looking for. Then click the magnifying glass icon.

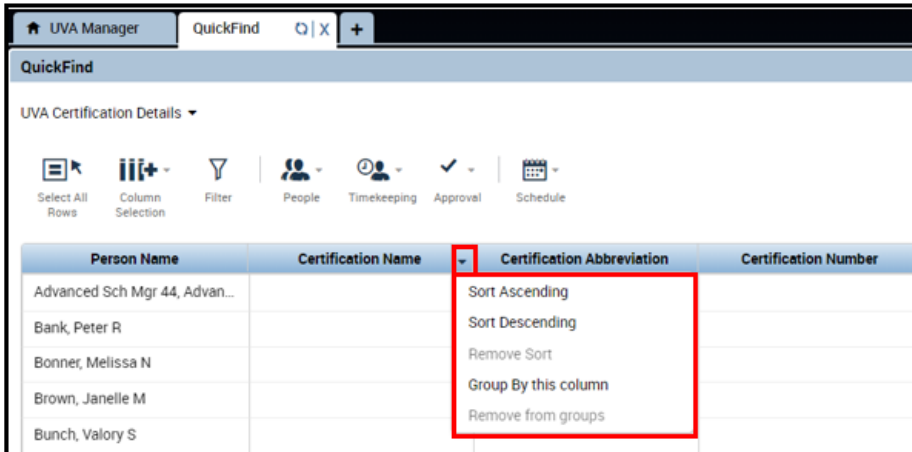


### ADDITIONAL INFORMATION

You can use the wild card character (\*) to complete a search or partial search.

## SORTING AND GROUPING DATA IN A GENIE

Within genies, you can sort columns of information by clicking the small arrow that displays when you hover over a column header. Options for how to sort or group the data within the column display.

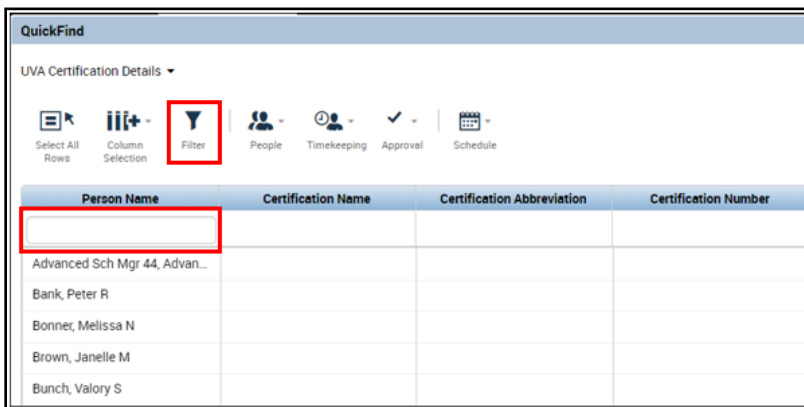


### ADDITIONAL INFORMATION

Click the Refresh icon to display the most current information in a genie or to return to the default view.

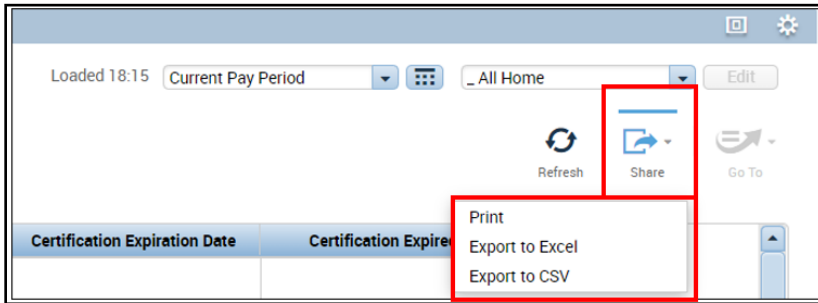
## FILTERING DATA IN A GENIE

You can use the filter function to narrow down the number of team members you are viewing within the genie. Click the Filter icon to view the columns that can be filtered. As you type in a field, only rows containing the characters you type remain in the workspace.



## EXPORTING GENIE INFORMATION

Genies display critical information in an easy-to-read format. You can print this information or export the data to other applications, such as Microsoft Excel, where you can reformat the data for your business needs.



## USING GOTO NAVIGATION

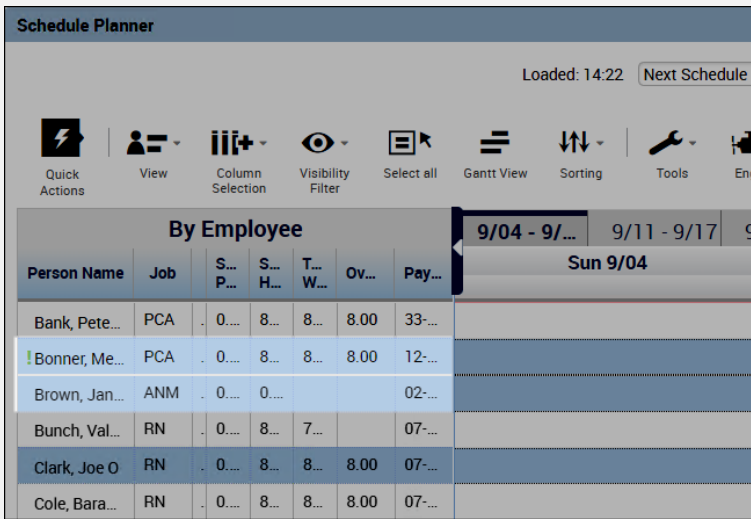
You can select one or more team members from a widget and navigate to another Kronos workspace, allowing you to perform a different action or review the information in more detail.

### LEARNING SCENARIO

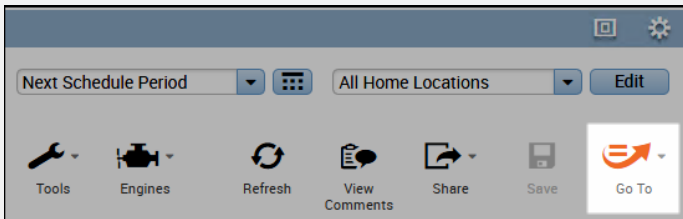
You want to review several of your team members' timecards at the same time. Use the GoTo control to access multiple timecards.

#### USE GoTo NAVIGATION

- 1 Click a team member name from within a widget. Hold the Control key and click multiple team member names to select more than one team member.

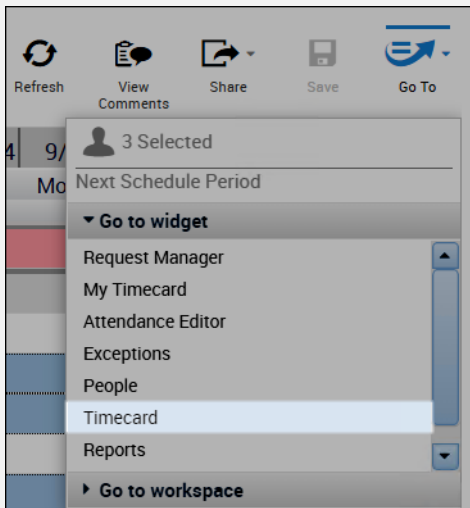


- 2 Click the **GoTo** icon in the upper-right corner.



### USE GoTo NAVIGATION

3 Select a widget or workspace from the list.



### ACCESSING MULTIPLE TEAM MEMBERS USING GOTO

From a genie, you can quickly access multiple team members' timecards. Only one timecard displays at a time, but it is easy to navigate from one team member's timecard to another using the navigation arrows in the timecard header. There are different methods available to select team members within a genie:

1. Hold the Ctrl key and click team member names.
2. Click a team member's name, hold the Shift key, and click the last team member's name in the range.
3. Click Select All from the toolbar.

# MODULE 3: INTRODUCTION TO ADVANCED SCHEDULER

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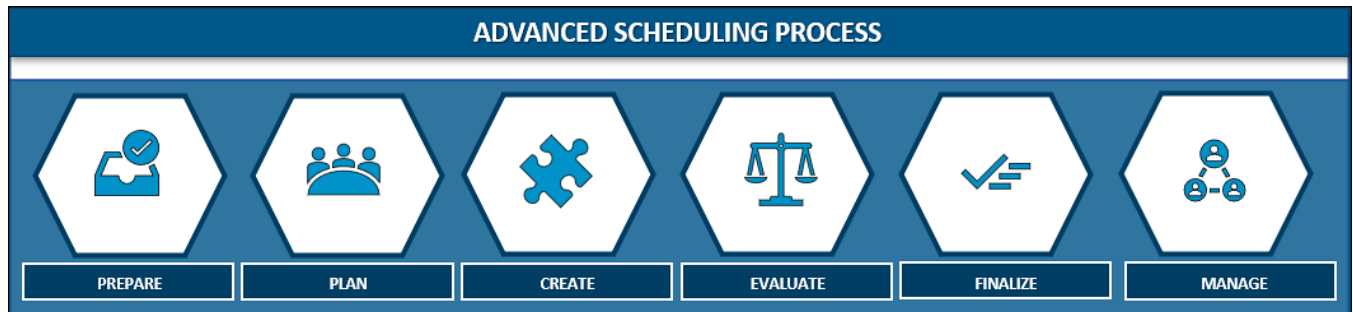
**MODULE OBJECTIVES:**

- Describe the scheduling process.
- Provide an overview of scheduling tools.
- Navigate and view schedules in the Schedule Planner.
- Save a custom location query.



## SCHEDULING PROCESS

To develop and deploy an efficient schedule, you need to ensure that you have the right people scheduled in the right jobs at the right time. The scheduling process aligns with and supports the overall labor management process and includes six main phases. While many of the scheduling tasks in Advanced Scheduler are automated or performed infrequently, they must be completed at the appropriate point in the scheduling process.



### PREPARE PHASE

The Prepare phase involves tasks that are not completed often but should be in place before planning the next schedule. This includes adding team members to schedule groups, adding schedule patterns for new hires and updating workload plans if necessary.

### PLAN PHASE

The Plan phase includes tasks that must be completed prior to creating the schedule. These tasks include reviewing or updating team member information such as skills and certifications, editing schedule patterns, availability and managing time off.

### CREATE PHASE

The Create phase includes the process of creating the overall schedule. This phase involves team member self-scheduling and completing known portions of the schedule by adding, editing and deleting shifts.

### EVALUATE PHASE

The next schedule period is evaluated for coverage and rule violations during the Evaluate phase. Advanced Scheduling provides many features and tools to help evaluate the schedule. Following an evaluation, you can enter schedule edits to remove schedule rule violations and match staffing requirements.



## SCHEDULE PLANNER OVERVIEW

The Schedule Planner is used to schedule both worked and non-worked time for your team members. The Schedule Planner displays schedules in columns and rows by team member name and date. The Schedule Planner has three main areas, the Toolbar, Context Selector and Schedule Workspace. The Schedule Workspace contains the Schedule Grid, Supporting Tabs and Indicators. Each is discussed below.

The screenshot shows the Schedule Planner interface. A red box highlights the **Toolbar** at the top, containing icons for Quick Actions, View, Column Selection, Visibility Filter, Select all, Gantt View, Sorting, Tools, Engines, Refresh, View Comments, Share, Save, and Go To. Another red box highlights the **Context Selector** at the top right, showing 'Loaded: 14:22', 'Next Schedule Period', 'All Home Locations', and 'Edit'. Below these are the **Indicators** and **Supporting Tabs** sections. The **Indicators** table shows metrics for Required, Scheduled, and Under time. The **Supporting Tabs** section includes Daily Coverage, Rule Violations, Staffing Assistant, and Metrics. The **Schedule Grid** is the main area showing employee schedules for various dates.

By Employee		9/04 - 9/10	9/11 - 9/17	9/18 - 9/24	9/25 - 10/01	10/02 - 10/08	10/09 - 10/15	
Person Name	Job	Sun 9/18	Mon 9/19	Tue 9/20	Wed 9/21	Thu 9/22	Fri 9/23	Sat 9/24
Bank, Pete...	PCA			7:00 - 19:30	7:00 - 19:30	7:00 - 19:30		
Bonner, Me...	PCA		7:00 - 19:30	7:00 - 19:30	7:00 - 19:30		7:00 - 19:30	
Brown, Jan...	ANM							
Bunch, Val...	RN			19:00 - 7:30			19:00 - 7:30	19:00 - 7:30
Clark, Joe O	RN					7:00 - 19:30 (x,07-NE)	7:00 - 19:30 (x,07-NE)	7:00 - 19:30 (x,07-NE)

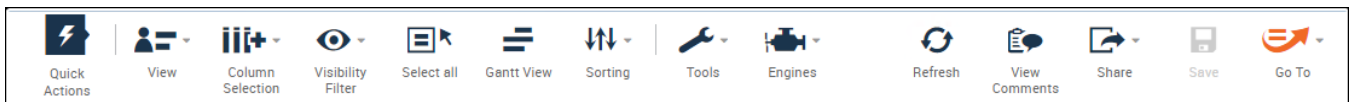
Indicators		All Days	Sun 9/18	Mon 9/19	Tue 9/20	Wed 9/21	Thu 9/22	Fri 9/23	Sat 9/24
Required		8715.0	207.5	207.5	207.5	207.5	207.5	207.5	207.5
Scheduled		3098.0	157.0	217.0	217.0	217.0	217.0	217.0	229.5
Under		6055.5	77.5	21.5	21.5	21.5	21.5	21.5	11.0

Supporting Tabs		Job	PCS/TRN/TRN 29/RN	Time Span	View All					
D2				4/5	4/5	4/5	4/5	4/5	4/5	5/5
E1				4/5	4/5	4/5	4/5	4/5	4/5	5/5
E2				4/5	4/5	4/5	4/5	4/5	5/5	4/5
N				4/5	4/5	4/5	4/5	4/5	5/5	4/5

## TOOLBAR

The Toolbar of the Schedule Planner contains the following components:



Element	Description
<b>Quick Actions</b>	Expands to provide access to short cuts that allow you to add, edit and delete shifts and pay codes using icons.
<b>View</b>	<p>You can view team member schedule data using different views:</p> <ul style="list-style-type: none"> <li>• <b>By Employee</b>- displays an alphabetical list of team members by name. Includes their daily schedule for the timeframe selected.</li> <li>• <b>By Schedule Group</b> – displays team members under their schedule group assignment. If a team member is not assigned to a group, they display under the “Ungrouped Team members” category at the top of the workspace.</li> <li>• <b>By Job</b> – displays a list of locations and the assigned jobs to that location. Schedule data displays for each job with an assigned schedule.</li> </ul>
<b>Column Selection</b>	Allows you to customize the columns within the Schedule Planner by showing or hiding specific columns.
<b>Visibility Filter</b>	Allows you to show or hide information within the schedule grid. You can display or hide items like shift times, pay code names, accrual names, assigned shifts, availability, pay codes, scheduled accrual amounts, open shifts and holidays.
<b>Select All</b>	Selects all team members in the workspace. You can use the GoTo control to navigate to a different widget or workspace after selecting all team members.
<b>Tabular/Gantt View</b>	Toggles between the two different scheduling views. Depending on your preference you can select either Gantt view or Table view.
<b>Sorting</b>	Allows you to sort columns within the Schedule Planner.
<b>Tools</b>	Allows you to manage schedule posts, multi-edits and coverage assignments.
<b>Engines</b>	Invokes a powerful engine to automate creation of open shifts. The Generate Schedule engine compares the staffing levels defined in the Workload Planner to shifts currently scheduled to determine how many shifts to create.
<b>Refresh</b>	Updates the information in the schedule grid with the most current data.
<b>View Comments</b>	Displays any comments associated with shifts or pay codes in the schedule.
<b>Share</b>	Allows you to export the data from the Schedule Planner into Excel.
<b>Save</b>	Saves any changes to the database. The Save button illuminates when you need to save your changes.
<b>GoTo</b>	Allows you to navigate to another Kronos component for the team member(s) selected within the schedule grid.

## CONTEXT SELECTOR

The Context Selector allows you to determine which of your team members display within the schedule grid and for what date range.



Element	Description
<b>Time Period</b>	Allows you to determine the timeframe you want to view, such as the current schedule period or a next schedule period. The timeframe you select determines what you see in the schedule grid. Select Range allows you to enter a start and end date for a specific timeframe.
<b>Calendar Icon</b>	The Calendar icon allows you to select a specific date or range of dates to display.
<b>Show Field</b>	Allows you to determine which group of team members displays in the Schedule Planner grid.

## SCHEDULE GRID

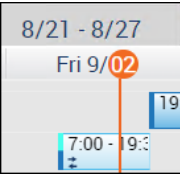


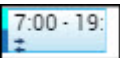
The grid displays each team member’s schedule for the dates selected in the timeframe field. Edits are performed in the schedule grid. You can view the schedule grid in either the Gantt view or Table view. Both are described below.

### GANTT VIEW

The Gantt view displays shifts, breaks and other time-related entities with their length proportional to their duration. The left border of the entity aligns with the start time. The right border aligns with the end time. The vertical line indicates the current time. To access the Gantt view, click the Gantt View button on the toolbar.

By Employee							9/04 - 9/10	9/11 - 9/17	9/18 - 9/24	9/25 - 9/31
Person Name	Job	S... P...	S... H...	T... W...	Ov...	Pay...	Sun 9/18	Mon 9/19	Tue 9/20	Wed 9/21
Bank, Pete...	PCA	0...	8...	8...	8.00	33...			PTO [12.0]	7:00 - 19:30
Bonner, Me...	PCA	0...	8...	8...	8.00	12...		7:00 - 19:30	7:00 - 19:30	7:00 - 19:30
Brown, Jan...	ANM	0...	0...			02...				
Bunch, Val...	RN	0...	8...	7...		07...			19:00 - 7:30	
Clark, Joe O	RN	0...	8...	8...	8.00	07...				
Cole, Bara...	RN	0...	8...	8...	8.00	07...	7:00 - 19:30	7:00 - 19:30	7:00 - 19:30	7:00 - 19:30

The following table describes the Gantt view indicators and their functions.


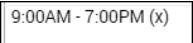
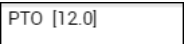
Indicator	Description
	Orange highlights and vertical line indicate the current date and time.
	Blue cells indicate a normal shift.
	Green cells indicate a scheduled pay code.
	Double arrows indicate the shift contain a transfer.

**TABULAR VIEW**

The Tabular view can display much longer periods of time and is a simplified version of the Gantt view. In the Tabular view entities are not proportional to their duration, breaks do not display, and an entire shift displays as being on the day when the shift starts, even if the shift spans midnight. To access the Tabular view, click the Tabular icon on the toolbar.

By Employee							9/04 - 9/10	9/11 - 9/17	9/18 - 9/24	9/25 - 9/30
Person Name	Job	S... P...	S... H...	T... W...	Ov...	Pay...	Sun 9/18	Mon 9/19	Tue 9/20	Wed 9/21
Bank, Pete...	PCA	0...	8...	8...	8.00	33...			7:00 - 19:30	7:00 - 19:30
Bonner, Me...	PCA	0...	8...	8...	8.00	12...		7:00 - 19:30	7:00 - 19:30	7:00 - 19:30
Brown, Jan...	ANM	0...	0...			02...				
Bunch, Val...	RN	0...	8...	7...		07...			19:00 - 7:30	

The following table describes the Table view indicators and their functions.

Indicator	Description
	An orange highlight displays the current date.
	An (x) indicates a shift with a labor level or work rule transfer.
	A pay code name within the cell indicates a scheduled pay code.

**ADDITIONAL INFORMATION**

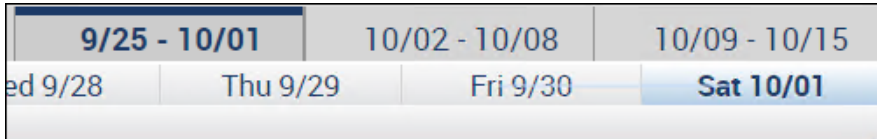
You can hover your cursor over a shift cell or a team member name to view more detailed information.

**TAILORING THE SCHEDULE PLANNER VIEW**

You have many options to view data in the schedule grid. Different view options are described below.

## ADJUSTING DATES

You may want to zoom in to view a few days in a schedule period. To zoom in on days, click and drag your cursor across several days to zoom in on those days. A light blue line indicator displays across the selected days when selecting which days to view. To zoom out, click the date range once to return to the week view.

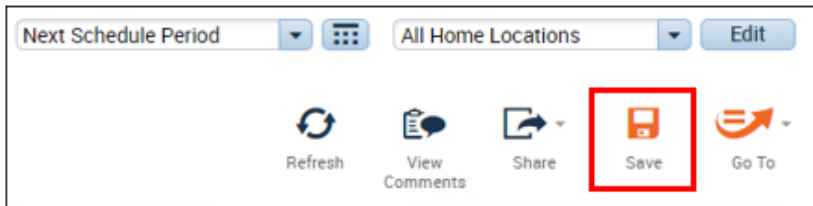


## SAVING AND REFRESHING DATA IN THE SCHEDULE PLANNER

When you add or modify schedule data, the application displays your edits but does not save them automatically. You must tell the application to save the data. Prior to saving your data, you can cancel your edits if necessary.

### SAVING EDITS

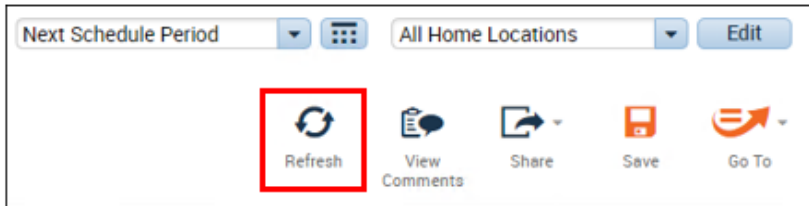
When you edit a schedule in the Schedule Planner, the Save icon activates to indicate that your data is not yet saved. The Save icon does not activate until you click or tab out of the cell you are editing.





### CANCELING EDITS

The Schedule Planner does not save your edits until you tell it to do so. Up until that time, you can remove or cancel your edits using the Refresh button. When you click Refresh, the application reloads the most recently saved information overwriting any unsaved edits.



### VIEWING SHIFT AND TEAM MEMBER DETAILS

From the schedule grid you can review team member data and schedule data. You can perform tasks on existing shift data. Actions from the right-click menu vary between team member data, shift cells with an existing shift and shift cells that are blank. Click a cell to edit existing information or right-click on a team member’s name or schedule cell to view detailed information and select actions that you can use to complete multi-step, common scheduling tasks.

### INDICATORS

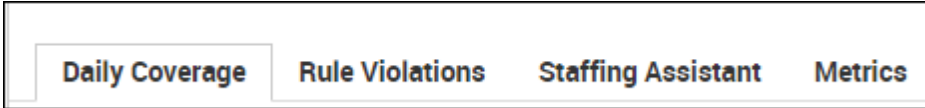
Click the Indicator arrows to view the assigned indicators. The table below describes common Nurse Manager indicators, but the indicators vary depending on your access profile.

Indicators	All Days	Mon 19	Tue 20	Wed 21	Thu 22	Fri 23	Sat 24	Sun 25
Required	4515.0	107.5	107.5	107.5	107.5	107.5	107.5	107.5
Scheduled	1467.5	100.0	100.0	100.0	100.0	105.0	120.0	105.0
Under	3251.0	21.5	21.5	21.5	21.5	17.5	4.0	17.5

Indicator	Description
<b>Required</b>	Covered hours from workload or labor volume.
<b>Scheduled</b>	Covered hours relative to workload or labor volume.
<b>Under</b>	Under scheduled hours relative to workload or labor volume.
<b>Over</b>	Over scheduled hours relative to workload or labor volume.

**SUPPORTING TABS**

Supporting tabs are located below the schedule grid. Click a specific tab to review information specific to that tab.



Element	Description
<b>Coverage</b>	Displays a graphical view of configured coverage by the time period selected. You can easily identify areas that require more coverage or less coverage.
<b>Daily Coverage</b>	<p>Contains coverage rows to help you evaluate the schedule and determine coverage options. Different coverage view options are available from the drop-down menus:</p> <ul style="list-style-type: none"> <li>• <b>Counts</b> – Numerically displays scheduled and planned coverage data.</li> <li>• <b>Coverage</b> – Graphically displays the scheduled and planned coverage data. The numeric value represents the number of team members scheduled and the bar graph color indicates if you are under, over or fully staffed. Hold your cursor over the graph bar to locate specific time span gaps.</li> </ul>
<b>Rule Violation</b>	Displays rule violations. Requirements for team members and organizations are pre-defined. Rule violations are displayed on the team member and organizational level if requirements for jobs and shifts are not met. For example, if a team member is scheduled for a job they are not qualified for, or do not have the appropriate certification for, a rule violation is displayed.
<b>Metrics</b>	Displays pre-configured metrics to evaluate labor and schedules. Example metrics include Cost, Coverage and Hours.
<b>Staffing Assistant</b>	Lists team members that can work open shifts. The most qualified team members are listed at the top using pre-configured criteria.

## SAVING A CUSTOM LOCATION

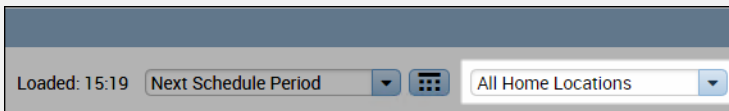
As a Manager, you may have access to team members at different locations and jobs in the Schedule Planner. From the Show field you can select one location and job to view at a time. If you notice you are accessing one particular location and job on a frequent basis you can save it to your drop-down list.

### LEARNING SCENARIO

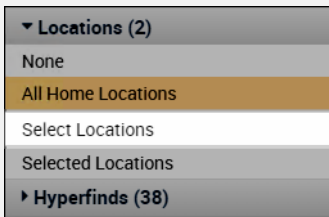
You want to be able to view the schedules of team members in a single unit when creating and viewing schedules. You set up saved locations so that you can display the schedules of your most frequently viewed team members with fewer clicks. Set up a location query for the RNs in your Unit.

#### SAVE A CUSTOM LOCATION

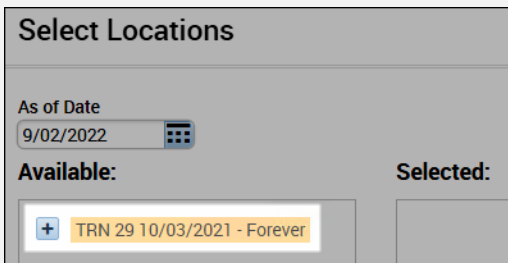
- 1 Click the drop-down arrow in the **Show** field.



- 2 Click **Select Locations**.

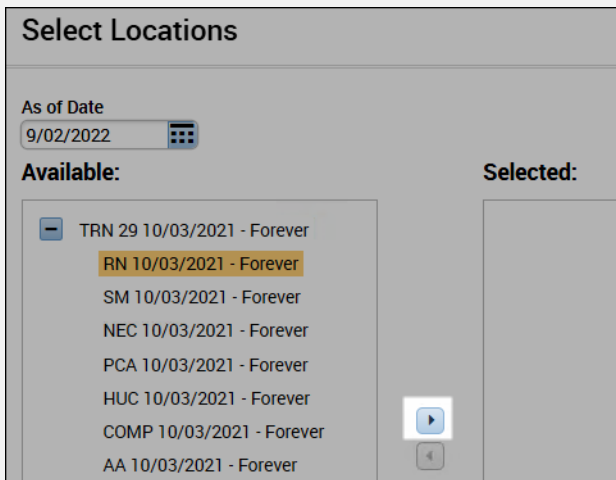


- 3 Click the **plus sign (+)** for the appropriate location.

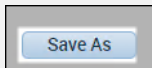


### SAVE A CUSTOM LOCATION

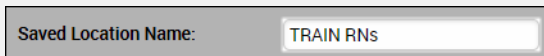
4 Select the appropriate job and click the right-facing arrow.



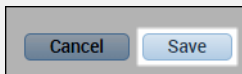
5 Click **Save As**.



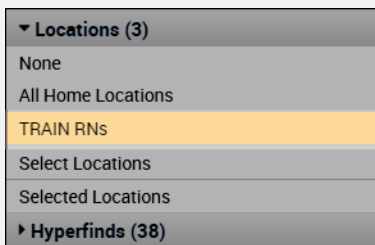
6 Enter the **Name** of your location query



7 Click **Save**.



8 The new location query displays in the **Show** field.



---

**ADDITIONAL INFORMATION**

The saved location query displays under your log on and is viewable only to you. You can select it and edit or delete it at any point in time.

# MODULE 4: USING THE WORKLOAD PLANNER

---

**MODULE OBJECTIVES:**

- Understand the purpose of the Workload Planner.
- Navigate the Workload Planner.
- Update a Workload plan.

## ABOUT WORKLOAD PLANNING

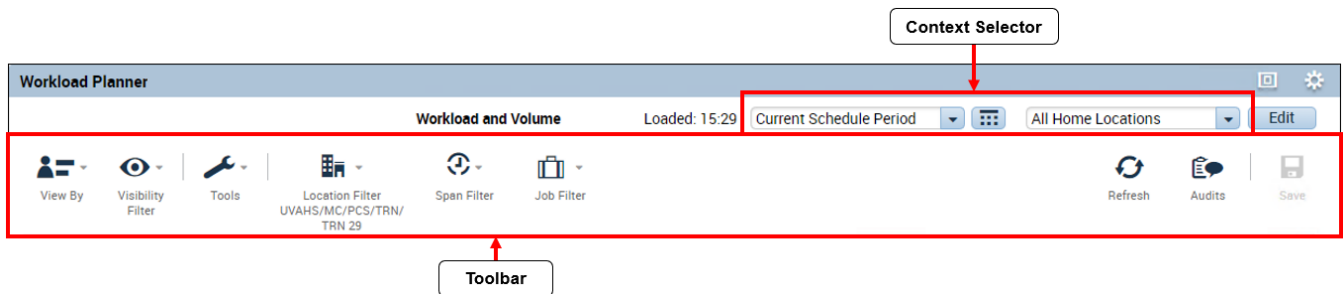
Kronos Advanced Scheduler assists with identifying labor needs and planning staffing resources to ensure that your staff is aligned with the amount of work that needs to be completed. The staffing matrix is the first element completed during the Plan phase. The main tool used to support this process is called Workload Planner. The Workload Planner is configured and updated based on annual budget matrices and the department core baseline staffing matrix.

## WORKLOAD PLANNER OVERVIEW

The Workload Planner is located in the Related Items pane. Once selected, it opens in a new Workspace tab. The Workload Planner includes two main areas: Toolbar and Workload grid. All areas are described below.

## TOOLBAR

The Workload Planner Toolbar contains the following components:



Element	Description
<b>Context Selector</b>	Allows you to determine the time period and team members you want to view in the workspace. These selections determine what you see in the grid.
<b>Toolbar</b>	<ul style="list-style-type: none"> <li>• <b>View By</b> – Allows you to view by Skill and Certification Profiles.</li> <li>• <b>Visibility Filter</b> – Allows you to show or hide information within the workload grid.</li> <li>• <b>Tools</b> - Provides the ability to create and edit repeating patterns of expected work.</li> <li>• <b>Location Filter</b> – Selects a different location to manage.</li> </ul>

Element	Description
	<ul style="list-style-type: none"> <li>• <b>Span Filter</b> – Allows you to manage only the spans required for this session.</li> <li>• <b>Job Filter</b> – Allows you to select which jobs display in the workload grid.</li> <li>• <b>Refresh</b> – Update the information in the grid with the most current data.</li> <li>• <b>Audits</b> – Lists the edits made to a workload including the user who completed the edits.</li> <li>• <b>Save</b> – Saves any changes to the database. The Save button illuminates when you need to save your changes.</li> </ul>

## WORLOAD PLANNER GRID

The Workload Planner allows you to view the staffing plan for your location. The graphic below illustrates the layout of the Workload Planner grid.

Job

Span

Type

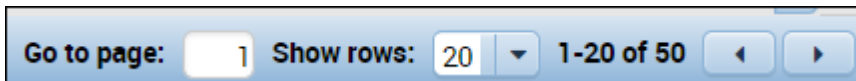
Required Staff

Job	Span	Type	Sun 9/04			Mon 9/05			Tue 9/06			Wed 9/07		
			Budg...	Plan	Actual	Budg...	Plan	Actual	Budg...	Plan	Actual	Budg...	Plan	Actual
RN	D1	Workload	5	5	5	5	5	5	5	5	5	5	5	5
RN	D2	Workload	5	5	5	5	5	5	5	5	5	5	5	5
RN	E1	Workload	5	5	5	5	5	5	5	5	5	5	5	5
RN	E2	Workload	5	5	5	5	5	5	5	5	5	5	5	5
RN	N	Workload	5	5	5	5	5	5	5	5	5	5	5	5
SM	D1	Workload	1	1	1	1	1	1	1	1	1	1	1	1
SM	D2	Workload	1	1	1	1	1	1	1	1	1	1	1	1
SM	E1	Workload	1	1	1	1	1	1	1	1	1	1	1	1
SM	E2	Workload	1	1	1	1	1	1	1	1	1	1	1	1
SM	N	Workload	1	1	1	1	1	1	1	1	1	1	1	1



Element	Description
<b>Job</b>	Displays the jobs for the selected location.
<b>Span</b>	Displays the zone category or shift times for the displayed job. <ul style="list-style-type: none"> <li>• <b>Zone</b> – A unique span of time during a workday for which coverage is measured. Used in units that schedule many shifts of varying lengths.</li> <li>• <b>Shift Set</b> – A collection of shifts for which coverage is measured. Contains definitive start and end designations for the time period for which work consistently need to be measured.</li> </ul>
<b>Type</b>	Defines a row as either Volume (census) or Workload (required staff).
<b>Required Staff</b>	Displays the coverage requirements for each date in the selected timeframe.

If all the data you expect does not display, use the page controls at the bottom right of the Workload Planner for more options.



# MODULE 5: WORKING WITH SCHEDULE GROUPS

---

**MODULE OBJECTIVES:**

- Describe the purpose of schedule groups.
- Assign team members to schedule groups.
- Remove team members from schedule groups.

## WORKING WITH SCHEDULE GROUPS

Schedule Groups are used to sort team members and/or manage team member self-scheduling. Each team member is placed in a schedule group based on their location in the self-scheduling process. For example, a new hire may be part of Self Scheduling Group C where they are the third group in the rotation to select their shifts to work.

The View icon, located in the toolbar, sorts team members by the Schedule Group name. This allows you to organize and view team members by job or shift assignment. For example, Day, Eve, Night, Exempt, etc. The Schedule Group name displays on a separate line and team members assigned to that group are listed in alphabetical order underneath. Schedule assignments and edits follow the same process in both the By Employee and By Group options.

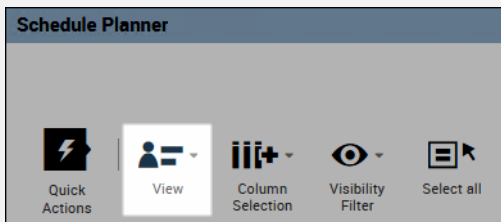
## ASSIGNING TEAM MEMBERS TO SCHEDULE GROUPS

### LEARNING SCENARIO

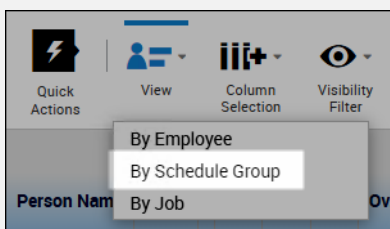
A team member works the Day shift. Assign her to the Day schedule group starting on Monday.

#### ASSIGN A TEAM MEMBER TO A SCHEDULE GROUP

- 1 Click the **View** icon at the top of the Schedule Planner.



- 2 Select **By Schedule Group**.

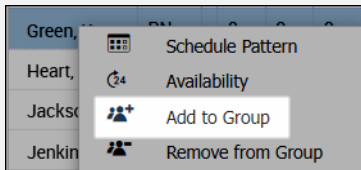


**ASSIGN A TEAM MEMBER TO A SCHEDULE GROUP**

**3** Right-click the team member's **Name**.

By Schedule Group						
Person Name	Job	S... P...	S... H...	T... W...	Ov...	Pay...
Fisher, Pat...	RN	0...	8...	4...		07-...
Green, Kat...	RN	0...	9...	9...	16...	07-...

**4** Select **Add to Group**.



**5** Select the appropriate **Schedule Group** from the drop-down menu.

**Add to group**

---

**Name:** Green, Katy A  
**Job:** RN  
**Job path:** UVAHS/MC/PCS/TRN/TRN 29/RN

Schedule group:

Start date: \*

**6** Click the Calendar icon in the **Start Date** field and select the date the group assignment begins.

Schedule group:

Start date: \*

End date: \*

Forever

**7** If applicable, click Specify Date in the **End Date** field and select the date the group assignment ends. If there is no foreseeable end to the group assignment, select **Forever**.

Schedule group:

Start date: \*

End date: \*

Forever

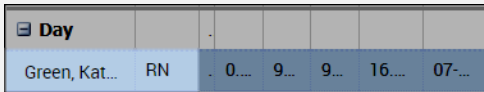
---

**ASSIGN A TEAM MEMBER TO A SCHEDULE GROUP**

**8** Click **Apply**.



**9** Verify the team member displays in the new **Schedule Group**.



---

**BUSINESS PRACTICE**

Self-scheduling uses schedule groups to control who can sign up for schedules and when. It is important that you audit your department schedule groups to ensure team members are assigned correctly.

---

**ADDITIONAL INFORMATION**

- A team member can be assigned to more than one Schedule Group at the same time.
- You can select multiple team members at once from the Schedule Planner and add them all to the same group at the same time following the same steps above.
- Follow the same steps to remove a team member from a group, choose Remove from Group in the menu instead.

# MODULE 6: WORKING WITH SCHEDULE PATTERNS

---

## **MODULE OBJECTIVES:**

- Describe the purpose of schedule patterns.
- Navigate the Pattern Editor.
- Build a schedule using a pattern template.
- Create a schedule without a template.
- Delete a pattern from a team member's schedule.

## SCHEDULE PATTERN OVERVIEW

The Schedule Planner allows you to instantly assign a schedule pattern to team members who work repeatable shifts on a regular basis. Once a pattern is applied to a team member’s schedule, it repeats the predefined shifts and days until an end date is defined or the pattern is deleted or overridden by another pattern. There are two methods for using schedule patterns: 1) inserting a predefined pattern template, or 2) creating an ad hoc pattern by manually entering shift days and times. In both cases, schedule patterns help you quickly assign schedules to team members for a defined period of time.

## SCHEDULE PATTERN EDITOR

The Pattern Editor allows you to view, add, modify or delete a team member’s schedule pattern. The graphic below illustrates the layout of the Schedule Pattern Editor workspace.

The screenshot shows the 'Schedule Pattern' editor interface. At the top, a box labeled 'Effective Dates' has a red arrow pointing to the 'Start Date' and 'End Date' fields. Below this, the 'Assigned to' section shows 'Brown, Corey R' with 'Primary job' set to 'None'. A table with columns 'Start Date', 'End Date', 'Duration', and 'Rotation' is visible. The 'Add Pattern' section includes 'Anchor Date' (9/04/2022), 'Start Date' (9/04/2022), and 'End Date' (empty) with a 'Clear' button and a 'Forever' radio button selected. A red box highlights the 'Define Pattern for' section, which includes a dropdown set to '1', radio buttons for 'Week(s)' (selected) and 'Day(s)', and an 'Override Other Patterns' checkbox. Below this are links for 'Add Shift', 'Add Pay Code', 'Shift Template', and 'Pattern Template', along with a search field containing '8-1630' and a 'Find' button. The 'Shift Workspace' is a table with columns for days of the week. The 'Monday', 'Wednesday', and 'Friday' columns contain the shift '8-1630'. A box labeled 'Edit Options' has a red arrow pointing to the 'Sunday' column, and a box labeled 'Shift Workspace' has a red arrow pointing to the '8-1630' shift in the Friday column. 'Cancel' and 'Apply' buttons are at the bottom right.

No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1		8-1630		8-1630		8-1630	

Element	Description
<b>Effective Dates</b>	Assigns start and end dates to the schedule pattern. <ul style="list-style-type: none"> <li>• <b>Start Date</b> - The date in which the team member begins working the schedule pattern.</li> <li>• <b>End Date</b> - When you know the team member’s schedule is changing at a specific point in time, enter the date the schedule pattern ends.</li> <li>• <b>Forever</b> - Select when there is no foreseeable end to the team member’s schedule.</li> <li>• <b>Define Pattern</b> - Allows you to define the rotation frequency and assigns shift times and details to the days in the rotation.</li> </ul>
<b>Edit Options</b>	The various buttons provide access to edit the pattern. <ul style="list-style-type: none"> <li>• <b>Shift Template</b> and <b>Pattern Template</b> links provide access to pre-built shifts and patterns.</li> <li>• <b>Comment</b> link allows you to associate comments with shifts.</li> <li>• <b>Copy/Paste</b> allows access to copy and paste shifts.</li> <li>• <b>Delete</b> link allows user to delete unwanted shifts.</li> </ul>
<b>Shift Workspace</b>	Review schedule data and perform tasks on existing data. The information in the grid varies depending on the selected viewing options.



## ASSIGNING A PATTERN TEMPLATE

### LEARNING SCENARIO

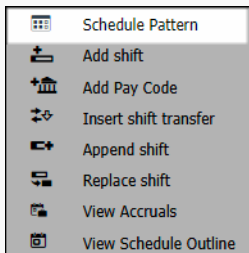
You have a team member who works the same shifts on the same days every week. To make scheduling quicker, insert a predefined pattern template to the team member's schedule. Set the end date to Forever.

#### ASSIGN A PATTERN TEMPLATE

- 1 Right-click the team member's name in the Schedule Planner.

By Employee	9/04
Name	Sun 9/04
Brown, Corey R	
Caldwell, Carolyn J	
Carter, Anthony T	

- 2 Select **Schedule Pattern**.



- 3 Click the **Anchor Date** field and select the effective date on which the pattern begins.

Anchor Date:\* 9/04/2022 Start Date:\* 9/04/2022

- 4 Click the **Calendar** icon in the Start Date field and select the effective date on which the team member begins working the pattern.

Start Date:\* 9/04/2022 End Date:\* Forever

**ASSIGN A PATTERN TEMPLATE**

5 Click the **Calendar** icon in the End Date field and select the last effective date of the pattern. To have the pattern in effect with no end date, select **Forever**.

Start Date: \* 3/06/2016 [Calendar Icon] End Date: \* [Calendar Icon] Clear

Forever

6 Optionally, select **Override Other Patterns** to replace any other assigned pattern.

Override Other Patterns

Items in rotation [Dropdown] Find

7 Click **Pattern Template** and select a template from the list.

Shift Template | Pattern Template | Item

Search...

Name	Description
M-F 8a-17a	Monday-Friday 0800-1700
Mon-Fri, 7a-3...	Monday - Friday, 0700-1530
Mon-Fri, 8a-4...	Monday - Friday, 0800-1630
Mon-Fri, 9a-5...	Monday - Friday, 0900-1730
Retail Pharm...	16 week Wknd Rotation

8 Click **Apply**.

Cancel Apply

9 Verify the pattern displays for the correct dates and click **OK**.

**Schedule Pattern**

Assigned to  
Brown, Corey R Primary job None

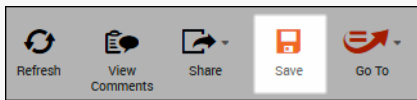
Start Date	End Date	Duration	Rotation
9/04/2022	Forever	1 week	1 Week:8 - 1630(Mon,Tue,Wed,Thu,Fri)

Add Pattern OK

---

**ASSIGN A PATTERN TEMPLATE**

**10** Click **Save**.



---

**BUSINESS PRACTICE**

The Anchor Date and the Start Date should always match.

## CREATING A SCHEDULE PATTERN WITHOUT A TEMPLATE

If a pattern template is not available in the drop-down list, you can build an ad hoc pattern for a team member. The ad hoc pattern is assigned to the selected team member; it cannot be saved and assigned to team members at a later time.

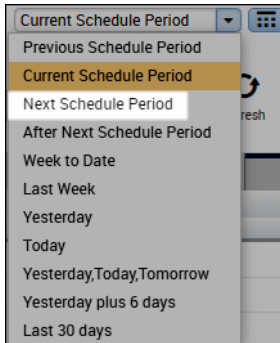
### LEARNING SCENARIO

You have a team member who works different shifts in different weeks, but there is not a pattern template for the specific schedule. You create a single-use pattern for a team member. Create a pattern to accommodate the following schedule:

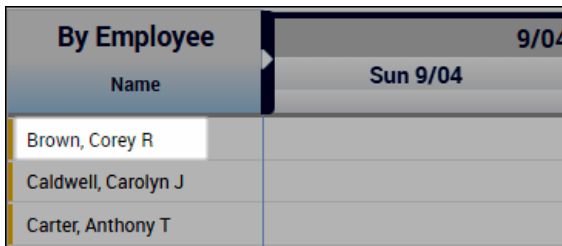
Week	Day	Assignment	Shift Time
1	Sunday	Night	1845-0715
1	Tuesday	Day	0845-2115
1	Thursday	Day	0845-2115
2	Tuesday	Day	0845-2115
2	Friday	Night	1845-0715
2	Saturday	Night	1845-0715

**CREATE A SCHEDULE PATTERN WITHOUT A TEMPLATE**

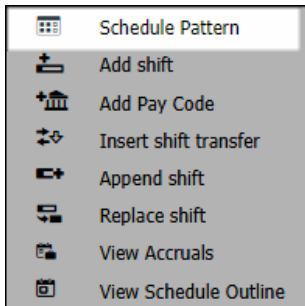
- 1 Click the drop-down arrow in the **Time Period** field and select the timeframe the pattern begins.



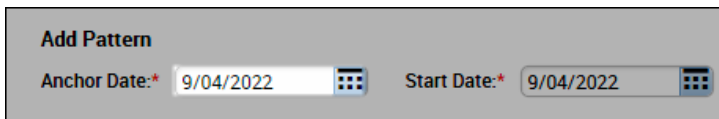
- 2 Right-click the team member's name in the Schedule Planner.



- 3 Select **Schedule Pattern**.



- 4 Click the **Calendar** icon in the Anchor Date field and select the effective date on which the team member begins working the pattern.



**CREATE A SCHEDULE PATTERN WITHOUT A TEMPLATE**

- 5 Click the **Calendar** icon in the Start Date field and select the effective date on which the pattern begins.

Start Date:\* 9/04/2022 [Calendar Icon] End Date:\* [Calendar Icon] Clear  
 Forever

- 6 Click the **Calendar** icon in the End Date field and select the last effective date of the pattern. To have the pattern in effect with no end date, select **Forever**.

Start Date:\* 9/04/2022 [Calendar Icon] End Date:\* [Calendar Icon] Clear  
 Forever

- 7 Set the **Define Pattern for** field to either **Days** or **Weeks** and enter the number of days or weeks the pattern repeats.

Define Pattern for:\* 2  Week(s)  Day(s)

- 8 Click the **Day** cell for the day you want to add a shift. Enter shift start and end times separated by a hyphen (i.e., 1845-0715).

	No.	Sunday
[+]	1	1845-715
[+]	2	

- 9 Continue adding shifts for the remainder of the scheduled days within the pattern.

No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	1845-715		845-2115		845-2115		
2			845-2115			1845-715	1845-715

- 10 Click **Apply**.

Cancel Apply

---

**CREATE A SCHEDULE PATTERN WITHOUT A TEMPLATE**

**11** Verify the pattern displays for the correct dates and click **OK**.

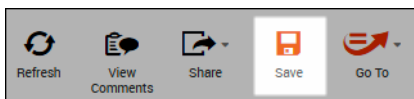
**Schedule Pattern**

Assigned to  
Jones, Sharon R Primary job None

	Start Date	End Date	Duration	Rotation
<input type="checkbox"/>	9/04/2022	Forever	2 weeks	2 Weeks: 1845 - 715(Sun,Fri,Sat),845 - 2115(Tue,Thu,Tue)

---

**12** Click **Save**.



## END DATE A SCHEDULE PATTERN

If a team member's schedule changes, you can apply an end date to the existing pattern assignment before entering a new pattern assignment.

### LEARNING SCENARIO

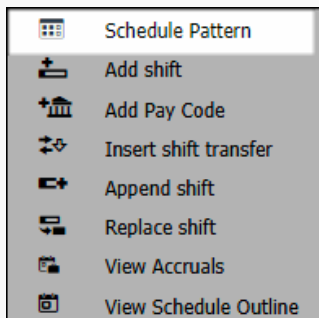
One of your team member's is changing schedules. End date the existing schedule pattern.

#### END DATE A SCHEDULE PATTERN

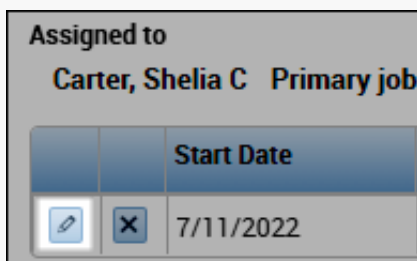
- 1 Right-click the team member's name in the **Schedule Planner**.

By Employee Name	9/04 - 9/10	
	Sun 9/04	Mon 9/05
Brown, Corey R		8:00 - 17:30
Caldwell, Carolyn J		9:00 - 17:30
Carter, Anthony T		
Carter, Shelia C	8:00 - 16:30	

- 2 Select **Schedule Pattern**.



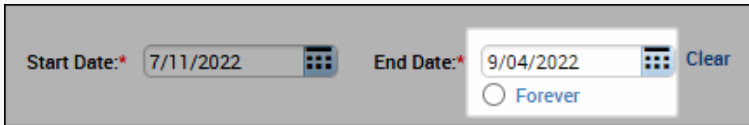
- 3 Click the **Edit** icon.





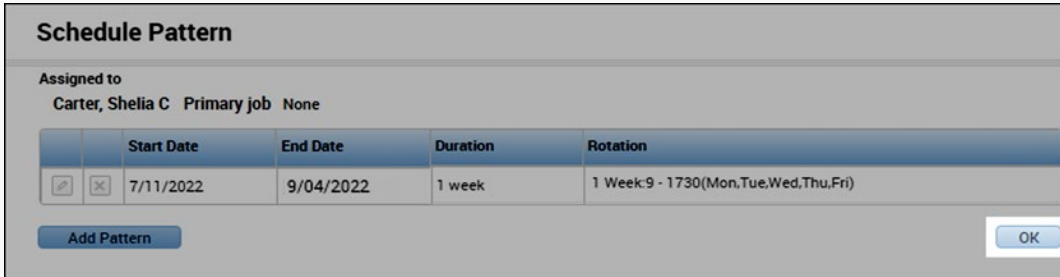
### END DATE A SCHEDULE PATTERN

4 Click the **Calendar** icon in the End Date field and select the last effective date of the pattern.



Start Date: 7/11/2022 End Date: 9/04/2022 Clear  
 Forever

5 Click **OK**.



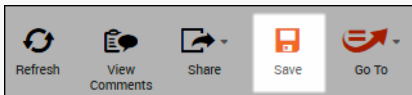
**Schedule Pattern**

Assigned to  
Carter, Shelia C Primary job None

	Start Date	End Date	Duration	Rotation
<input type="checkbox"/>	7/11/2022	9/04/2022	1 week	1 Week-9 - 1730(Mon.Tue.Wed.Thu.Fri)

Add Pattern OK

6 Click **Save**.



Refresh View Comments Share Save Go To

# MODULE 7: MANAGING REQUESTS

---

**MODULE OBJECTIVES:**

- Describe the purpose of team member requests.
- Review team member requests using alerts.
- Manage team member requests for time off.
- Manage team member schedule requests.

## TIME OFF REQUESTS OVERVIEW

Kronos Advanced Scheduling automates the time off request process. Team members submit requests electronically for Manager review and approval. A Manager can either approve or refuse a submitted request. When the request is approved, it automatically overrides the team member's schedule in the Schedule Planner. In the current pay period of the request, the pay code is applied to the team member's timecard and reduces his/her accrual balance. When the request is refused, the team member receives a notification.

## REVIEWING TEAM MEMBER REQUESTS USING ALERTS

The Requests alert displays any time-off or other type of requests from your team members which require your review and action.

### LEARNING SCENARIO

After logging into Kronos you notice there are several time off request alerts from team members. You would like to review each request to determine what action to take on the request.

#### OPEN A TIME OFF REQUEST

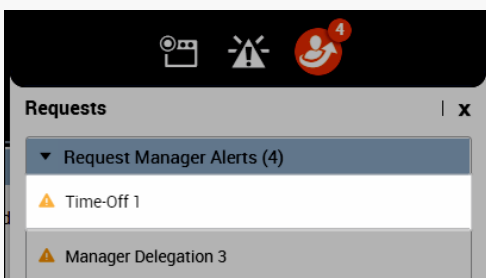
- 1 Click the Alerts **Refresh** button to get up-to-date data.



- 2 Click the **Requests** alert icon.

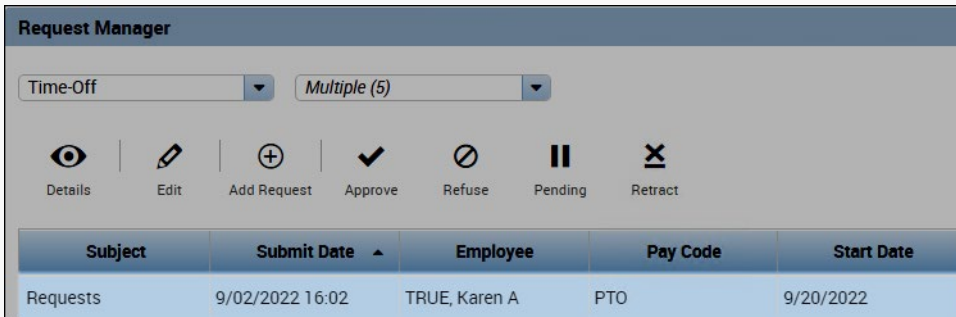


- 3 Click the **Request Type**.



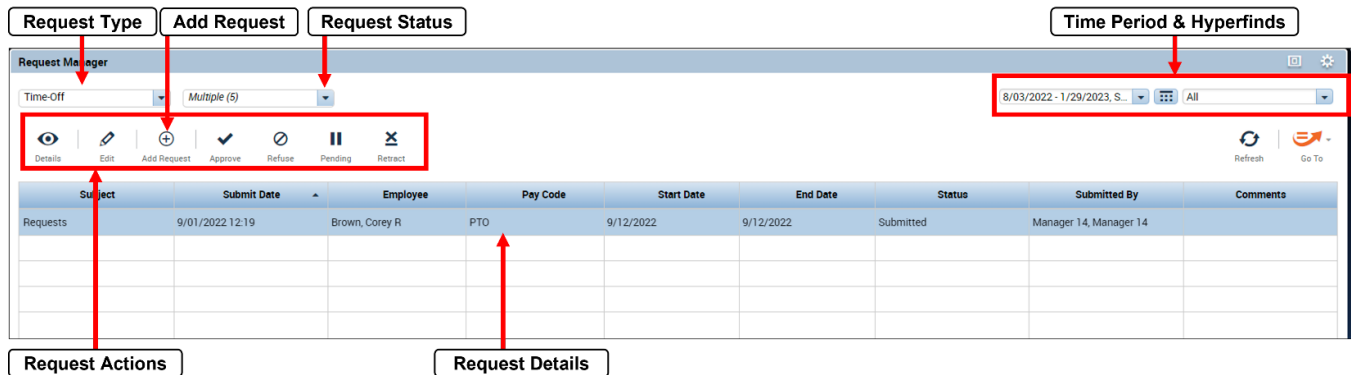
**OPEN A TIME OFF REQUEST**

4 The **Request Manager** widget is automatically activated and displays the team member(s) request details.



**THE REQUEST MANAGER WIDGET**

The Request Manager widget displays a list of team members who have requested time-off. The widget contains detailed information to allow you to review the contents of the request. The widget also allows you to view more detailed information before approving or rejecting the request.



Element	Description
<b>Request Type</b>	Allows you to filter the requests that display by their type.
<b>Add Request</b>	Allows a manager to request on behalf of a team member.
<b>Request Status</b>	Allows you to filter the requests that display by their status.

Element	Description
<b>Time Period &amp; Hyperfinds</b>	Determines the time period and team members for the requests you want to view.
<b>Request Actions</b>	Enables you to perform actions related to requests.
<b>Request Details</b>	<p>Displays the details of each team member request. Each request includes:</p> <ul style="list-style-type: none"> <li>• <b>Modified By</b> – The last user to submit or modify the request.</li> <li>• <b>Subject</b> – Displays the type of request.</li> <li>• <b>Submit Date</b> – Displays the date the request was submitted.</li> <li>• <b>Status</b> - Displays the status of the request.</li> <li>• <b>Submitted By</b> - The team member who submitted the request.</li> <li>• <b>Start Date</b> – The date the team member is requesting to be off.</li> <li>• <b>Employee</b> – The team member’s name.</li> <li>• <b>End Date</b> – The last date the team member is requesting to be off.</li> <li>• <b>Pay Code</b> – The type of hours being requested.</li> <li>• <b>Comments</b> – Displays any comments associated with the request.</li> </ul>








## RESPONDING TO A TIME OFF REQUEST

### LEARNING SCENARIO

You have reviewed a team member’s request for time off and want to approve the request.

#### APPROVE A TIME-OFF REQUESTS

- 1 From the **Request Manager** widget, click the row containing the time-off request you want to approve.

 Details	 Edit	 Add Request	 Approve	 Refuse	 Pending	 Retract
Subject	Submit Date ▲	Employee	Pay Code	Start Date	End Date	
Requests	9/02/2022 16:02	TRUE, Karen A	PTO	9/20/2022	9/20/2022	

**APPROVE A TIME-OFF REQUESTS**

2 Click the **Approve** icon.

Details	Edit	Add Request	Approve	Refuse	Pending	Retract
Subject	Submit Date	Employee	Pay Code	Start Date	End Date	
Requests	9/02/2022 16:02	TRUE, Karen A	PTO	9/20/2022	9/20/2022	

3 Review the details of the request.

Submitted: 9/02/2022 - 16:02:47  
Modified by: ksched14

Employee: TRUE, Karen A      Type: Requests

Start date	End date	Pay code	Time Unit	Start time	Daily Amount
9/20/2022	9/20/2022	PTO	Hours	8:00	8.0

Accruals on: 9/20/2022

Accrual	Balance
LV-Bone Mar Organ Don	0.0 Hour
LV-Emergency Paid Sick Leave	0.0 Hour
LV-FMLA	8640.0 Hour

**Status History**

Submitted: 9/02/2022 - 16:02:47  
ksched14  
ESS

4 Click **Approve**.

**Status History**

Submitted: 9/02/2022 - 16:02:47  
ksched14  
ESS

**Comments (0)**

Select Comment

Type a note (optional)

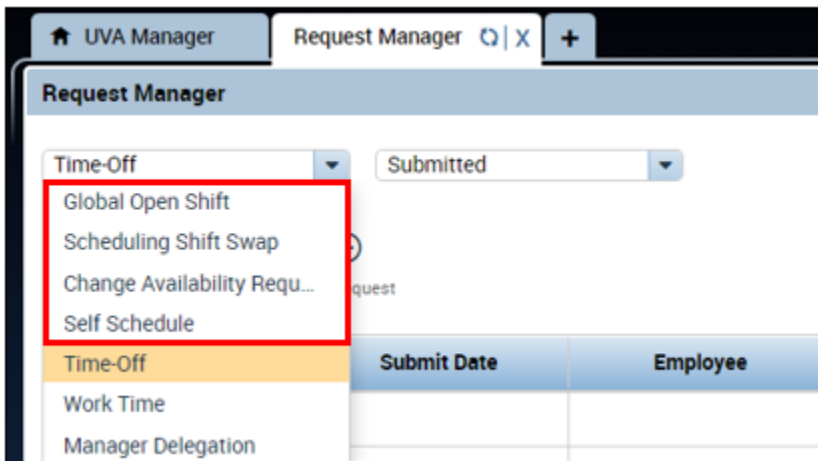
Cancel      Approve

**ADDITIONAL INFORMATION**

If you want to attach a comment, it must be attached to the request prior to approving or rejecting the request.

**RESPONDING TO SCHEDULE REQUESTS**

You can view and respond to schedule requests in a posted schedule using the Request Manager widget. You respond to schedule requests in the same fashion you do for time off. The only difference is selecting the appropriate type of request. If you approve a request, the change is made to the schedule and the team member is notified automatically. If you reject a request, no changes are made to the schedule and the team member is notified automatically.

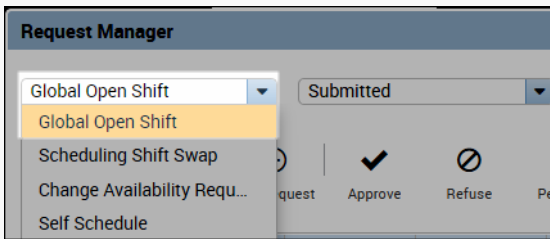


## LEARNING SCENARIO

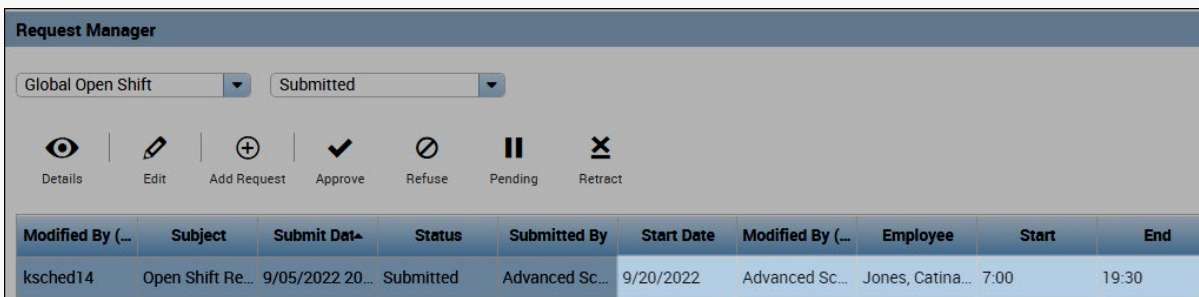
You have reviewed a team member's request to work an open shift. Approve the request to apply the change to the schedule.

### APPROVE A SCHEDULE REQUEST

- 1 Click the **Request Type** field and select the type of schedule requests you want to manage.



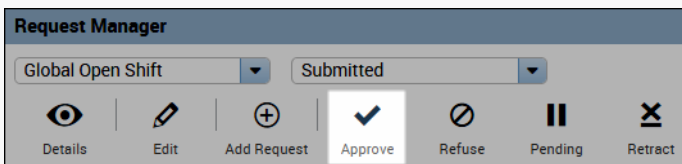
- 2 Click the row containing the schedule request you want to approve.



The screenshot shows the 'Request Manager' interface with a table of schedule requests. The table has the following columns: Modified By (...), Subject, Submit Date, Status, Submitted By, Start Date, Modified By (...), Employee, Start, and End. The first row of data is highlighted in blue.

Modified By (...)	Subject	Submit Date	Status	Submitted By	Start Date	Modified By (...)	Employee	Start	End
ksched14	Open Shift Re...	9/05/2022 20...	Submitted	Advanced Sc...	9/20/2022	Advanced Sc...	Jones, Catina...	7:00	19:30

- 3 Click the **Approve** icon.





## APPROVE A SCHEDULE REQUEST

### 4 Review the details of the request.

### Approve Open Shift Request

→ Submitted: 9/05/2022 - 20:50:27

Modified by: ksched14

Employee: Jones, Catina A

Shift Start Date: 9/20/2022    Type: Open Shift Request - Global

○ 7:00 [12.5 h]: UVAHS/MC/PCS/TRN/TRN 29/PCA

**Status History**

→ Submitted: 9/05/2022 - 20:50:27

ksched14  
ESS

### 5 Click **Approve**.

→ Submitted: 9/05/2022 - 20:50:27

ksched14  
ESS

**Comments (0)**

Select Comment ▼

✕ Type a note (optional)

Cancel    Approve

# MODULE 8: WORKING WITH SHIFTS

---

**MODULE OBJECTIVES:**

- Describe the methods available for adding and editing shifts.
- Insert a shift template.
- Describe the purpose of pay codes.
- Schedule time using pay code edits.

## ADDING SHIFTS

The Schedule Planner provides different methods for adding shifts into team member schedules depending on the situation. You can add shifts using one of the following methods:

1. In-cell entry – used for adding simple shifts that include only a shift start and end time. Shift start and end times are entered directly in the date cell.
2. Shift Templates – used when entering a common shift in which a shift template has already been created.
3. Shift Editor – used when adding more complex shifts that contain specific shift attributes (i.e., shifts with transfers, etc.).

## INSERTING A SHIFT TEMPLATE

### LEARNING SCENARIO

Your team member works a common shift from 0800-1630. Since the shift is used often, there is a shift template already created. Insert the shift template.

#### INSERT A SHIFT TEMPLATE

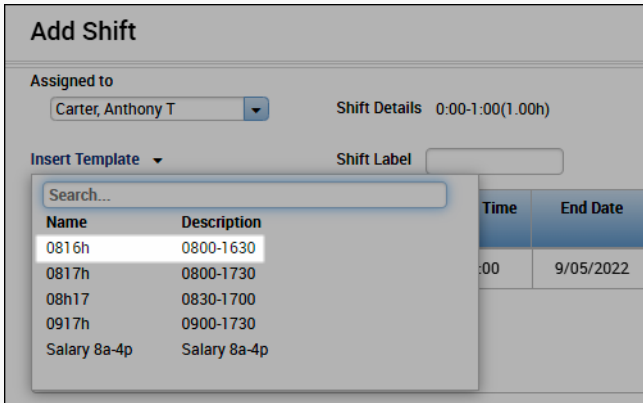
- 1 Locate the team member’s row and right-click the cell under the date where you want to add a shift. Select **Add Shift**.

The screenshot shows a scheduling grid with columns for dates 9/04, 9/05, and 9/06. A right-click context menu is open over the cell for Carter, Anthony T on 9/05. The menu options are: Add shift, Add Pay Code, Insert shift template, Restore, and Paste.

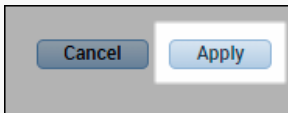
By Employee Name	9/04 - 9/10			
	Sun 9/04	Mon 9/05	Tue 9/06	Wed 9/07
Brown, Corey R		8:00 - 17:30	8:00 - 17:30	
Caldwell, Carolyn J		9:00 - 17:30		9:00
Carter, Anthony T				
Carter, Shelia C		8:00 - 16:30		
Davis, Valerie A				
Jackson, Erica A				
Johnson, Gail S				

## INSERT A SHIFT TEMPLATE

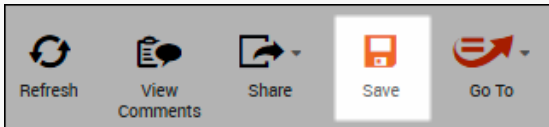
2 Click drop-down arrow in the **Insert Template** field and select a template from the list.



3 Click **Apply**.



4 Click **Save**.



## ADDITIONAL INFORMATION

If you determine that a team member's shift needs to be shortened or lengthened, you can edit the shift start or end times accordingly.

## DELETING SHIFTS

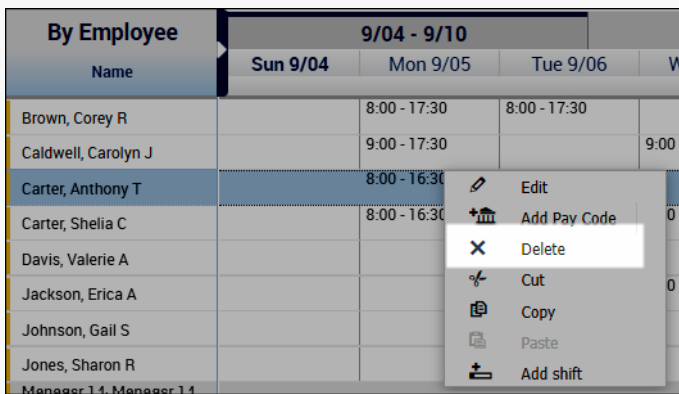
If a team member is no longer working a specific shift, you can delete the shift from the schedule. If the team member’s schedule changes, it is important to update the Schedule Planner accordingly, so the team member does not receive an exception in the timecard.

### LEARNING SCENARIO

Your team member is no longer working the 0800-1630 shift, so you must delete the shift.

#### DELETE A SHIFT

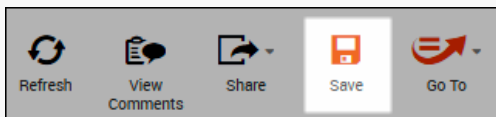
- 1 Right-click the date cell for the team member whose shift you want to delete. Select **Delete**.



The screenshot shows a scheduling grid with columns for dates 9/04, 9/05, 9/06, and 9/07. The rows list employees: Brown, Corey R; Caldwell, Carolyn J; Carter, Anthony T; Carter, Shelia C; Davis, Valerie A; Jackson, Erica A; Johnson, Gail S; Jones, Sharon R; and Manager 14. A right-click context menu is open over the cell for Carter, Anthony T on 9/05, which shows a shift of 8:00 - 16:30. The menu options are: Edit, Add Pay Code, Delete, Cut, Copy, Paste, and Add shift.

By Employee Name	9/04 - 9/10			
	Sun 9/04	Mon 9/05	Tue 9/06	Wed 9/07
Brown, Corey R		8:00 - 17:30	8:00 - 17:30	
Caldwell, Carolyn J		9:00 - 17:30		9:00 -
Carter, Anthony T		8:00 - 16:30		
Carter, Shelia C		8:00 - 16:30		0-
Davis, Valerie A				0-
Jackson, Erica A				
Johnson, Gail S				
Jones, Sharon R				
Manager 14, Manager 14				

- 2 Click **Save**.



## SCHEDULING A PAY CODE AMOUNT

Entering a pay code into a team member’s schedule allows you to schedule non-worked time. Non-worked hours include sick time and vacation or paid time off. You should schedule your team members’ non-worked time when you know about it in advance. Once the scheduled date becomes part of the current pay period, the pay code amount automatically populates the team member’s timecard.

### LEARNING SCENARIO

One of your team members is going to be on vacation on Friday. You want to schedule a pay code amount in the team member’s schedule as a reminder of the absence, but more importantly to populate the team member’s timecard accordingly.

#### SCHEDULE A PAY CODE AMOUNT

- 1 Locate the team member’s row and right-click the date to which you want to enter a pay code amount. Select **Add Pay Code**.

By Employee	9/04 - 9/10			
Name	Sun 9/04	Mon 9/05	Tue 9/06	Wed 9/07
Brown, Corey R		8:00 - 17:30	8:00 - 17:30	
Caldwell, Carolyn J		9:00 - 17:30		9:00
Carter, Anthony T				
Carter, Shelia C		8:00 - 16:00		10:00
Davis, Valerie A				10:00
Jackson, Erica A				
Johnson, Gail S				

- Add shift
- Add Pay Code**
- Insert shift template
- Restore
- Paste

- 2 Confirm the date selected in the **Effective Date** field is correct.

**Add Pay Code**

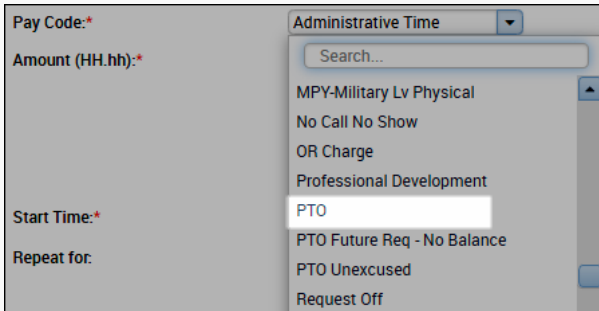
Assigned to  
Carter, Anthony T

Effective Date:\*

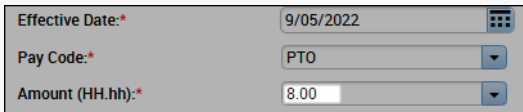
Pay Code:\*

**SCHEDULE A PAY CODE AMOUNT**

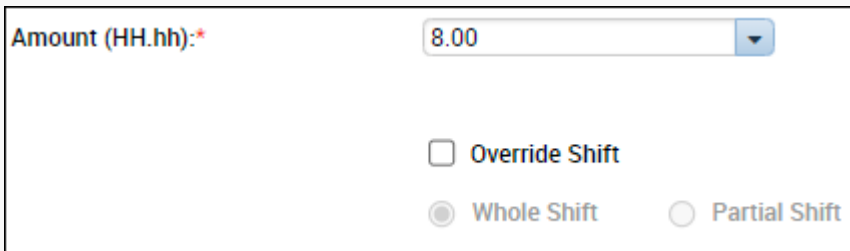
**3** From the **Pay Code** drop-down list, select the pay code.



**4** Enter the number of hours to allocate to the pay code in the **Amount** field.



**5** If the pay code amount must replace the team member’s existing shift, select the **Override Shift** check box. To override the entire shift, select **Whole Shift**. To override part of the scheduled shift, select **Partial Shift**.



**6** In the **Start Time** field, enter the effective time for the pay code amount. If the team member already has a schedule, the shift start time is the default time



**7** In the **Repeat for (D)** field, enter the number of consecutive days for which the pay code amount applies.

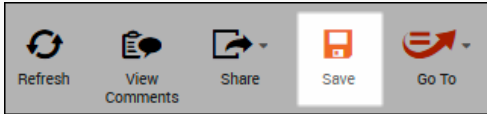


**SCHEDULE A PAY CODE AMOUNT**

**8** Click **Apply**.



**9** Click **Save**.





# MODULE 9: WORKING WITH TRANSFERS

---

**MODULE OBJECTIVES:**

- Describe the purpose of transfers.
- Schedule labor account, work rule and job transfers.

## TRANSFERS OVERVIEW

Throughout a shift, a team member punches for the time they work. The recorded time is allocated to their default labor account and work rule assignment along with any non-worked hours. Transfers allow you to allocate hours to an alternate labor account in order to charge the hours where they are worked. This process is useful when team members work in different cost centers or at different locations.

When you schedule a work rule transfer, the Kronos application applies a different set of rules to the team member's shift when calculating hours. This feature allows certain worked time to calculate differently than other worked time.

If the transfer is known in advance, it is entered into the schedule. When a team member punches in and out, the hours are automatically allocated according to the scheduled transfer.

## SCHEDULING LABOR ACCOUNT TRANSFERS

### LEARNING SCENARIO

One of your team members is going to work in a different department one day in the next schedule period. In order for labor to be allocated correctly, you need to schedule the team member in the department where the team member is working. Create a shift and include a Labor Account transfer.

#### SCHEDULE A LABOR ACCOUNT TRANSFER

- 1 From the **Quickfind** widget, locate the team member.



Name	ID	Primary Labor Account
Carter, Anthony T	9014X015	MC01/-/2026000/9014/101880/P108190
Carter, Shelia C	9014X008	MC01/-/2409000/9014/101880/P108190

**SCHEDULE A LABOR ACCOUNT TRANSFER**

2 Highlight the team member and click **Go To**.

Name	ID	Primary Labor Account	Totals Up To Date
Carter, Anthony T	9014X015	MC01-/-/2026000/9014/101880/P108190	✓
Carter, Shelia C	9014X008	MC01-/-/2409000/9014/101880/P108190	✓

3 Select **Schedules**.

1 Selected

Week to Date

Go to widget

- Attendance Editor
- Exceptions
- Request Manager
- People
- Schedules**
- Timecard
- Reports

Go to workspace

4 Right-click the date of the team member for which you want to enter the transfer and select **Add shift**.

By Employee						9/04 - 9/10	9/11 - 9/17
Name	S...	Weekly ... Hours	Pay...	T...	Assigned Manager	Sun 9/04	Mon 9/05
Carter, Anthony T	0...	0.00	06...		Manager 14, Ma...		

- Add shift
- Add Pay Code
- Insert shift template
- Restore
- Paste

5 In the **Start Time** field, enter the time the shift transfer begins.

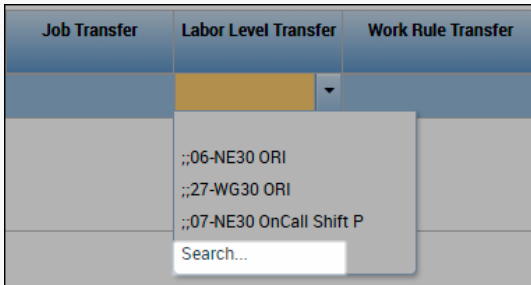
Start Date	Type	Start Time
9/05/2022	Regular	0800

**SCHEDULE A LABOR ACCOUNT TRANSFER**

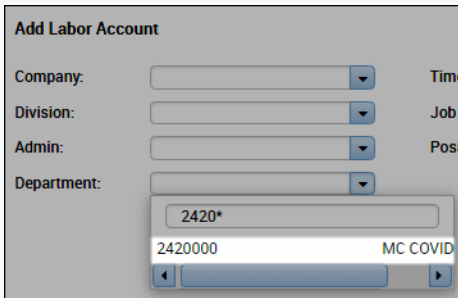
6 In the **End Time** field, enter the time the shift transfer ends.

Type	Start Time	End Time
Regular	8:00	1630

7 Click the **Labor Level Transfer** field and select the applicable Labor Account from the list. If the labor account does not display, click **Search**.



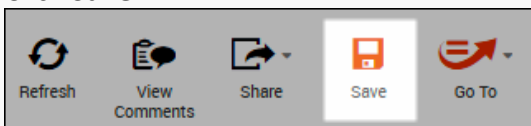
8 Click the drop-down arrow for the labor level for which you want to transfer and select a labor entry from the list. Alternatively, you can search for labor levels using the Search feature for each field.



9 Click **Apply**.

10 Click **Apply** again.

11 Click **Save**.



## SCHEDULING ON-CALL

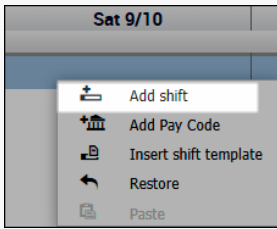
When team members are assigned an on-call shift, their hours are calculated differently for the time they are on call and for the time they are called in. As a result, you need to do a job transfer in the schedule for the team member’s hours to be calculated and paid accurately. To schedule on-call simply add a new shift with a work rule transfer or edit an existing shift to add the work rule transfer.

### LEARNING SCENARIO

You need to schedule a team member for an on call shift the first weekend of the next schedule period. Add a shift and schedule an On-Call transfer.

#### SCHEDULE ON-CALL

- 1 Right-click the Date cell you want to schedule On-Call and select **Add shift**.



- 2 Click the **Start Time** field and enter the time the shift begins.

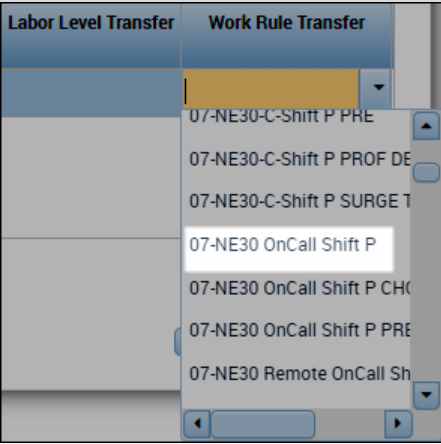
	Start Date	Type	Start Time
+ x	9/10/2022	Regular	0800

- 3 Click the **End Time** field and enter the time the shift ends.

Start Date	Type	Start Time	End Time
9/10/2022	Regular	8:00	1630

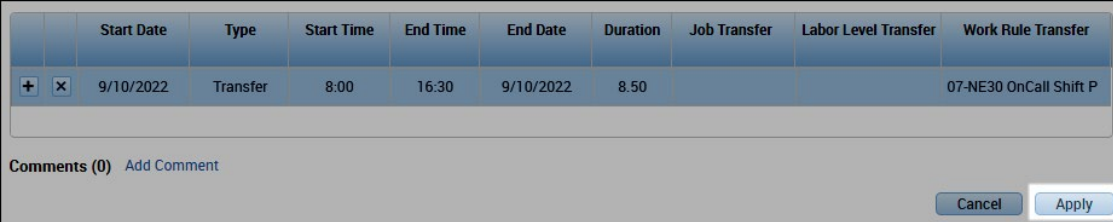
- 4 Click the **Work Rule Transfer** field and select the applicable Work Rule from the list.

**SCHEDULE ON-CALL**



The screenshot shows a software interface for scheduling on-call shifts. A dropdown menu is open under the 'Work Rule Transfer' column, listing several options including '07-NE30 OnCall Shift P'. The interface also has a 'Labor Level Transfer' column.

5 Verify the information and click **Apply**.

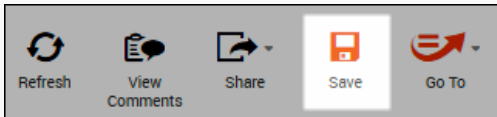


	Start Date	Type	Start Time	End Time	End Date	Duration	Job Transfer	Labor Level Transfer	Work Rule Transfer
+ x	9/10/2022	Transfer	8:00	16:30	9/10/2022	8.50			07-NE30 OnCall Shift P

Comments (0) [Add Comment](#)

[Cancel](#) [Apply](#)

6 Click **Save**.



**BUSINESS PRACTICE**

On-call shifts should not overlap pay periods.

## SCHEDULING A JOB TRANSFER

### LEARNING SCENARIO

You need to perform a job transfer to reflect where one of your team member's is working today.

#### SCHEDULE A JOB TRANSFER

- 1 Locate the team member's row and right-click the date to which you want to apply a job transfer.

By Schedule Group							9/04 - 9/10	
Person Name	Job	S... P...	S... H...	T... W...	Ov...	Pay...	S 18	M 19
Conley, Sh...	RN	0...	8...			07...	7:00 - 19:30	7:00 - 19:30

- 2 Select **Edit**.

By Schedule Group							9/04 - 9/10		9/11
Person Name	Job	S... P...	S... H...	T... W...	Ov...	Pay...	S 18	M 19	T 20
Conley, Sh...	RN	0...	8...			07...	7:00 - 19:30	7:00 - 19:30	
Fisher, Pat...	RN	0...	6...			07...	7:00 -		
Green, Kat...	RN	0...	9...			07...			

- 3 Click **Search** from the Job Transfer drop-down list.

Job Transfer
Labor Level Transfer
Work Rule Transfer

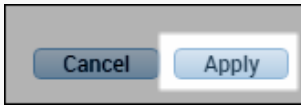
- 4 Expand the organizational map and click to select the job.

Job Transfer
Labor Account
Work Rule

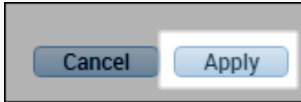
- TRN 4/03/2017 - Forever
- TRN 16 10/03/2021 - Forever
  - RN 10/03/2021 - Forever
  - SM 10/03/2021 - Forever
  - NEC 10/03/2021 - Forever
  - PCA 10/03/2021 - Forever

**SCHEDULE A JOB TRANSFER**

5 Click **Apply** to close the Transfer window.



6 Click **Apply** to close the Shift Editor.



7 Click **Save**.





# MODULE 10: GENERATING THE SCHEDULE

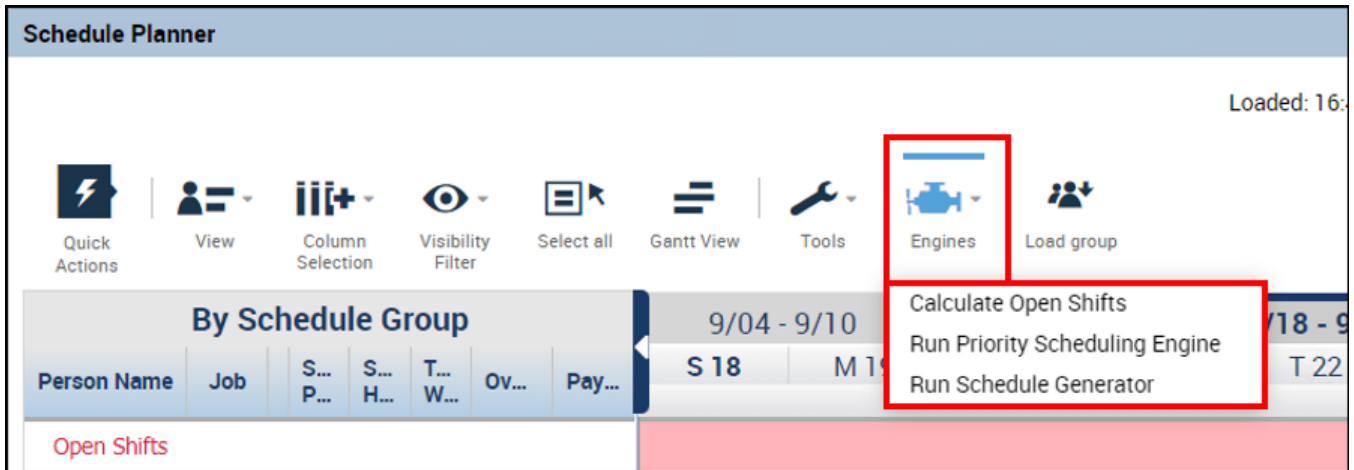
---

**MODULE OBJECTIVES:**

- Run the schedule generator.

## GENERATING OPEN SHIFTS

The Schedule Generator is an engine that can be run to compare the workload plan to the existing scheduled shifts and identify how many open shifts are needed in order to meet the staffing matrix requirements. Open shifts are shifts that have been added to the schedule and have not been assigned to a team member. The Schedule Generator is accessible from the Schedule Planner.



### ADDITIONAL INFORMATION

Schedule Generator is scheduled as a batch process and automatically runs to create open shifts for self-scheduling. However, managers and schedulers have the ability to run the schedule generator if additional open shifts or extra shifts are needed after the self-scheduling process is complete.

## MANAGING THE SELF-SCHEDULING PROCESS

After workload adjustments are made and the known portions of the schedule are complete, the next schedule is opened for team member self-scheduling. Team members receive notification in Team member Self-Service and/or by email when the schedule period is open for self-scheduling.

# MODULE 11: EVALUATING AND BALANCING THE SCHEDULE

---

**MODULE OBJECTIVES:**

- Evaluate schedule coverage.
- Identify and resolve schedule rule violations
- Enter any manual schedule adjustments to meet coverage.

## EVALUATING THE NEXT SCHEDULE

Kronos Advanced Scheduling has tools to help you with the evaluation process of the next schedule period. Those tools include the Daily Coverage tab, the Metrics tab and the Rule Violations tab.

## EVALUATING SCHEDULE COVERAGE FROM THE DAILY COVERAGE TAB

The Daily Coverage tab helps you evaluate the schedule and determine coverage options for the next schedule period. The table below provides a description of coverage row display options:

The image displays two screenshots of the Kronos software interface, illustrating different view options for the Daily Coverage tab. Both screenshots show the 'View Options' menu and the 'Coverage Row Options' menu. The top screenshot shows the 'View' dropdown set to 'Counts' and the 'Job' field set to 'PCS/TRN/TRN 29/RN'. The bottom screenshot shows the 'View' dropdown set to 'Coverage' and the 'Job' field set to 'PCS/TRN/TRN 29/RN'. Both screenshots show a table with rows D1, D2, E1, E2, and N, and columns representing different time zones or shifts.

Element	Description
<b>View Options</b>	Provides options for viewing coverage row data in different formats: <ul style="list-style-type: none"> <li>• <b>View</b>—Displays coverage row data in Counts or Coverage format.</li> <li>• <b>Job</b> – Displays daily coverage one location and job at a time by making a selection from the job field.</li> <li>• <b>Span</b> – Displays daily coverage for each zone. Zones split a 24-hour time span into 4-hour increments to easily identify a part of a day that is over or under covered.</li> </ul>

Element	Description
<b>View Options</b>	Provides options for viewing coverage row data in different formats: <ul style="list-style-type: none"> <li>• <b>View</b>—Displays coverage row data in Counts or Coverage format.</li> <li>• <b>Job</b> – Displays daily coverage one location and job at a time by making a selection from the job field.</li> <li>• <b>Span</b> – Displays daily coverage for each zone. Zones split a 24-hour time span into 4-hour increments to easily identify a part of a day that is over or under covered.</li> </ul>

Element	Description
<b>Coverage Row Data</b>	Provides daily coverage row data to quickly identify when there is more or less coverage than required for the View and Job selected: <ul style="list-style-type: none"> <li>• <b>Counts</b> - Numerically displays scheduled and planned coverage data. (e.g., 0/1 = under coverage by one team member (zero scheduled and one planned).</li> <li>• <b>Coverage</b> – Graphically displays scheduled and planned coverage data. The numeric value represents the number of team members scheduled and the bar graph color indicates if you are under, over, or fully staffed. Hold your cursor over the graph bar to locate specific time span gaps.</li> </ul>

**ADDITIONAL INFORMATION**

If you discover that there are too many or too few team members scheduled, you can modify the schedule by adding or deleting shifts to meet the workload.

**REVIEWING SCHEDULE RULES**

A schedule rule violation occurs when a schedule breaks a predefined scheduling rule. As you review and adjust your upcoming schedule, you can check rule violations to evaluate compliance with your schedule policies and guidelines. If you encounter a schedule rule violation, you must revise the team member’s schedule, so it complies with the rules. There are two severity levels: 1) Warning – You can correct or ignore a warning rule violation. A warning rule violation is saved in the database and 2) Informational – a guideline was broken, but one with the lowest level of severity.

Daily Coverage   Rule Violations   Staffing Assistant   Metrics						
Date	Severity	Employee/Org.	Rule Type	Name	Description	Loaded
9/04/2022	! Informational	Employee	Maximum hours per week tha...	Bonner, Melissa...	Scheduled for 48.0 hours (0.0 h from Timecard + 48.0 h from Scheduler), which is more than the weekly maximum of 40.0 hours.	
9/18/2022	! Informational	Employee	Maximum hours per week tha...	Bonner, Melissa...	Scheduled for 48.0 hours (0.0 h from Timecard + 48.0 h from Scheduler), which is more than the weekly maximum of 40.0 hours.	

**WARNING**

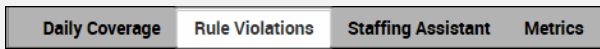
A message in the Rule Violations tab tells you if you have reached the maximum number of rule violations that can be displayed. To view all rule violations, select a smaller group of team members and/or a shorter timeframe.

## LEARNING SCENARIO

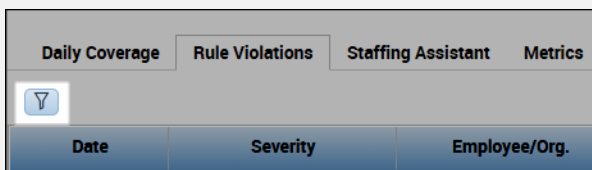
As part of your evaluation, you check to confirm whether the schedule is violating any schedule rules. If so, you adjust the schedule and recheck the rules.

### REVIEW SCHEDULE RULES

1 Select the **Rule Violations** tab.



2 Optionally, select the **Filter** icon to filter the violations.



3 Review the details of each rule violation.

Date	Severity	Employee/Org.	Rule Type	Name	Description
9/04/2022	! Informational	Employee	Maximum hours per week tha...	Bonner, Melissa...	Scheduled for 48.0 hours (0.0 h from Timecard + 48.0 h from Scheduler), which is more than the weekly maximum of 40.0 hours.
9/18/2022	! Informational	Employee	Maximum hours per week tha...	Bonner, Melissa...	Scheduled for 48.0 hours (0.0 h from Timecard + 48.0 h from Scheduler), which is more than the weekly maximum of 40.0 hours.

4 Perform the necessary schedule adjustments to remove the violation.

By Employee								9/04 - 9/10	9/11 - 9/17	9/18 - 9/24
Person Name	Job	S... P...	S... H...	T... W...	Ov...	Pay...	04	Mon 9/05	Tue 9/06	Wed 9/07
Open Shifts[1] ▶										
Bank, Pete...	PCA	. 0...	1...	8...	8.00	33...			7:00 - 19:30	7:00 - 19:30
! Bonner, Me...	PCA	. 0...	1...	8...	8.00	12...		7:00 - 19:30	7:00 - 19:30	7:00 - 19:30

## MAKING SCHEDULE ADJUSTMENTS

After evaluating coverage, hours and rule violations, you might need to apply edits before posting the schedule. Editing schedules can include tasks such as:

- Assigning any remaining open shifts.
- Adding or extending shifts to address under coverage.
- Deleting or shortening shifts to address over coverage.
- Transferring shifts to other jobs or locations to manage coverage.

# MODULE 12: FINALIZING THE NEXT SCHEDULE

---

**MODULE OBJECTIVES:**

- Post the next schedule.



## POSTING THE NEXT SCHEDULE

When the schedule is satisfactory you can post it so that team members know when and where they are scheduled to work. When you post a schedule, the system saves a copy of the schedule to the database and creates an audit trail. Marking a schedule as posted allows the system to track the number of changes made to a schedule after it is completed. Kronos Advanced Scheduling also provides the ability to repost schedules as needed.

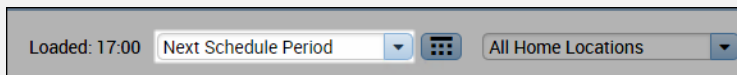
## POSTING THE SCHEDULE USING MANAGE SCHEDULE POSTING

### LEARNING SCENARIO

You have completed your schedule for the next schedule period and need to post the schedule for your team members. Post the schedule.

#### POST SCHEDULE USING MANAGE SCHEDULE POSTING

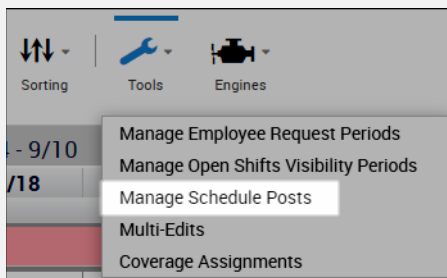
- 1 Click the drop-down arrow in the **Timeframe** field and select **Next Schedule Period**.



- 2 From the **Locations & Hyperfinds** field select a location to post.

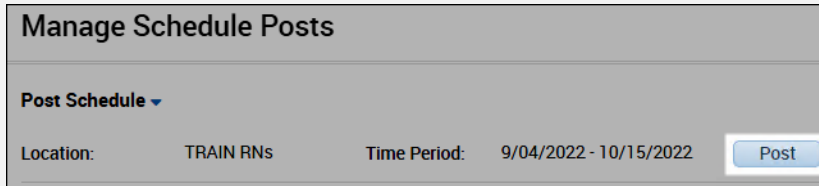


- 3 Click the **Tools** icon and select **Manage Schedule Posts**.



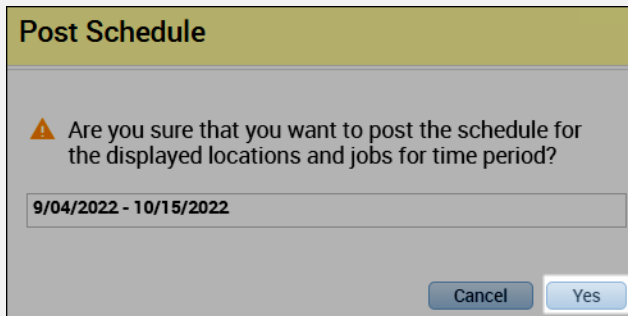
### POST SCHEDULE USING MANAGE SCHEDULE POSTING

4 Click **Post**.



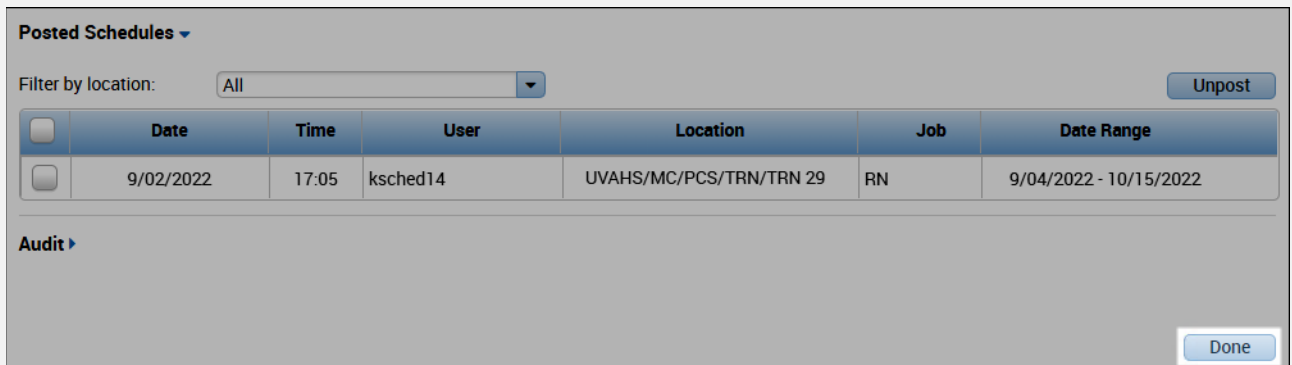
The 'Manage Schedule Posts' dialog box shows the 'Post Schedule' dropdown menu. Below it, the 'Location' is set to 'TRAIN RNs' and the 'Time Period' is '9/04/2022 - 10/15/2022'. A 'Post' button is visible on the right side.

5 Click **Yes** to confirm the schedule post.



The 'Post Schedule' confirmation dialog box displays a warning icon and the text: 'Are you sure that you want to post the schedule for the displayed locations and jobs for time period?'. Below this, the time period '9/04/2022 - 10/15/2022' is shown in a text field. At the bottom, there are 'Cancel' and 'Yes' buttons.

6 Click **Done**.



The 'Posted Schedules' section shows a table with columns: Date, Time, User, Location, Job, and Date Range. A filter by location is set to 'All'. An 'Unpost' button is in the top right. An 'Audit' link is at the bottom left, and a 'Done' button is at the bottom right.

	Date	Time	User	Location	Job	Date Range
<input type="checkbox"/>	9/02/2022	17:05	ksched14	UVAHS/MC/PCS/TRN/TRN 29	RN	9/04/2022 - 10/15/2022

#### ADDITIONAL INFORMATION

Once the schedule is posted, it is visible to the team members in Team member Self-Service, and they are able to submit schedule requests (e.g., swap shifts).

# MODULE 13: USING THE STAFF MANAGEMENT WIDGET

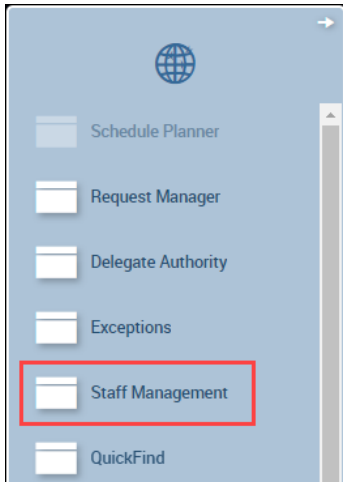
---

## **MODULE OBJECTIVES:**

- Access the Staffing widget.
- Navigate the Staffing widget.
- Enter an adjustment to a shift in the Staffing widget.
- Replace a shift with a pay code in the Staffing widget.

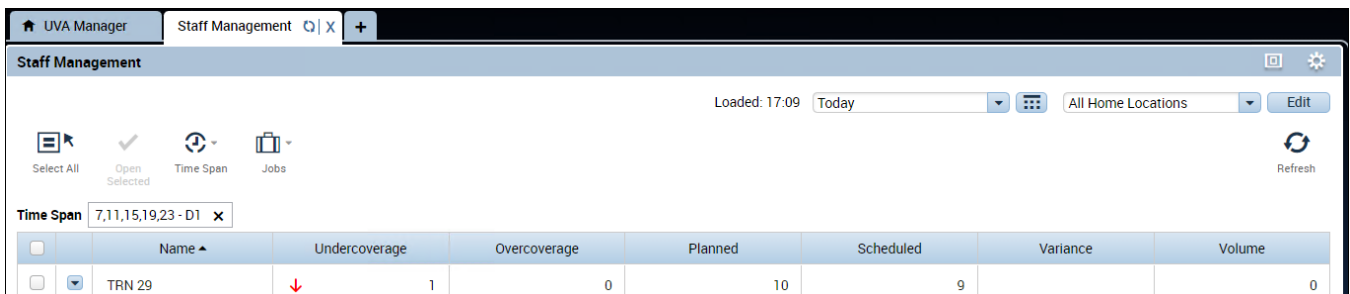
## INTRODUCTION TO THE STAFF MANAGEMENT WIDGET

The Staff Management widget is a tool used to quickly compare your budgeted workload and staffing plan to your scheduled resources all in one place. The Staff Management widget allows you to operate optimally across units with your available budget and staffing resources. The Staff Management widget gives a view into yesterday, today or tomorrow and is available to manage the current day to day changes for scheduling and coverage. The Staff Management widget is accessible from the Related Items pane.



## NAVIGATING THE STAFF MANAGEMENT WIDGET SUMMARY PAGE

The Staff Management widget presents a summary page to view coverage information for each unit selected in the show field. The toolbar on the summary page allows you to filter by time span and jobs for the units selected. You can also select the units you want to see in more detail and use the Open Selected icon to drill down into each selected unit from the list.

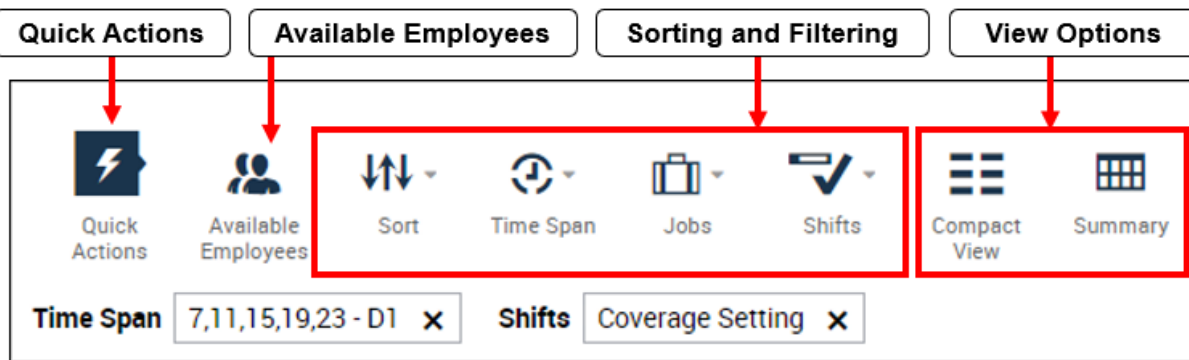


## NAVIGATING THE STAFF MANAGEMENT WIDGET DETAIL PAGE

Once you open selected locations from the Staff Management widget summary page, you can view details about each location selected. The Staff Management widget detail includes two main areas; 1) header and 2) workspace, each area is described below.

### STAFF MANAGEMENT WIDGET HEADER

The header of the Staff Management widget contains the following components:



Element	Description
<b>Quick Actions</b>	Expands to provide access to short cuts that allow you to add, edit and delete shifts and pay codes using icons.
<b>Available Employees</b>	Lists team members who can fill open shifts. Click the icon to show or hide the list of team members.
<b>Sorting and Filtering</b>	Allows you to sort by name, job or schedule and to indicate which time spans, jobs and shifts display.
<b>View Options</b>	<ul style="list-style-type: none"> <li>• <b>Compact View</b> - Toggles between a compact view and an extended view.</li> <li>• <b>Summary</b> - Directs you back to the summary page of the Staff Management widget.</li> </ul>

## COVERAGE WORKSPACE

Click the Coverage Bar to display the coverage workspace. The coverage workspace contains the following components:

The screenshot shows the Coverage Workspace interface. At the top, there are three callout boxes: 'Location' pointing to 'TRN 29', 'Coverage Bar' pointing to a bar with a red arrow and '0', and 'Actions' pointing to a dropdown arrow. Below this is a table with columns: Job, Planned, Scheduled, and Variance. The table contains data for jobs RN, SM, NEC, PCA, and HUC. A 'Coverage Data' callout box points to the 'Planned' column of the HUC row.

Job	Planned	Scheduled	Variance
RN	5	4	-1
SM	1	1	0
NEC	0	0	0
PCA	3	3	0
HUC	1	1	0

Element	Description
<b>Location</b>	Displays the name of the selected department. Hold your cursor over the name to view the full path.
<b>Coverage Bar</b>	Displays a summary of the coverage status, designated by the color of the arrow. <ul style="list-style-type: none"> <li>• <b>Red</b> – indicates under coverage.</li> <li>• <b>Blue</b> – indicates over coverage.</li> </ul>
<b>Actions</b>	Allows you to add a shift, close a unit and move to the first or last position on the page.

Element	Description
<b>Coverage Data</b>	Displays the coverage details by job: <ul style="list-style-type: none"> <li>• <b>Planned</b> – sum of all team member hours in the adjusted workload plan for a time span, divided by the time span.</li> <li>• <b>Scheduled</b> – sum of all the jobs that are in the Schedule Planner for the defined time span, divided by the time span.</li> <li>• <b>Variance</b> – difference between planned and scheduled.</li> </ul>

## STAFF MANAGEMENT WIDGET WORKSPACE

The workspace in the Staff Management widget allows you to enter last minute team member schedule changes. The schedule edits performed in the widget are automatically saved to the Schedule Planner.

The screenshot shows the Staff Management widget interface. At the top, there are two callout boxes: 'Location' pointing to the 'TRN 29' header and 'Coverage Bar' pointing to the summary row. The main table lists staff members with columns for name, role, and time. A 'Schedule Data' callout box at the bottom points to the 'Wright, Titus A' row.

Staff Management			
TRN 29			
↓ 1	✓ 0	PLN 10	SCH 9 VOL 0
⌵	Clark, Joe O	SM	7:00 - 19:30
	Conley, Shelia L	RN	7:00 - 19:30
	Crookenden, Eric T	PCA	7:00 - 19:30
	Fisher, Patty R	RN	7:00 - 19:30
	Jackson, Sarah R	RN	7:00 - 19:30
	Jones, Catina A	PCA	7:00 - 19:30
	Longley, Kristi M	RN	PTO Unexcus...
	Maine, Danielle S	RN	7:00 - 19:30
	West, Timothy L	HUC	7:00 - 15:30
	Wright, Titus A	PCA	7:00 - 19:30

Element	Description
Location	Displays the name of the selected department. Hold your cursor over the name to view the full path.
Coverage Bar	Displays a summary of the coverage status, designated by the color of the arrow. <ul style="list-style-type: none"> <li>• <b>Red</b> – indicates under coverage.</li> <li>• <b>Blue</b> – indicates over coverage.</li> </ul>
Schedule Data	Lists team members scheduled to work on the date selected. <ul style="list-style-type: none"> <li>• Click the blue drop-down arrow on the team member or shift row to view the details of their scheduled shift.</li> <li>• Right-click a team member name to access an action menu.</li> <li>• Icons to the left of a name indicate a schedule edit.</li> <li>• Black text indicates a scheduled job, red text indicates an open shift and green text indicates a scheduled pay code.</li> </ul>

## USING THE SHIFT EDITOR

When you right-click a team member name and select Edit from the menu, the Shift Editor displays. You can perform the same edits in the Staff Management widget shift editor in the same fashion as the Schedule Planner shift editor. All fields function the same.

### Edit Shift

Assigned to  Shift Details 7:00-19:30(12.50h) Primary Job UVAHS/MC/PCS/TRN/TRN 29/RN

[Insert Template](#) Shift Label

	Start Date	Type	Start Time	End Time	End Date	Duration	Job Transfer	Labor Level Transfer	Work Rule Transfer
+ x	9/02/2022	Regular	7:00	19:30	9/02/2022	12.50			

Comments (0) [Add Comment](#)



## ADJUSTING SCHEDULED SHIFTS IN THE STAFF MANAGEMENT WIDGET

If you determine that a team member’s shift needs to be adjusted, you can edit it accordingly. Multiple editing options are available from the Staff Management widget including changing start or end times, adding a comment or pay code, changing the work rule assignment or performing a job transfer. Schedule edits can be performed from the arrow beside an team member name or from the Action button menu bar.

### LEARNING SCENARIO

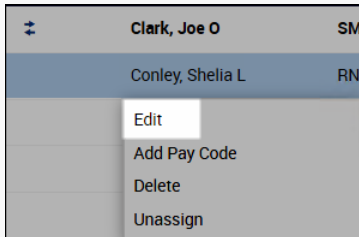
A team member needs to end her shift one hour later tomorrow. Change her shift end time using the Shift Editor.

#### CHANGE A SCHEDULED SHIFT TIME

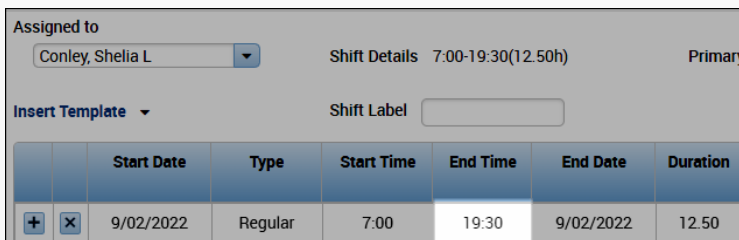
- 1 Right-click the team member Name with the shift you want to edit.



- 2 Select Edit.



- 3 Click the End Time field.



**CHANGE A SCHEDULED SHIFT TIME**

4 Enter the time the team member is ending her shift.

	Start Date	Type	Start Time	End Time	End Date	Duration
+ x	9/02/2022	Regular	7:00	1730	9/02/2022	12.50

5 Click **Apply**.



**ATTACHING A COMMENT**

**LEARNING SCENARIO**

After adjusting a team member’s scheduled time, you need to notate the change in the system. Assign a comment to a team member’s shift.

**ATTACH A COMMENT**

1 Right-click team member name with the shift you want to attach a comment.

TRN 29					
	2	0	PLN 10	SCH 8	VOL 0
⌵	Clark, Joe O		SM	7:00 - 19:30	⌵
💬	Conley, Shelia L		RN	7:00 - 17:30	⌵
	Fisher, Patty R		RN	7:00 - 19:30	⌵

2 Select **Edit**.

⌵	Clark, Joe O	SM
	Conley, Shelia L	RN
		<ul style="list-style-type: none"> <li>Edit</li> <li>Add Pay Code</li> <li>Delete</li> <li>Unassign</li> </ul>

**ATTACH A COMMENT**

3 Select **Add Comment**.

		Start Date	Type	Start Time	End Time
<input type="checkbox"/>	<input type="checkbox"/>	9/02/2022	Regular	7:00	17:30

Comments (0)

4 Select the **Comment(s)** you want to attach from the drop-down list.

Comments (1)

Approved

Type a note (optional)

5 Optionally, click the **Note** field and enter a free-text note with supporting information.

Comments (1)

Approved

Type a note (optional)

6 Click **Apply**.

## UNASSIGNING A SHIFT

In some instances, it may be necessary to unassign a team member from a shift. As was mentioned earlier in this course, when you unassign a shift it becomes an open shift that can be assigned to a different team member.

### LEARNING SCENARIO

A team member called back and forgot she had prior plans and is unable to work. You unassign her from her scheduled shift.

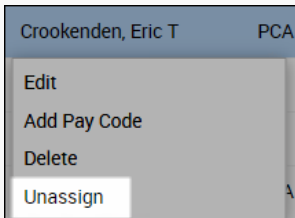
#### UNASSIGN A SHIFT

- 1 Right-click the team member name with the shift you want to remove.

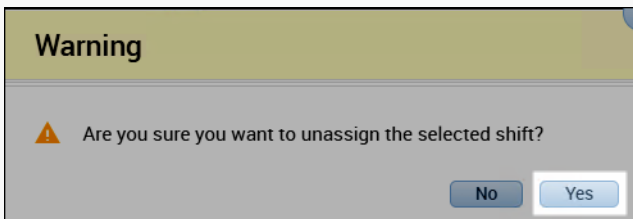


TRN 29					
	↓ 1	✓ 0	PLN 10	SCH 9	VOL 0
⚙	Clark, Joe O	SM	7:00 - 19:30		
💬	Conley, Shelia L	RN	7:00 - 17:30		
	Crookenden, Eric T	PCA	7:00 - 19:30		

- 2 Select **Unassign**.



- 3 Click **Yes** to confirm the edit.



### UNASSIGN A SHIFT

4 Click **Apply**.



## DELETING A SHIFT

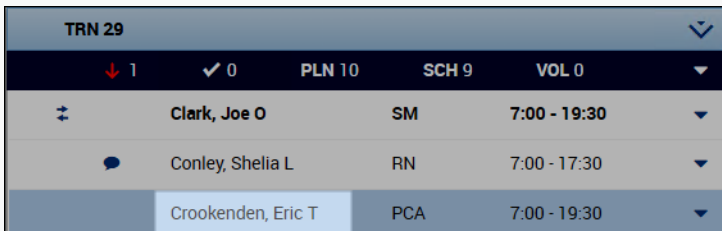
It may be necessary to remove a shift from the schedule. For example, you scheduled the team member on the wrong date or you decide not to fill an open shift.

### LEARNING SCENARIO

You accidentally scheduled a team member for the wrong date, delete the incorrect shift.

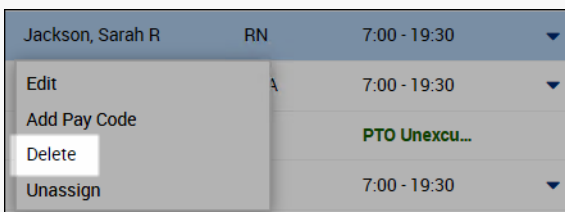
### DELETE A SHIFT

1 Right-click the team member **Name** with the shift you want to remove.



TRN 29					
	↓ 1	✓ 0	PLN 10	SCH 9	VOL 0
⚙	Clark, Joe O		SM	7:00 - 19:30	▼
🗨	Conley, Shelia L		RN	7:00 - 17:30	▼
	Crookenden, Eric T		PCA	7:00 - 19:30	▼

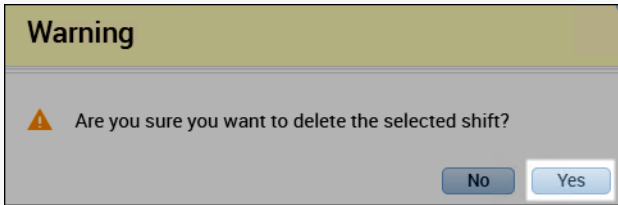
2 Select **Delete**.



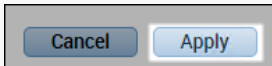
Jackson, Sarah R	RN	7:00 - 19:30	▼
Edit	A	7:00 - 19:30	▼
Add Pay Code			
Delete		PTO Unexcu...	
Unassign		7:00 - 19:30	▼

**DELETE A SHIFT**

3 Click **Yes** to confirm the edit.



4 Click **Apply**.



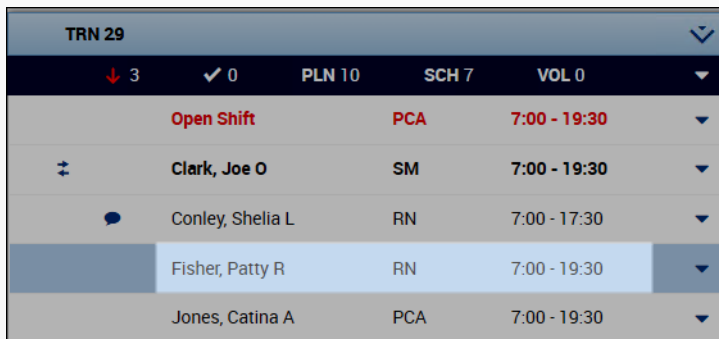
**REPLACING A SHIFT WITH A PAY CODE**

**LEARNING SCENARIO**

One of your team members called to say that due to a family emergency, he needs to take a personal day. You add a pay code to replace his shift in the Staff Management widget.

**REPLACE A SHIFT WITH A PAY CODE**

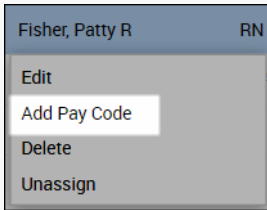
1 Right-click the team member's **Name** for which you want to apply a pay code.



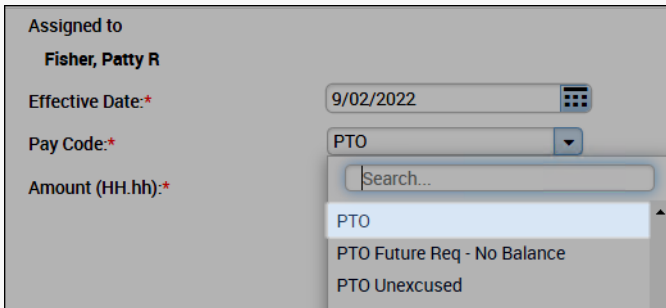
TRN 29	↓ 3	✓ 0	PLN 10	SCH 7	VOL 0	
Open Shift			PCA		7:00 - 19:30	▼
⌵	Clark, Joe O		SM		7:00 - 19:30	▼
🗨	Conley, Shelia L		RN		7:00 - 17:30	▼
	Fisher, Patty R		RN		7:00 - 19:30	▼
	Jones, Catina A		PCA		7:00 - 19:30	▼

**REPLACE A SHIFT WITH A PAY CODE**

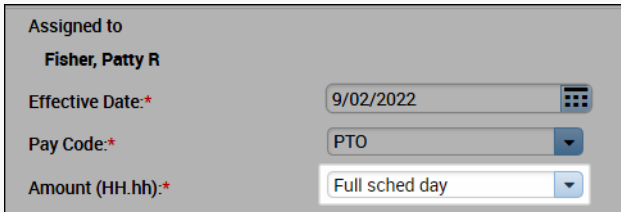
**2** Select **Add Pay Code**.



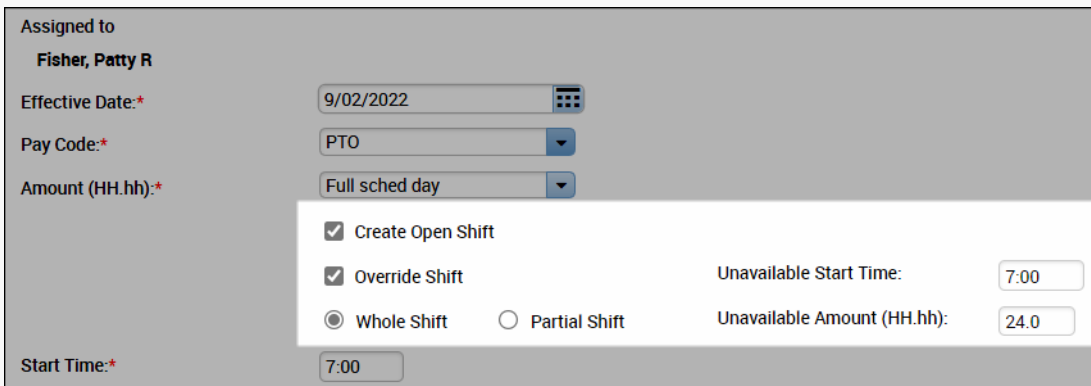
**3** Click the **Pay Code** drop-down field and select a pay code.



**4** From the **Amount** field, enter the duration of time to be applied to the pay code selection.



**5** Update the default fields as applicable.



**REPLACE A SHIFT WITH A PAY CODE**

6 Enter the time the pay code begins in the **Start Time** field.

The screenshot shows a form for assigning a shift. The 'Assigned to' field is 'Fisher, Patty R'. The 'Effective Date' is '9/02/2022'. The 'Pay Code' is 'PTO'. The 'Amount (HH.hh)' is 'Full sched day'. There are checkboxes for 'Create Open Shift' and 'Override Shift', both of which are checked. Below these are radio buttons for 'Whole Shift' (selected) and 'Partial Shift'. To the right, there are input fields for 'Unavailable Start Time' (7:00) and 'Unavailable Amount (HH.hh)' (24.0). At the bottom, the 'Start Time' field is set to '7:00'.

7 Click the **Add Comment** link.

The screenshot shows a button labeled 'Comments (0) Add Comment'.

8 Select the **Comment(s)** you want to attach from the drop-down list.

The screenshot shows a dropdown menu titled 'Comments (0)'. The menu is open, showing a search bar and a list of comment options: 'Approved', 'Doctor Appointment', and 'Early In'. The 'Approved' option is currently selected.

9 Click **Apply**.

The screenshot shows two buttons: 'Cancel' and 'Apply'.



# MODULE 14: USING SMS QUICKFILL

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*MODULE OBJECTIVES:*

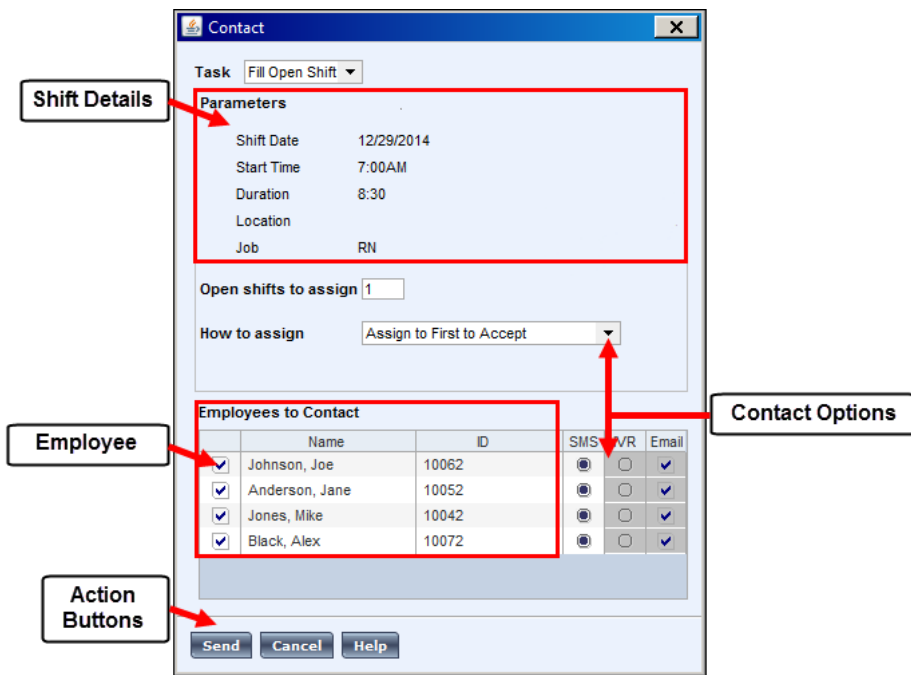
- Navigate the SMS Quickfill features.

## OFFERING AN OPEN SHIFT TO QUALIFIED TEAM MEMBERS

The Staffing Assistant tab in the Schedule Planner displays a list of open shifts for the time period selected and allows you to quickly locate and assign a qualified and available team member to work the shift. Use SMS Quickfill when you want to offer an open shift to a group of team members before you assign a team member to work the shift. The Quickfill option is accessible by clicking the Contact button on the Staffing Assistant tab.

## SMS QUICKFILL OVERVIEW

With SMS Quickfill you can offer an open shift to the list of team members who meet the shift criteria. Once a response is received from a team member, the Schedule Planner automatically assigns the team member to the shift or contacts you to perform the assignment, depending on the option selected in the How to assign field.



Element	Description
Shift Details	Lists the details of the open shift you are offering.
Team Member List	Displays a list of team members to Contact who are qualified to work the shift.

Element	Description
<b>Action Buttons</b>	Sends or cancels the notification.
<b>Contact Options</b>	<ul style="list-style-type: none"> <li>• <b>Open shifts to assign</b> – Allows you to change the total number of open shifts with the same date, times, and job you want to offer.</li> <li>• <b>How to assign</b> – Displays different options for assigning the shift:               <ul style="list-style-type: none"> <li>○ <i>Assign to First to Accept</i>: Automatically assigns the open shift to the first team member that accepts the open shift and sends an email to the scheduler as to who accepted and filled the shift.</li> <li>○ <i>Offer to All, Assign to Match Order</i>: Allows you to specify the number of minutes for team members to respond. After the specified minutes have passed, you can choose from the match list of team members who responded and assign it to the team member who is most qualified or has the most seniority.</li> <li>○ <i>Call Sequentially by Priority</i>: Allows you to specify the number of minutes between sequentially contacting team members and notifies you when a team member is located for assignment.</li> </ul> </li> <li>• <b>Contact method</b> - Allows you to choose which method you want to use when you offer an open shift to team members. You can elect to send an SMS, email or both to team members.               <ul style="list-style-type: none"> <li>○ <b>SMS</b> – Team member receives the notification via text message.</li> <li>○ <b>Email</b> – Team member receives the notification in their Inbox.</li> </ul> </li> </ul>

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**ADDITIONAL INFORMATION**

Assign to First to Accept is the only assignment option that automatically assigns a team member to the open shift. You need to manually assign the team members to the open shift in the Schedule Planner when a different assignment option is selected.