Quick Actions Toolbar

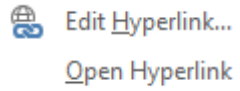
(Managers and Schedulers)

Using the Hyperlinks below will allow navigation to each icon located in the Quick Action Toolbar.

Assign
Unassign
Shift Transfer
Insert Shift Template
Comments
Pay Code
Copy/Paste
Delete
Swap
Closed Quick Actions Toolbar
Additional Questions?

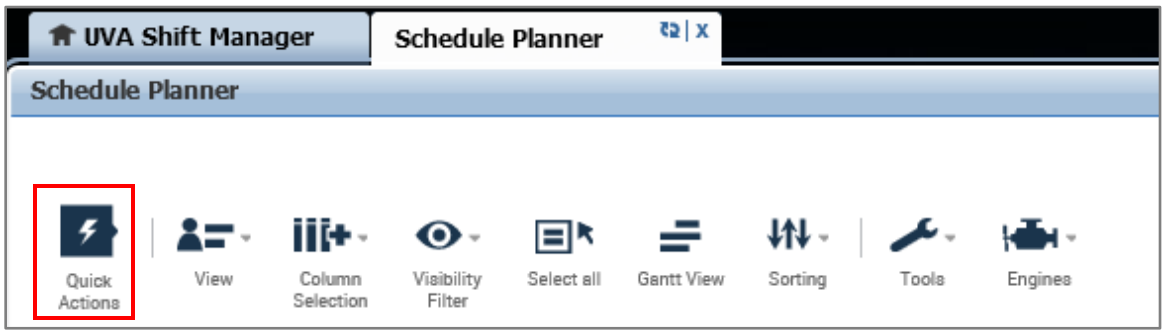
To open a hyperlink:

Highlight hyperlink
Select Swap then Hold down the Control key and left click to open
Or
Highlight Swap then right click to open

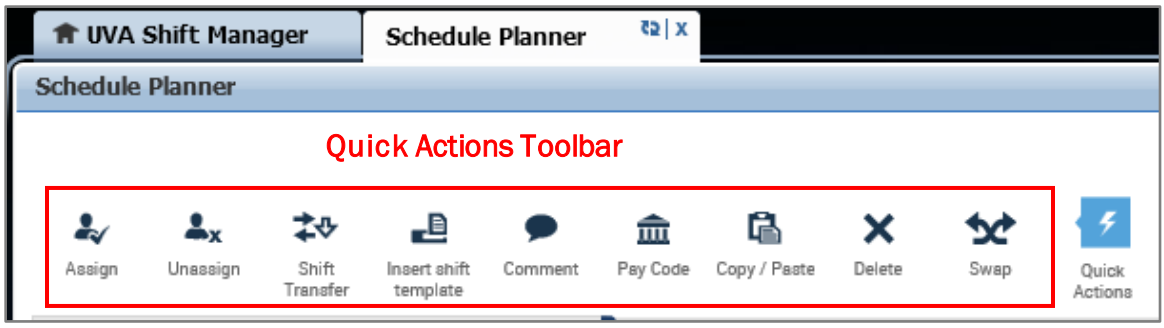


Quick Actions Toolbar

- Locate the *Quick Actions* icon on the *Schedule Planner* toolbar



- Click on Quick Actions which opens the toolbar



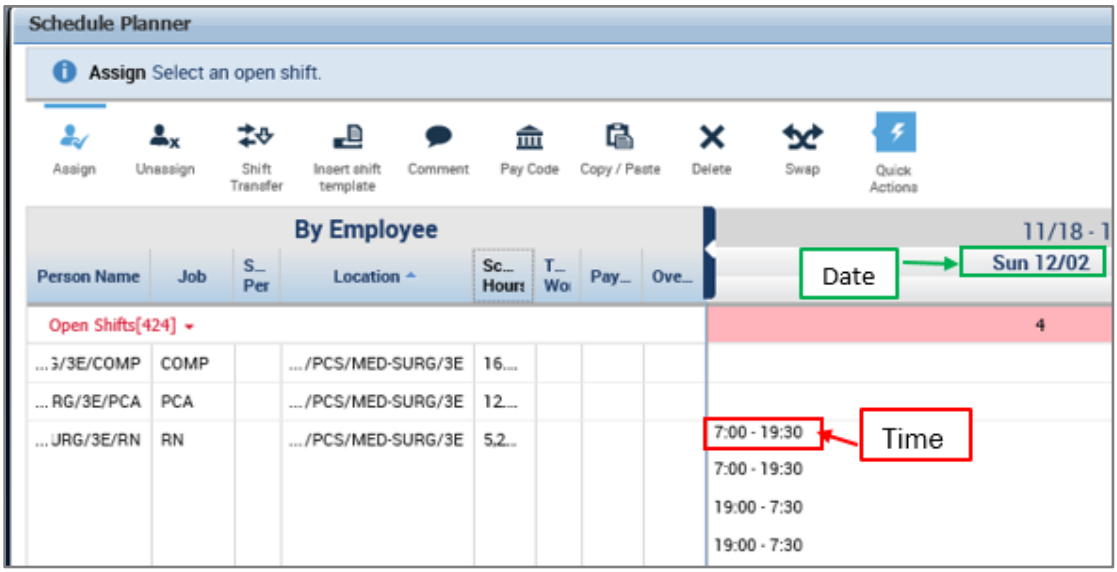
- From the Quick Actions toolbar, select the icon/tool to be utilized in order to make the icon/tool active (turns blue)
- Clicking on the icon/tool again makes it inactive (turns grey)
- The Save icon commits any changes to the schedule

Assign

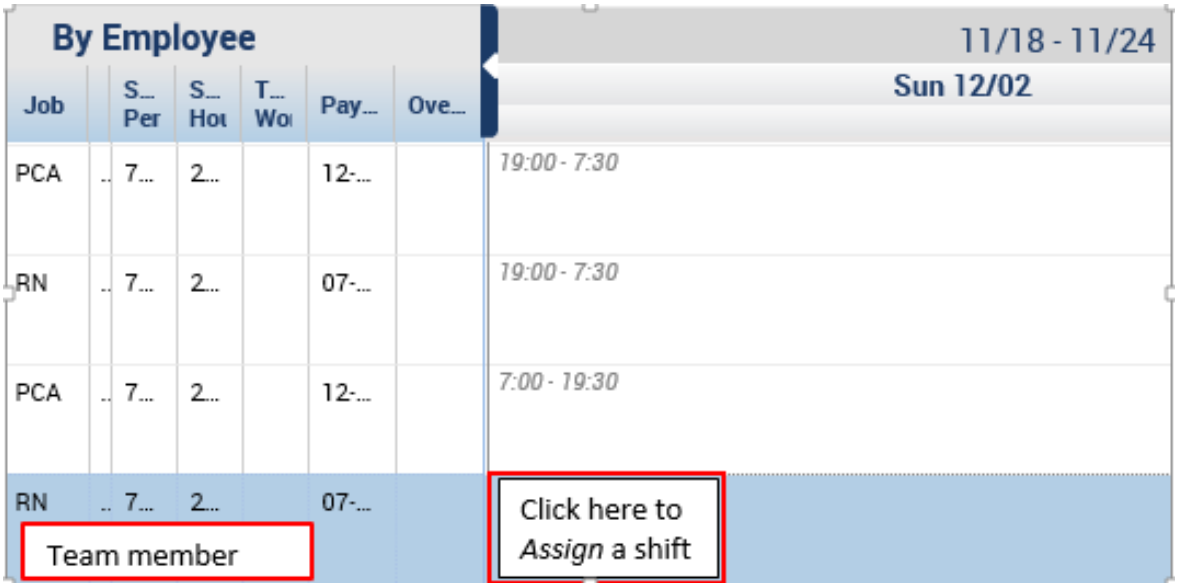
- Click on the *Assign* icon to make it active

- To *Assign* a shift, click the *arrow* beside Open Shifts

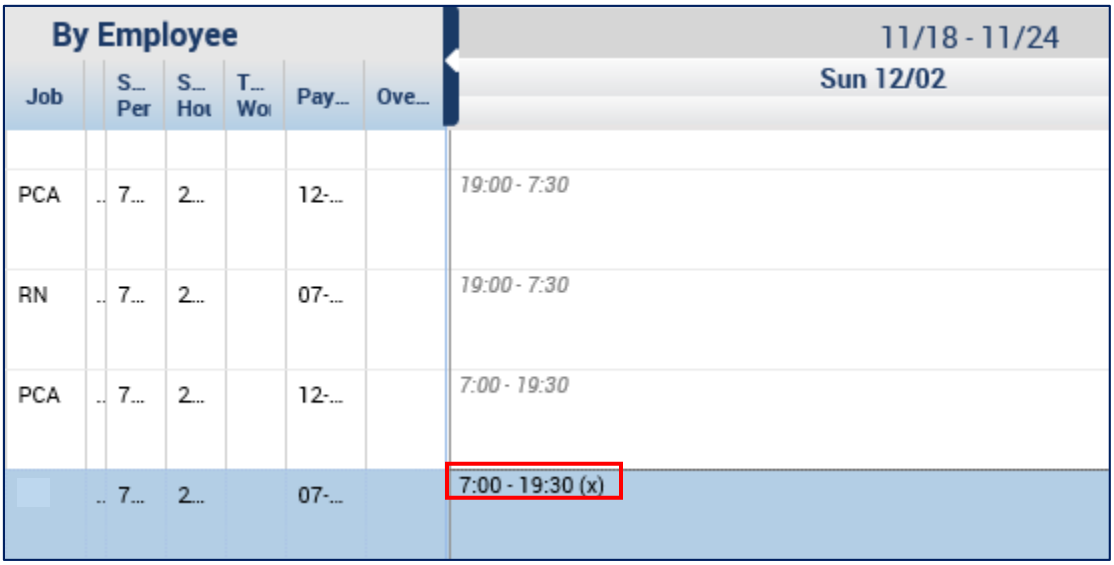
- Select the *Open Shift to assign*
  - Click the shift time and date to select the *Open Shift* to fill



- *Click* into the cell under the date of the team member to *Assign* the shift



- The *(x)* indicates the assigned shift

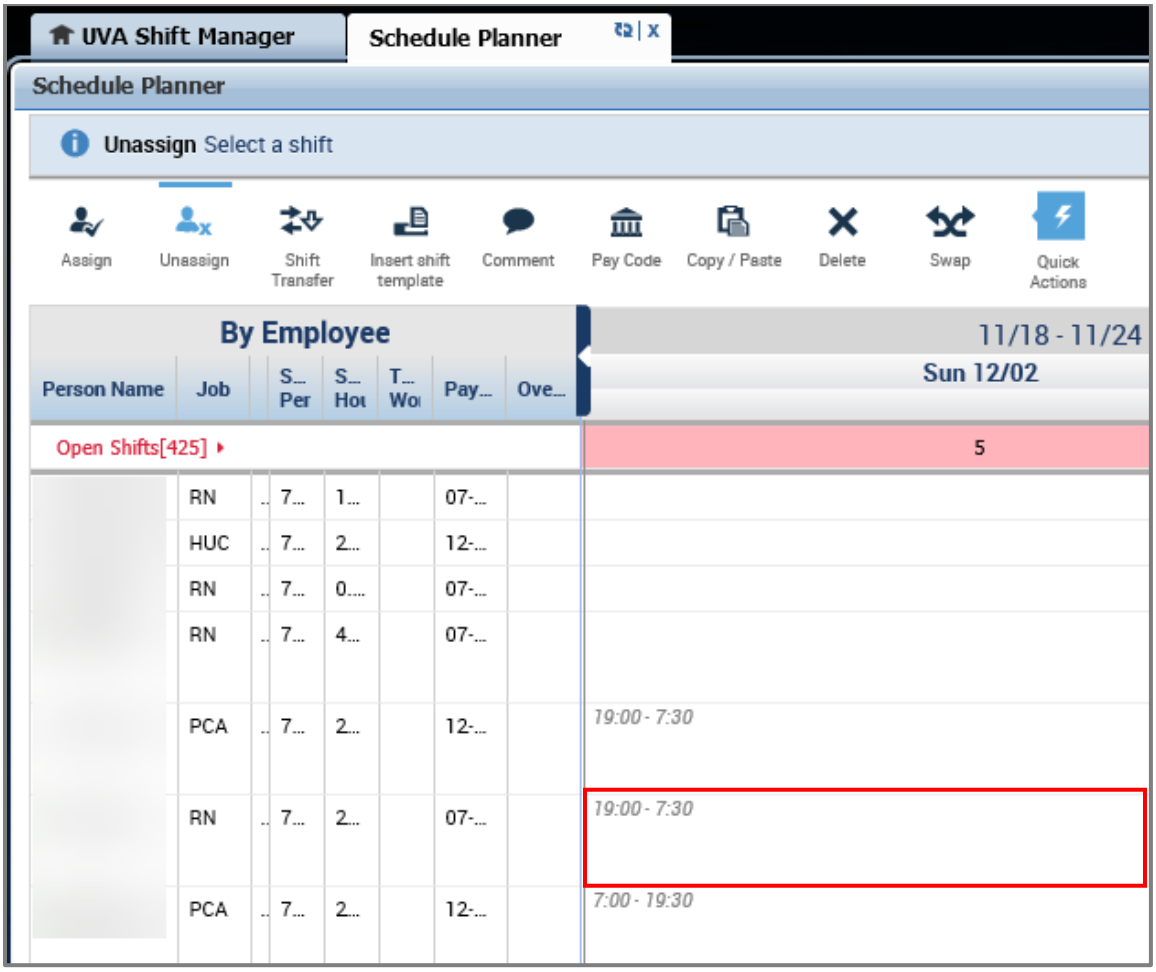


- Click the *Assign* icon to deactivate it

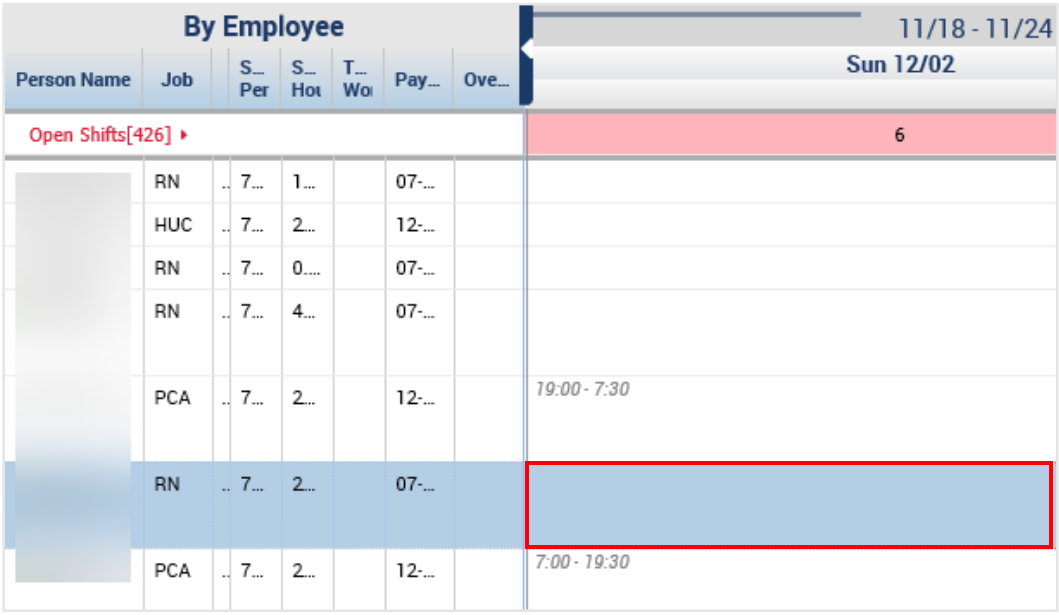
- Remember to *Save* to commit the changes to the schedule

Unassign

- Open the *Unassign* Icon then select the team member
- Click into the cell beside the team member whose shift needs to be unassigned

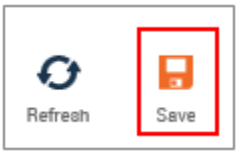


- The shift will be removed from the team member's schedule and an open shift will be created



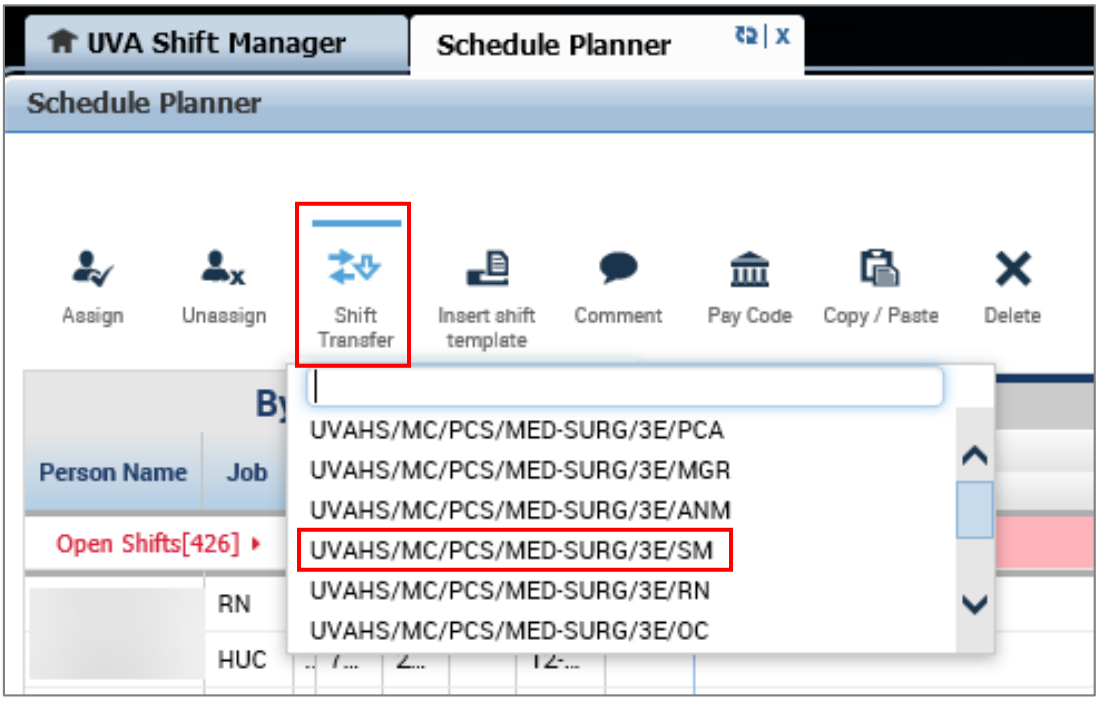
- Clicking the *Unassign* icon again will deactivate the icon

- Remember to save to commit the changes to the schedule

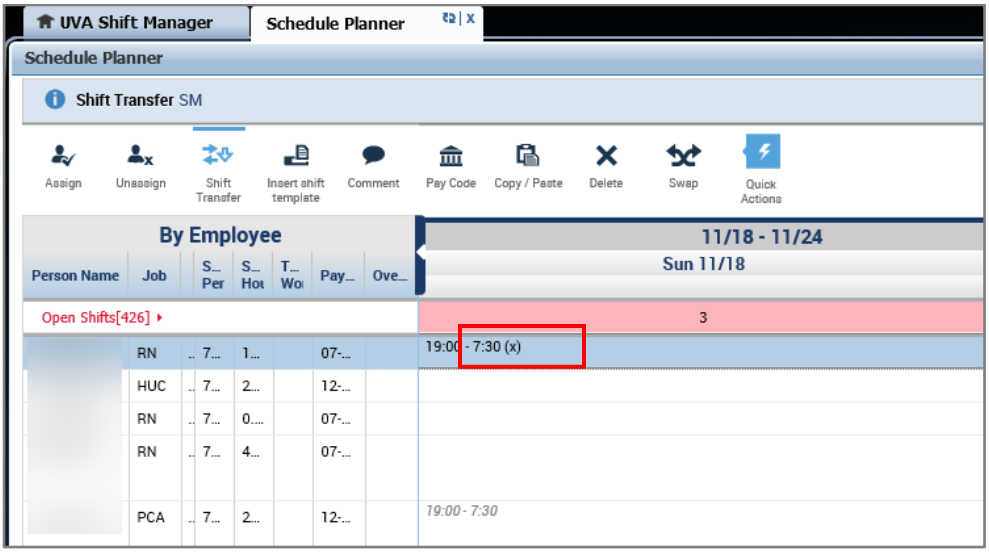


Shift Transfer

- Click on *Shift Transfer*
- *Select the job/role from the dropdown the team member will be assigned*

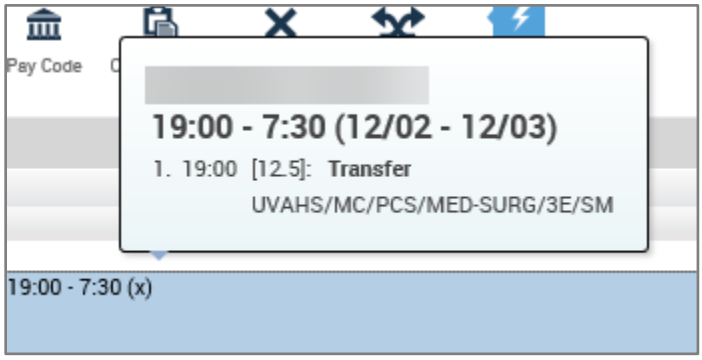


- Select the team member, click into the cell to float the team member to the new job (In this case the RN is floating to the Shift Manager job)



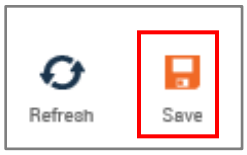
- The (X) indicated the team member has been floated to a different job in the department

Recommend: Hover to ensure the correct shift transfer was entered



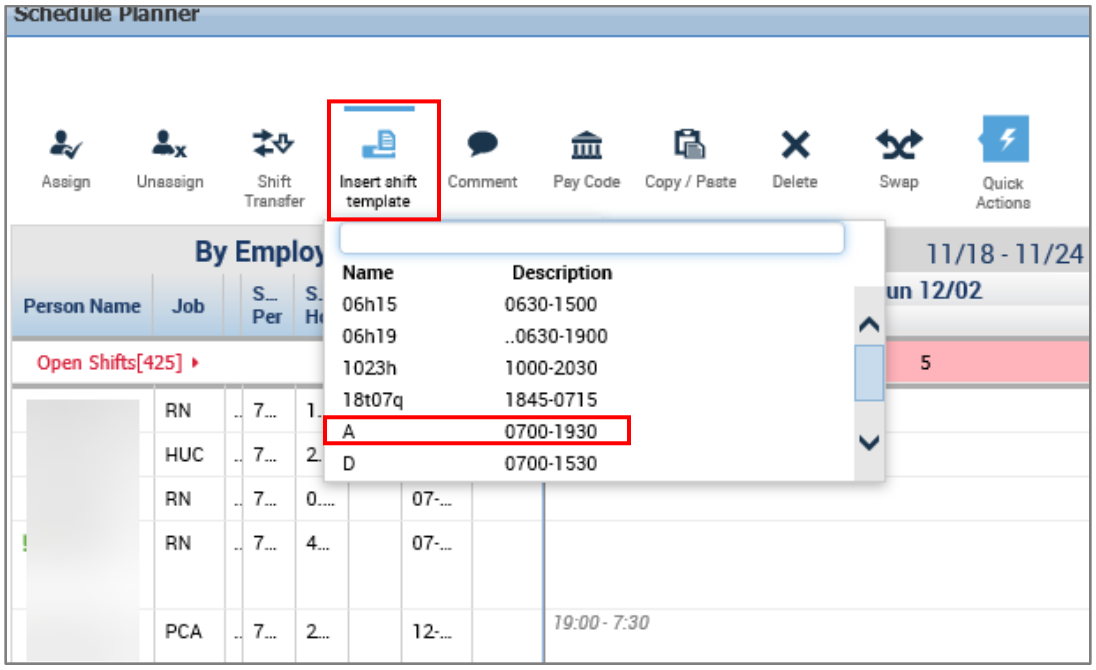
- Clicking the *Shift Transfer* icon again will deactivate the icon

- Remember to save to commit the changes to the schedule

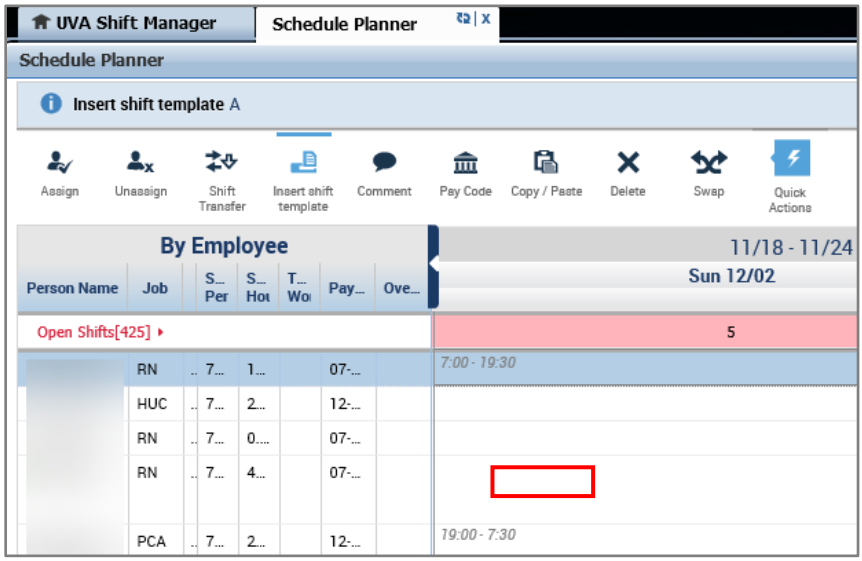


Insert shift template

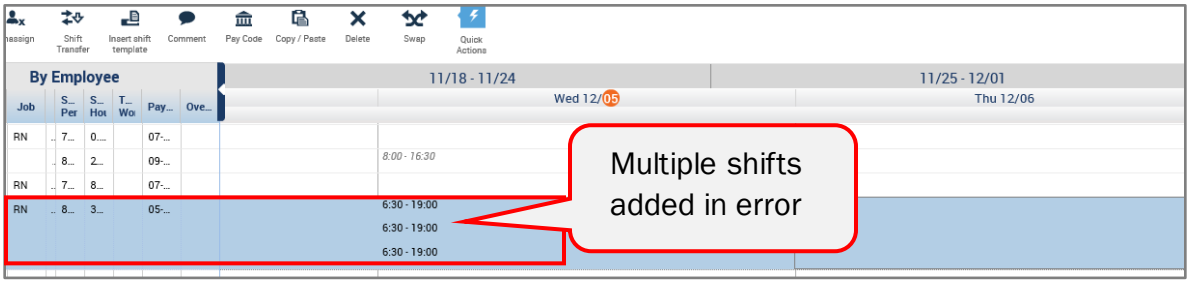
- *Activate the Insert shift template by clicking on it*
- *Choose the template from the dropdown menu*



- Select the template and locate the team member to add the shift they are working
- Click into the correct date to insert the shift template into the schedule



Be careful to click Insert Shift Template only once where the template needs to be inserted. Duplicate shifts or shifts on the wrong date can be added.

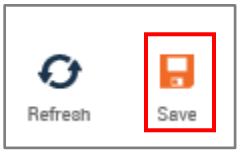


- *Click* the *Insert shift template* to deactivate the icon

Icon is active

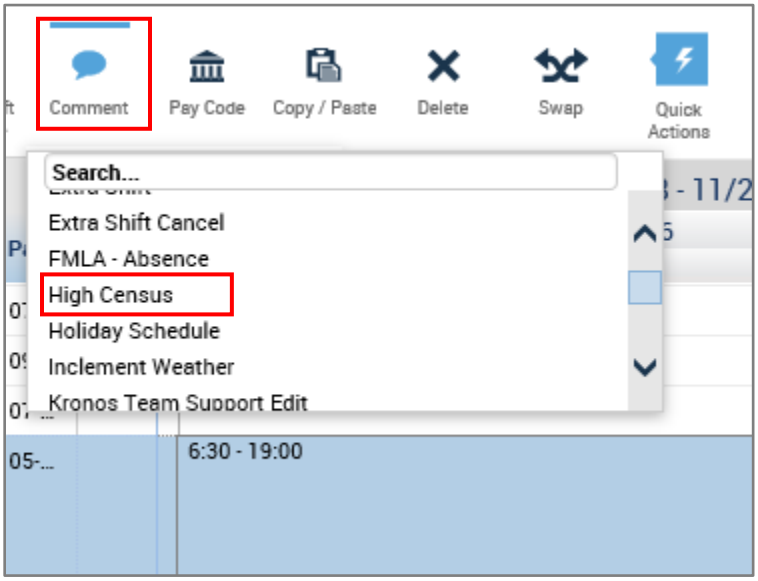
Icon is inactive

Remember to save to commit the changes to the schedule

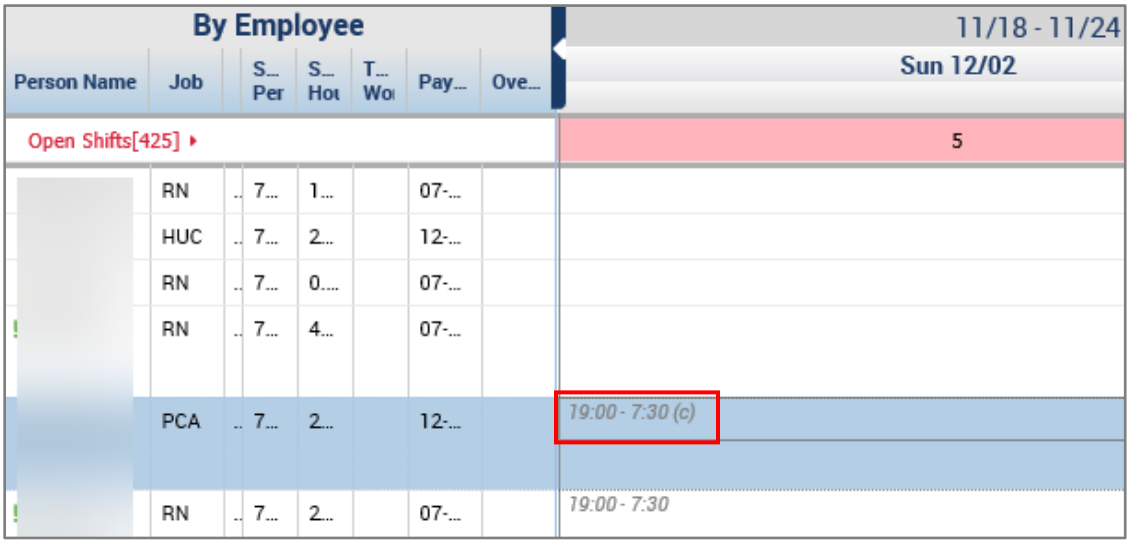


Comments

- *Click* on the *Comment* icon in the *Quick Actions* tool bar to activate it
- Choose the comment from the dropdown window

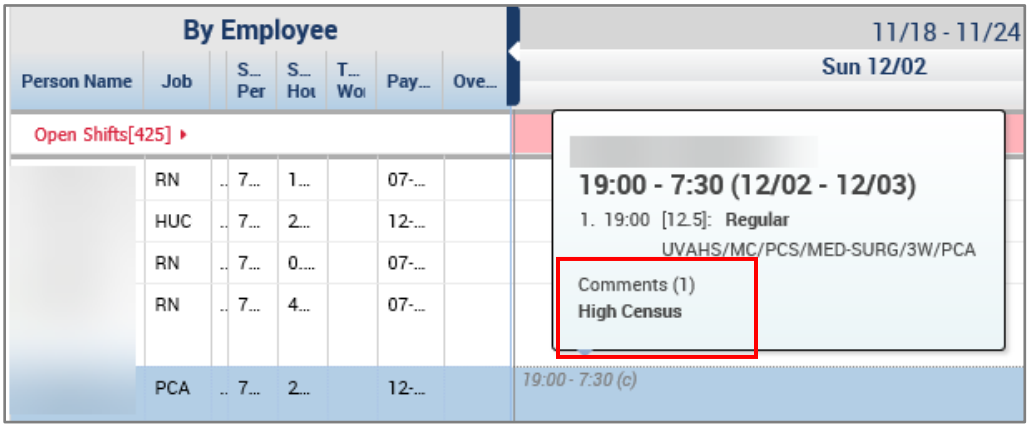


- Select the team member's shift to add a comment

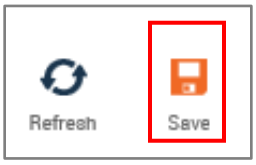


- Note the (C) which indicates the Comment is viewable from the schedule
- Click the *Comment* icon to deactivate it

- Hovering displays the comment that has been added

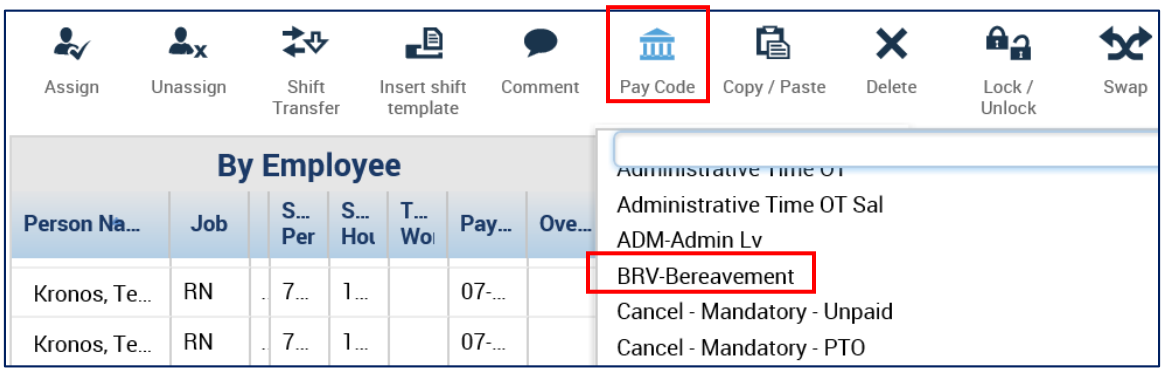


- Remember to save to commit the changes to the schedule

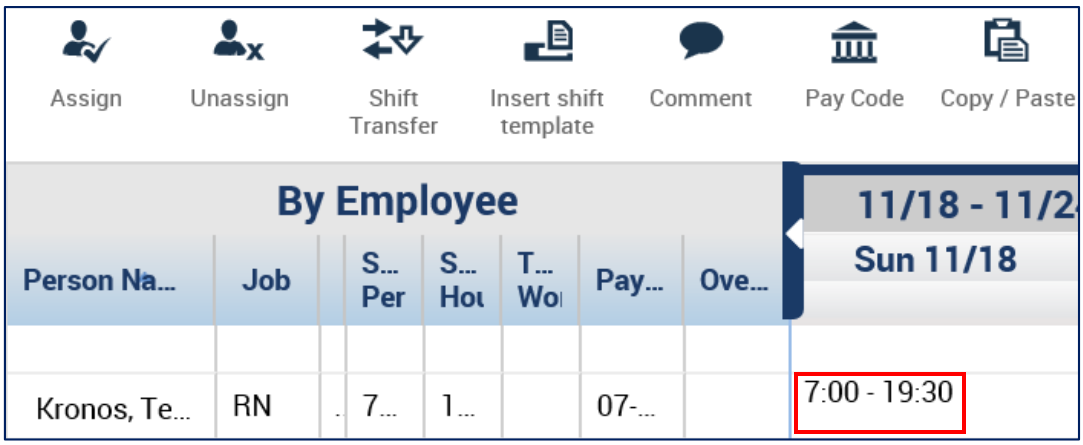


Pay Code

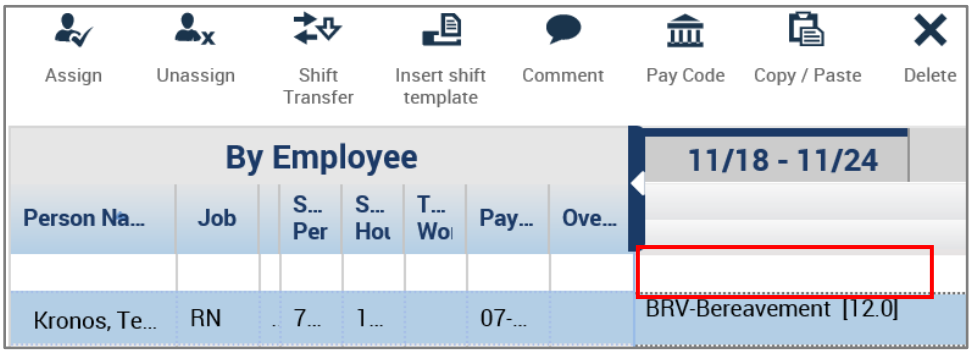
- From the *Quick Actions* toolbar activate the *Pay Code* Icon
- Select the *Pay Code* to be added



- Select the team member, correct date, and click into the cell



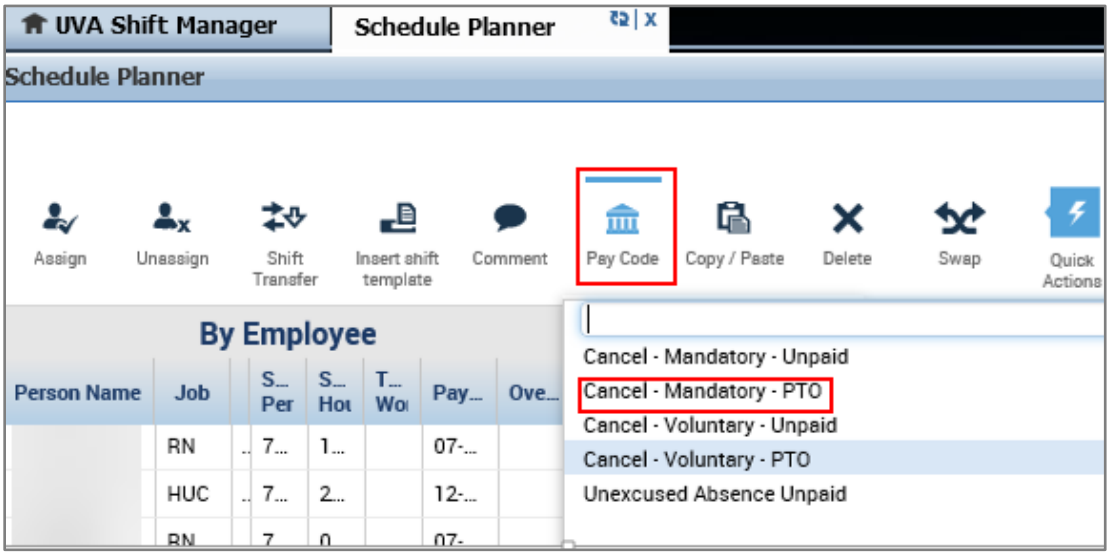
- The shift will change to the appropriate Pay Code in the Schedule



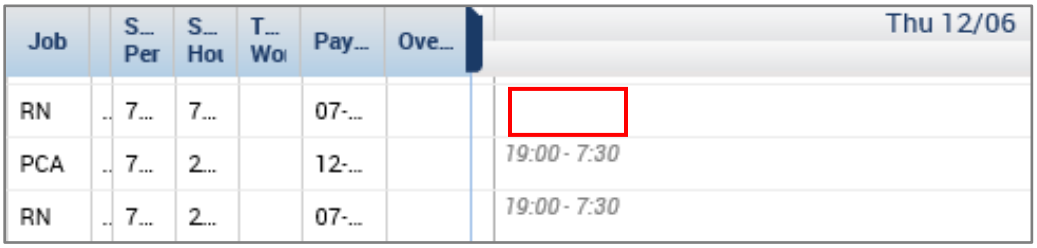
Additional example of a frequently used *Pay Code*

Entering a *Pay Code* for a team member who was cancelled due to low census

- From the *Quick Actions* toolbar activate the *Pay Code* Icon
- Select the *Pay Code* to be added
    - If cancelling the shift due to low census and the team member wants to use PTO, select Cancel – Mandatory – PTO (*Pay Code*)



- Select the team member, correct date, and click into the cell

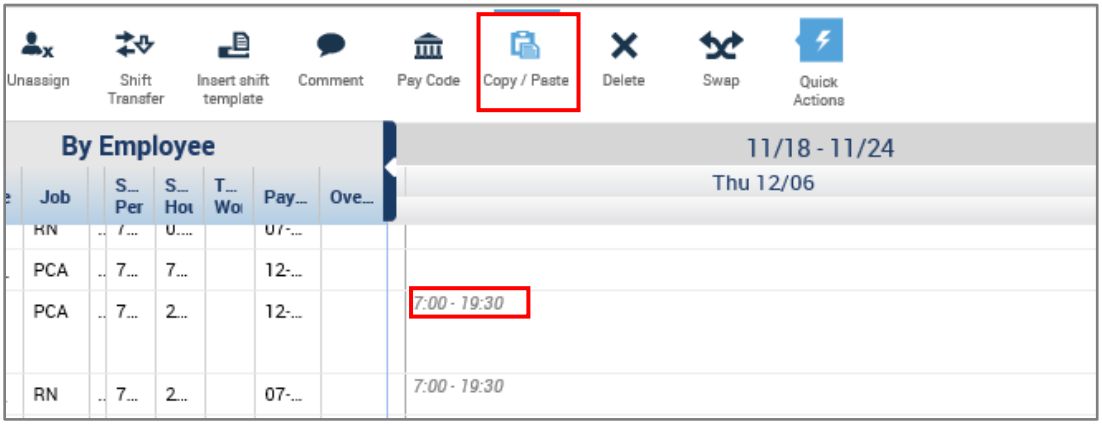


- The shift will change to the appropriate *Pay Code* in the *Schedule*

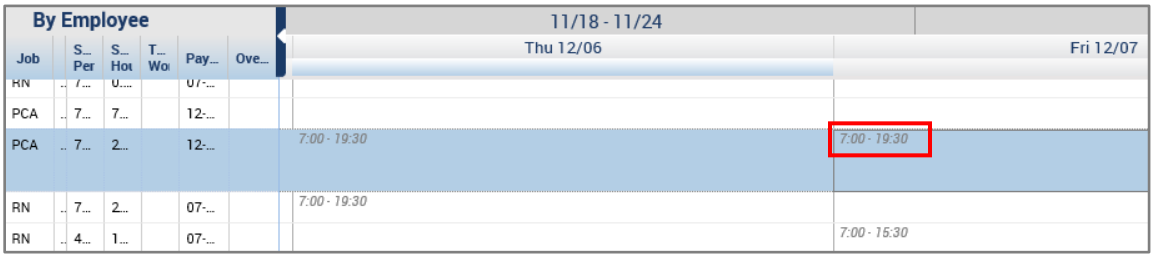
Note: If entering the *Pay Code* for an *Unexcused Absence* it is easier to use the *Schedule Planner* to ensure triggering the attendance event.

Copy/Paste

- Click on the Copy/Paste icon in the Quick Actions Toolbar, select the shift/job to copy

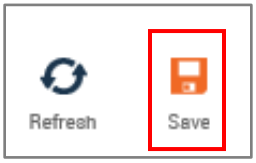


- Place the (+) in the date cell to paste the copied shift



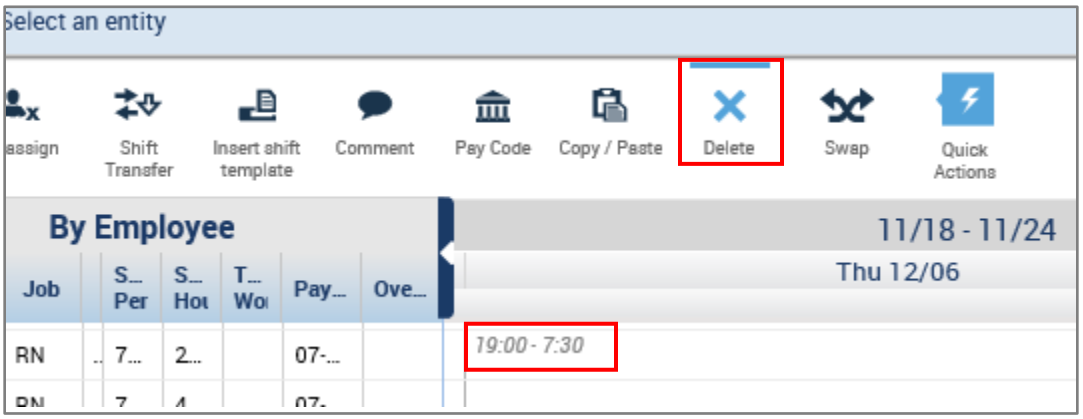
- Deactivate the Copy/Paste function by clicking the Copy / Paste icon.

- Remember to save to commit the changes to the schedule

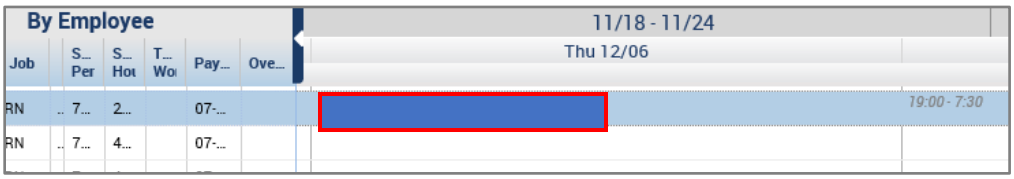


Delete

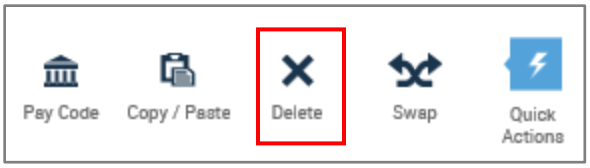
- In order to delete a shift activate the *Quick Actions* toolbar
- Select Delete, then click on the shift to delete



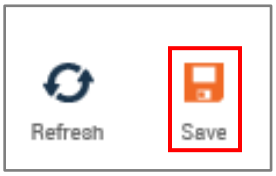
- The shift is removed from the schedule



- Deactivate the Icon by clicking the Delete icon to prevent inadvertently removing additional shifts from the calendar

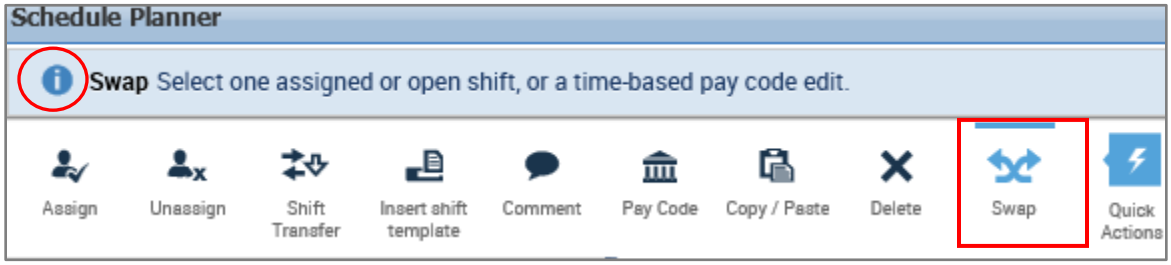


- Remember to save to commit the changes to the schedule

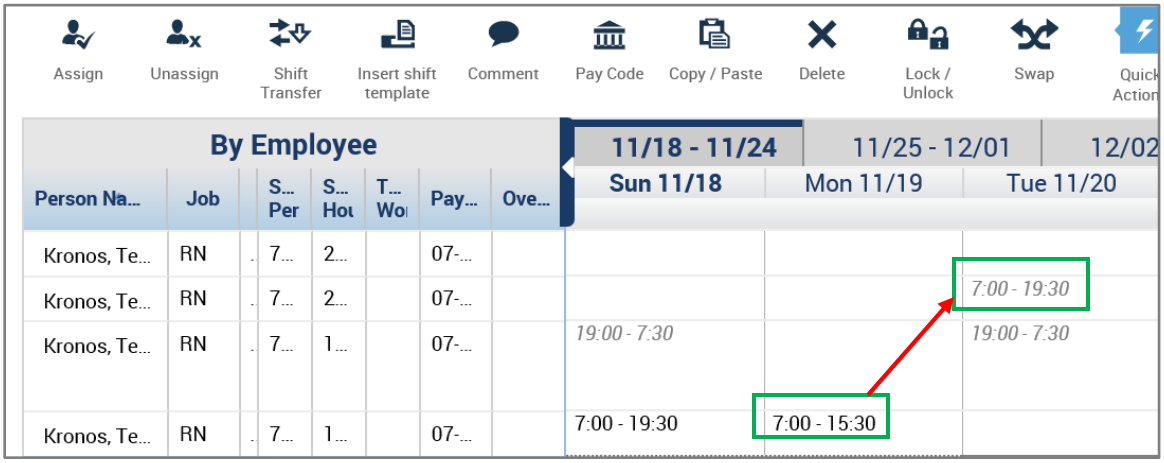


Swap

- Click on the Swap icon in order to activate the function
- When active the gives information for use

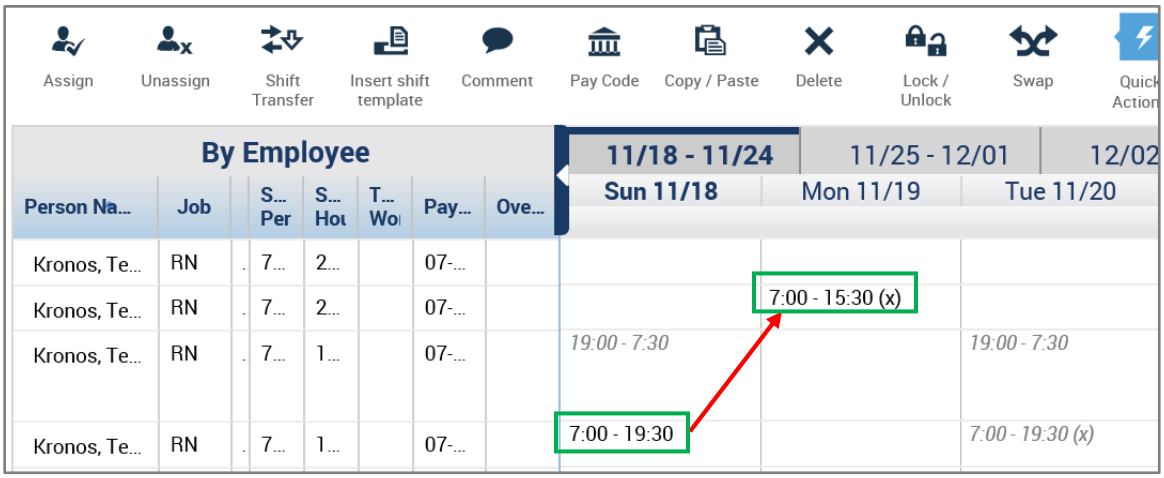


- Click on the correct date, time, and shifts of the team members who are swapping the shifts

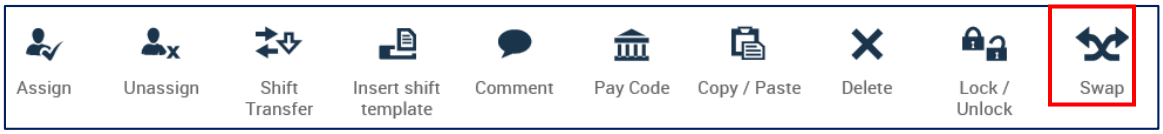


- As soon as the second cell is clicked in the Swap occurs

Note: The (x) indicates a *Shift Swap* occurred



- Deactivate the Icon by clicking the Swap icon

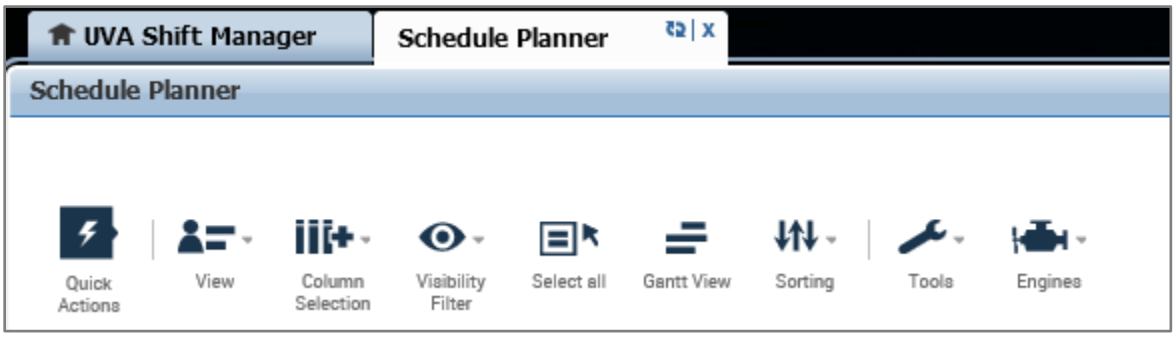


- Remember to save to commit the changes to the schedule

Closed *Quick Actions* menu

- Click the *Quick Actions* icon to deactivate the toolbar and return to the *Schedule Planner* toolbar

Note: Closing the *Quick Actions* menu will activate the *Schedule Planner* menu



Additional Questions?

- Call the Help Desk at 434-924-5334
  OR
- Go to KNOWLEDGELINK and enter a ticket online

See job aid located on the *Kronos Welcome Page* titled:
Submit a Help Desk Ticket On-line