



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

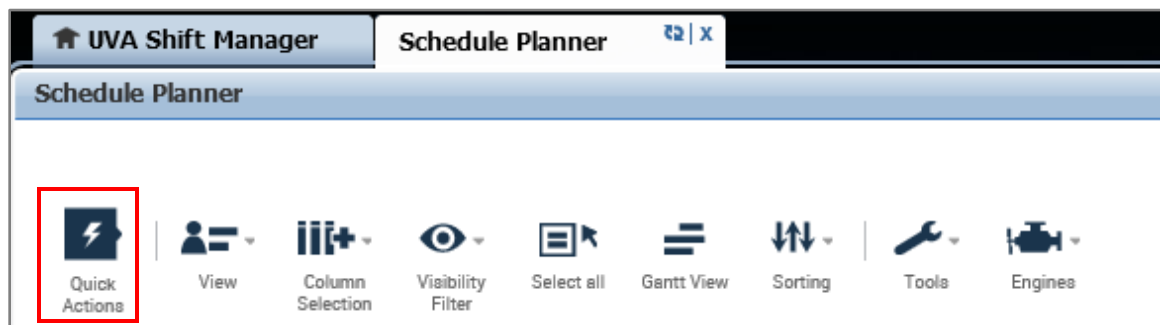
Or

Highlight [Swap](#) then right click to open

 Edit Hyperlink...
 Open Hyperlink

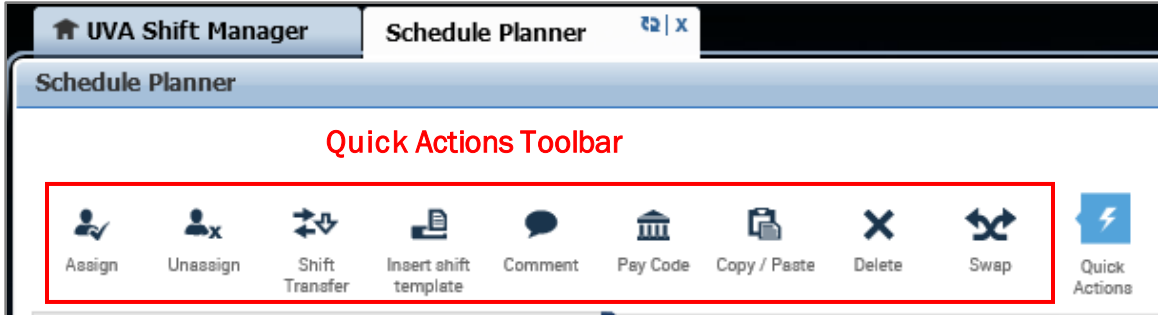
Quick Actions Toolbar

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





- Click on Quick Actions which opens the toolbar

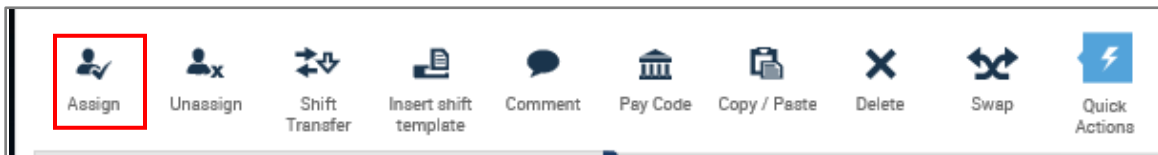


- From the Quick Actions toolbar, select the icon/tool to be utilized in order to make the icon/tool active (turns blue)
- Clicking on the icon/tool again makes it inactive (turns grey)
- The Save icon commits any changes to the schedule



Assign

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



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

By Employee						
Person Name	Job	S... Per	S... Hot	T... Wor	Pay...	Ove...
Open Shifts[425] ▾						



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

Schedule Planner

Assign Select an open shift.

Assign Unassign Shift Transfer Insert shift template Comment Pay Code Copy / Paste Delete Swap Quick Actions

By Employee 11/18 - 11/24

Person Name	Job	S_Per	Location	Sc_Hour	T_Wo	Pay	Ove	Date
Open Shifts[424]								4
...	3/3E/COMP	COMP	.../PCS/MED-SURG/3E	16...				Sun 12/02
...	RG/3E/PCA	PCA	.../PCS/MED-SURG/3E	12...				7:00 - 19:30
...	JRG/3E/RN	RN	.../PCS/MED-SURG/3E	5.2...				7:00 - 19:30
								19:00 - 7:30
								19:00 - 7:30

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

By Employee 11/18 - 11/24

Sun 12/02

Job	S_Per	S_Hot	T_Wo	Pay	Ove	
PCA	7...	2...		12...		19:00 - 7:30
RN	7...	2...		07...		19:00 - 7:30
PCA	7...	2...		12...		7:00 - 19:30
RN	7...	2...		07...		Click here to Assign a shift

Team member



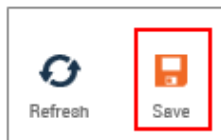
- The (x) indicates the assigned shift

By Employee						11/18 - 11/24
Job	S... Per	S... Hot	T... Wor	Pay...	Ove...	Sun 12/02
PCA	7...	2...		12...		19:00 - 7:30
RN	7...	2...		07...		19:00 - 7:30
PCA	7...	2...		12...		7:00 - 19:30
	7...	2...		07...		7:00 - 19:30 (x)

- 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

UVA Shift Manager | Schedule Planner

Schedule Planner

Unassign Select a shift

Assign Unassign Shift Transfer Insert shift template Comment Pay Code Copy / Paste Delete Swap Quick Actions

By Employee 11/18 - 11/24
Sun 12/02

Person Name	Job	S... Per	S... Hot	T... Wo	Pay...	Ove...
Open Shifts[425]						5
	RN	7...	1...		07-...	
	HUC	7...	2...		12-...	
	RN	7...	0...		07-...	
	RN	7...	4...		07-...	
	PCA	7...	2...		12-...	19:00 - 7:30
	RN	7...	2...		07-...	19:00 - 7:30
	PCA	7...	2...		12-...	7:00 - 19:30

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

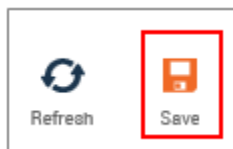


By Employee							11/18 - 11/24
Person Name	Job	S... Per	S... Hot	T... Woi	Pay...	Ove...	Sun 12/02
Open Shifts[426] ▶							6
[Employee Name]	RN	.. 7...	1...		07...		
	HUC	.. 7...	2...		12...		
	RN	.. 7...	0....		07...		
	RN	.. 7...	4...		07...		
	PCA	.. 7...	2...		12...		19:00 - 7:30
	RN	.. 7...	2...		07...		[Redacted]
	PCA	.. 7...	2...		12...		7:00 - 19:30

- 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

The screenshot shows the 'UVA Shift Manager' interface with the 'Schedule Planner' tab active. A toolbar contains several icons: Assign, Unassign, Shift Transfer (highlighted with a red box), Insert shift template, Comment, Pay Code, Copy / Paste, and Delete. Below the toolbar, a dropdown menu is open, displaying a list of job roles. The role 'UVAHS/MC/PCS/MED-SURG/3E/SM' is highlighted with a red box. Other roles in the list include UVAHS/MC/PCS/MED-SURG/3E/PCA, UVAHS/MC/PCS/MED-SURG/3E/MGR, UVAHS/MC/PCS/MED-SURG/3E/ANM, UVAHS/MC/PCS/MED-SURG/3E/RN, and UVAHS/MC/PCS/MED-SURG/3E/OC.

- 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)

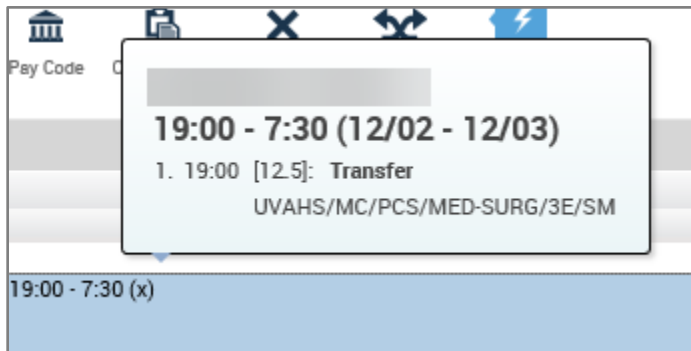
The screenshot shows the 'UVA Shift Manager' interface with the 'Schedule Planner' tab active. The title bar indicates 'Shift Transfer SM'. The toolbar includes icons for Assign, Unassign, Shift Transfer, Insert shift template, Comment, Pay Code, Copy / Paste, Delete, Swap, and Quick Actions. Below the toolbar, a table titled 'By Employee' is displayed. The table has columns for Person Name, Job, S. Per, S. Hot, T. Wor, Pay, and Ove. The table shows a row for an RN employee with a shift highlighted in red, indicating the transfer. The shift is labeled '19:00 - 7:30 (x)'. Other rows in the table include HUC, RN, RN, and PCA employees with their respective shifts.



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



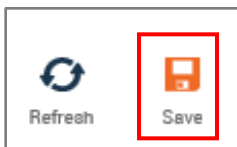
Recommend: Hover to ensure the correct shift transfer was entered



- 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

Schedule Planner

Assign Unassign Shift Transfer **Insert shift template** Comment Pay Code Copy / Paste Delete Swap Quick Actions

By Employee

Person Name	Job	S... Per	S... H...	Name	Description
Open Shifts[425] ▶				06h15	0630-1500
	RN	7...	1...	06h19	..0630-1900
	HUC	7...	2...	1023h	1000-2030
	RN	7...	0....	18t07q	1845-0715
	RN	7...	4...	A	0700-1930
	RN	7...	07...	D	0700-1530
	PCA	7...	2...	12...	19:00 - 7:30

- 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

UVA Shift Manager Schedule Planner

Schedule Planner

Insert shift template A

Assign Unassign Shift Transfer **Insert shift template** Comment Pay Code Copy / Paste Delete Swap Quick Actions

By Employee

Person Name	Job	S... Per	S... Hot	T... Wai	Pay...	Ove...
Open Shifts[425] ▶						
	RN	7...	1...	07...	7:00 - 19:30	
	HUC	7...	2...	12...		
	RN	7...	0....	07...		
	RN	7...	4...	07...		
	PCA	7...	2...	12...	19:00 - 7:30	

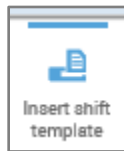


Be careful to click Insert Shift Template only once where the template needs to be inserted. Duplicate shifts or shifts on the wrong date can be added.

By Employee							11/18 - 11/24	11/25 - 12/01
Job	S. Per	S. Ho	T. Wa	Pay...	Ove...			
RN	7	0		07...				
	8	2		09...		8:00 - 16:30		
RN	7	8		07...				
RN	8	3		05...		6:30 - 19:00		
						6:30 - 19:00		
						6:30 - 19:00		

Multiple shifts added in error

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

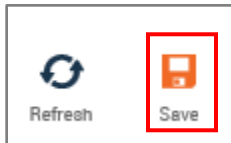


Icon is active



Icon is inactive

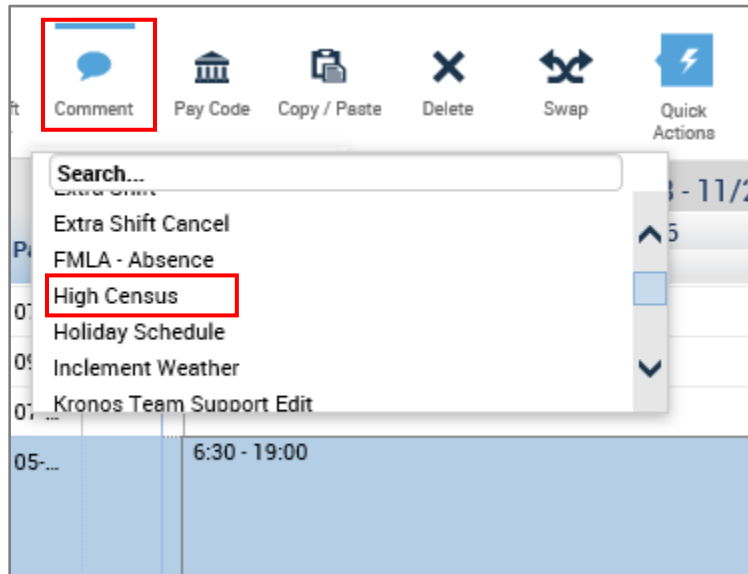
Remember to save to commit the changes to the schedule





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

By Employee							11/18 - 11/24
Person Name	Job	S... Per	S... Hot	T... Wor	Pay...	Ove...	Sun 12/02
Open Shifts[425] ▶							5
	RN	.. 7...	1...		07-...		
	HUC	.. 7...	2...		12-...		
	RN	.. 7...	0...		07-...		
	RN	.. 7...	4...		07-...		
	PCA	.. 7...	2...		12-...		19:00 - 7:30 (c)
	RN	.. 7...	2...		07-...		19:00 - 7:30



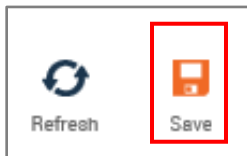
- Note the (C) which indicates the Comment is viewable from the schedule
- Click the *Comment* icon to deactivate it



- Hovering displays the comment that has been added

By Employee							11/18 - 11/24	
Person Name	Job	S... Per	S... Hot	T... Wor	Pay...	Ove...	Sun 12/02	
Open Shifts[425] ▶								
	RN	.. 7...	1...	07-...			19:00 - 7:30 (12/02 - 12/03) 1. 19:00 [12.5]: Regular UVAHS/MC/PCS/MED-SURG/3W/PCA Comments (1) High Census	
	HUC	.. 7...	2...	12-...				
	RN	.. 7...	0...	07-...				
	RN	.. 7...	4...	07-...				
	PCA	.. 7...	2...	12-...			19:00 - 7:30 (c)	

- 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

The screenshot shows the 'Quick Actions' toolbar with the 'Pay Code' icon (a building) highlighted with a red box. Below the toolbar is a table titled 'By Employee' with columns: Person Na..., Job, S... Per, S... Hot, T... Wo, Pay..., and Ove... The table contains two rows for 'Kronos, Te...' with job 'RN' and shift '7... 1...'. A dropdown menu is open over the table, listing various pay codes, with 'BRV-Bereavement' highlighted by a red box.

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

The screenshot shows the 'Quick Actions' toolbar with the 'Pay Code' icon highlighted. Below the toolbar is the 'By Employee' table. A date range '11/18 - 11/24' is selected at the top right, and a specific date 'Sun 11/18' is selected below it. The table row for 'Kronos, Te...' with job 'RN' and shift '7... 1...' is highlighted, and the cell for the selected date contains the time '7:00 - 19:30', which is highlighted with a red box.

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

The screenshot shows the 'Quick Actions' toolbar with the 'Pay Code' icon highlighted. Below the toolbar is the 'By Employee' table. A date range '11/18 - 11/24' is selected at the top right. The table row for 'Kronos, Te...' with job 'RN' and shift '7... 1...' is highlighted, and the cell for the selected date contains the pay code 'BRV-Bereavement [12.0]', which is highlighted with a red box.



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)*

The screenshot shows the 'UVA Shift Manager' interface with the 'Schedule Planner' tab active. The toolbar includes icons for Assign, Unassign, Shift Transfer, Insert shift template, Comment, Pay Code (highlighted), Copy / Paste, Delete, Swap, and Quick Actions. Below the toolbar is a table titled 'By Employee' with columns for Person Name, Job, S... Per, S... Hot, T... Wor, Pay..., and Ove... The dropdown menu for the Pay Code icon is open, showing options: Cancel - Mandatory - Unpaid, Cancel - Mandatory - PTO (highlighted), Cancel - Voluntary - Unpaid, Cancel - Voluntary - PTO, and Unexcused Absence Unpaid.

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

Job	S... Per	S... Hot	T... Wor	Pay...	Ove...	
						Thu 12/06
RN	7...	7...		07...		<input type="text"/>
PCA	7...	2...		12...		19:00 - 7:30
RN	7...	2...		07...		19:00 - 7:30

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



By Employee						11/18 -
Job	S... Per	S... Hot	T... Wo	Pay...	Ove...	Sun 12/02
RN	7...	4...		07-...		
PCA	7...	2...		12-...		Cancel - Mandatory - PTO [12.0]

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

By Employee						11/18 - 11/24
Job	S... Per	S... Hot	T... Wo	Pay...	Ove...	Thu 12/06
RN	7...	0...		07-...		
PCA	7...	7...		12-...		
PCA	7...	2...		12-...		7:00 - 19:30
RN	7...	2...		07-...		7:00 - 19:30

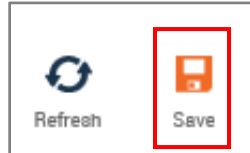
- Place the (+) in the date cell to paste the copied shift

By Employee						11/18 - 11/24
Job	S... Per	S... Hot	T... Wo	Pay...	Ove...	Thu 12/06
RN	7...	0...		07-...		
PCA	7...	7...		12-...		
PCA	7...	2...		12-...		7:00 - 19:30
RN	7...	2...		07-...		7:00 - 19:30
RN	4...	1...		07-...		7:00 - 15:30

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

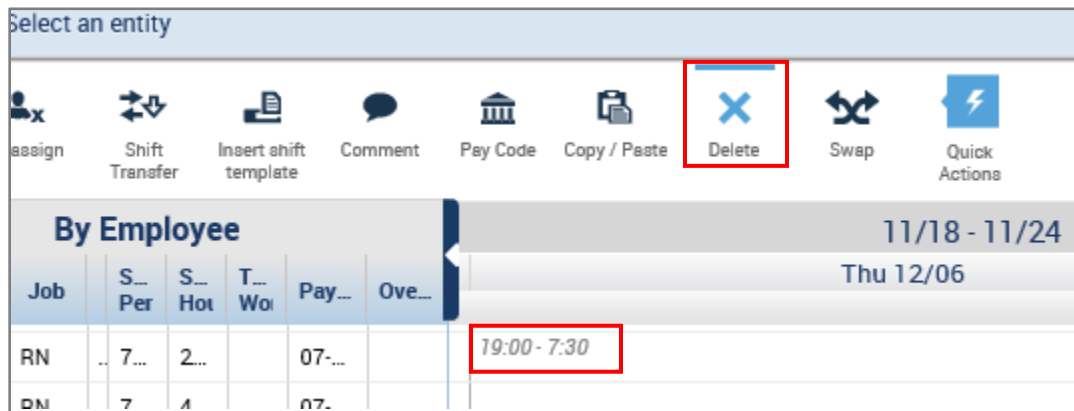


- Remember to save to commit the changes to the schedule



Delete

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

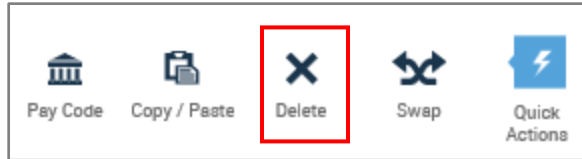


- The shift is removed from the schedule

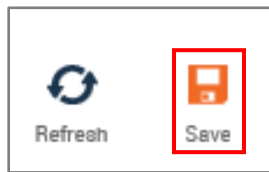





- Deactivate the Icon by clicking the Delete icon to prevent inadvertently removing additional shifts from the calendar

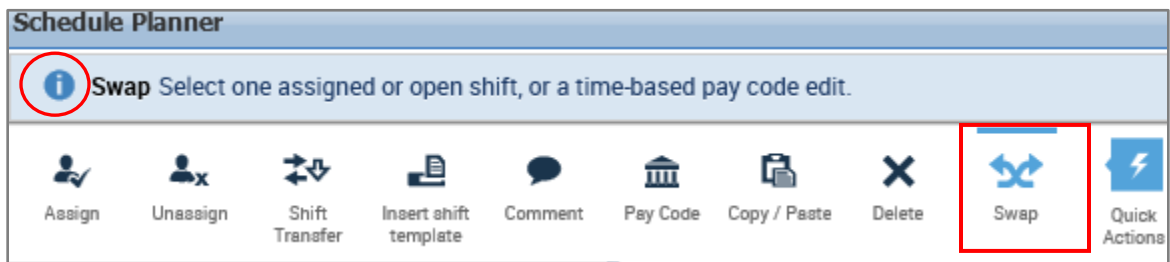


- Remember to save to commit the changes to the schedule



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



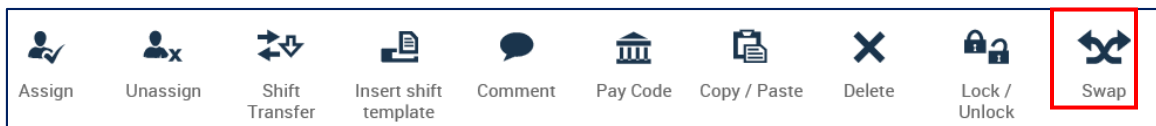
By Employee							11/18 - 11/24	11/25 - 12/01	12/02
Person Na...	Job	S... Per	S... Hot	T... Wo	Pay...	Ove...	Sun 11/18	Mon 11/19	Tue 11/20
Kronos, Te...	RN	7...	2...		07...				7:00 - 19:30
Kronos, Te...	RN	7...	2...		07...				7:00 - 19:30
Kronos, Te...	RN	7...	1...		07...		19:00 - 7:30		19:00 - 7:30
Kronos, Te...	RN	7...	1...		07...		7:00 - 19:30	7:00 - 15:30	

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

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

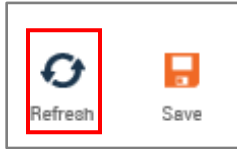
By Employee							11/18 - 11/24	11/25 - 12/01	12/02
Person Na...	Job	S... Per	S... Hot	T... Wo	Pay...	Ove...	Sun 11/18	Mon 11/19	Tue 11/20
Kronos, Te...	RN	7...	2...		07...				
Kronos, Te...	RN	7...	2...		07...			7:00 - 15:30 (x)	
Kronos, Te...	RN	7...	1...		07...		19:00 - 7:30		19:00 - 7:30
Kronos, Te...	RN	7...	1...		07...		7:00 - 19:30		7:00 - 19:30 (x)

- Deactivate the Icon by clicking the Swap icon



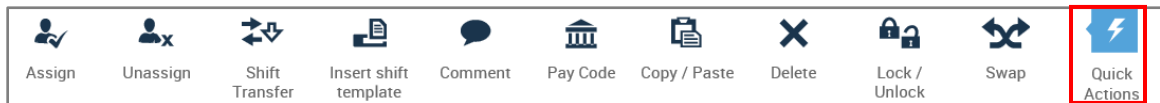


- Remember to save to commit the changes to the schedule

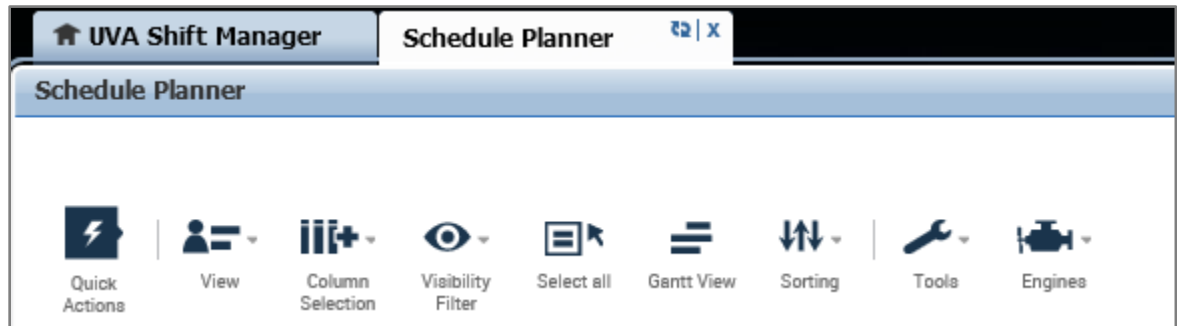


Closed *Quick Actions* menu

- 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