

Schedule360® Clinic Administrator Guide - Master Schedules

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Scheduler Reference Guide

Scheduler User Guide - Overview and Purpose

This guide provides instructions for using Schedule360 (S360) to schedule shifts for clinic admins and schedulers.

The guide includes directions on filling open shifts by the Scheduler along with self-scheduling into open shifts by location for clinical staff.

Definitions for Section I – Login by Scheduler:

Login by Scheduler

Web site address: www.Schedule360.com, click on [Login button](#) to enter your Scheduler username and password.

Enterprise Home Page View

The Enterprise Home Page displays after the Scheduler completes their login.

This **Home Page** serves as the entry point and high-level status view for the Scheduler. Select your scheduling Group to display your districts/states.

When Schedule360 builds your interface, we will group certain things together.

For example in [this interface](#), the sites are “grouped”, by job type across all sites.

The following provides an overview of each feature displayed on the Group Home Page:

Enterprise Drop Down Menu

Open: This links to [open shifts by site](#) at a monthly glance

Staff: This links to the [Location Staff Directory](#) at a Group level.

Daily: Displays a [quick at a glance schedule](#) by site by group

Reports

The [Reports link](#) features [various reports](#) at an Enterprise scale. It provides a Market Dashboard for 3 months of open shifts, Time Offs, HOT shifts, Reserved shifts by District and location level.

Enterprise Locations Dropdown

The [drop down](#) provides a way for the scheduler to [quickly select a site](#) by name or location

Update User Information & Password

[Update User Information](#) and Password buttons allow the administrator to update their own information

[Group](#) links to a “Group” and the respective locations within each District. Drilling down to the District and location level provides access to location calendars, related/assigned location staff for each location -

Group [Dropdown Menu](#) provides a quick way for schedulers to toggle between views and reports from an Enterprise level. See more about this menu below

[Group Display Counts](#) - when selected will run a quick tally of open shifts by 4 week period

Delta Menu [Group Reports](#) links to a dashboard of [reports by group](#).

[Select Location](#) allows you to quickly select a location by group using the dropdown, to see their [location calendar](#). Allows the Scheduler to quickly jump to the current monthly schedule for any location.

Group Delta Menu

Views

[Daily](#) - When selected shows a [quick glance of scheduled staff](#) by site.

[Daily Delta](#) - Give you access to [quickly make changes](#) to the entire schedule at scale. Move staff, change shift times or types, and add notes.

[Weekly Open](#) - See [open shifts](#) by week across the group. Select [Display Counts](#) to view data.

[Weekly All](#) - A [calendar view](#) by site of all shifts

[Two Weeks Open](#) - See [open shift by two week](#) period

[Two Weeks View All](#) - [Calendar view by site](#) of all shifts

Reports

[Staff](#) - a complete list of staff for a group.

“Month” Open - gives you the next two months of any open shifts.

Bi-weekly Open Shift Display (Shown as **Weekly 12/11 I 10/10**) highlights for the Scheduler open shifts in the upcoming weeks across the entire Group. The number display, “**10**”/”**11**” are links to the weekly shift openings by location at a Group level.

M I M2 = Monthly: **M** compiles all open shifts across the Group for current calendar month; **M2** compiles all open shifts across the Group for next month.

Definitions for – Group Detail View:

OPEN Standard Shifts In practice, the Scheduler will fill [OPEN](#) standard shifts with Float Staff to their bi-weekly scheduling requirements, i.e. 80 hours x 2-week payroll period.

HOT Open Shift: [HOT shifts](#) are any OPEN Standard shift changed to HOT by the Scheduler. HOT shifts are available for self-scheduling via the staff login to ALL qualified, Float, and PRN staff. HOT open shifts are designated on the Scheduler view with the word HOT and appear as the letter “H” on the staff login calendar.

Group Detail View

The [Group Detail view](#) provides the Scheduler a comprehensive view of all Districts/states and their respective locations within the market.

- **Group Summary:** At the top of Group Detail View the Dashboard, Weekly Open Shifts, Bi-weekly Open Shifts from the home page are repeated in summary format.
- **District Summary:** A District summary is provided as a header to each District location grouping. This District summary provides a Weekly Open shift, Bi-weekly Open Shifts, Dashboard, Pending Vacations in next 4 months, and link to Set Schedules for the respective District.
- **Location Staff Directory**
 - **Location Staff Directory Link** is the underlined number preceding the location name e.g. 1. Store 506. The number 1 links to the Staff directory for this location.
 - **Location Monthly Calendar Links:** the months shown to the right of each location name links to the monthly schedule. E.g. [Aug](#) [Sep](#) [Oct](#)

Location - Monthly Calendar Links

[Location Schedule Monthly Tab:](#) To access the Location Monthly Calendar click on a monthly link on Market Detail View e.g. [Aug](#) [Sep](#) [Oct](#)

The Location level display provides the following tabs **Scheduling > Monthly**

- **Scheduling** tab > **Monthly** sub-tab is the monthly location schedule; this is the default screen for the location. From the monthly schedule, the Scheduler may toggle to past months or future months using the arrows on either side of the month. A **Select** selection link to the right of the toggles provides 12 monthly links for launching future monthly schedules. The current date, i.e. “today’s date”, is highlighted in green on the monthly schedule as a visual reference to the past and future schedule.

Staff Drop Down

Staff tab > **Active** sub tab – the [Staff directory](#) for the location is found under the Staff tab. The Staff tab defaults to the Active staff.

The Active Staff Directory is divided into the following three groups:

Assigned Location or Clinic Staff are staff assigned to the location. This is their home location for requesting and reporting Time Off. Clinic Staff can also be qualified to work in other locations.

Floats are staff qualified to work in this location during Time Off days from Assigned Location Staff. These Float staff could also be used within this location for position openings occurring from resignations, extended leaves by Assigned Location and locations with staff shortages.

PRN Staff are qualified to work in the location. PRN Staff are adjunct staff who pick up open shifts and typically do not have “required” work target commitments.

Directory Drop Down

Directory

This dropdown displays additional staff sub links. These Staff lists are roll-up directories providing the Scheduler a quick and efficient method for finding an Employee within S360 and viewing their information without having to move to each location’s staff list:

- **District Staff** is a directory of all Staff by type in the District.
- **Group Staff** is a directory of all Staff by type in the Group
- **Enterprise Staff** is a directory of all Staff by type in the Enterprise / Company.
- **Enterprise Facility** is a directory of all Staff defined by all assigned locations for the employee.
- **Staff Assignment** is a directory of all Staff with sub links at a Group and District level. The Staff Assignment directory is a useful shortcut tool for updating staff profiles. Additional discussion and uses for the Staff Assignment link is provided later in the workbook.
- **Unscheduled Staff** a data cut of the location staff list for any Employee not scheduled in the current month.
- **Notes** - quickly see notes for facility or enterprise

Quick Access Drop-Down Menu (Facilities)

Quick Access Drop-Down Menu allows the scheduler to toggle between each location’s staff list within the Group.

Staff tab displays additional sub-tabs:

- Staff can also be added through the [Add New link](#) under the Staff tab. Click the Add New link and enter the new employee’s contact information, profile information, assignments, and qualifications. Schedule360 (S360) will create the user acct. based on their employee number entered on the contact page.

- **Inactive Staff** sub-tab displays inactive / terminated/resigned Staff with a system inactivation date and Scheduler who inactivated the employee. Reactivation of inactive Staff in situations of rehire or a return from a leave of absence is accomplished through the Inactive Staff list.

Monthly Calendars - Staff

From the facility level, [access the staff tab](#) and link to [staff member's current month](#) and two future months e.g. Aug Sep Oct are provided to the right of each Employee on the directory. Clicking on any of the three monthly links will display the Employee's calendar.

A Float Employee working in multiple locations will have a compiled calendar of all scheduled shifts across multiple locations on their monthly calendar. The Employee's calendar also displays approved time-off requests and preferences.

Hours Column: Each employee's calendar displays an hours column. This column displays their target work hours and their scheduled hours.

Employee Dropdown

The [Employee dropdown](#) from the staff list provides access to the following sub-links for each.

Profile

Contact
Profile
Assignment
Summary User Account

Scheduling/Time Off

Employee Calendar
Schedules
Set Schedules
Time Off
Availability
Enter Requests
Remove Filled Shifts
Add Note

Reports

Messages
Schedule Summary
All Stores

These Employee sub-links above represent the same tabs and links on the Employee Training Tutorial. Refer to the Employee Training tutorial for a comprehensive review of these sub-links. These sub-links work the same way from the Employee Scheduler's login; allowing the Scheduler to perform functions that an Employee performs from their Employee login.

Employee Profile

Employee Profile: S360 uses an individual Profile for each Employee that includes location directory information, licensure, title and position, vacation tracking, matching rules criteria by Scheduler for Employee scheduling and self-scheduling.

Access to the Employee Profile: The Employee profile is accessed by clicking on the [underlined name](#) on the Staff List e.g. [N. Schwartze](#). The second method for accessing the Employee Profile is the sub-link [Profile](#) from the Employee's calendar view.

Employee Profile:

Contact screen: The Contact screen provides the Employee directory information and employment specifics; contact information, employment type, and Employee number. Red outlined areas are required fields for completion.

Profile screen defines the license type and the three employment types:

- Assigned Location Staff
- PRN Staff
- Float Staff

“Post and Exchange” question – a guide to the Yes/No choice set up:

Deploy “Post” link and “Posted Shifts” report Tab for this Employee’s login to allow to Post & Exchange Shifts: YES NO

- Assigned Location Staff – YES, are typically allowed to post and exchange shifts with their location partners.
- Float Staff – NO, are commonly “scheduled” into shift openings by the Scheduler, therefore, Floats should not be able to switch their shifts with location staff.
- PRN Staff– NO, commonly pick up their shifts and allowing them to switch shifts with salaried location staff may result in payroll conflicts.

“Enter Availability” question – a guide to the Yes/No choice set up:

Deploy “Enter Availability” Tab for this Employee’s login to allow posting of availability requests: YES NO

- Assigned Location Staff – NO, Location Staff follow a recurring set schedule pattern. Posting availability is unnecessary.
- Float Staff – YES, are commonly “scheduled” into shift openings by the Scheduler, therefore, Floats should post their availability for viewing by the Scheduler.
- PRN Staff– YES, commonly pick up their shifts, and allowing them to post availability may assist the Schedulers in identifying available PRN Staff with last-minute shift openings.

Assignment link: defines the following based on the Group selection

- Home location
- Qualified locations
- Assigned location

These three sections are color-coded to address intra-relations between the sections but change from landscape (Qualified section) to portrait (Assigned sections) for differentiation with the selection process.

Home Location is a drop-down box that includes all locations for the Group. In addition, two additional “holding” locations are deployed 1. PRN Location 2. Float location; as defined these are the choices for PRN and Float Staff. The primary purpose of the Home location is the placement of the Time Off requests under the correct location.

Home location selections to follow:

- Location Staff – select home location – Employee’s assigned location
- Float Staff – home location choice is faux location “Float”
- PRN Staff – home location choice is faux location “PRN”

Qualified Locations: defines all the potential locations or geographic areas that Employee may pick up shifts

- Location Staff: first select their home location on the color-defined qualified groupings as described in section a. above. Second, select all locations in the qualified location section the Employee could potentially pick up open shifts typically based on geography and preferences.
- Float Staff – first select Float faux location on the color-defined qualified groupings. Second, select all locations in the qualified location section the Float Employee could be placed by the Scheduler.
- PRN Staff - first select PRN faux location on the color-defined qualified groupings. Second, select all locations in the qualified location section the PRN may pick up shifts within their geography and preferences.

Assigned Locations: defines all the locations for location staff. Float and PRN staff Qualified Locations should follow the same selections under the Assigned locations sections. By assigning and qualifying a Float and PRN in both sections, they will appear on the Staff tab list for each location selected.

- Location Staff: select their home location from the color-coded assignment area. Do not select “other” locations in the “Assigned” section. Location Staff are only assigned to their home location.
- Float: for every qualified location selected in the qualified section, the same locations must be selected in the Assigned location section.

[Summary link](#): provides an overview from selections and information submitted for each of the components of the Employee Profile.

Location - Staff – New Staff / Inactivating Staff / User Account Retrieval

Inactivating Staff Member – i.e. Resignation

To inactivate an employee from S360, click on the employee’s name on the staff list to launch the Contact Screen for the staff member. [Click on the “Inactive” radio button](#) above the staff member’s last name and then click submit at the bottom of the screen.

On the next screen, you will see a [list of their current scheduled shifts](#). You can choose to take them off the schedule now or in the future. Select the option that is best.

Important Note: do not select inactive for a Staff member who is reassigned or transferred to a new location from an existing location. To move staff, update the staff member's information on the

Assignment screen by selecting a new Home Location, a new Assignment selection, and changes to qualified locations if required.

A new Group selection is required for staff moving to a new geographic Group location.

Profile Cleanup / Updating Multiple Staff Profiles

Schedulers commonly find the initial data load into S360 has incomplete Assignment information. The Scheduler's personal knowledge of each Employee's location preferences is often missed on the data load.

The **Staff Assignment** sub-link is a useful screen for updating multiple staff profiles. To access the **Staff Assignment** sub-link, go to the **Staff** tab for any location. The **Staff Assignment** sub-link is displayed below the Directory delta near the top left of the screen.

The **Staff Assignment** sub-link utilization

The [directory groupings](#) assist the Scheduler in displaying common groups of employees for updating; e.g. District Group.

The Staff Assignment groupings are as follow:

- Location Level
- District Level Directory
- Group Level Directory
- Enterprise Level Directory

These [group directories displays](#) the following links for each Employee:

Summary Contact Profile Assignment

The Scheduler may click on the Assignment link to update the information and Submit updated information for the employee. To quickly return to the next employee, the Scheduler will click their back browser twice, returning to the directory. The next employee can be updated in the same method.

The Staff Assignment link saves the Scheduler from clicking through an entire profile for each employee when only one component is being changed.

Time Off Requests by the Scheduler

Time Offs requests are deployed specifically to your facility's requirements and procedures.

Employee Time Off requests are completed from the Employee's login.

Please refer to the Employee Training Tutorial for a full understanding of the procedures the Employee uses to make Time Off requests.

Entering a Time Off request on behalf of an employee

Situations may occur that require a Scheduler to input a Time Off request for an employee.

To enter a Time off request on behalf of an employee the following procedure is used:

1. Go to the **Staff** tab under the location the employee is assigned.
2. Find the employee on the staff list
3. [Select the Time Off sub link from the employee dropdown](#)
4. [On the monthly calendars](#), click on the date or dates for the Time Off dates.
5. Click Submit.

S360 will provide an [alert notification](#) asking if you want to approve the Time Off request immediately or hold the Time Off request as a [Pending request](#).

Click the **OK** button to begin the approval process; click the **Cancel** button to hold the new requests as pending.

When the **OK** button is selected [the approval screen](#) will appear.

1. Use the select all to approve all requests
2. Use the select all under the “Remove scheduled shifts” column to remove any scheduled shift for the requested Time Off dates.
3. Click Submit to approve the Time Off and Remove any scheduled shifts.
4. Following the approval of the Time Off, the shifts will open on the calendar and a message will be sent to the employee’s Message Board.

The Time Off abbreviation [VAC will appear](#) on the employee’s calendar.

Removing a Previously Approved or Pending Time Off Request

Situations will occur requiring the Scheduler to remove or withdraw previously approved Time Off requests for an employee.

1. Go to the **Staff** tab under the location the employee is assigned.
2. Select the **Time Off** sub-link for the employee
3. Above the Calendar Months, the [following sub links are displayed](#)

Time Off Approval / History Time Off Pending / Denials

1. Click on the [appropriate link](#) to Delete or Withdraw.
2. Note, for previously approved Time Off, the Scheduler will need to reschedule the employee into shifts removed from the original Time Off requests.

Time Off Report

The Time Off Report gives an overview of pending and approved time-off requests at the [Enterprise](#), [Group](#), and [location](#) levels. Approved time off requests are displayed on the Time Off Report Calendar in green and pending requests appear in red.

Pendings –Approval by Scheduler

Pending Vac: Displays Time Off requests to the Scheduler for their Staff.

S360 organizes pending requests for staff at a [District](#) and [Location level](#) based on the Home Location chosen on an employee's Assignment screen. [Pending Time Off](#) requests are rolled at the location level into a District, Group, and Enterprise [Time Off report](#).

A Scheduler will use this information to determine how many requests are approved based on the resources for backfilling the shift openings incurred by Time Off approvals.

Admin Master Schedule

The Master Schedule (MS) is considered the epicenter of the entire Schedule360 application. In summary, the MS is a template schedule comprising the mix of employee types and the number of shifts required to run the clinic on a daily basis. A separate MS is created for each day of the week to allow for differences in your daily scheduling requirements, e.g., Weekends are always busier than Tuesdays.

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

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

Where is the Master Schedule located?

Go to Location > Admin tab > Master Schedule subtab > Sunday (default)

A [Master Schedule](#) exists for each day of the week – Sunday through Saturday.

Modifying the Master Schedule?

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

Troubleshooting:

Why will the Master Schedule not update when I try to reduce the number of shifts?

An alert message displays “cannot update MS, you must remove set schedules ...”

The MS has a fixed number of shifts for each day and job type. Recall that Employee Set Schedules are directly linked to Shifts in the MS. If the specific shift and job type are 100% used by employees in Set Schedules, e.g. 2/2 100%, the application has stored these set schedule position(s).

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

Admin Release Dates

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

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

Employee Set Schedules

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

Step 1 - Click on the Set Schedule Link

Step 2 - Select the location the Employee works

Step 3 – In the drop-down box above Sunday, Select the Profile, Job Type, and Shift.

Then click “Go”

Step 4 – Select the days of the week the employee works by checking the “Select” box in the lower left-hand corner of the Day. When finished, select the time frame in which the schedule recurs in the box above Sunday. When complete, select “Go and Review All Schedules”

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

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

Step 6 – The shifts are now Green. Click Return to Set Schedule

The process is complete. The Set Schedule shifts for the Employee will “lockdown” and be scheduled every time Schedule360™ releases to the Batch shifts for the Master Schedule for future scheduling periods.

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Scheduling Functions – Scheduling into OPEN Shifts

“Scheduling” into OPEN shifts can be accomplished through a few different methods:

- **Weekly Open shift Reporting and Scheduling**
- **Single Open Shift Scheduling**
- **Multiple Open Shift Scheduling**
- **Open Shift Scheduling by Employee**
- **Location Calendar Scheduling**

Weekly Open shift Reporting and Scheduling:

As described in the Home Page Detail View Section, [Weekly Open shifts](#) are the primary default view for displaying shift openings at a Group, District, and Location level.

- From the [Group Detail View](#), **Weekly** and **Weekly Open** numerical links display the shift openings for the respective locations.
- Float and PRN staff are displayed under the Open shifts with their work targets and actual hours for the payroll period in yellow noncompliance or green compliance with work targets.
- Existing confirmed shifts and the location are displayed for the week for each Float and PRN employee. Note, these confirmed shifts in location locations are underlined to allow the Scheduler to quickly remove the Float from an existing shift to accommodate a new schedule based on the weekly openings displayed.

Single Open Shift Scheduling

To fulfill a single shift from the Weekly Open display; click on the underlined shift timing e.g. 9a – 9p. The open shift will display the Availability Screen for the shift. Assigned Location staff, Float, and PRN staff are displayed along with their work targets.

1. [Select Shift](#)
2. [Select Staff](#)
3. [Staff Scheduled](#)
 - a. A Schedule button to the right of each employee allows the Scheduler to immediately schedule an employee into a shift.
 - b. A [View Calendar button](#) allows the Scheduler to view an employee's calendar prior to scheduling the employee in the shift.
 - c. The Scheduler will receive an [OT potential alert](#) if the Employee selected to fill the shift weekly hours exceed 42 hours or their bi-weekly payroll hours exceed 80 hours.

Multiple Open Shift Scheduling

Schedulers will commonly “schedule” Float staff into multiple shifts within the same location. From the Weekly Open view, the Scheduler determines the Float or Floats for fulfilling multiple open shifts.

1. To fulfill multiple open shifts [displayed on the Weekly 5 I 2 I](#) click on number e.g. 5, then, select the underlined Location to the left of the open shifts for the location. The browser will direct you to the [Weekly Open Shifts By Group](#).
2. From Weekly Open you can [click on the time or float staff name](#) to schedule them into the shift.

At the top of the [location Monthly schedule](#), a **Match drop-down box** provides a collated listing of all Location Assigned Staff, Float, and PRN Staff. Select the Float Employee from the **Match drop-down box**, you wish to schedule.

1. [Select Employee From Drop Down](#)
2. [Check which Shifts You want to fill with the employee](#)
3. [Confirm Schedule changes](#), you can select Abort to Abort the changes.
4. [Confirmation the employee has been scheduled into the shifts](#)

Note: The weekly totals will be calculated in the column to the right allowing the Scheduler to optimize the hours being scheduled for the Float employee in accordance with their work requirements.

A column to the right of each week displays the proposed weekly hours and bi-weekly work hours during the shift selection process. The bi-weekly work hours selected should not exceed 80 hours. Staff with bi-weekly hours exceeding 80 hours will display on the Group OS report.

Open Shift Scheduling by Employee

Each employee's name [displayed on the Weekly open report](#) is underlined; Emily Wessling. This link will take you to the employee's calendar.

The [Advance Search dropbox](#) on the top left of the employee's calendar allows the Scheduler to search for all qualified open shifts available to the employee.

From the drop-down box select “**View All Open Shifts**”. By searching the specific date, you can see any [open shifts](#) across all qualified and assigned locations will display on the employee's calendar.

1. [Search for Shifts on dates](#)
2. [Check the boxes of the shift you wish to schedule and select submit](#)
3. [Confirm shift and times and accept](#)
4. [The employee is scheduled for the shift](#)

The Market Schedule may select multiple shifts at the same or different locations for this employee by selecting the small select box in the lower corner of each shift.

- a. The **Submit** button on the top right corner will refresh the calendar with the selected shifts.
- b. The Scheduler may review the yellow highlighted shifts. The Abort button removes any shift before confirming.
- c. To confirm these shifts with the employee, the Scheduler selects the **Approve All** button on the top right of the calendar.

Location Calendar Scheduling

- Open shifts displayed on the location calendar can be filled with an available qualified employee by [clicking on the Open shift](#) e.g. **OPEN 9a – 9p**.
- The [Open shift will display](#) the “Availability” report by employee type, i.e. Assigned Location, Float, and PRN staff.
- A double red asterisk appears next to the employee’s name if they are already scheduled on this date.
- The schedule button to the right of the employee’s name offers a one-click mechanism for filling the shift with the selected employee.
- At the [top of the available list of staff](#) is the following link **Qualified / Not Assigned Location Staff** link. This link displays all Location Assigned staff who are qualified but not assigned to this location. This link allows you to view location staff in the area who potentially can work extra to fill this shift.

Scheduling Functions – Swap and Reopen FILLED Shifts

The Scheduler has numerous options to modify, adjust, and change Staff in filled shifts. From the location schedule, the [Scheduler selects the shift timing](#) for any filled shift, e.g. Smith **830A – 9P**. The filled shift reveals the following options for modification:

Swap and Replace Shift radio button: This function removes the scheduled employee from the shift and provides a listing of qualified staff for swapping the shift into their schedule.

1. [Select The Swap Replace Button](#) and hit submit.
2. You can [swap the employee](#) OR
3. Look at their calendar, and [Swap From Calendar View](#)
4. The Employee is now [Swapped](#).

Shortcut Method for Swap and Replace Shifts: Another option to Swap and Replace a shift is to [click on the confirmed employee's name](#) on the location calendar. **Smith** 830 – 9P. By clicking on Smith, instead of the shift time, the browser will immediately [launch the listing of qualified staff](#) for the swap. Then either use the swap button (Step 2 above) or view the calendar (Step 3 above) to place a different employee into the shift.

Remove and Reopen shift radio button: This function removes the scheduled employee and reopens the shift. The employee is automatically notified via their Message Board that their shift was removed from their schedule.

1. [Open the shift and select remove employee](#), reopen shift
2. [Select a reason](#)
3. [The shift is now available](#) to schedule

Remove and Delete Shift radio button: This function removes the scheduled employee and deletes the shift from the schedule. The employee is automatically notified via their Message Board that their shift was removed from their schedule.

1. [Select the shift](#)
2. [Select Remove Employee](#) Delete Job
3. [Select Reason](#)
4. The Shift is [deleted](#)

HR Incident radio button: This function leaves the employee scheduled on the shift but allows the Scheduler to [document an incident](#) involving the employee on the shift. E.g. [Tardy Incident](#)

Call Off radio button: This function [removes the employee](#) from the scheduled shift, [documents the incident](#) e.g. Personal Illness, and reopens the shift on the schedule. You can also [make the shift HOT](#), details on that are below.

Miscellaneous Scheduling Functions

Editing a Shift Time: Schwartz 9A – 6P: From the location schedule click on the [Schwartz 9A – 6P shift time](#). From the Modify Shift select the [Edit Timing link](#) on the left.

Drop-down boxes are provided with shift times to choose. Or you may create a custom shift timing using the start and end time shift timing boxes. Schwartz is now available until 9 PM so we will adjust to 9A-9P.

[Choose the appropriate button](#) at the bottom of the screen to return to the location schedule or create a new shift due to the edit of the existing shift.

Note, if you change an 830A – 9P to 830A – 1P, you will need to create a new shift for the remaining portion of 1P – 9A.

Call Offs, Dispatching shift openings: As described in the previous section - reopening shifts due to Personal Illness is accomplished through the Call Off radio button.

To dispatch this newly open shift to qualified staff click on the open shift e.g. **OPEN 830A – 9P** on the location schedule to display the availability screen. At the top of the availability, the screen is a Dispatch link displaying the phone numbers, emails, and cell phone text messaging for the qualified assigned Staff.

1. [Click on the shift](#)
2. [Select Dispatch to Assigned or Unassigned Staff](#) From Drop Down.
3. [Select the method of dispatch](#), and you can use the preformatted message or create your own.
4. [Confirmation](#) the message sent.

A preformatted message is displayed for the Open Shift. The Scheduler may add text to this message or modify it to their preferences. After selecting the staff to dispatch, Schedule360 will create an archive of the message.

Similar to the availability screen, a second dispatch group link for Qualified / Not Assigned to the Location is available providing a dispatch to all Location Assigned Staff not working on this date.

Shift Tags: Shift tags allow the Scheduler to define each shift type for every Employee. Shifts can be defined as [Original Schedule](#) (OS) and Overlap (OL)

Delta Symbol

The Delta symbol is located on the monthly calendar and provides easy access to numerous shift modifications. The Scheduler can quickly change the shift time, delete the shift, reopen the shift, add a shift note for multiple shifts, make a shift HOT, and document call-outs.

Click on the [Delta Symbol](#) for the date you would like to modify.

1. The [delta modification screen](#) will open in a new window. Then make your selections for each shift on that day and click Submit to confirm the changes.
2. Close the delta modification screen and refresh the Monthly Calendar to review your adjustments.

HR Tab

The HR tab compiles at a location level call offs, incidents, cancellations, and Time Offs. The Detail All link provides the Scheduler with a date picker for running reports specific to a time period. Each reported section on Detail All, e.g. “Cancellations Sept 01 – Sept 30” is a link to an individual report for this section. Click on the underlined report name, “Cancellations” for an individual report.

Overview

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

HR Tab - Components

In this section we will illustrate and define the following components within the HR Section:

- **Incident Report**
- **Credentials**
- **Special Credentials**

- Skills
- Licensure/DEA Exp

[HR – Incident Reports - ALL](#)

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

[HR – Incident Reports – Detail All](#)

The Detail-All report provides an in-depth detailed explanation for every documented Incident within the Department. This report can be queried for other periods using the “From and “To” boxes.

Reports Include: Incident Report, Vacation Report, Cancellation Report

[HR – Incident Reports – Call-Off, HR-Incident, Incidents by Day](#)

Finally, these reports also allow the User to view Specific Incident types such as “Call-Offs” and “HR Incidents”, in both rolling and annual views by location and enterprise views. A final view allows the User to query specific “Incidents by Day.”

Location Level - HR Tab – Credentials Reports

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

The report provides several easy-to-read reports that can be sorted by ALL and EXPIRED. Additionally, the report provides a live link to each Employee’s Profile allowing the Admin user to access and update the expired credential once it has been renewed.

Enterprise displays the same information, allowing an Admin user to plan accordingly for credential recertification.

[Track Credentials in Employee Profile](#)

Special Credentials and Skills

Similar to the Credentials Report, “Special Credentials” and “Skills” track specific credentials and skills required for an Employee to work. Examples might be “Authorized to Give Injections”, or Any Special credential specific to that location can be tracked and managed through this report.

[Special Credential Report](#)

[License Tracking: Employee Profile](#)

Schedule360 also provides a specific field for tracking license numbers and expirations in the employee profile.

License Reports

The HR > License sub-tab provides reports similar to the credential reports. Schedulers can quickly track expired licenses at the location, group, or [enterprise](#) levels. You can also [export the report](#) to an email address.

Admin tab

Adjustments sub-tab

The Admin tab defaults to the Adjustments sub-tab. The Adjustments sub-tab provides the Scheduler with administrative tools for modifying multiple shifts to:

- [Release scheduled staff and delete shifts](#)
- [Release Scheduled Staff Only](#)
- [Modify Shift Timings](#)
- [Delete Open Shifts Only](#)
- [Change Multiple Shifts to HOT](#)

The Scheduler will find these links useful in managing shift adjustments from information gathered on the dashboard.

Adjustments links Defined.

Admin tab > Adjustments > **1. Release Scheduled Staff & Delete Shifts.**

This sequence allows the Scheduler to remove multiple shifts from scheduled employee calendars for a specified period. The Scheduler may find a use for this function when staff schedules are changing for a defined short-term period at a location but the existing schedule will return to the existing set recurrence pattern.

However, if set schedules are changing permanently for staff, the Scheduler should use functions found [under the Sets link](#) on the locations monthly calendar, Approved/Delete Recurring Sets to recreate the set schedules for the entire location.

Admin tab > Adjustments > **2. Release Scheduled Staff Only.**

This sequence allows the Scheduler to:

“1. Release Scheduled Staff and Delete shifts” without the delete function.

Admin tab > Adjustments > **3. Remove Open shifts Only**

This sequence allows the Scheduler to:

“1. Release Scheduled Staff and Delete shifts” without the Release Schedule Staff function.

Admin tab > Adjustments > **4. Change Multiple Shifts to HOT.**

This sequence allows the Scheduler a rapid method for changing the remaining future openings to HOT.

As the timeframe shortens to a Standard Open shift, the Scheduler will need to convert multiple Standard Open shifts to HOT. A HOT open shift expands the self-scheduling to all qualified Location, Float, and PRN Staff. HOT increases the possibility of pick up via self-scheduling albeit at a higher cost.

Admin > sub tabs

Job Request Form sub tab

The Schedule360 Job Request form provides the Scheduler a method for adding ad hoc shifts into a location schedule. Ad hoc shift additions are considered extra shifts added to the location schedule. A common example for adding shifts could be a new hire orientating in a location with the full staff of location staff working.

From the Admin tab select the Job Request sub-tab. Complete your drop-down selections and click on the calendar date or dates for adding the shift parameters in drop-down boxes. Submit the request type and calendar dates. Review your selection for accuracy and Complete Process.

Your selections will appear as Open shifts on the location calendar.

See above for [scheduling staff](#) in these shifts.

Reports Link

The [Reports link](#) is available at the Group, District, and Location levels. By clicking on it the scheduler gains access to a set of configured reports.

NOTE: If your organization has a need for additional reports please contact your account representative for support.

Export Report

Use the [export link](#) to select a from and to date to export schedule and time off data.

Over-Scheduled Report:

Once the Scheduler chooses to override the over-scheduled Alerts (OS) the OS hours will appear on the [OS Report](#). OS Reports can be seen at Group, district, and location levels. The report displays each Employee with scheduled hours exceeding 80 hours in a bi-weekly pay period. By clicking the left and right arrows the Scheduler can view each time frame. The report provides a reading of the Staff scheduled hours and how many OS hours they received. Each report gives a total of OS hours according to the displayed timeframe and Group, district, and location level.

Group OS Report: The Group level OT report provides OT information for every District within the Group.

To access the Group OS report click the Reports link to the right of the desired Group. Then click the over-scheduled link to view the OS report.

District OS Report: The [district level OS report](#) displays OS hours for the respective locations within the district.

To access the District OS report click the Reports link within the District. Then click the over-scheduled link to view the OS report.

Location OS Report: The [location level OS report](#) displays information for all Staff receiving overtime within a specific location.

To access the Location OS report click the Reports link on the monthly calendar. Then click the over-scheduled link to view the OS report.

Dashboards

The dashboard displays all open positions within each location for a 3-month period. Dashboards are available at a District, and Group level. To access the dashboard click on the [reports link](#) at the Group and District level. Then click on the [dashboard link](#) to open the report.

[Dashboards](#) are a comprehensive long-term planning tool for backfilling Time Off shifts/location openings and communicating the “availability” of the open shifts to Assigned Location, Float, and PRN Staff.

The goal for filling open shifts leftover after optimizing Floats to work requirements is to use less costly PRN Staff prior to extra hours for Assigned Location Staff.

Definition: HOT are pre-approved open shifts for extra pay when the Employee’s bi-weekly hours exceed 80 hours. A HOT designation is required on an Open shift for Location Assigned staff, Floats, and PRNs to self-schedule. Please review the Staff Tutorial for the self-scheduling process via the Employee login.

Location Assigned Staff may not see openings within their location or across their qualified locations unless the openings are HOT. The dashboard is an excellent tool to review the current status of all open shifts.

From the Dashboard data, the Scheduler may modify the open shifts by selecting the ADJ link next to each location. The [ADJ link](#) will open the Adjustment screen under the Admin tab for the respective location. The following functions are available on the [Admin tab](#) > Adjustments:

OPEN (O) shift conversion to HOT

- As time approaches near the date of the open shift, the Scheduler will need to convert the Open shift to HOT to allow qualified Location Staff, Floats, and PRNs to pick up the extra shift. Qualified Location Staff, Floats, and PRNs may only self-schedule into HOT shifts.

Converting OPEN shifts to HOT Shifts

- A single shift on the location’s monthly calendar can be converted to a HOT shift by clicking on the [shift timing 9a – 9p](#). On the left side of the availability screen, the Scheduler will find a [Make HOT Shift](#) link. The shift will now [display as HOT](#) and become available for self scheduling with qualified Location and Float Staff.

Converting Multiple OPEN shifts to HOT

- Schedulers commonly [convert multiple OPEN shifts](#) for a location to HOT for a month at time when their cutoff date is reached in the prior month and OPEN shifts still remain in the location.
- To convert multiple OPEN shifts to HOT, the Scheduler may click on the OPEN (O) shift number e.g. **8**, on the Dashboard. The browser will redirect to the monthly schedule for the location. Select the Admin tab for launching the default Adjustments tab. The [Change Multiple Shifts to HOT](#) link is found on the Admin tab > Adjustments screen.

Hot Shift Report

The [Hot Shift report](#) provides an overview of all HOT shifts in the selected area. If the shift has been backfilled, the scheduled employee will display with the date and time the shift was filled.

Last Dispatch info is included. Use the dispatch link to send the shift details to all qualified employees who are not scheduled to work on that day.