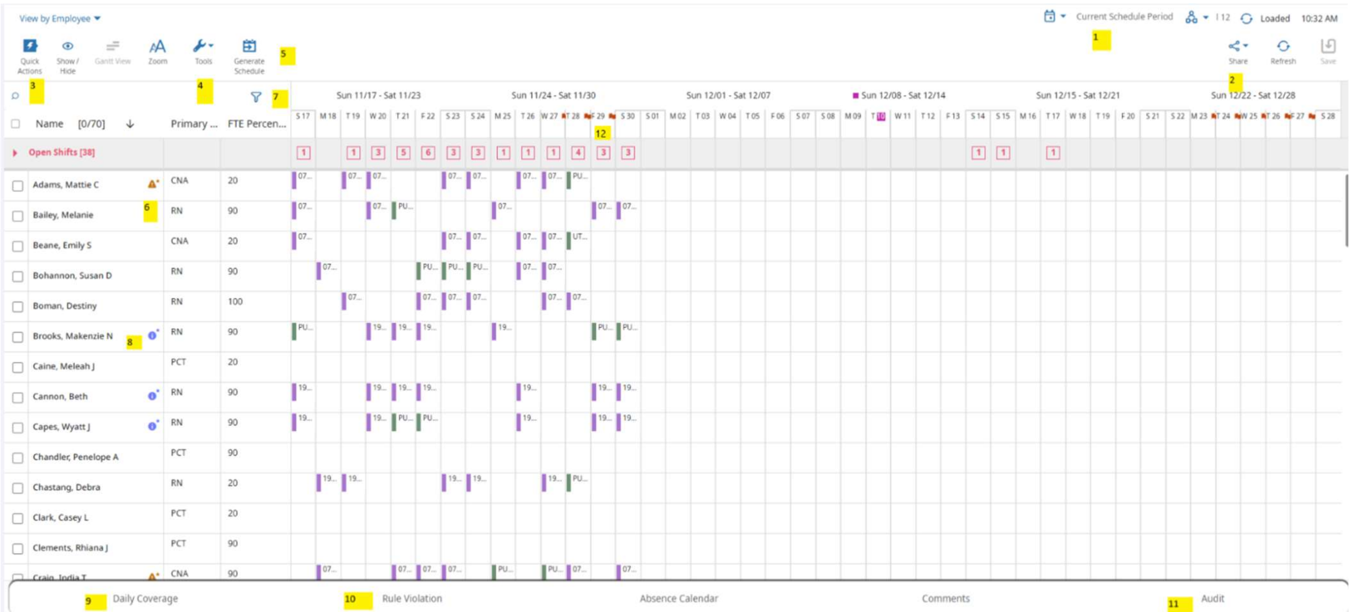
USA HEALTH

# AS Scheduler Planer Overview

*Please review the corresponding number for each listing*




1: **Timeframe Selection** – View different preset timeframes or create a custom range selection

2: **Share** – Convert schedule to PDF or print reports

3: **Quick Action** – Opens Quick Actions tab *

4: **Tools** – Opens schedule posting tools as well as call lists and employee notification options

5: **Generate Schedule**- Uses coverage calendar and schedule to calculate and add open shifts to schedule.

6: **Warning notification**- Alerts scheduler to moderate potential scheduling issues.

7: **Filter**- Add/ Remove columns that include employee demographic data (Hire date, Phone #, FTE%, etc...)

8: **Informational Notification**- Alerts scheduler to minor scheduling issues

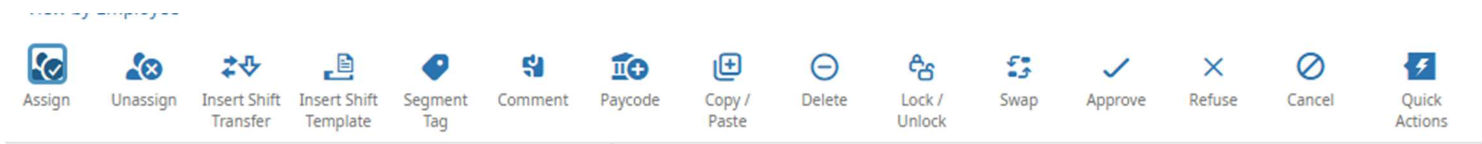
9: **Daily Coverage**- Shows daily coverage based on projected department needs

10: **Rule Violation**- Displays Informational and Warning Notifications

11: **Audit**- Displays schedule edits as well as the date and time that they were made and by whom.

12: Holiday notification flag- Red flags on dates note facility holidays

## Quick Actions



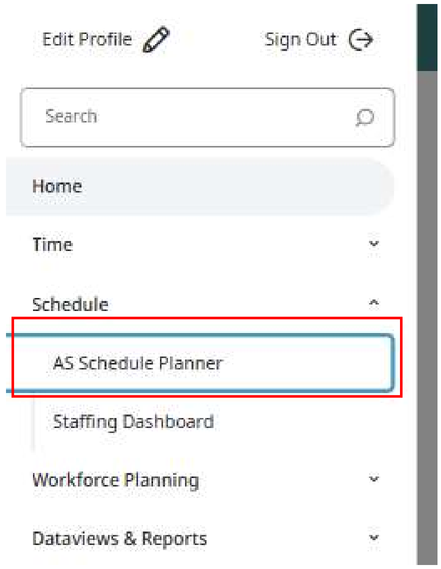

- **Assign**: Assign open shifts to employee by selecting desired open shift Date/Time and then the employee that it will be assigned to.
- **Unassign**: Removes selected shift from schedule. Creates an open shift to replace it.
- **Insert Shift Transfer:** Select and insert Shift Transfer to schedules
- **Insert Shift Template**: Select preset shifts to copy to schedule
- **Segment Tag**: Select tags that will appear on schedule related to department assignments.
- **Comment**: Add comments to scheduled shifts
- **Paycode**: Select pay code to make multiple edits to employee schedules. (Does not allow for comments to be entered)
- **Copy/Paste**: Copy shift and paste to other dates. Good for 'one-off' shifts that are not included in the shift templates.
- **Delete**: Removes shift from schedule. Does not create an open shift to replace it.
- **Lock/Unlock**: Locks individual/ multiple shifts from edits. Must be unlocked prior to making edits.
- **Swap:** Swaps shifts on 2 selected employees
- **Approve:** Approves Open Shift and Time Off requests that appear on the schedule (sends message to requester)
- **Refuse**: Refuses / removes Open Shift and Time Off requests on the schedule (sends message to requester)
- **Cancel**: Removes Open Shift and Time Off requests (does not send message to requester)
- **Quick Action**: Closes Quick Action tab

USA HEALTH

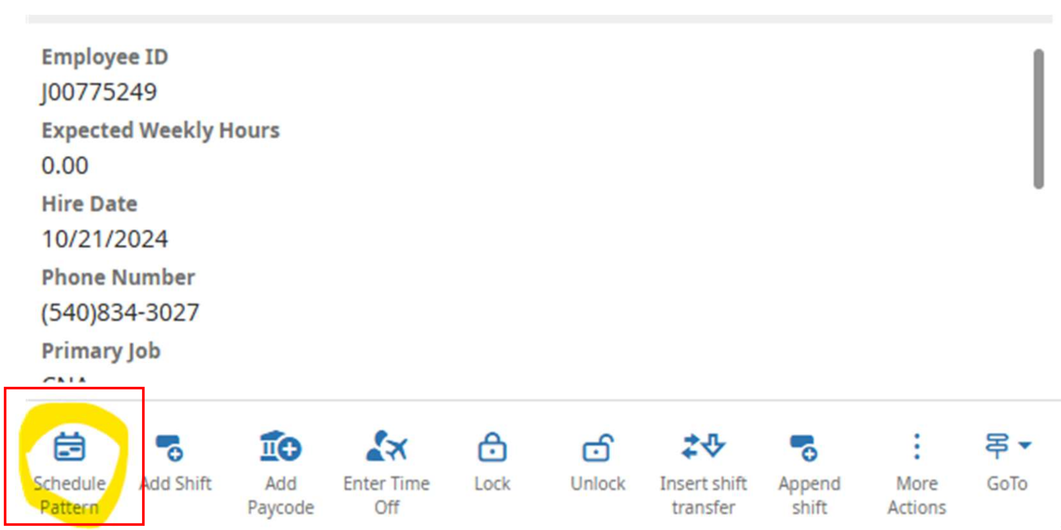
## Entering Employee Pattern

For employees that work the same schedule pattern with minimal variations.

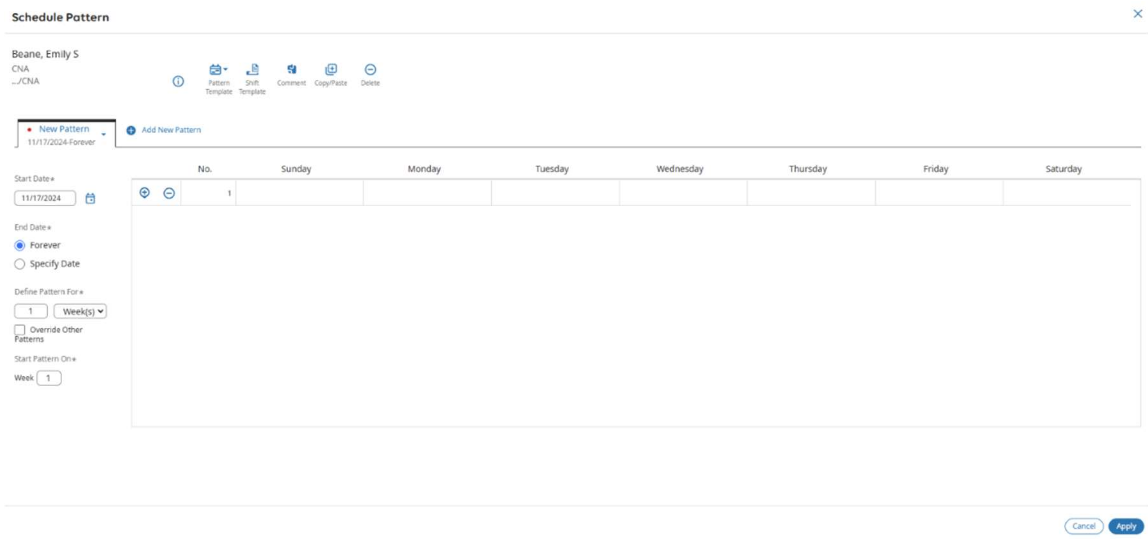
- **Step One:** Select the Hamburger Icon on the Home screen. Select the AD Schedule Planner under the Schedule dropdown.




- **Step Two:** Left Click on the employee to add the pattern to and select Schedule Pattern from the Menu.

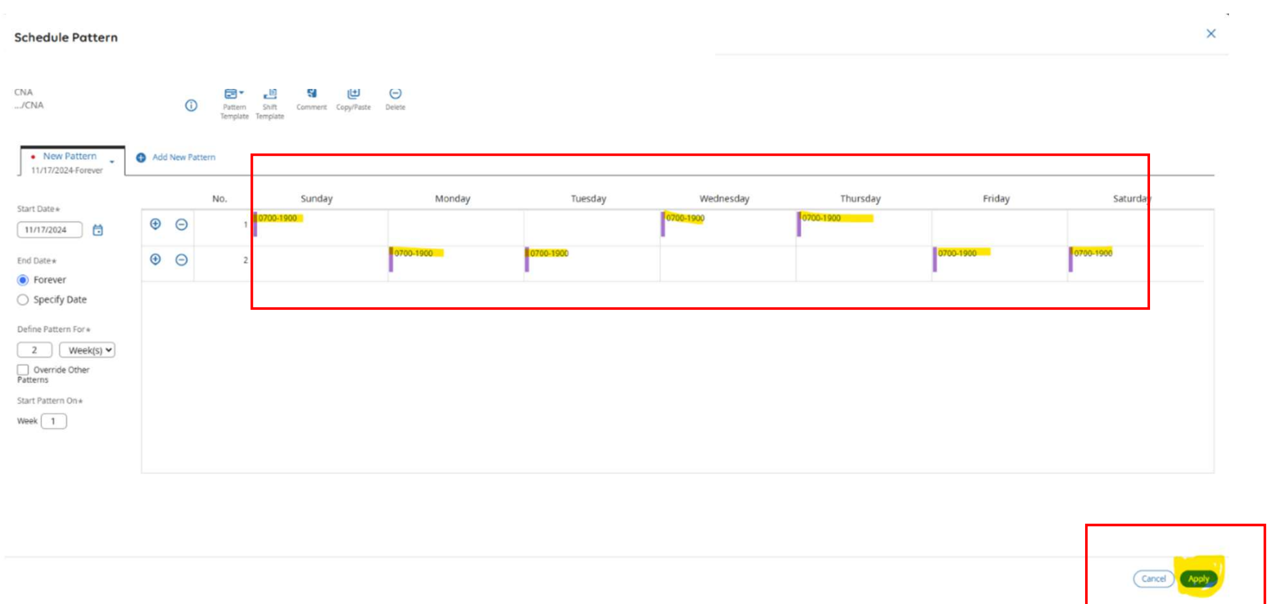


- **Step Three:** To initiate, the **<u>start date</u>** must be on or after the current date. The **<u>End Date</u>** must always be the Default.
    - *Users can specify an end date to end the pattern by clicking in the Specify Date.*



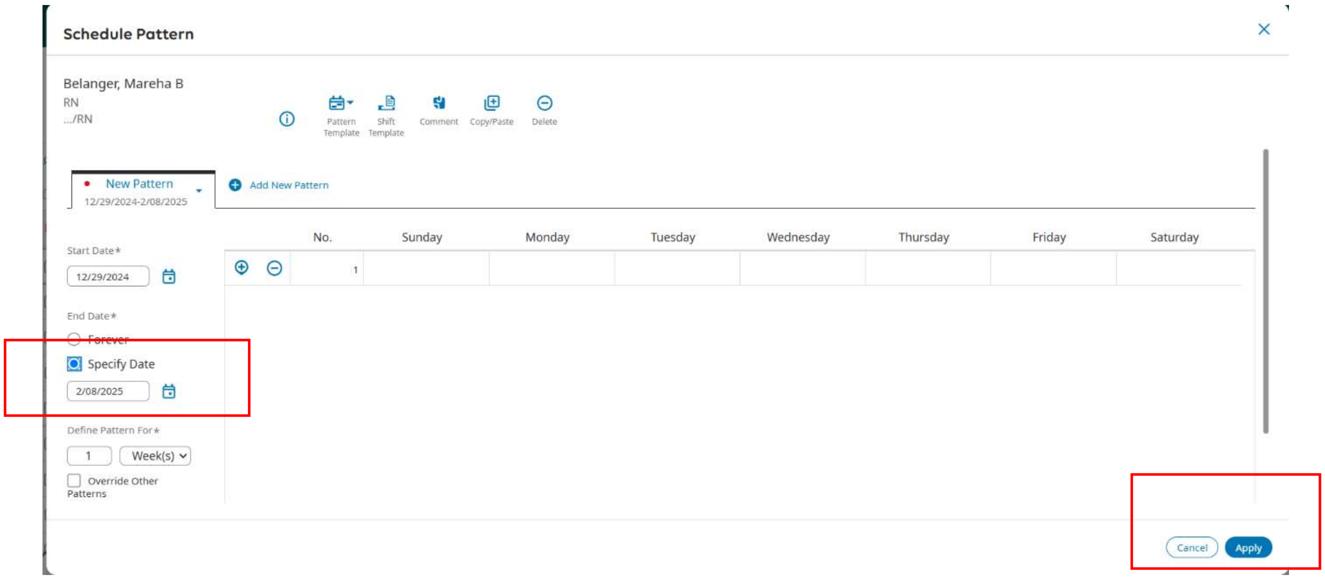

    - Users can use the plus (+) or minus (-) signs to navigate the dates.

    - The input schedule pattern is created by users either entering in the time manually or by using the Shift Template selection.
        - Select **<u>Apply</u>** and **<u>Save</u>** when done.



# Editing/Ending an Existing Pattern

The same steps will be taken to edit an existing pattern _except_ that an end date for the current pattern will need to be selected prior to adding a new pattern.



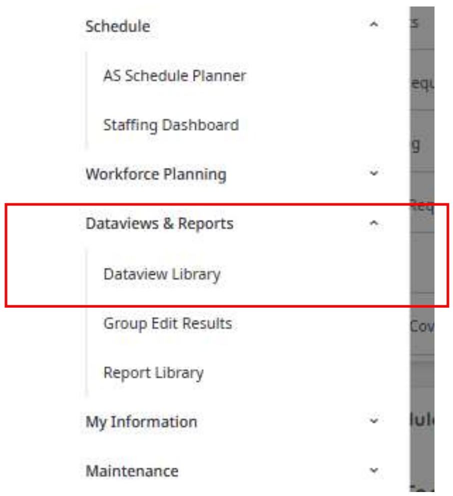

To terminate a pattern simply select an end date.

Select **Apply** then **Save**.

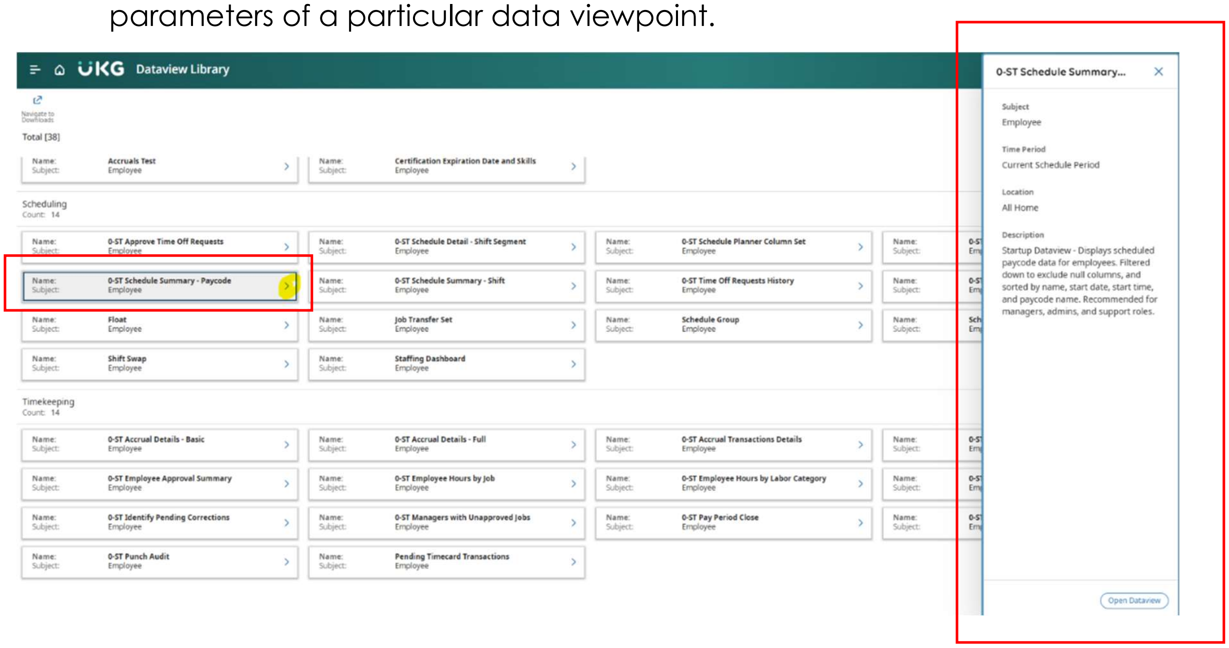
# DataViews

Dataviews are customized reports which can be run, exported or both displaying an in-depth view of calculation outputs from iterations. These can be grouped by periods or sites and allow deeper analysis of the budget if required.

- **Step One:** Select the Hamburger Icon then Dataviews and Reports.
  - Next, Select Data view Library




- **Step Two:** Users must select the tile of the report they would like to run.
  - Click on the arrow to the right of the side box to display a description of the parameters of a particular data viewpoint.



*Dataviews with default to the Current Schedule period for All Home Locations.*

**Step Three:** Select the dropdowns to change the parameters to run the report needed.

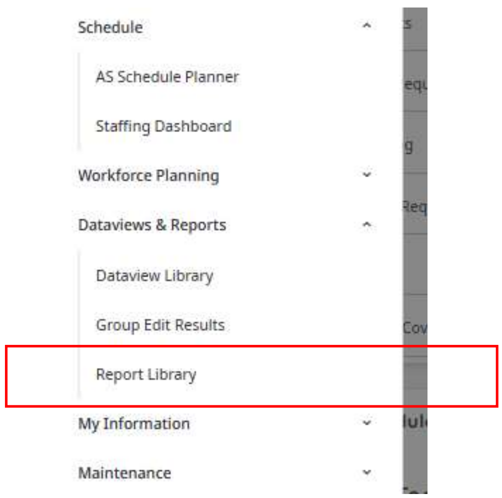

- Users can **<u>share,</u> <u>print</u>**, or **<u>export</u>** the report to a csv file.

*A csv file allows users to mange the report information in either Excel or Sheets.*

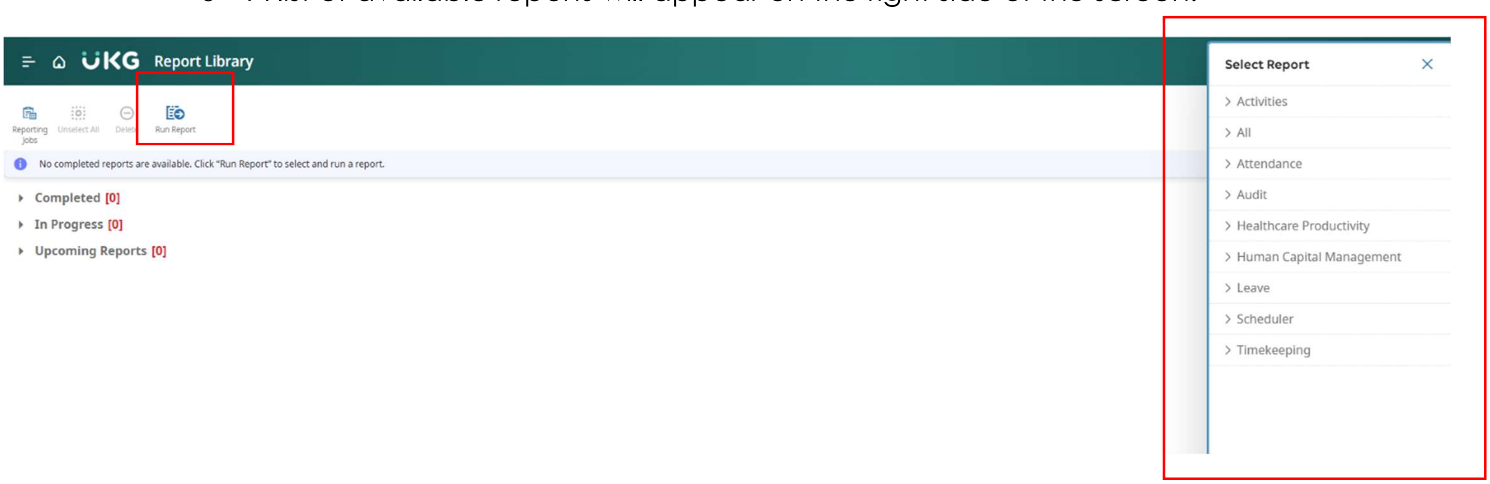
# Reports

**Reports** enable you to organize information into an easy-to-read, easy-to-distribute file format. With highly formatted and customizable layouts, reports can be scheduled to run at regular intervals and managers can be notified when a report is available.

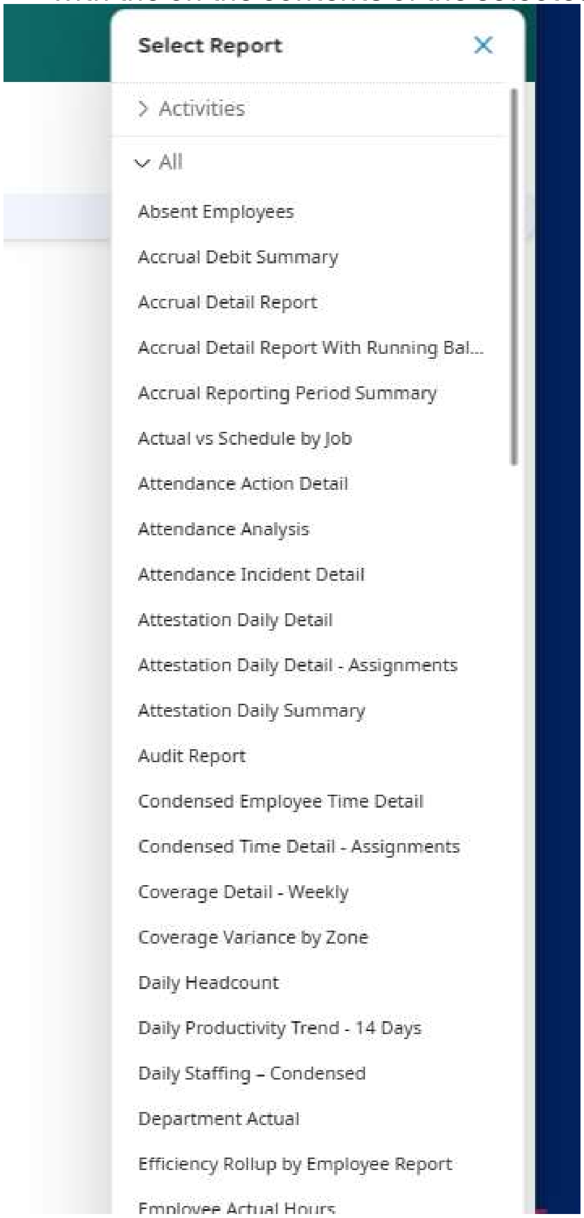
- **Step One: Step One:** Select the Hamburger Icon then Reports.
  - Next, Select Reports




- **Step Two: Select Run Reports**
  - A list of available reports will appear on the right side of the screen.



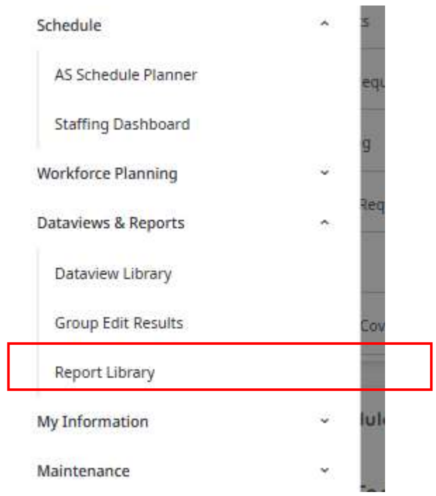
- Click on the dropdown arrow to view each report option. A brief description will display with the on the contents of the selected report.




- **Step Three:** Select the report needed to run. A second pan will open the report parameters.
    - Users must fill in the required data in the parameters pane.
    - Select the appropriate **output (PDF/ CSV, XLSX)**
    - Select **Run Report** when done

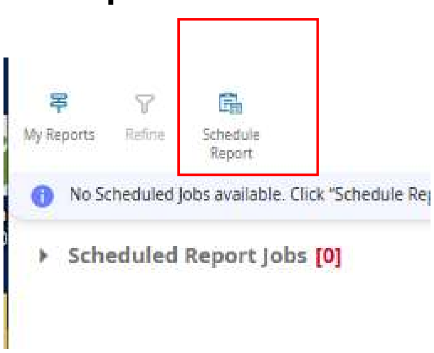
# Scheduling Reports

- **Step One:** Select the Hamburger Icon then Reports.
    - Next, Select Reports

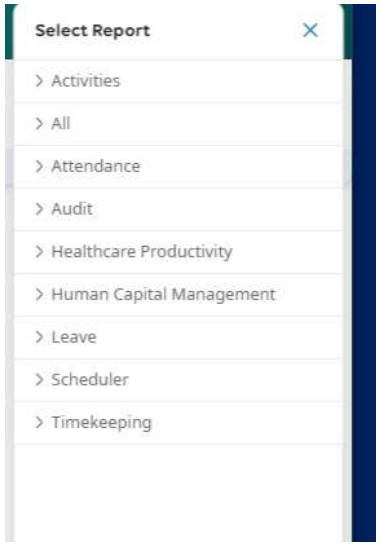



- **Step Two:** Select Reporting Jobs

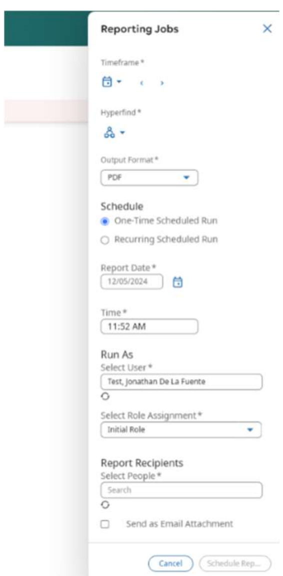

- **Step Three:** Select Schedule Reports.

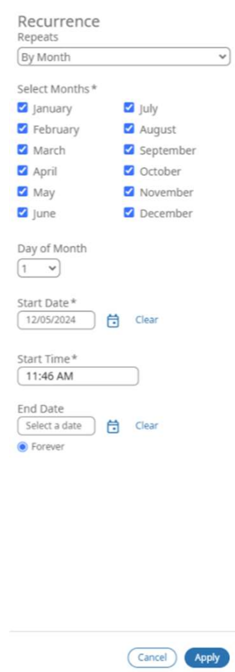


Click on the dropdown arrow to view each report option. A brief description will display with the on the contents of the selected report.




- **Step Four:** Select the report that needs to be scheduled. The reports parameter pane will appear.



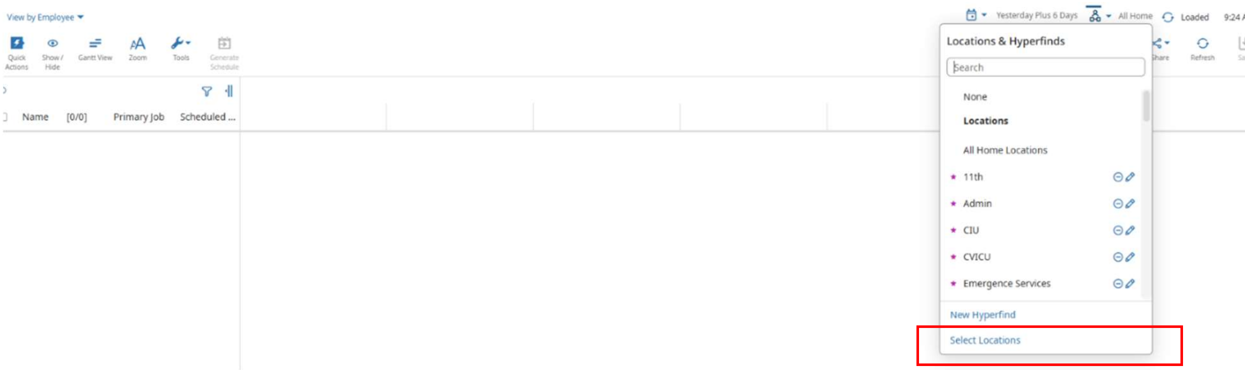

  - Users must fill in the required data in the parameters pane.
  - Select the appropriate **output (PDF/ CSV, XLSX)**
  - Select **Run Report** when done

# Creating Custom Locations

Creating custom locations is done in any of the scheduler tools. It is used when multiple departments need to be separated or if there is a need to segment off certain groups of employees based on department or job title.

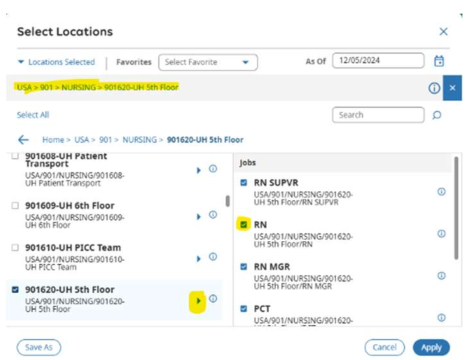
**Navigation> Home screen> Timecards> All Home**

- **Step One:** Select Locations




The view will default to *All Home Locations*, which will include all the employees who report to the supervisor.

- **Step Two:** Department Selection
  - Available locations will display on the left-hand side of the box.
  - Selecting the blue arrow will allow users to drill down to sub departments or jobs.
  - Selecting the department box will add that department or job to the current list to view.




This function does not work for timekeeping.

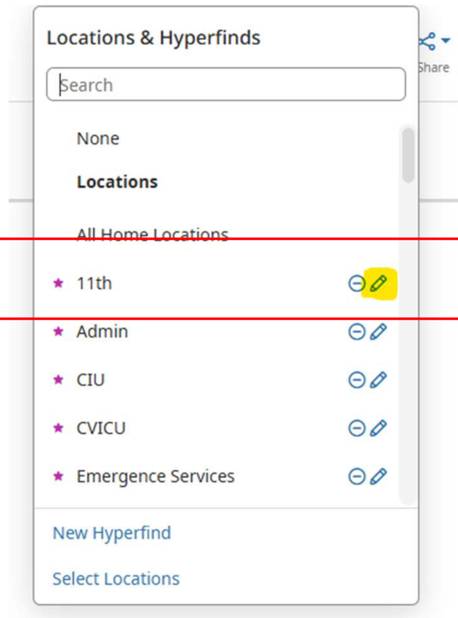
- **Step Three:**
  - **Save As**: Can be used to Name a Location

- Users can save locations as favorites
- Apply when done

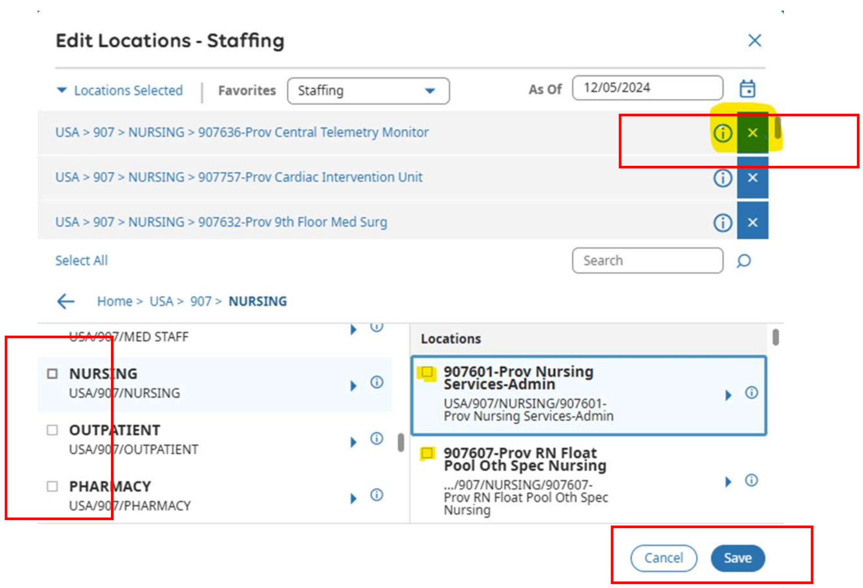
# Editing a Saved Location

**Navigation> Home screen> Timecards> All Home**

- **Step One**: Select the pencil icon to edit.




- **Step Two:** Click on the **X** to the right of the department to remove departments or jobs from the location.
  - Users can **check** boxes to the left of the department to add.
  - **Save** when done

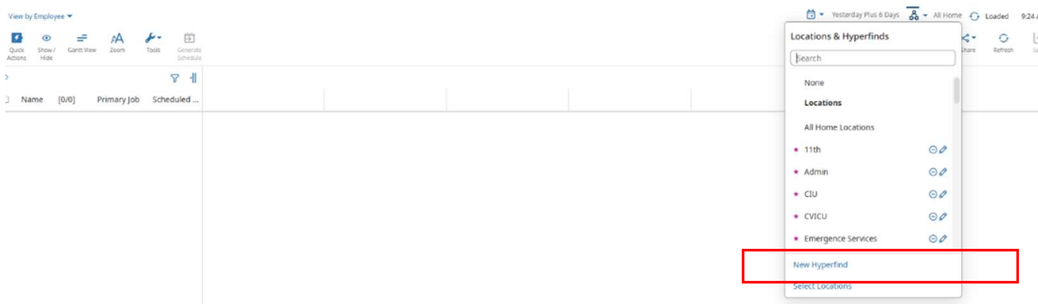


# Creating Custom Hyperfinds

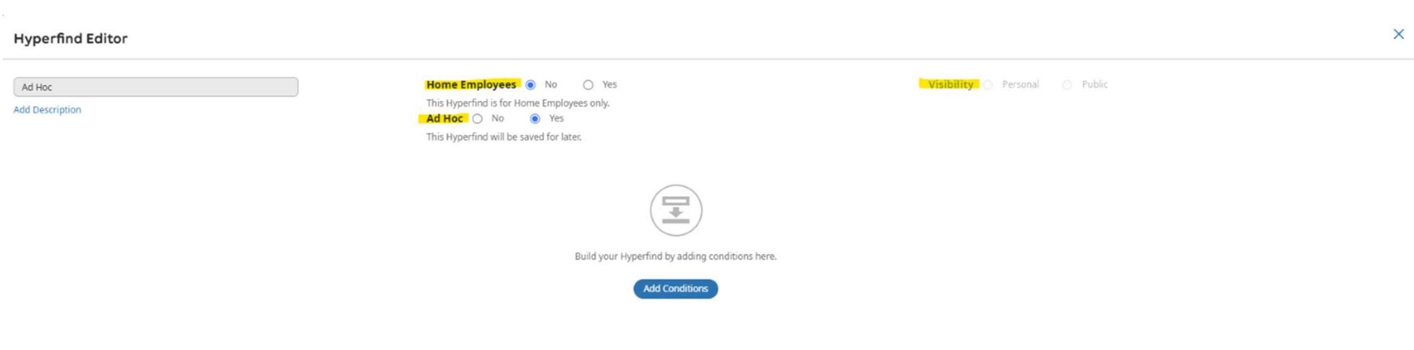
- Hyperfinds are used to create a group of employees based on specific identifiers such as name, job, ID number, department, etc...
- Hyperfinds can be used to filter staff in all tools, however, they are most used in timekeeping and reporting.
- Use of Hyperfinds in Scheduling tools will limit the performance of those applications.

**Navigation> Home screen> Timecards> All Home**

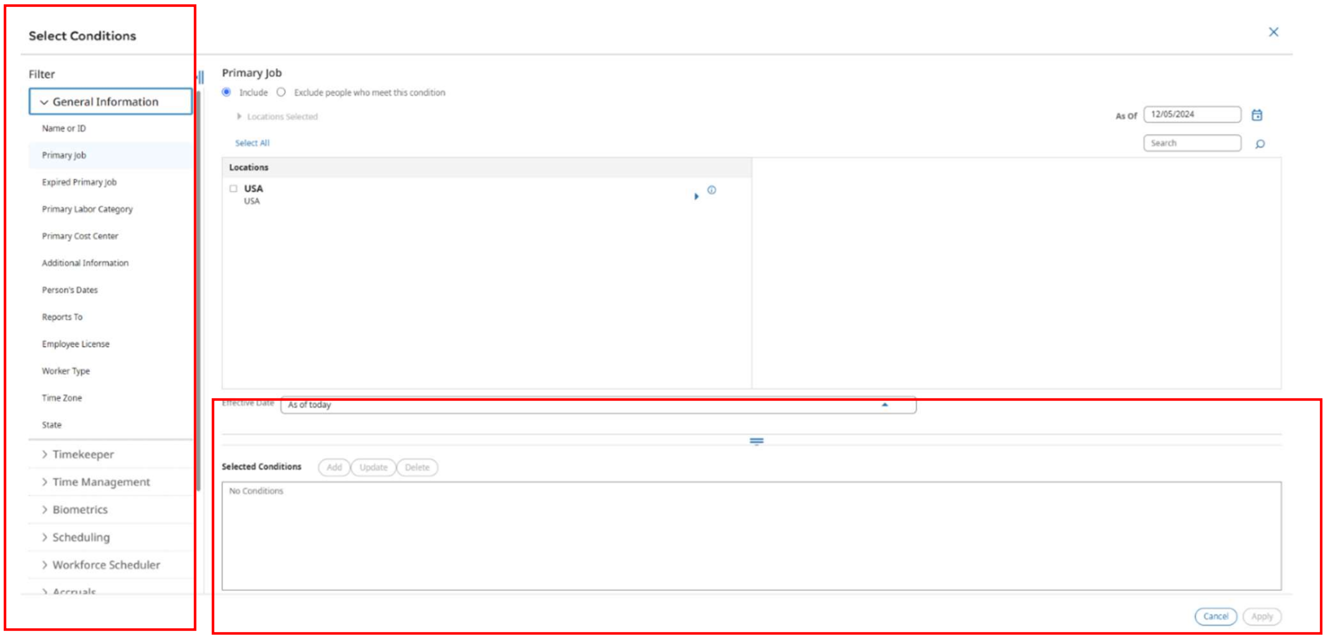
- **Step One:** Select New Hyperfind from the dropdown.




- **Step Two: Hyperfind Editor Functions**
    - **Home Employees:** No or Yes
        - Users can search employees in home departments only
    - **Ad Hoc**: No or Yes
        - Users can save a name to a function to be used later.
            - Select **Yes** if this will be a one-time search.
            - Select **No** if the search will be saved. Users will be prompted to add a name and description for the search parameters.
    - **Visibility**:
        - **Personal**: Users can save their searches, if it will be needed for departments other than their own.
        - **Public**: Hyperfinds will be visible to the whole organization.

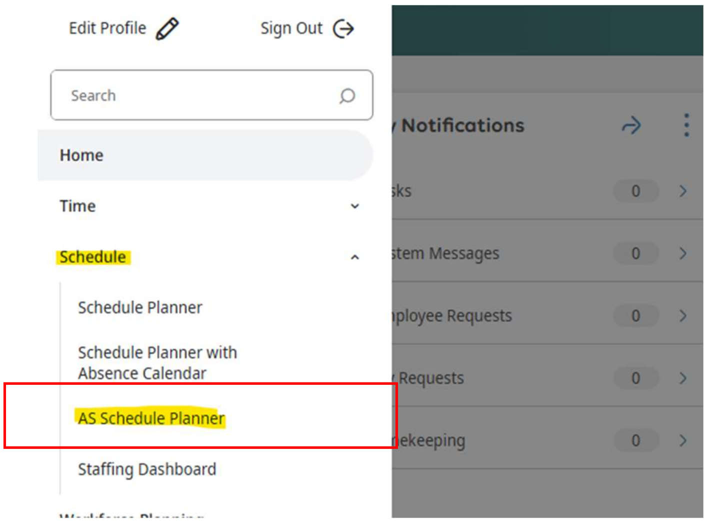


- **Add Conditions**
  - **Filters**: The filters can be used to select the conditions users would like to apply to the search.
  - Select **Add** to include the selected conditions.
  - Select **Delete** to remove conditions.
  - Select **Apply** when finished



## Entering an Employee Schedule

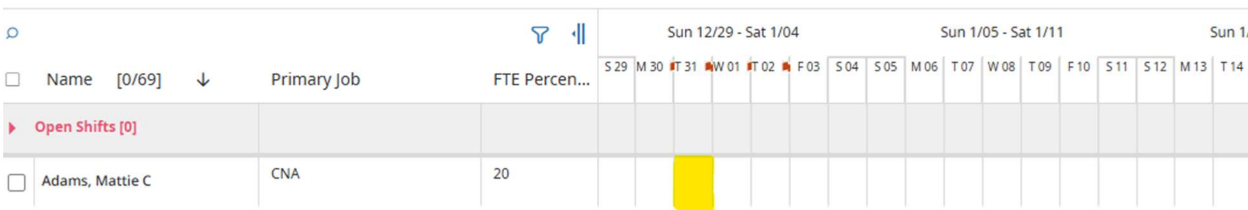
- **Step One:** Select the Hamburger Icon on the Home screen, then Schedule, then AS Schedule Planner.



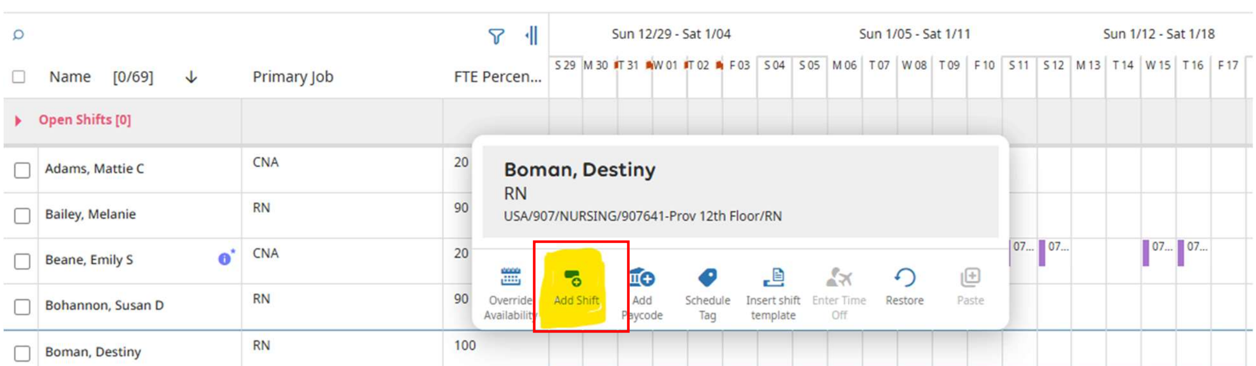

- **Step Two:** Users can use the **Schedule** and **Location** to determine the time and the department the employees would like to work.

**Users have four (4) options to choose from when entering in an employee's schedule. Use one of the following options listed on the tip sheets below.**

- **Option 1:**
  - **Left click** in the box of the schedule to add a shift. Manually type in the shift start and end times separated by a (-)
    - Example: 0700-1900
    - 7am-7pm
    - 7:00am-7:00pm
    - Press **Enter** key
    - Select **Save**

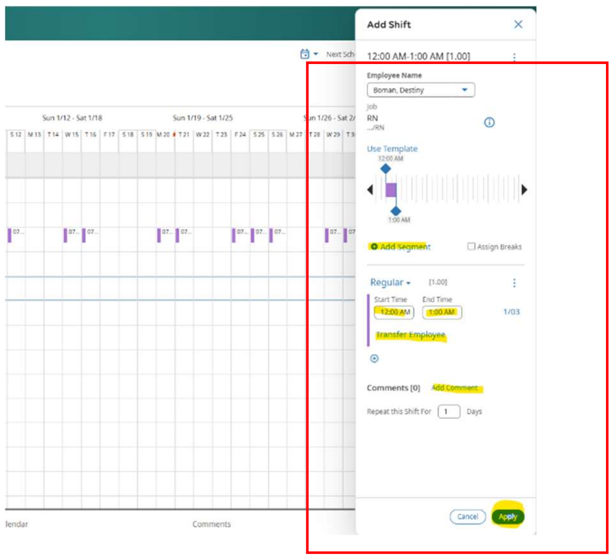



- **Option 2:**
  - Right click on the box users want to add schedule to.
  - Select **Add Shift**.

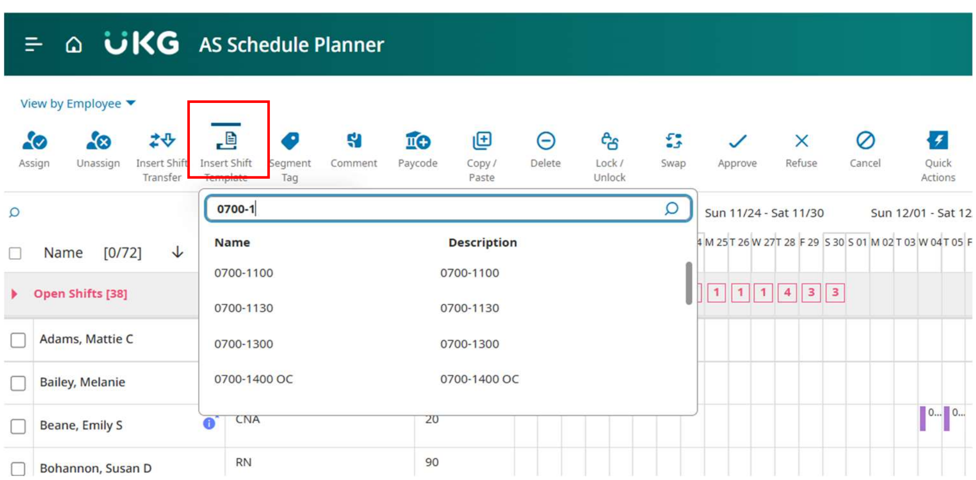



*This will open a detail pane on the Right side of the screen to allow users to add shift information.*

- **<u>Option 2 (continued):</u>**
    - Enter a preset shift template
    - Separate the shift into segments
    - Manually enter a start and end time
    - Transfer the employee to another department or job
    - Add a comment to the shift
    - Select **Apply** when all the required information is completed.
    - Select **Save** when done




- **<u>Option 3:</u>**
    - Open the Quick Actions tab on the Schedule Planner.
    - Select **Insert Shift Template**



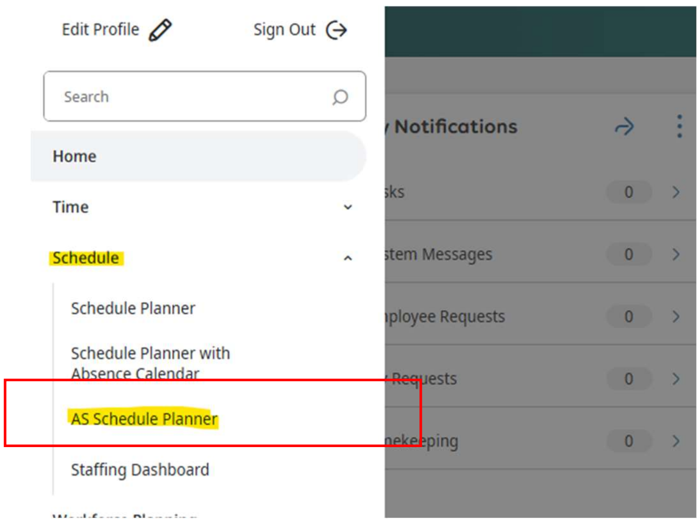
- A crosshair cursor will appear and every schedule box that is selected will be assigned to that shift.
- Select the Insert Shift Template icon again to stop.
- Select Save

- **Option 4:**
  - Use the Quick Actions tab to select Copy/Paste
  - Select a shift to copy.
  - A crosshair cursor will appear, and every schedule box that is selected will be assigned to that shift.
  - Select Save

*******This process with copy the shift exactly, including any work rules, shift tags, or notes*******

# Entering Pay Codes on an Employee Schedule

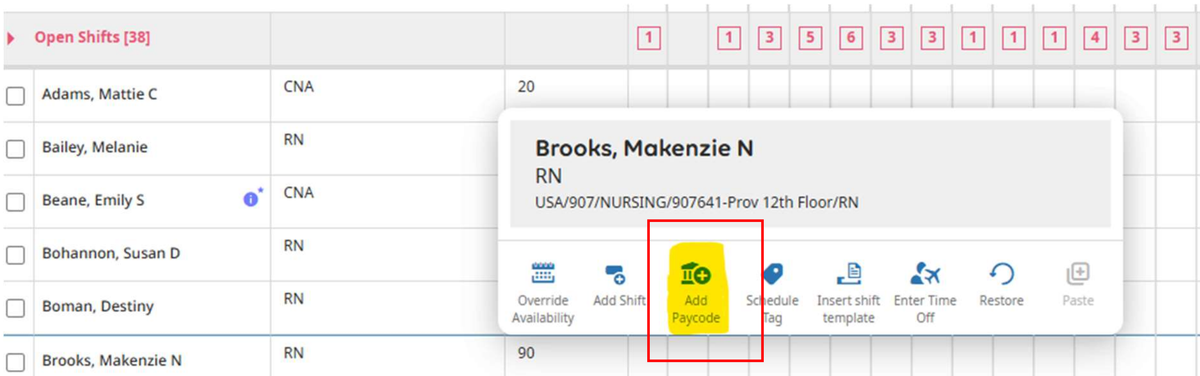
- **Step One:** Select the Hamburger Icon on the Home screen, then Schedule, then AS Schedule Planner.



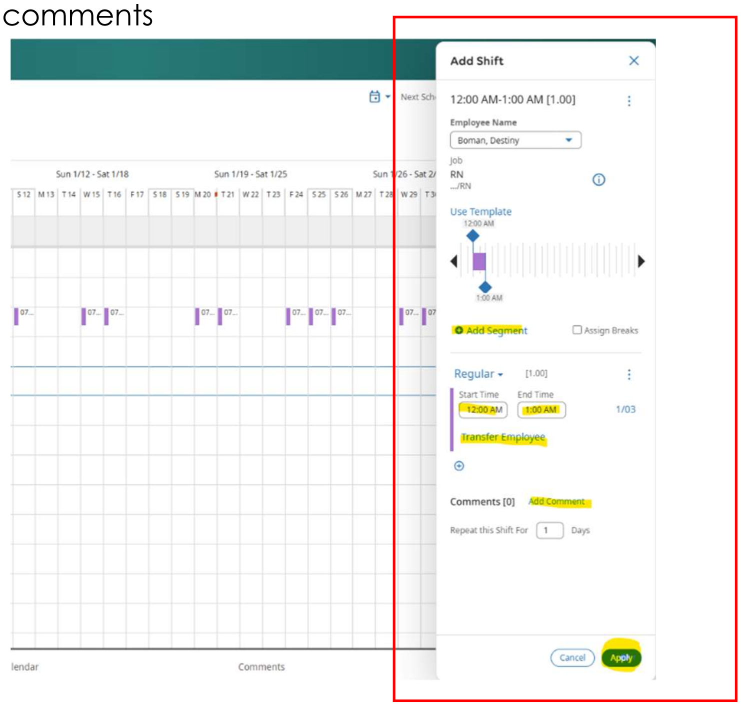

- **Step Two:** Use the Time Frame and Location menus to select the schedule time and department work on.


*There are multiple options users can choose from when adding pay codes.*

- **<u>Option 1</u>:**
    - **<u>Step One</u>**: Right click on the box to add a schedule to. Select **Add Paycode.**



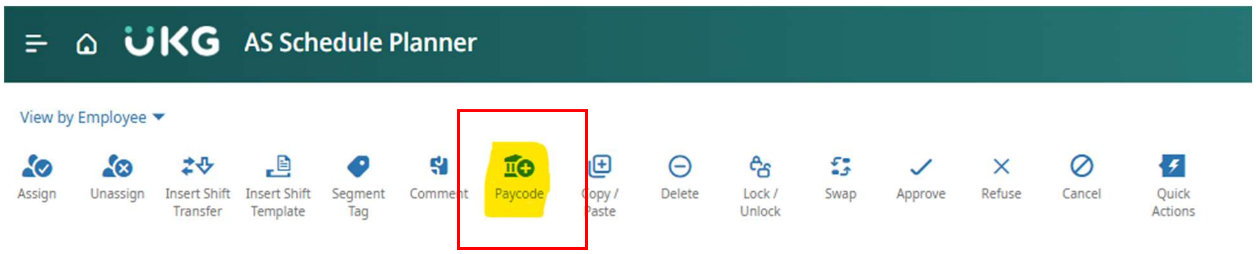

- Select the Effective Date
- Select the Paycode
- Select the start time (Default is 12:00am)
- Select Duration for the Paycode from dropdown menu
- Specify the number of hours
- Override the shift (remove shift from schedule)
- Create an open shift (Creates an available shift for remaining staff to view/fill)
- Repeat for additional consecutive days.
- Add comments



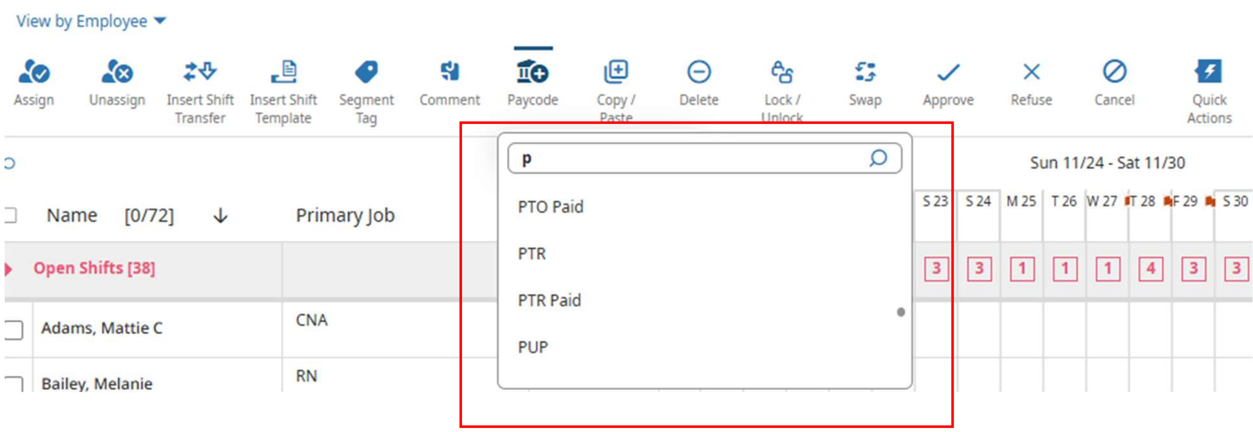
***This process works on all dates whether there is a scheduled shift or not.***

- Select Apply when all the required information is completed.
- Select Save

- **<u>Option 2:</u>**
  - **Step One:** Access the Quick Actions tab on the upper left side of the Schedule Planner. Select Paycode.




  - Select the appropriate paycode to use from the dropdown menu.




  - A crosshair cursor will appear and every schedule box that is selected will be assigned a pay code for the full scheduled shift. This will create an open shift to match the necessary coverage for that department.
  - ***Note:*** *This only works on days when the employee currently has schedule. This will not work on blank dates.*
  - Select the Paycode icon again to **stop**.
  - Select **Save**

**<u>Option 3: </u>Copy/ Paste**

- Use the Quick Actions tab to select Copy/Paste
- Select a Paycode that you want to copy.
- A crosshair cursor will appear and every schedule box that is selected will be assigned that Paycode.
- Select **Save**

*******This process with copy the Paycode <u>exactly</u>, including any work rules, shift tags, or notes*******

USA HEALTH

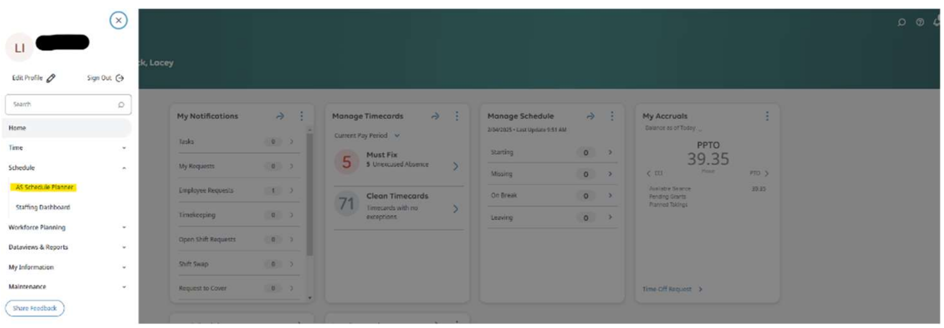
# Employee Groups

Employee Groups are used to filter staff based on personal preference. It is also used with Advanced Scheduler to place staff in groups for self-scheduling.

- Chemo Nurse
- Contract Staff
- CRRT / ECHMO
- Days
- Evenings
- Nights
- Orientation
- PRN
- RRT
- Schedule Group A/B/C/D

## Adding Employees to Groups

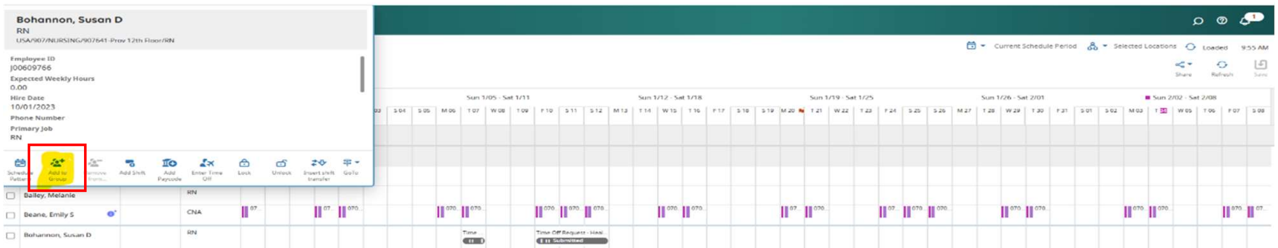
- **Step One**: Select the Hamburger icon, then AS Schedule Planner



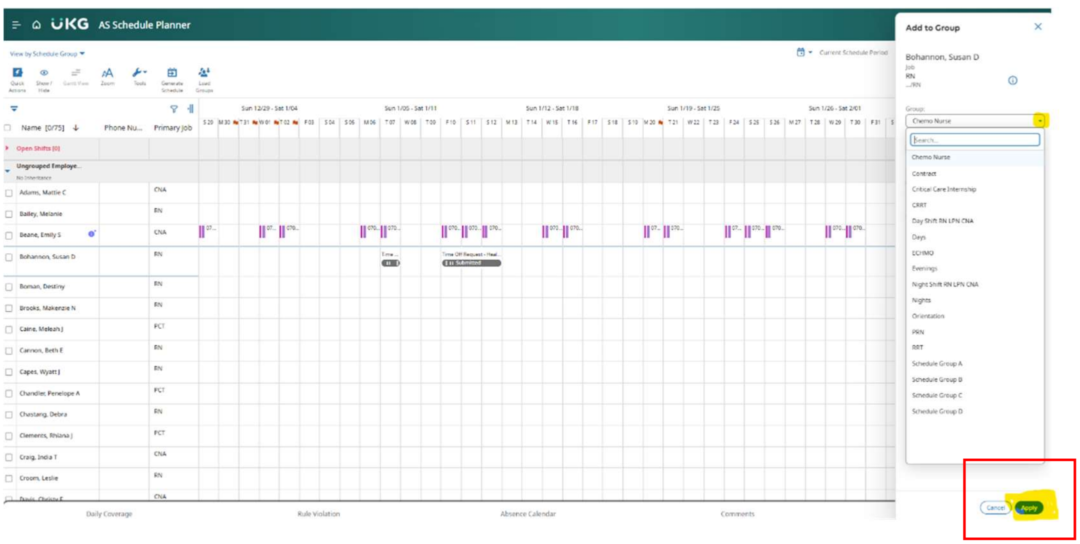

- **Step Two:** Select the Location that is intended to be put into a group.


- **Step Three:** Under the "View By" drop down, Select "Schedule Group".

- **Step Four:** Right Click on the employee(s). (Multiple employees can be selected using the checkboxes on the far left of the scheduler).
  - Select “Add to Group”




- **Step Five**: Select Group that you wish to add Employee(s) to.




  - Select Apply when done

*Note: Individual employees can be in multiple groups*

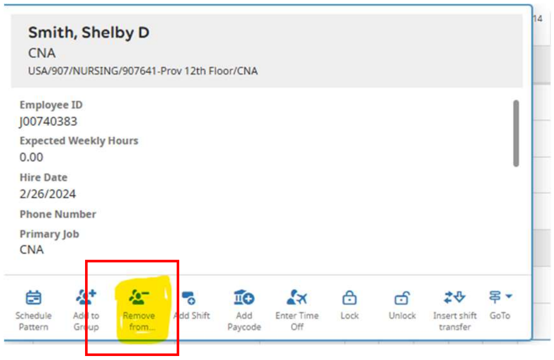
## Removing Employees from Groups

- **Step One:** Navigate to AS Schedule Planner

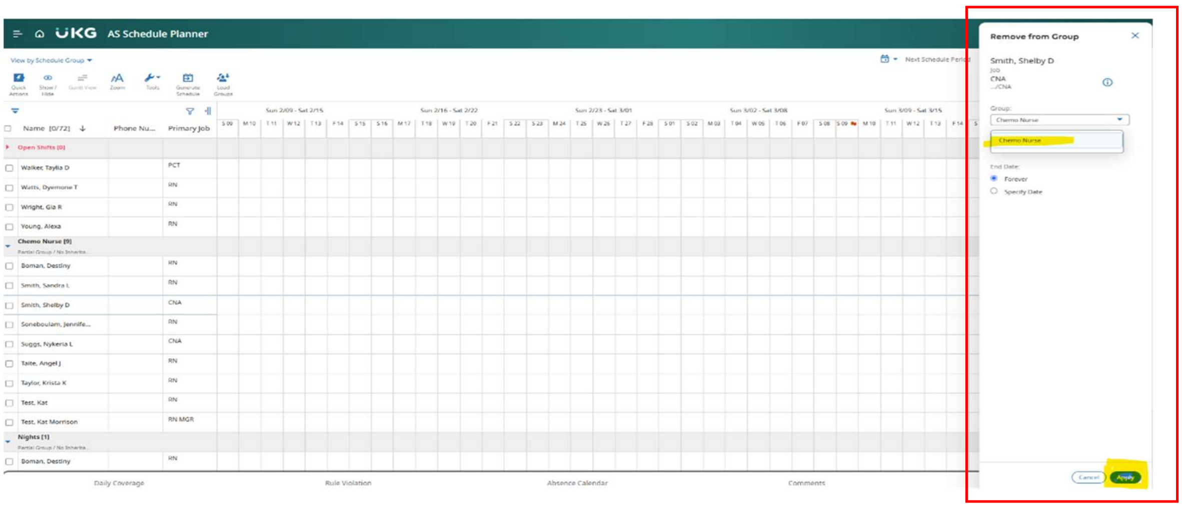
*Employees should make sure they are on the Current Schedule Period*

- **Step Two**: Select the Location for the intend to set groups to be set in
  - Under the “View By” drop down, Select “Schedule Group”

- **Step Three:** Right Click on the employee(s) (Multiple employees can be selected using the checkboxes on the far left of the scheduler).
  - Select “Remove from Group”




- **Step Four:** Select Group the Employee(s) needs to be removed from.
  - Select Apply when done.

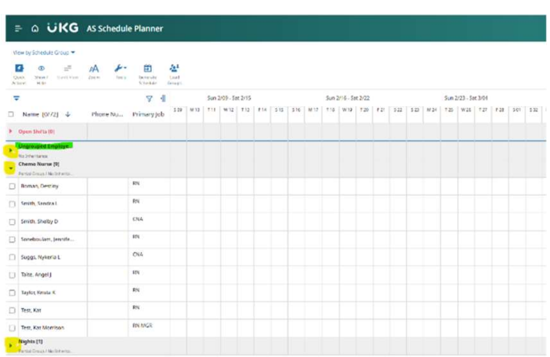



## Using the View by Schedule Groups

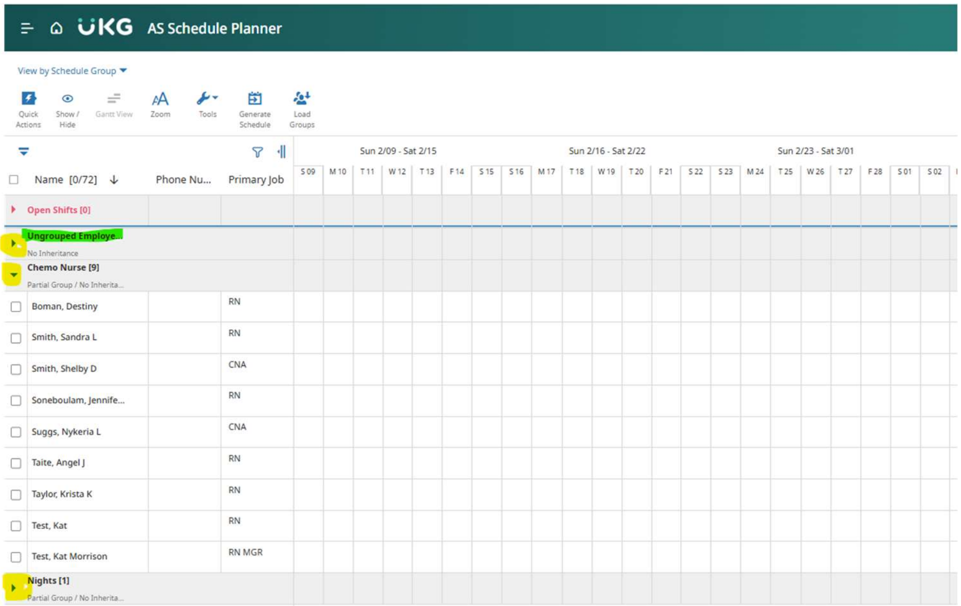
- **Step One:** Navigate to AS Schedule Planner

*Employees should make sure they are on the Current Schedule Period*

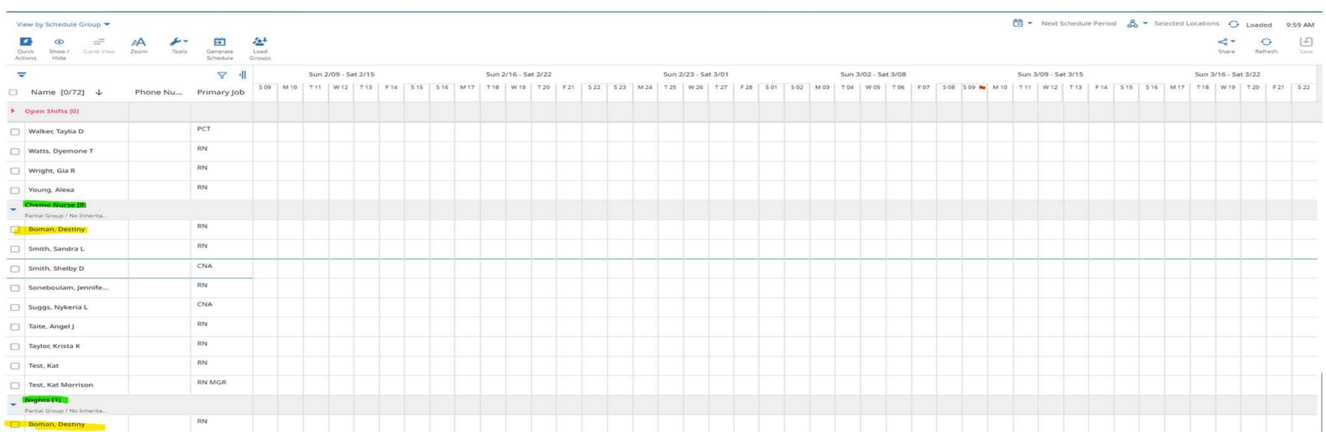
- **Step Two**: Select the Location for the intend to set groups to be set in
  - Under the "View By" drop down, Select "Schedule Group"
  - Ungrouped employees will appear at the top of the list.



Collapse and Expand Groups using the arrow icon to the left of the Group Name.




If an employee is in multiple groups, then they will appear multiple times on the schedule.



All other scheduler functions will work the same. (i.e., Quick actions, Schedule Generator, Schedule Posting, Daily Coverage, Audit, etc...)