

AS Scheduler Planer Overview

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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

Last Edited February 4, 2025



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Quick Actions

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Assign	Unassign	Insert Shift Transfer	Insert Shift Template	Segment Tag	Comment	Paycode	Copy / Paste	Delete	Lock / Unlock	Swap	Approve	Refuse	Cancel	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



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.

Edit Profile 🖉	Sign Out (
Search	۵
Home	
Time	•
Schedule	^
AS Schedule Planner	
Staffing Dashboard	
Workforce Planning	~
Dataviews & Reports	~

• **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</u>
 <u>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.

Cancel Apply

• Select <u>Apply</u> and <u>Save</u> when done.

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Nor Pattern In17/2024 Forew No. Sunday Monday Tuesday Wednesday Thursday Friday Saturda In1772024 O	CNA /CNA	Pattern Templati	55년 Salt Comment Copy/Paste Template	() Delete						
No. Sanday Modely Tuesday Wednesday Tunsday Tunsday Pride Sanday 1117/2024 Image: Sanday Image: Sanday<	New Pattern 11/17/2024-Forever	Add New Pattern								
11/172024 Image: Contract of the	Start Date*	No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	
Info Dates 	11/17/2024	• •								
Specify Date Define Pattern Fork 2 Week(3) Goverable Other Fatterns Start Pattern Ose Week 1	End Date*	⊕ ⊖ 2	2	0700-1900	0756-1900			0700-1900	0700-1900	
Define Pattern For * 2 Week(t) * Overade Other Fatterns Start Pattern On * Week	 Specify Date 							-		
2 Week(s) ● □ Override Other Patterns Start Pattern One Week 1	Define Pattern For *									
Paters Sart Paters One Week 1	2 Week(s) V Override Other									
Week 1	Patterns Start Pattern On*									
	Week 1									
									_	_



Editing/Ending an Existing Pattern

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

ielanger, Mareha B N ./RN		0	Pattern Template) Shift Comment Co Template	Delete					
• New Pattern 12/29/2024-2/08/2025	O A	dd New	Pattern							
Test Detect			No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
12/29/2024	€	Θ	1							
and Date*										
- Forever	_									
Specify Date										
2/08/2025										
Define Pattern For*										
1 Week(s) 🗸										
Override Other										

To terminate a pattern simply select an end date.

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



DataViews

<u>Dataviews</u> are customized reports which can be run, exported or both displaying an indepth 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.
 - o 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.

::											
- ω υ	NG Dataview Library										0-ST Schedule Summary X
vigate to whiteads											Subject Employee
Name: Subject:	Accruais Test Employee	>	Name: Subject:	Certification Expiration Date and Skills Employee	>						Time Period Current Schedule Period
theduling											Location All Home
Name: Subject:	0-ST Approve Time Off Requests Employee	>	Name: Subject:	0-ST Schedule Detail - Shift Segment Employee	>	Name: Subject:	0-ST Schedule Planner Column Set Employee	>	Name: Subject:	0-51 Emp	Description Startup Dataview - Displays scheduled pavrode data for employees: Filtered
Name: Subject:	0-ST Schedule Summary - Paycode Employee	0	Name: Subject:	0-ST Schedule Summary - Shift Employee	>	Name: Subject:	0-ST Time Off Requests History Employee	>	Name: Subject:	0-5" Em	down to exclude null columns, and sorted by name, start date, start time, and paycode name. Recommended for
Name: Subject:	Float Employee	>	Name: Subject:	Job Transfer Set Employee	>	Name: Subject:	Schedule Group Employee	>	Name: Subject:	Sch Emj	managers, admins, and support roles.
Name: Subject:	Shift Swap Employee	>	Name: Subject:	Staffing Dashboard Employee	>						
mekeeping sunt: 14											
Name: Subject:	0-ST Accrual Details - Basic Employee	>	Name: Subject:	0-ST Accrual Details - Full Employee	>	Name: Subject:	0-ST Accrual Transactions Details Employee	>	Name: Subject:	0-5" Emp	
Name: Subject:	0-ST Employee Approval Summary Employee	>	Name: Subject:	0-ST Employee Hours by Job Employee	>	Name: Subject:	0-ST Employee Hours by Labor Category Employee	>	Name: Subject:	0-51 Emi	
Name: Subject:	0-ST Identify Pending Corrections Employee	>	Name: Subject:	0-ST Managers with Unapproved Jobs Employee	>	Name: Subject:	0-ST Pay Period Close Employee	>	Name: Subject:	0-ST Emp	
Name: Subject:	0-ST Punch Audit Employee	>	Name: Subject:	Pending Timecard Transactions Employee	>						
											(Open Dataview)



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.

Current Schedule Period	<	>	🖧 👻 All Home Locations	0	Loaded	11:01 AM
			Detai	ls	• Restore	Save

• 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

<u>Reports</u> 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.

Ξ Δ ŪKG Report Library		Sele	ct Report	×
		> Act	ivities	
Reporting Unselect All Delets Run Report Jobs		> All		
No completed reports are available. Click "Run Report" to select and run a report.		> Att	endance	
Completed [0]		> Au	dit	
In Progress [0]	> He	althcare Productivity		
Upcoming Reports [0]		> Hu	man Capital Management	
		> Lea	ive	
		> Scheduler		
		> Tin	nekeeping	

• Click on the dropdown arrow to view each report option. A brief description will display

with the on the contents of the selected report.

Select Report	×
> Activities	1
∽ All	
Absent Employees	- 11
Accrual Debit Summary	- 11
Accrual Detail Report	- 11
Accrual Detail Report With Running E	Bal
Accrual Reporting Period Summary	- 11
Actual vs Schedule by Job	- 11
Attendance Action Detail	
Attendance Analysis	
Attendance Incident Detail	
Attestation Daily Detail	
Attestation Daily Detail - Assignment	s
Attestation Daily Summary	
Audit Report	
Condensed Employee Time Detail	
Condensed Time Detail - Assignment	3
Coverage Detail - Weekly	
Coverage Variance by Zone	
Daily Headcount	
Daily Productivity Trend - 14 Days	
Daily Staffing – Condensed	
Department Actual	
Efficiency Rollup by Employee Report	£
Employee Actual Hours	

- **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





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.

	Repeats	
Reporting Jobs X	By Month	`
Timeframe *	Select Months*	
⊟ • • • >	January	
	February	t
Hyperfind *	🗹 March 🗹 Septer	nber
å *	🗹 April 🛛 Octob	er
Output Format *	🗹 May 🗹 Noven	nber
PDF	🗹 June 🗹 Decem	ber
Schedule		
One-Time Scheduled Run	Day of Month	
 Recurring Scheduled Run 	1 *	
Report Date *	Start Date*	
12/05/2024	12/05/2024 🗎 Clear	
Time*		
11:52 AM	Start Time*	
Run As	11:46 AM	
Select User *	End Date	
Test, Jonathan De La Fuente	Select a date	
0	Select a date	
Select Role Assignment*	Forever	
Initial Role		
Report Recipients		
Search		
0		

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

View by Employee 💌			🗧 👻 Yesterday Plus 6 Days	🖧 🕶 All Horr	e G L	oaded 9:24 AM
🖸 💿 🚅 🗚 👉 🖄			Locations & Hyperfinds		8-	0 U
Quick Show / Gantt View Zoom Tools Generate Actions Hide Schedule			ßearch		share	Refresh Save
Name [0/0] Primary Job Scheduled			None Locations			
			All Home Locations			
			* 11th	00		
			* Admin	00		
			* CIU	00		
			★ CVICU	00		
			* Emergence Services	00		
			New Hyperfind			
			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:
 - o Save As: Can be used to Name a Location



- Users can save locations as favorites
- o Apply when done

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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
 - o Users can search employees in home departments only
- Ad Hoc: No or Yes

0

- 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.

Hyperfind Editor			×
Ad Hoc Add Description	Home Employees No Yes This Hyperfind is for Home Employees only. Ad HoE No Yes This Hyperfind will be saved for lates. 	Visibility OPersonal OPublic	
	Build your Hyperfind by adding conditions here.		
	Add Conditions		



- 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

Select Conditions		×
Filter	II Primary Job	
✓ General Information	 Include O Exclude people who meet this condition 	(1) 107 (MA)
Name or ID	Locations Selected Salert all	As of 12/05/2024
Primary Job	Lessing	
Expired Primary Job		
Primary Labor Category	USA	
Primary Cost Center		
Additional Information		
Person's Dates		
Reports To		
Employee License		
Worker Type		
Time Zone	Effective Date As of today	•
State		
> Timekeeper	Selected Conditions (Add) Undate Delete	7
> Time Management	No Conditions	
> Biometrics		
> Scheduling		
> Workforce Scheduler		
> Accusale		
		Cancel (Apply)

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.

- <u>Option 1:</u>
 - 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

Q					8	4		5	Sun 12	/29 - 5	Sat 1/0)4				Sun 1/	05 - S	at <mark>1/1</mark>	I.				Sun 1/
	Name	[0/69]	\checkmark	Primary Job	FTE Perc	en	S 29	M 30	T 31 🗖	W 01	T 02 🛤	F 03	5 04	S 05	M 06	T 07	W 08	T 09	F 10	S 11	<u>5 12</u>	M 13	T 14
×	Open Shif	ts [0]																					
	Adams, N	lattie C		CNA	20																		

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

Q			₽ 4		Sun 12/29	- Sat 1/04			Sun 1/05	Sat 1/1	1			-	Sun 1/	12 - Sa	t 1/18	
	Name [0/69] 🗸	Primary Job	FTE Percen	S 29 M 30	T 31 W 0	1 🗖 02 角 F	03 5 04	S 05 M 06	T 07 W	08 T 09	F 10	S 11	S 12	M 13	T 14	W 15	T 16	F 17
×	Open Shifts [0]																	
	Adams, Mattie C	CNA	20 Bom	an, De	stiny													
	Bailey, Melanie	RN	90 USA/90	7/NURSING	G/907641-F	Prov 12th F	loor/RN											
	Beane, Emily S	CNA	20		fο	0		² X	0		ıÐ	07	07			07	07	
	Bohannon, Susan D	RN	90 Override Availability	Add Shift	Add Paycode	Schedule Tag	Insert shift template	t Enter Tim Off	e Resto	re F	aste							
	Boman, Destiny	RN	100															

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

• Option 2 (continued):

- Enter a preset shift template
- Separate the shift into segments
- o Manually enter a start and end time
- o Transfer the employee to another department or job
- o Add a comment to the shift
- Select **Apply** when all the required information is completed.
- o Select Save when done



• Option 3:

- o Open the Quick Actions tab on the Schedule Planner.
- Select Insert Shift Template

= a üKG	AS Schedule I	Planner								
View by Employee ▼ 2 2 2 2 2 4 Assign Unassign Insert Shift Transfer	Insert Shift Template	Comment Paye	tode Copy / Paste) Delete	දිය Lock / Unlock	Swap	Approve	× Refuse	Cancel	Quick Actions
♀ □ Name [0/72] ↓	0700-1 Name 0700-1100		Description	n			Sun 11/24 - 4 M 25 T 26 W 2	Sat 11/30	Sun -	12/01 - Sat 12 F 03 W 04 T 05 F
Open Shifts [38]	0700-1130		0700-1130			I]]]]]]	4 3	3	
Bailey, Melanie	0700-1300 0700-1400 OC		0700-1300 0700-1400 O	C						
Beane, Emily S	CNA RN		20 90							0 0

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- 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.
- o 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.
- o 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**.

•	Open Shifts [38]			1		1	3	5	6	3	3	1	1	1	4	3	3
	Adams, Mattie C	CNA	20														
	Bailey, Melanie	RN	Brooks	, Mal	kenzi	ie N	1										
	Beane, Emily S	CNA	KN USA/907/N	URSING	/90764	1-Pro	ov 12th	n Floor	r/RN								
	Bohannon, Susan D	RN			fo		0		_		S ×	4		í	+		
	Boman, Destiny	RN	Override Add Availability	d Shift	Add Paycod	e	Schedul Tag	le In te	sert shift emplate	Ente	er Time Off	Re	store	Pa	ste		
	Brooks, Makenzie N	RN	90														

- Select the Effective Date
- Select the Paycode
- o Select the start time (Default is 12:00am)
- o Select Duration for the Paycode from dropdown menu
- o 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.
- o 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
- Option 2:
 - **Step One:** Access the Quick Actions tab on the upper left side of the Schedule Planner. Select Paycode.

÷	ن ۵	KG	AS Sch	edule I	Planner	5								
View by	Employee Unassign	↓ Insert Shift Transfer	Insert Shift Template	Segment Tag	Comment	TO Paycode	(lopy / Paste) Delete	<mark>උය</mark> Lock / Unlock	Swap	Approve	X Refuse	Cancel	Quick Actions

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

V	lew by	Employee	•																
As	o sign	V nassign	≵ Insert Shift Transfer	Insert Shift Template	Segment Tag	S Comment	Paycode	Copy / Paste) Delete	Cc Lock / Uplock	Swap	Appr	ove	× Refus	se	Canc	el	Qui	ck
С							P				Q			S	un 11.	/24 - S	at 11/3	30	
	Nan	ne [0/7	72] 🗸	Pri	mary Job		PTO Paid					S 23	<mark>5 2</mark> 4	M 25	T 26	W 27	T 28 🗖	F 29 🛤	S 30
	Open	Shifts [38]	I				PTR					3	3	1	1	1	4	3	3
	Adan	ns, Mattie	с	CN/	A		PTR Paid				0								
	Baile	y, Melanie		RN															

- 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



Option 3: 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.
- o Select Save

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



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

	\otimes										0 0
LI Contraction of the second s	sk, La										
Search	٥	My Notifications	ə :	Manage Tir	necards 🌧	Manage Schedule	ð		My Accruais		
Home		Tesks	(4) >	Current Pay P	eriod v	2/54/2025 - Last Updats 9:51 AM	6		Estance as of Today		
Schedule		My Kequests	100.2	5 5	Unexcused Absence	Mosing	0	2	39.35		
AS Schedule Planner		Employee Requests	0.0	71 0	ean Timecards	On Break	0			20.15	
Workforce Planning		Timekeeping	C (0)		reprions	Leaving	0	>			
Dataviews & Reports		Open Shift Requests	(8) >								
My Information		Shift Swap	(0								
Share Feedback		Request to Cover							Time Off Request >		

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

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View by Employee	AA Ja	e 💼																																đ	- 10	prent	(cheou	le Perio	× &	- 3	lected i	ocation	8 0 8*	Losde	9)	53 AW
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• Step Three: Under the "View By" drop down, Select "Schedule Group".

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View by Employee 💌																									(1) ~	Current	Schedu	le Perios	۵	• Selve	teri Loc	ations (Load	Jed ?	53 AM
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- **Step Four:** Right Click on the employee(s). (Multiple employees can be selected using the checkboxes on the far left of the scheduler).
 - \circ ~ Select "Add to Group" ~

Bohannon, Susan D RN USANGZARI (ISSING-2007641-Prov 12th Grow/IBN																																			Q	0	æ
Fmployee ID J00609766 Expected Weekly Hours		1																								6	• 0	irrent S	chedul	e Period	&	 Select 	rted Lo	ications s	0.	Naded O Refres	935 AM
0.00 Hire Date						Sun	1/05 - 5	iat 1/11					Sun 1/1	2 - Sat	1/18					Sun 1/	19 - Sat	1/25					Sun 1	(26 - 5a	2/01					Sun 2/0	12 - Set 2)	08	
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D Bohannon, Susan D RN							•			Reques	- HAN																										

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

ew by Schedule Group 💌	A Jacom Tools	Cenerate Schedule	At Load																								• Cur	ient Sch	edule Per	riod	Bohannon, Susan D Job RN _/RN
		8 1		Sun 12/2	- Set 1/0				Sun 1	125 - Sat 1/1	1			5	un 1/12 -	Sat 1/18				5	iun 1/19	- Set 1/2	5				Sun 1/2	6 - Sat 2	01		Group:
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Onen Shifts ISI																															Bearth
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Caine, Meleah J		FCT																													20N
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capes, wyart]		877																													Schedule Group B
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Chastang, Debra		EN																													Schedule Group D
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Craig, India T		CNA																													
Croom, Leslie		RN																													
		CNA																													

• 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"

LS HEALTH

Smit	th, She	lby D							
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USA/90	7/NURSIN	G/907641-I	Prov 12th Fl	oor/CNA					
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schedule	Add to	Remove	Add Shift	Add	Enter Time	Lock	Unlock	Insert shift	GoTo

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

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Boman, Destiny		RN																																				
Smith, Sandra I.		RN																																				
Smith, Shelby D		CNA																																				
Soneboulam, Jennife		RN																																				
Suggs, Nykeria L		CNA																																				
Taite, Angel J		RN																																				
Taylor, Krista K		RN																																				
Test, Kat		RN																																				
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Nights (1) Partial Group / No Schwitte																																						
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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.

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Ŧ			7 4			Sun 3	1939 - 54	1 2/15					Sun 2	194-51	e 2/22					Sun 2	/23 - 58	(30)			
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	Boman, Destiny		RN																						
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Last Edited February 4, 2025

LS HEALTH

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

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Vi	ew by Schedule Group 👻																								
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1	7		8 1			Sun	2/09 - 5	at 2/15					Sun 2	/16 - Sa	at 2/22					Sun 2	/23 - Sa	t 3/01			
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	Chemo Nurse [9] Partial Group / No Inherita																								
כ	Boman, Destiny		RN																						
	Smith, Sandra L		RN																						
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כ	Soneboulam, Jennife		RN																						
כ	Suggs, Nykeria L		CNA																						
)	Taite, Angel J		RN																						
כ	Taylor, Krista K		RN																						
כ	Test, Kat		RN																						
2	Test, Kat Morrison		RN MGR																						

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

View by Schedule Group 🔻																															6	Ne	t Sched	ile Peri	id 🖧	▼ Se	lected L	ocation	0	Loade	2d 5	9:59 AM
Quick Show / Gantt View	AA J	ols Generate Schedule	Load Groups																																				Share	Refre	> seats	5ave
Ŧ		8 1	Ű.		Sun 2/0	09 - Sat 2	/15				Sun	2/16 - 54	at 2/22					Sun 2	/23 - Sa	t 3/01					Sun 3	02 - Sat	3/08				Sui	3/09 -	Sat 3/15					Sun 3	16 - Sat	3/22		
□ Name [0/72] ↓	Phone Nu.	. Primary Job	5 09	M 10	T 11	W 12 1	13 11	14 51	5 51	5 M 17	T 18	W 19	T 20	¥ 21	5.22	5 23	M 24	T 25	W 26	T 27	F 28	\$ 01	5 02	M 03	T 04	wos	TOS	F 07	5 08 5	10 🐜 N	10 71	1 W 1	2 T 13	F 14	5.15	5.16	M 17	T 18	W 19	T 20	F 21	5 22
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Boman, Destiny		RN																																								

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