



## **Workforce Management (WFM)**

*Employee Tools (ETM/Mobility) and  
Supervisors' Basic Scheduling Guide*

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## Scheduling Rules

## Scheduling Rules

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### Schedule required for everyone

Due to the goal of automation and efficiency with scheduling and the goal of productivity/staffing analytics:

- Everyone must have a schedule but the timesheet/punches will drive pay.
  - Shift pay isn't paid to eligible staff without clocks and a schedule.
  - IVO Time isn't calculated for eligible employees without a schedule.
- Salaried (Exempt) staff must have a schedule and no longer punch in. No Shift—they are not paid.
- Hourly (NonExempt) staff must clock in and out for lunch. Illinois State law is a 20 minute meal break within the first five hours of the shift so we will be placing a meal break (unpaid, uninterrupted break) on the schedule to drive better staffing analytics (e.g. prevents meal breaks from including in nursing hours per patient days – if the employee does not take a lunch, that time will be included in those calculations).
- Must abide by **One Day Rest in Seven Act** for scheduling for hourly staff, whether a telecommuter or onsite employee and must abide by this for primary and secondary positions or when floating staff.

The **One Day Rest in Seven Act** requires at least 24 hours of rest for an hourly employee in every calendar week. It is a law intended to give employees a break from the strain of work. A calendar week is defined as seven consecutive 24 hour periods starting at 12:01 a.m. Sunday morning and ending at midnight the following Saturday.

Ideally, this is not a difficult rule to comply with, given most employees work five or less shifts per week. A pay period schedule for an 8-hour/day, 40-hour/week employee may look something like this given (O = off ; X = work):

Week 1						Week 2						
S	M	T	W	R	F	S / S	M	T	W	R	F	S
O	X	X	X	O	X	X	X	O	X	X	X	O

However, in period of peak census or turnover, we often ask our staff to work additional hours or shifts above their normal schedule. In addition, staff seeking additional hours may also make themselves available for additional shifts. The same individual in this case may have a schedule that may look something like this, which is compliant with the law in that it provides for a 24-hour rest period each week:

Week 1						Week 2						
S	M	T	W	R	F	S / S	M	T	W	R	F	S
X	X	X	X	O	X	X	X	O	X	X	X	X

Another variation of a compliant schedule may look like this (although not recommended):

Week 1						Week 2						
S	M	T	W	R	F	S / S	M	T	W	R	F	S
O	X	X	X	X	X	X	X	X	X	X	X	O

**A schedule may NOT look like this, even at the request of the employee (the first week does not provide for a 24-hour period of rest):**

Week 1						Week 2						
S	M	T	W	R	F	S / S	M	T	W	R	F	S
X	X	X	X	X	X	X	O	X	X	O	X	X

It is critical for all individuals who are involved in scheduling (including the individual employee) to be mindful of this requirement and pro-actively monitor staff work days per week. *Exceptions apply to Registered Nurses in the hospital setting who may not be scheduled above budgeted hours without the RN's voluntary agreement.*

In addition, schedules must comply with the Health Care Accountability Act - 92\_HB3536 – excerpted below regarding hourly healthcare staff scheduling:

5 circumstances beyond the individual's control.

6 (b) Notwithstanding any other provision of law to the  
7 contrary, and subject only to the exceptions included in this  
8 Section, a hospital may not mandate or otherwise require,  
9 directly or indirectly, a health care employee to work or be  
10 in on-duty status in excess of any of the following:

11 (1) The scheduled work shift or duty period.

12 (2) 12 hours in a 24-hour period.

13 (3) 40 hours in a 7-consecutive-day period.

14 Nothing in this subsection is intended to prohibit a  
15 health care employee from voluntarily working overtime.

16 (c) No health care employee may work or be in on-duty  
17 status more than 16 hours in any 24-hour period. Any health  
18 care employee working 16 hours in any 24-hour period must  
19 have at least 8 consecutive hours off duty before being  
20 required to return to duty. No health care employee may be  
21 required to work or be on duty more than 7 consecutive days  
22 without at least one consecutive 24-hour period off duty  
23 within that time.

## WFM Scheduling Compliance and Cost Control

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### WFM Makes this easier!

When creating work schedules, situations that would pose a violation in WFM such as:

- Weekly Rest will be denied.
- WFM will also provide a warning re: Overtime to help schedule someone into Overtime (you can still do it).
  - Secondary department will get Overtime (will be handled at go-live like it is in Kronos today).
- Alerts if over FTE
- Supervisors get notices on shift swaps and attendance control

### Start considering your department-specific scheduling policies and practices:

- 1) Are they current?
- 2) What might need updating?
- 3) 3) How do you balance your schedule so that you are not overstaffed for a weekday shift compared to a weekend shift, or a day vs night shift?

## How do Employees Appear on a Team (Department Cost Center) in WFM?

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### Driven by our HR System.

In the LIVE Production site for WFM:

- HR will terminate employees and will populate new hires/transfers on to your teams (departments) in WFM. Employees will appear on your team whether primary or secondary (your cost center) automatically when HR knows about it.
  - IMPORTANT for Advance Scheduling departments: YOU must remove the employee from future schedules in WFM yourself.
    - Employee's last day is 7/9, you must remove them from any scheduled dates/times on the schedule from 7/10 onward.

## WFM Role Permissions

One site does it all!

WFM contains timesheet (punching activity) and scheduling. What you see and have access to do is based upon role permissions created by our HR Department as follows:

Security/Role Permissions for WFM			
	Supervisor	Employee	Scheduler
What type of information will you see?	<ul style="list-style-type: none"> <li>Edit Timesheets</li> <li>See Self but not edit</li> <li>Authorize timesheets</li> <li>Approve Interactions</li> <li>Submit Leave Request</li> <li>See Self but not edit Reports</li> <li>Can Delegate Messages</li> <li>Schedules employees</li> </ul>	<ul style="list-style-type: none"> <li>See Self but not edit</li> <li>Submit Time Off/Leave Request Messages via ETM (Employee Time Mgmt.) and Mobile Apps but not via TimeClock iPads</li> </ul>	Schedules employees but no Timesheet edits
Timesheet Access:	Edit	View Only	View
Timesheet Authorization (Approval):	Yes	No	No
Who approves time-off requests?	Yes	No	No
Who can run reports?	Yes	No	Yes - reports only for scheduling
Who can override departments (e.g. floating) or alternate/secondary positions?	Yes	No	Yes
Who can view pay rates/salary information?	No	Yes	No



## Accessing HELP

- **Human Resources: Employee List for Teams, Access/Security to WFM and Schedules:**
  - LOA, Attendance Control and HR Policy Interpretation
- **Payroll or Timesheet: Ashley Surprenant (36304) for RMC Corporation, or Genelle Hadedank (36302) for SLC Corporation**
  - All departments' timesheets due for authorization by Mondays at 11AM following end of the pay period.
  - **Just ONE unauthorized (red X) timesheet/edit means payroll cannot be run for health system.**
  - **AUTHORIZE DAILY for accuracy!**
- **For Light Duty/Employee Injuries – Patient Safety/Employee Health: Cheri Schweiger (35501)**
- **Tip Sheets/Guides via Rivernet:**



### Training/Editing Schedule Templates:

Kristine Charbonneau or Janet Jensen at 22702 (ODL).

If you need to rebuild an advanced schedule template, you will need the following information:

- **Shift Start and End Times**
- **# of staff needed if full census by shift, broken down job code and shift for each each day of the work week (Sunday through Saturday)**

For example:

Job Code	Shift Time	Day/# of Staff needed for full census (plan for extra)
----------	------------	--

1000	5A – 5:30PM	Sunday 3 staff
		Monday – 4 Staff
		Tuesday – 4 staff

And so on.

## Logging On

Remember: Your WFM PROD User Name and Password always match your Riverside NT user name and password.

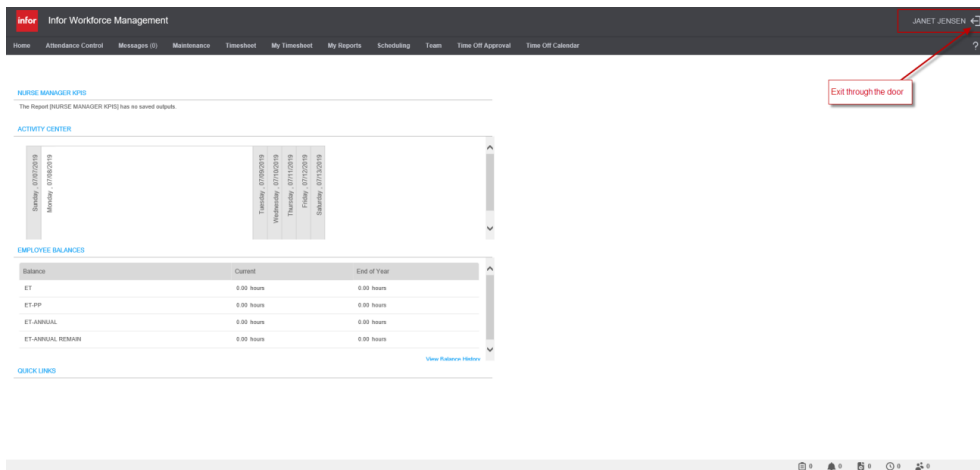
WFM PROD is our Live system and can be access via Employee Self Service from work or home (use Employee Page on the riversidehealthcare.org website or Rivernet). You may also see the icon below on your desktop.



You MUST use Google Chrome as your browser or things will not display correctly.

Please refer any permissions/role security access issues to HR.

1. Enter your **user ID** and **password** in their designated fields.
2. Approve the Imprivata prompt or enter in the Imprivata code.
3. Click Sign-In to see your Home Page in WFM (shown below).



**infor** Infor Workforce Management JANET JENSEN

Home Attendance Control Messages (0) Maintenance Timesheet My Timesheet My Reports Scheduling Team Time Off Approval Time Off Calendar

**NURSE MANAGER KPIS**  
The Report NURSE MANAGER KPIS has no saved subsets.

**ACTIVITY CENTER**

Start Date	End Date	Start Date	End Date
Sunday, 07/19/2019	Monday, 07/22/2019	Tuesday, 07/23/2019	Wednesday, 07/24/2019
		Thursday, 07/25/2019	Friday, 07/26/2019
		Saturday, 07/27/2019	

**EMPLOYEE BALANCES**

Balance	Current	End of Year
ET	0.00 hours	0.00 hours
ET PIP	0.00 hours	0.00 hours
ET ANNUAL	0.00 hours	0.00 hours
ET ANNUAL REMAINT	0.00 hours	0.00 hours

[View Balance History](#)

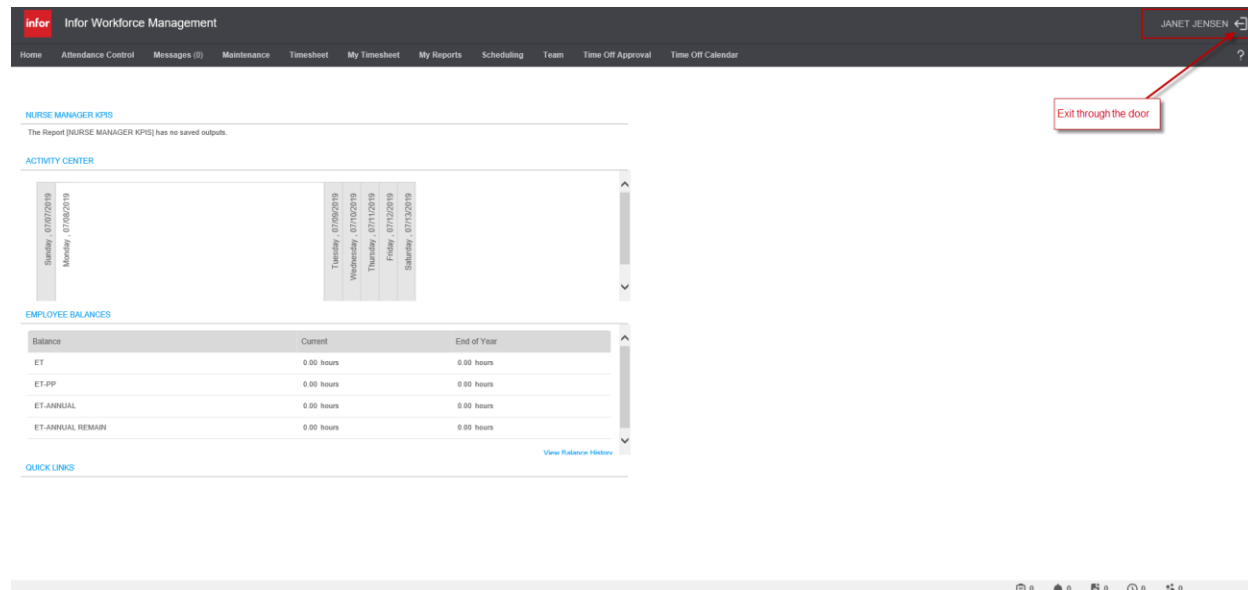
**QUICK LINKS**

## Signing Out

### Signing Out of WFM:

- Closes your session securely
- Signals to WFM that you no longer require access to any of its components
- Prevents other people from accessing your information

To log off WFM, ONLY click the door as shown below.



The screenshot shows the Infor Workforce Management interface. At the top right, the user name 'JANET JENSEN' is displayed next to a door icon. A red callout box with the text 'Exit through the door' points to this icon. The interface includes a navigation menu with options like Home, Attendance Control, Messages (0), Maintenance, Timesheet, My Timesheet, My Reports, Scheduling, Team, Time Off Approval, and Time Off Calendar. Below the navigation, there are sections for 'NURSE MANAGER KPIS', 'ACTIVITY CENTER', 'EMPLOYEE BALANCES', and 'QUICK LINKS'. The 'EMPLOYEE BALANCES' section contains a table with columns for Balance, Current, and End of Year.

Balance	Current	End of Year
ET	0.00 hours	0.00 hours
ET-PP	0.00 hours	0.00 hours
ET-ANNUAL	0.00 hours	0.00 hours
ET-ANNUAL REMAIN	0.00 hours	0.00 hours

# Scheduling Overview

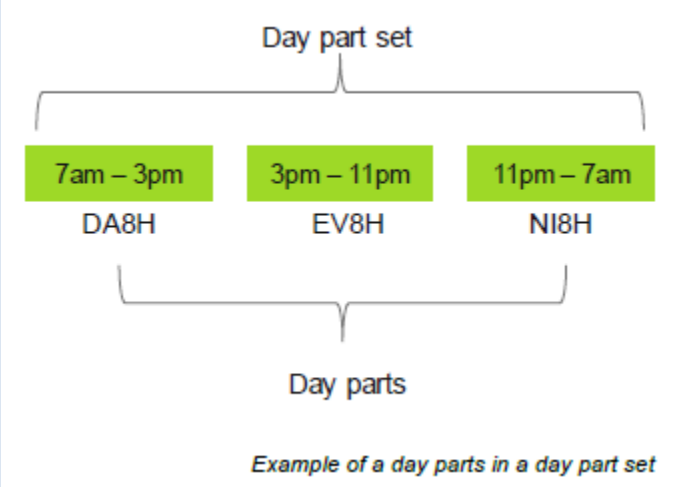
## Two Types of Schedules

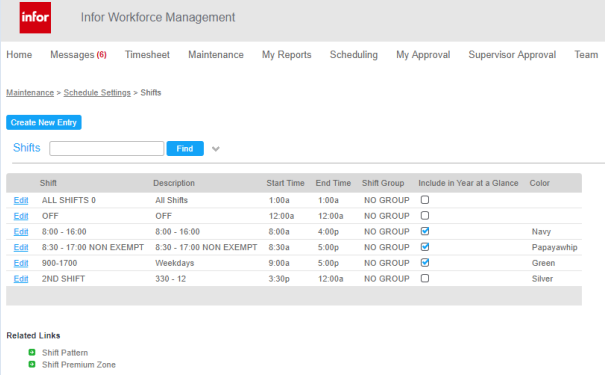
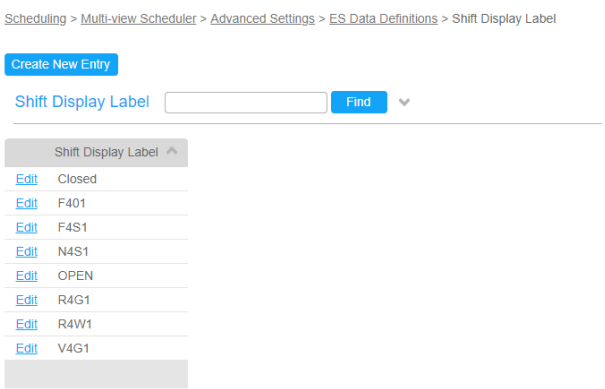
### Schedule required for everyone

Type of Scheduling	Who Uses It?	Setup Components/Considerations
<p><b>Basic Scheduling</b></p> <p><b>(Set it and Forget it or assigning a Schedule to a person)</b></p>	<ul style="list-style-type: none"> <li>• Department has set schedules</li> <li>• There is very little management of schedules required</li> <li>• When Employees miss work there is no need to replace them</li> <li>• Meeting work load demands is not an issue</li> <li>• Exempt Staff/Fixed Departments/Managers</li> <li>• Set up at Employee Level</li> <li>• Collection of Shifts over a set number of days</li> <li>• The pattern repeats over and over on to an Employee's Timesheet</li> <li>• Pre-set Labor Allocations can be defined for Employees who do not Clock (e.g. set salaried staff for example or hourly staff who work M/W/F 8A to 4:30P)</li> </ul>	<p><b>Setup Components</b></p> <ol style="list-style-type: none"> <li>1) Create Shifts</li> <li>2) Create Shift Patterns</li> <li>3) Assign Shift Patterns to Employees</li> <li>4) Manage changes in the Team Dashboard module</li> <li>5) Department schedules are reviewed, analyzed and edited in the Team Dashboard</li> </ol> <p><b>Considerations:</b></p> <ul style="list-style-type: none"> <li>• What Shifts do we need to configure to meet Basic Scheduling needs?</li> <li>• What are all the Shift Patterns we will use? Riverside has configured shift labels to promote consistency.</li> <li>• Which Departments (Teams) and or Employees/Jobs/Positions should be set with specific Shift Patterns?</li> </ul>
<p><b>Advanced Scheduling</b></p> <p>(Schedule assigns work)</p>	<ul style="list-style-type: none"> <li>• Required for self-scheduling or shift swapping and acuity integration</li> <li>• <b>Required for On-Call/Standby (you will have the ability to do some of this on the timesheet with editing—schedule automates it)</b></li> <li>• Employees do not have set defined hours and schedules</li> <li>• Workload demands are integral to the scheduling process (flexing, call)</li> <li>• Managing schedules after they've been published to staff is common</li> <li>• Real time overview and management of current day is required</li> </ul>	<ul style="list-style-type: none"> <li>• Schedules are generated and managed at the Team level</li> <li>• Multiple teams can be managed in one Advanced View</li> <li>• Schedules <u>cannot</u> be managed down a hierarchy</li> <li>• Scheduler is in full control of schedule until they Publish</li> <li>• Published schedules can still be managed and edited</li> </ul>

## Key WFM Scheduling Terminology

### WFM-Speak

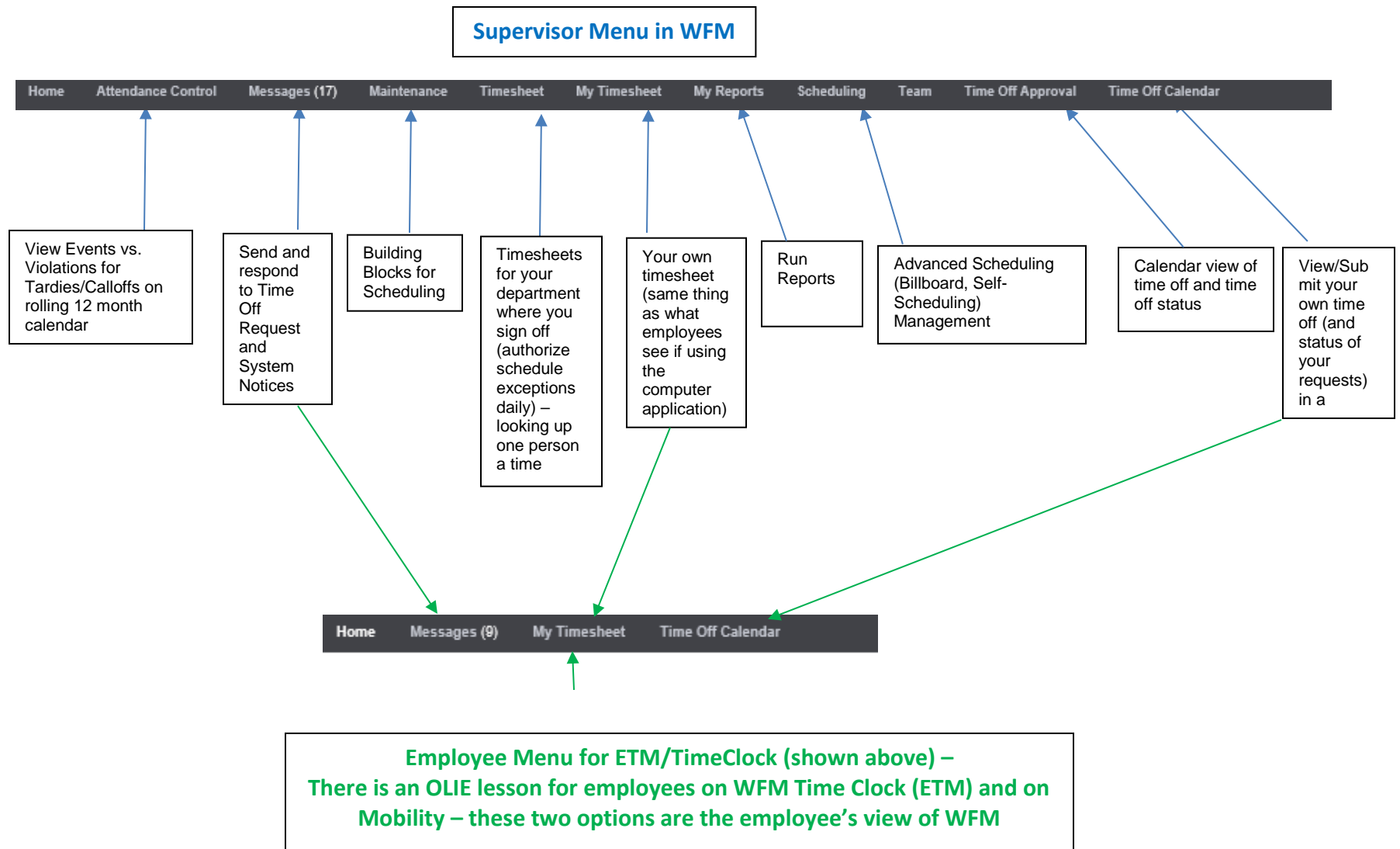
WFM Term	Definition/Concept
Team	<p>Department/Cost Center (displayed as Unit in Advanced Scheduling View)</p> <p>Key Terms</p> <ul style="list-style-type: none"> <li>Team Schedule Period                             <ul style="list-style-type: none"> <li>Number of weeks each schedule covers (1 to 6)</li> <li>Start Date</li> </ul> </li> <li>Day Part Set                             <ul style="list-style-type: none"> <li>24 hour period broken into parts</li> <li>Must be continuous</li> <li><b>Best practice is the parts match shift start and end times</b></li> </ul> </li> </ul>
	 <p style="text-align: center;"><i>Example of a day parts in a day part set</i></p> <p>The difference between shifts and day parts can be a difficult concept to understand. Shifts are not the same as day parts, but they do coincide. When setting up shifts, you also must assign a day part to the shift.</p> <p>The third day part (NI8H) in the example above begins at 11:00 pm. If it's 11:00 pm on a Wednesday, the shift may be for Thursday.</p>
Jobs	<ul style="list-style-type: none"> <li>Position Code auto-assigned to the employee by the HRIS</li> <li>You can only create Shifts for a Team for the Jobs assigned to that Team (again, managed by HRIS) and for which the employee is qualified.</li> <li>A shift that has a job assigned to it automatically</li> </ul>

WFM Term	Definition/Concept	
<b>Shift</b>	<p>adopts the associated labor metrics of that job.</p> <ul style="list-style-type: none"> <li>Shifts must be set up for each team and become part of a schedule</li> <li>Shifts are comprised of an Activity (e.g. WRK, Education, etc.) that spans from a shift start to shift end time.</li> <li>All Workload requirement settings are measured by Shifts per Day Part per Day</li> </ul>	
<b>Shift Display Labels</b>	<ul style="list-style-type: none"> <li>Shift Display labels are short codes used in the Advanced Scheduling View (ASV) Calendar Display</li> <li>All Shifts must be assigned a Display label</li> <li>They can be color coded per Team and can also be used by other teams.</li> </ul>	
<b>Time Codes</b>	<ul style="list-style-type: none"> <li>Time Codes represent the type of activity performed during a given time period.</li> <li>Activities can only have ONE time code; but time codes can have many activities.</li> </ul>	<p>Time codes are used to classify the extent of time an employee is scheduled to work. Each period of an employees' time can be represented by a different time code, 1 of which is used to identify if the employee was working or why the employee was absent. These time codes have pay-related implications.</p> <p>Examples of time codes are:</p> <ul style="list-style-type: none"> <li>WRK (work)</li> <li>UAT (Unallocated Time)</li> <li>VAC (vacation)</li> </ul>
<b>Activities</b>	<ul style="list-style-type: none"> <li>Activities indicate the type of work that occurs within a shift</li> </ul>	<p><b>On:</b> Indicates work or regular time:</p> <ul style="list-style-type: none"> <li>WRK = Work</li> <li>ORIENT = Orientation</li> <li>EDU = Education</li> </ul>

WFM Term	Definition/Concept																									
	<ul style="list-style-type: none"> <li>Activities utilize time codes and timesheet</li> <li>When booking time off, a relief activity code must be established</li> <li>Activities can only have ONE time code.</li> </ul>	<ul style="list-style-type: none"> <li>BRK = Break</li> <li>UAT = Unassigned Time</li> </ul> <p><b>Time Off:</b> indicates ET (VAC) or ET-Unscheduled (Sick) – this is an LTA (Long Term Assignment) override on the schedule</p> <p><b>OFF:</b> When using this to book time off for an employee, the shift is removed from the employee’s timesheet completely</p> <p><b>On-Call:</b> Allows concurrent work time so both the WRK (recall time back to work) and wrk time. On-Call shifts CANNOT contain meal or break times.</p> <p><b>Leave Activities:</b> Vacation and Sick (non-working time).</p>																								
<p><b>Premium</b></p>	<ul style="list-style-type: none"> <li>Previously called a Paycode added to Regular time for specific teams (e.g. Xray 2<sup>nd</sup> modality, Preceptor, ER Diff, Charge, etc.).</li> <li>These codes will be restricted to areas/job roles granted permission to use them <b>by HR</b> based upon historical usage and intention of the code.</li> </ul>																									
<p><b>Pay Group</b></p>	<ul style="list-style-type: none"> <li>Riverside Corporation (process levels)</li> </ul>	<table border="1"> <thead> <tr> <th>Find</th> <th>Pay Group</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Clear</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td>0</td> <td>THESE PEOPLE DONT GET PAID BY THE SYSTEM</td> </tr> <tr> <td><input type="checkbox"/></td> <td>1</td> <td>Hourly employees</td> </tr> <tr> <td><input type="checkbox"/></td> <td>2</td> <td>Salaried Employees</td> </tr> <tr> <td><input type="checkbox"/></td> <td>RIVERSIDE</td> <td>Riverside Healthcare</td> </tr> <tr> <td><input type="checkbox"/></td> <td>SLC</td> <td>Senior Living Corporation</td> </tr> <tr> <td><input type="checkbox"/></td> <td>OAKSIDE</td> <td>Oakside</td> </tr> </tbody> </table>	Find	Pay Group	Description	Clear	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	0	THESE PEOPLE DONT GET PAID BY THE SYSTEM	<input type="checkbox"/>	1	Hourly employees	<input type="checkbox"/>	2	Salaried Employees	<input type="checkbox"/>	RIVERSIDE	Riverside Healthcare	<input type="checkbox"/>	SLC	Senior Living Corporation	<input type="checkbox"/>	OAKSIDE	Oakside
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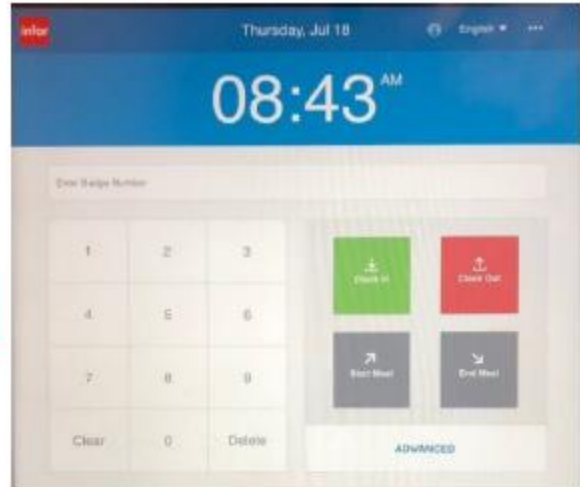
## Supervisor Menu vs. Employee Menu



## ETM (Timeclock) vs iPad vs. Mobility

## iPad Clocking In/Out/Meal Breaks

The Infor WFM iPad is available in select locations across the health system. The WFM iPads will either be wall mounted, at a kiosk or on a tabletop stand. The iPad is only used for clocking on and off for shifts and unpaid meal periods.



### CLOCKING

To clock on and off for shifts and unpaid meal periods, you must enter your employee ID first. Many new Riverside ID badges have your employee ID listed on the back of your badge.

---

#### CLOCK ON

1. Enter employee ID
2. Click Clock On
3. You will receive an alert letting you know you have clocked on for your shift

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#### BEGIN UNPAID MEAL PERIOD

1. Enter employee ID
2. Click Start Meal
3. You will receive an alert letting you know you have started your meal period

---

#### END UNPAID MEAL PERIOD

1. Enter employee ID
2. Click End Meal
3. You will receive an alert letting you know you have returned from your meal period

---

#### CLOCK OUT

1. Enter employee ID
2. Click Clock Out
3. You will receive an alert letting you know you have clocked out for your shift

# ETM/Timeclock

## ETM (Employee Transaction Manager) or Timeclock Icon on Desktops

Infor ETM can be accessed from home or work through the ETM web page. Infor ETM has the capability for staff to clock on and off for shifts and meal periods, send and receive workmail messages, submit availability, view your own and your team's schedules, give away and swap shifts, self-schedule, pick up shifts from the Shift Billboard, submit time off requests and attest to your timesheet.

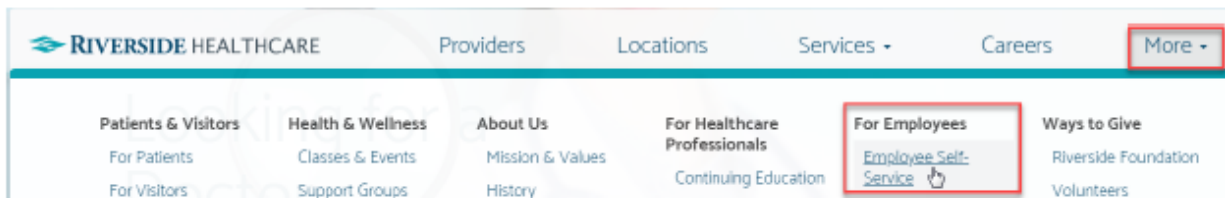
### ACCESSING ETM

There are two ways to access ETM: (1) Employee Self Service (2) TimeClock icon on a Riverside workstation desktop.

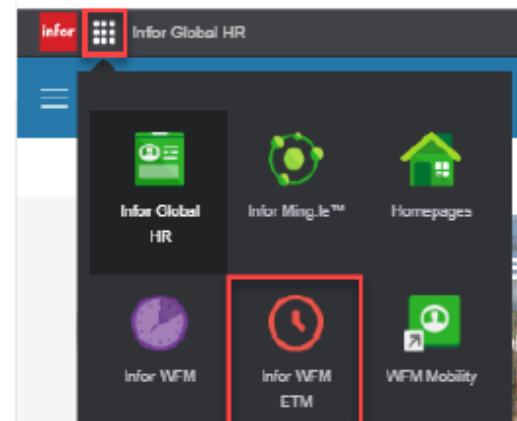
#### EMPLOYEE SELF SERVICE

To access ETM from a non-Riverside workstation, you will need to open the Employee Self Service Portal from Riverside's home page.

1. Open Riverside's home page
2. Click More
3. Click Employee Self Service under "For Employees"



4. Click ADFS
5. Log in using your Riverside network login
6. Use two-factor authentication
7. Select the menu button on the top left of your screen
  - a. There are three icons for Infor:
    - i. Infor WFM: web page recommended for use by schedulers and supervisors
    - ii. Infor WFM ETM: web page recommended for employees using WFM from a computer
    - iii. WFM Mobility: web page recommended for employees using WFM from a mobile device
8. Click Infor WFM ETM



## TIMECLOCK ICON

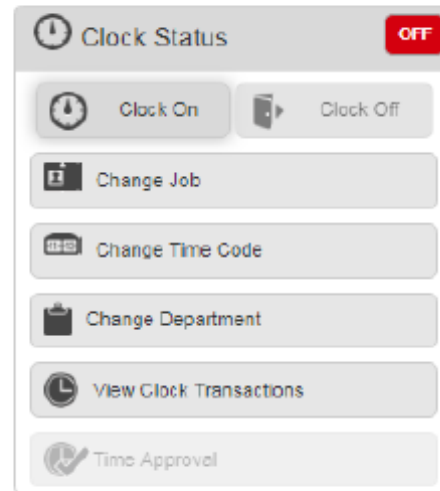
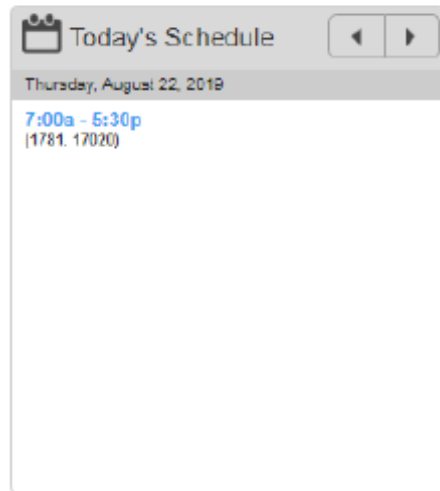
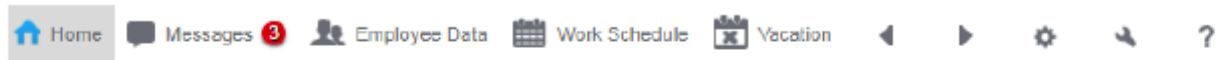
To access ETM from a Riverside workstation, you can use the TimeClock icon on the desktop

1. Log into the Riverside workstation
2. Click TimeClock
3. Click ADFS
4. Use two-factor authentication



## ETM HOME PAGE

The ETM Home Page displays Today's Schedule for you as an employee including the date, start and end times of your scheduled shift, your job code, and department ID. You can click the forward or backward buttons in the Today's Schedule header to view your schedule for different days. Your Clock Status also appears on the ETM Home Page. It will display as either On in green text or Off in red text. From Clock Status, you can clock on and off for your shift, begin and end your meal period, change your job code, change your time code, change your department, view clock transactions and attest to your timesheet.

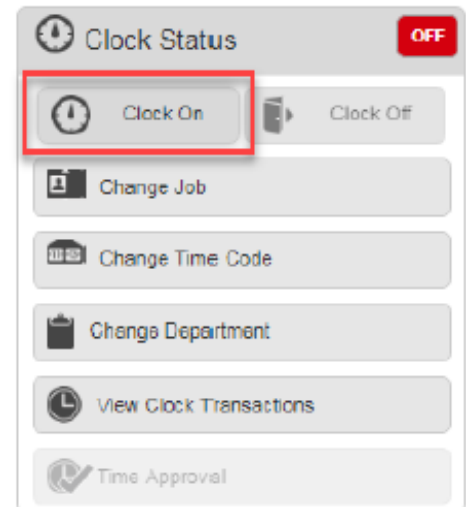
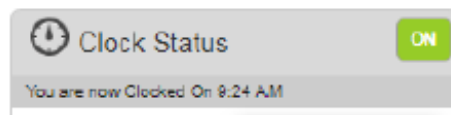


## CLOCK STATUS

To use the ETM clock, you must be logged on to a Riverside workstation. If you are working from a non-Riverside location, you must either be using the firewall or you must be set up as a Mobility user.

### CLOCK ON

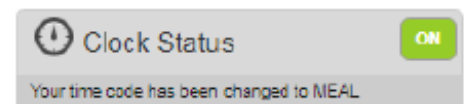
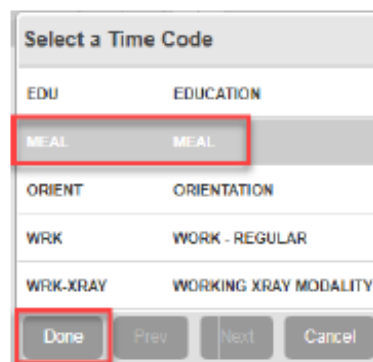
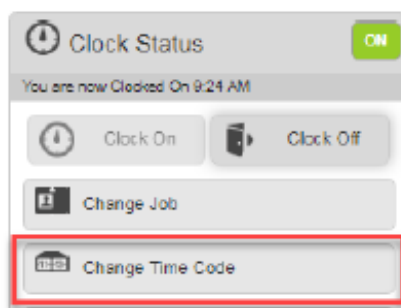
1. From ETM's home page, click Clock On
  - a. A confirmation message appears asking if you are sure you want to clock on
2. Click Yes
  - a. If you are not on a Riverside workstation, you will receive an error message stating you are not on an approved device or location
  - b. The fail message will appear under the Clock Status, reminding you why you could not clock on
3. When you do clock on, your clock status will appear as On in green text with the time you clocked on



- a. If you forgot to clock on for your shift, you will need to clock on when you do remember and send your supervisor a Workmail message with your actual arrival time.

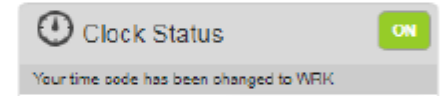
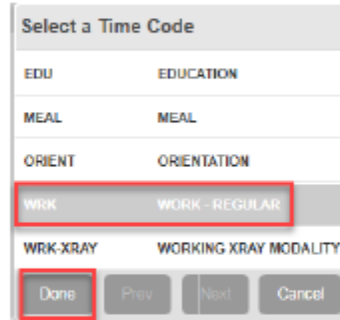
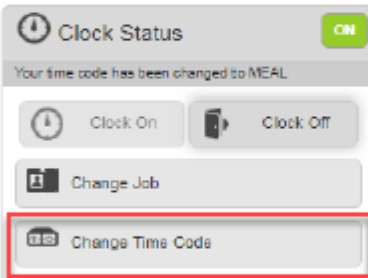
### BEGIN UNPAID MEAL PERIOD

1. Click Change Time Code
2. Select Meal
3. Click Done



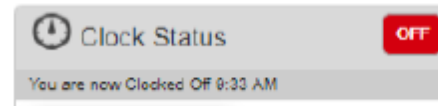
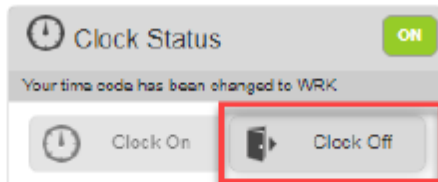
## END UNPAID MEAL PERIOD

1. Click Change Time Code
2. Select Work-Regular
3. Click Done



## CLOCK OUT

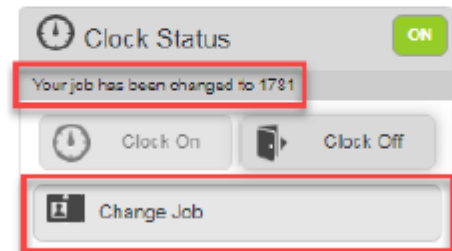
1. Click Clock Off
  - a. A confirmation message appears asking if you are sure you want to clock off
2. Click Yes
3. your clock status will appear as Off in red text with the time you clocked off



## CHANGE JOB

If you are an individual who holds multiple positions at Riverside, you can change the job you are working in currently if it was not scheduled as such. This can be helpful for last minute changes to your schedule when you are pulled to different positions throughout the course of a day.

1. Click Change Job
2. Select the job you are changing to
3. Click Done

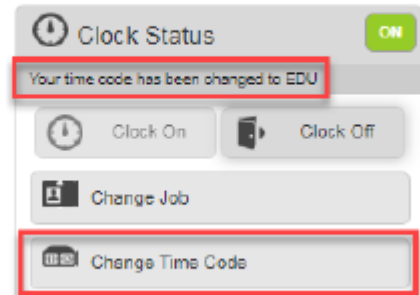




## CHANGE TIME CODE

Your schedule should reflect the type of work you will be doing and how it will be allocated in terms of time codes. You can adjust your time code if you will be in orientation or education if it is not already reflected in your schedule as such.

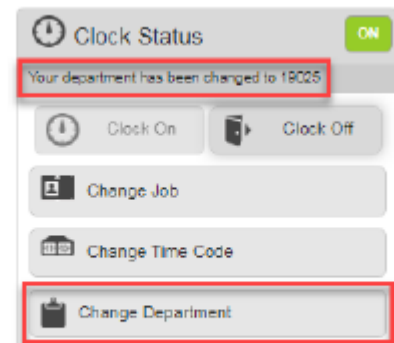
1. Click Change Time Code
2. Select the appropriate time code
3. Click Done



## CHANGE DEPARTMENT

If you will be floating, unexpectedly to another department, you can utilize change department to update the department you are currently working in.

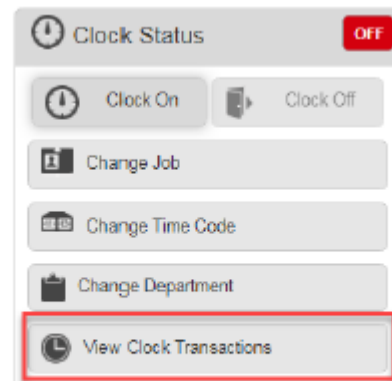
1. Click Change Department
2. Select the department you will be working in
3. Click Done



## VIEW CLOCK TRANSACTION

You can view all time punches for a specified day in this activity.

1. Click View Clock Transactions
  - a. You are brought to the [Work Schedule Transactions](#) activity



## CLOCKING IN DURING ORIENTATION OR EDUCATION

During orientation periods and educational days, you must clock in using a different time code unless already assigned in the shift in WFM.

### IPAD

To Clock In during orientation or education:

1. Enter Employee ID
2. Click Advanced
3. Click the drop-down menu
4. Click Time Code
5. Click Orientation or Education
6. Click Submit

To Begin Meal:

1. Enter Employee ID
2. Click Start Meal

To End Meal:

1. Enter Employee ID
2. Click Advanced
3. Click the drop-down menu
4. Click Time Code
5. Click Orientation or Education
6. Click Submit

To Clock Out:

1. Enter Employee ID
2. Click Clock Out

Note\*\* If an employee clocks out during orientation for any reason (travel, leaving campus, etc.), when clocking back in, they must follow the steps to click in during orientation or education again.

### ETM/TIMECLOCK

To Clock In during orientation or education:

1. Log on to computer
2. Double-click TimeClock icon on desktop
3. Use 2-factor to log in
4. Click Change Time Code
5. Click Orientation or Education
6. Click Done

To Begin Meal:

1. Click Change Time Code
2. Click Meal
3. Click Done

To End Meal:

1. Click Change Time Code
2. Click Orientation or Education
3. Click Done

To Clock Out:

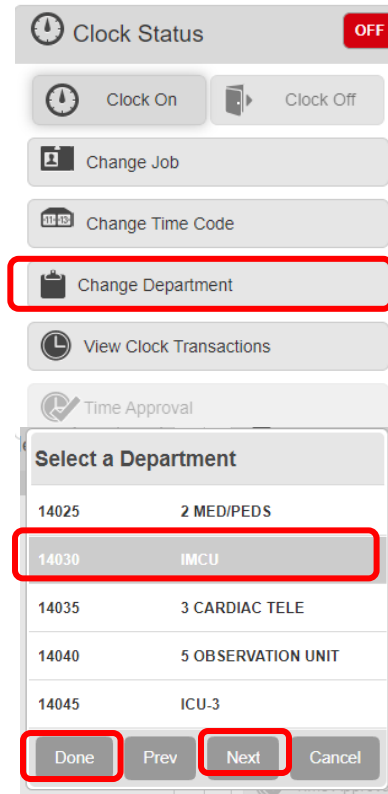
1. Click Clock Off

## FLOATING VIA ETM/Timeclock (cannot float at the iPad)

To Float to another department at the **START** of your shift:

To Float to another department at the START of your shift:

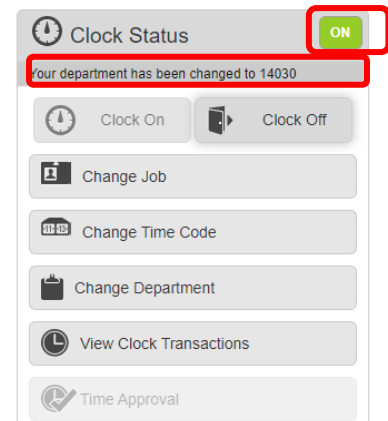
1. Double-click ETM/Timeclock icon on computer desktop.
2. Use your network login and 2-factor Imprivata to log in.
3. Click on **Change Department**.
4. Click **Next** until you see the department number/name you are floating to.
  - a. Hint: To get to inpatient nursing units, click **Next** 14 times.
5. Click on the department number/name (IMCU is selected in this example).
6. Click **Done**.
  - a. When done correctly, Clock Status will read **On** and a message will display that reads: “**Your department has been changed to \_\_\_\_.**” You will remain logged into this department until you float again today or clock **OFF** for your shift.



## To Float to another department DURING your shift:

To Float to another department during a shift where you already clocked in to your department:

1. Double-click ETM/Timeclock icon on computer desktop.
2. Use your network login and 2-factor Imprivata to log in to ETM.
3. Click on **Change Department**.
4. Click **Next** until you see the department number/name you are floating to.
  - a. Hint: To get to inpatient nursing units, click **Next** 14 times.
5. Click on the department number/name you are floating to (IMCU is selected in this example).
6. Click **Done**.
  - a. When done correctly, Clock Status will read **On** and a message will display that reads: “**Your department has been changed to \_\_\_\_.**” You will remain logged into this department until you float to another department today or until you clock **OFF** for your shift.



## To Float back to your home department DURING your shift:

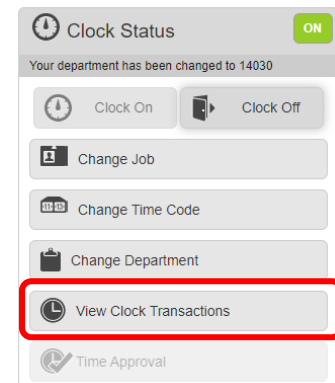
To Float back to your home or primary department during a shift, follow these steps:

1. Double-click ETM/Timeclock icon on computer desktop.
2. Use your network login and 2-factor Imprivata to log in to ETM.
3. Click on **Change Department**.
4. Click **Next** until you see the department number/name you are floating to.
  - a. Hint: To get to inpatient nursing units, click **Next** 14 times.
5. Click on the department number/name you are floating to (IMCU is selected in this example).
6. Click **Done**.
  - a. You will remain logged into this department until you float again today or clock **OFF** for your shift today.

## Check your Clocks – worried about missed clocks?

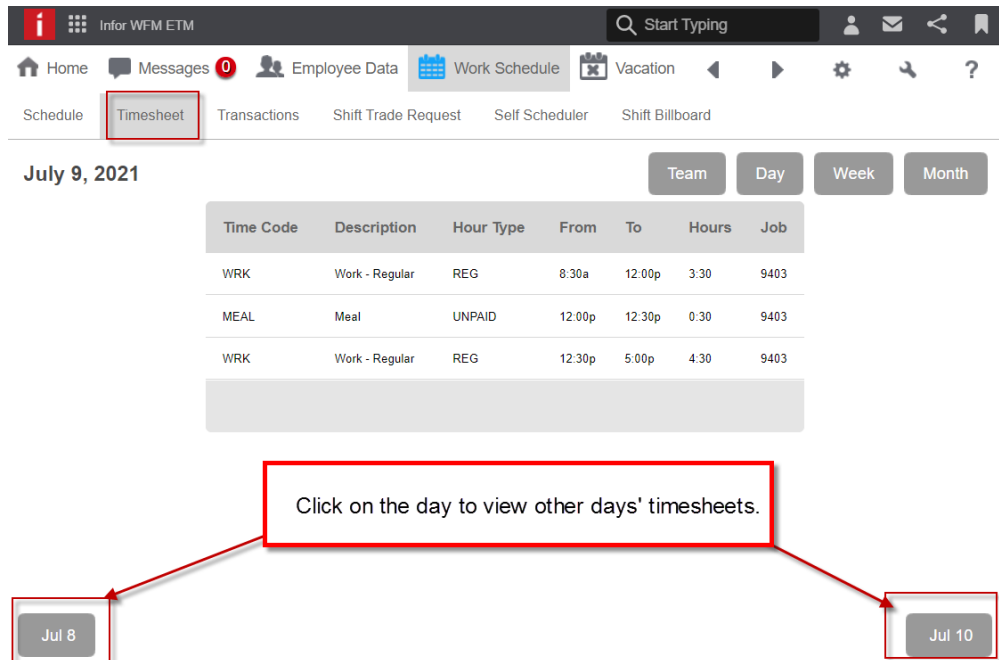
If concerned you have a missed clock or want to view your floats/clocks for today:

1. Double-click ETM/Timeclock icon on computer desktop.
2. Use your network login and 2-factor Imprivata to log in to ETM.
3. Click on **View Clock Transactions**. Your clocks for the current day including float will appear.



## View your timesheet for other dates

1. Double-click



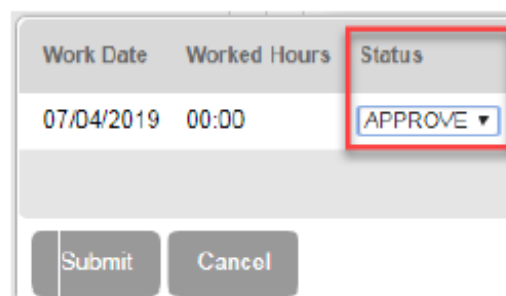
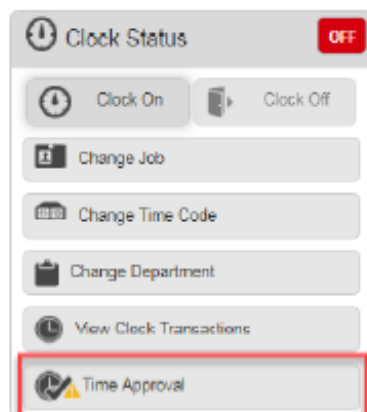
Time Code	Description	Hour Type	From	To	Hours	Job
WRK	Work - Regular	REG	8:30a	12:00p	3:30	9403
MEAL	Meal	UNPAID	12:00p	12:30p	0:30	9403
WRK	Work - Regular	REG	12:30p	5:00p	4:30	9403

- ETM/Timeclock icon on computer desktop.
2. Use your network login and 2-factor Imprivata to log in to ETM.
  3. Click **View Clock Transactions**.
  4. Click **Timesheet**. Your timesheet for the current day will display .  
Click on the day to view other dates' timesheets.

## TIME APPROVAL

At the end of each shift, you will need to attest to your own timesheet to verify all time punches and errors codes, if any, are accurate.

1. Click Time Approval
  - a. You can see the Work Date and Worked Hours for that day
4. For each day listed, you will need to update the status to Approve or Reject. Click the down arrow next to each day and select the appropriate status
5. Click Submit
  - a. If you Reject a timesheet, you must send a Workmail message to your supervisor explaining what on the timesheet you disagreed with

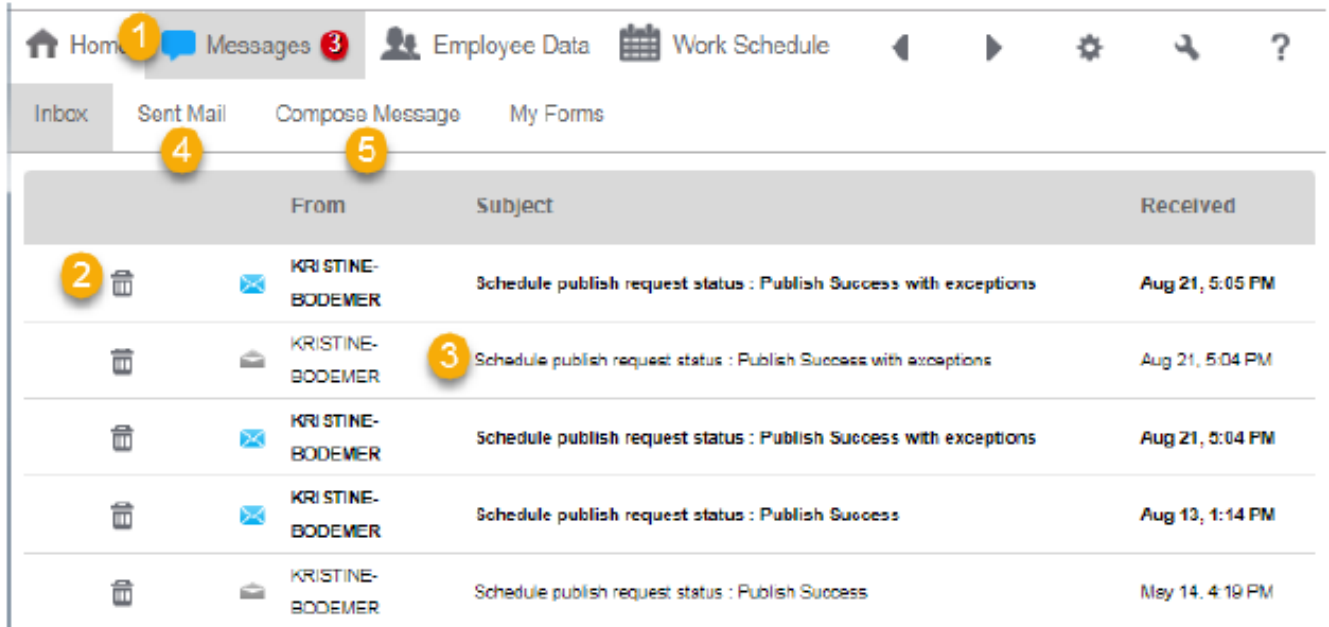


## WORKMAIL MESSAGE

Workmail message is an activity within WFM that functions similar to email. You can send a new message, reply and forward messages, and view forms you've received from this activity. The types of message you will receive in WFM are messages pertaining to a self-scheduling process opening or closing for a specified date range, your time off approval requests and shift swaps being approved or denied, and attendance violation notifications.

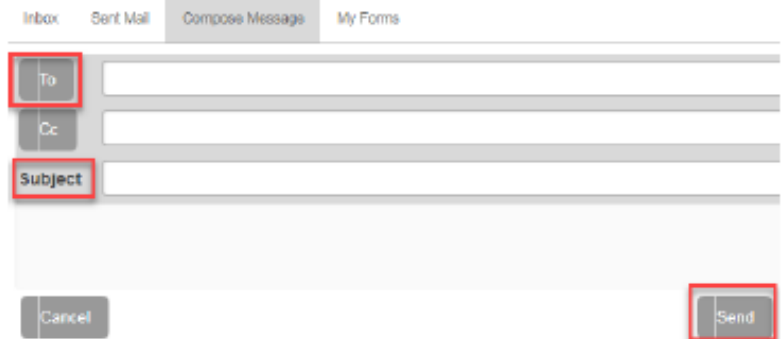
1. Click Messages on the top toolbar
  - a. You are brought to your inbox. Any messages that are bolded have not been opened yet.
2. To delete a message, click the trash can next to a message
3. To open a message, select the message
  - a. When viewing a message, you have the ability to delete, forward, reply or close the message
  - b. Some messages contain hyperlinks to bring you to another activity such as self-scheduling
  - c. If you have accrued enough time violations to reach disciplinary action, you will receive a message containing a form with the disciplinary action
4. Select Sent Mail
  - a. You can see Workmail messages you've sent to other staff members
5. To create a new message, click Compose Message

- a. This message activity should be replacing your paper edit sheets. Any time a time punch is missed whether for your shift or lunch or any time you disagree with your time sheet, you will send a message to your supervisor



	From	Subject	Received
2	KRISTINE-BODEMER	Schedule publish request status : Publish Success with exceptions	Aug 21, 5:05 PM
	KRISTINE-BODEMER	Schedule publish request status : Publish Success with exceptions	Aug 21, 5:04 PM
	KRISTINE-BODEMER	Schedule publish request status : Publish Success with exceptions	Aug 21, 5:04 PM
	KRISTINE-BODEMER	Schedule publish request status : Publish Success	Aug 13, 1:14 PM
	KRISTINE-BODEMER	Schedule publish request status : Publish Success	May 14, 4:19 PM

6. In the To field, you can enter the individuals first name hyphen last name. Or you can click the To button and search the dictionary
7. Enter a subject in the subject line and the message in the body of the message
8. Once the message is composed, click Send



9. Click My Forms
  - a. Forms pertain to data submitted or received. For example, any time availability is entered or shift swaps are submitted, that is considered a form and you can see the result of that form in the My Forms activity for whether the action was approved or denied

## EMPLOYEE DATA

Employee Data displays information pertaining to you as an individual, your earned time balances and gives you a place to enter your work availability

1. Click Employee Data on the top toolbar



## PERSONAL INFO

On the Personal Info tab, you can see your employee ID, hire date, department ID among other various items

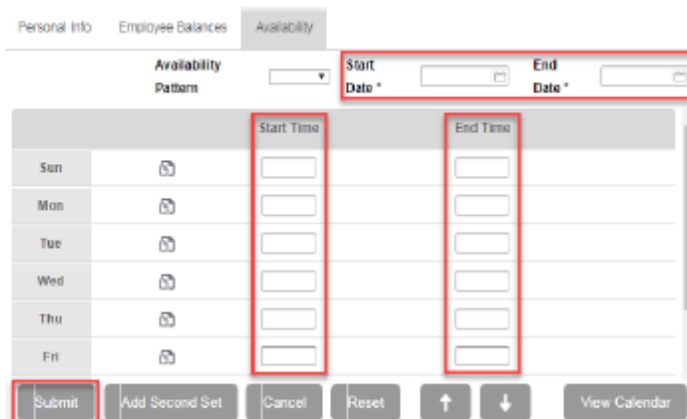
## EMPLOYEE BALANCES

1. Click Employee Balance
  - a. You can view your current and projected end of year earned time balances

Balance Type	Current Amount Left	End of Year Amount	Units
ET	270.00	240.00	HOURS
ET-ANNUAL REMAIN	81.10	13.10	HOURS
ET-PP	0.00	-34.78	HOURS
ET-ANNUAL	134.90	168.12	HOURS

## AVAILABILITY

1. Click Availability
  - a. You can enter your availability for days of the week, Sunday through Saturday and for specified weeks
2. Enter a date range you want to apply availability for
3. Enter the start and end time for each day's availability
4. Click Submit
  - a. Your availability will be sent to your supervisor for approval. Whether approved or denied, you will receive a Workmail messaging indicating the status of your availability request. Once your availability is approved, it will be displayed in the Availability activity. If you need to update your availability, you can click New and enter new dates and times. You can also choose to look at the calendar view of your approved availability.
5. Click View Calendar
  - a. You can see any time off entered as well as your approved availability. Do not confused this calendar view with your actual schedule





## WORK SCHEDULE

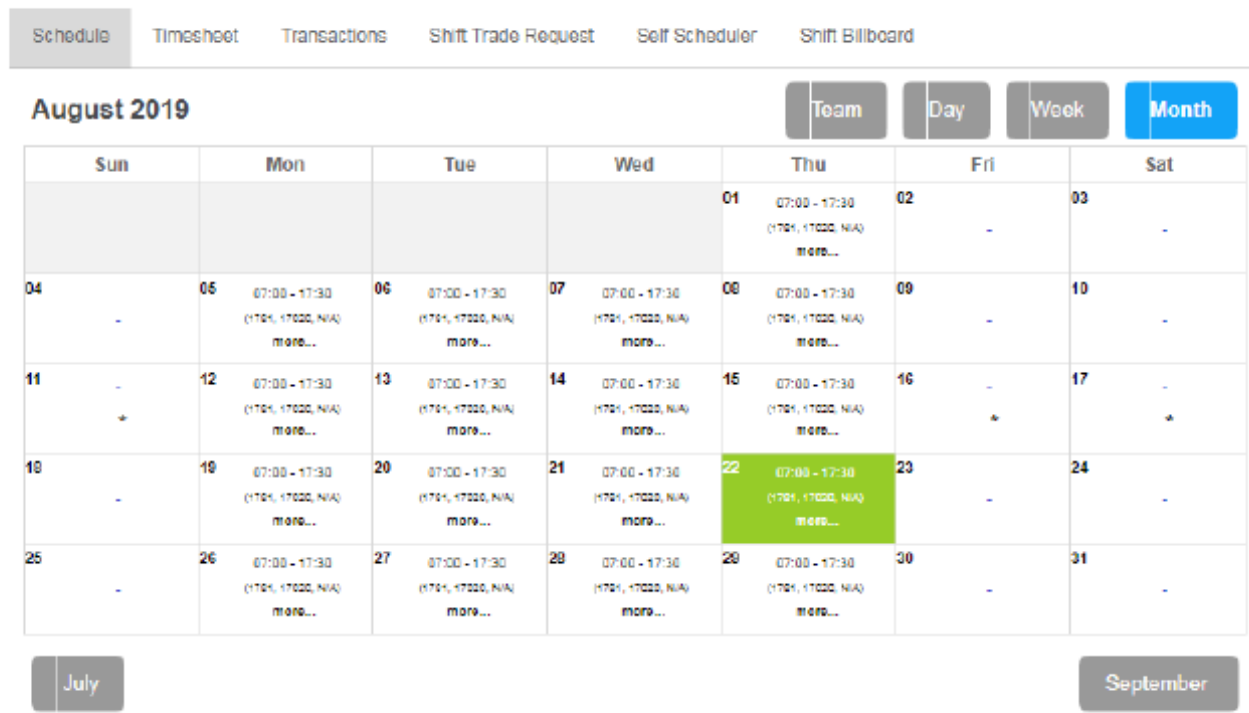
The Work Schedule allows you to see your own individual schedule as well as your team's. You can also swap shifts, self-schedule and pick up shifts from the Shift Billboard.

1. Select Work Schedule on the top toolbar



## SCHEDULE

The first tab in Work Schedule is called Schedule. You can see your own schedule for a month at a time by default. You can choose to view the schedule by day or week. You can also change days, weeks or months by selecting the icons in the bottom corners. You can also view your team's schedule. Days that you are scheduled to work list the start and end times of the shift. Days that you are scheduled off list the off reason with an asterisk. Days highlighted in red mean that the timesheet is unauthorized for that day.



Sun	Mon	Tue	Wed	Thu	Fri	Sat
				01 07:00 - 17:30 (1701, 17020, NIA) more...	02 -	03 -
04 -	05 07:00 - 17:30 (1701, 17020, NIA) more...	06 07:00 - 17:30 (1701, 17020, NIA) more...	07 07:00 - 17:30 (1701, 17020, NIA) more...	08 07:00 - 17:30 (1701, 17020, NIA) more...	09 -	10 -
11 +	12 07:00 - 17:30 (1701, 17020, NIA) more...	13 07:00 - 17:30 (1701, 17020, NIA) more...	14 07:00 - 17:30 (1701, 17020, NIA) more...	15 07:00 - 17:30 (1701, 17020, NIA) more...	16 *	17 *
18 -	19 07:00 - 17:30 (1701, 17020, NIA) more...	20 07:00 - 17:30 (1701, 17020, NIA) more...	21 07:00 - 17:30 (1701, 17020, NIA) more...	22 07:00 - 17:30 (1701, 17020, NIA) more...	23 -	24 -
25 -	26 07:00 - 17:30 (1701, 17020, NIA) more...	27 07:00 - 17:30 (1701, 17020, NIA) more...	28 07:00 - 17:30 (1701, 17020, NIA) more...	29 07:00 - 17:30 (1701, 17020, NIA) more...	30 -	31 -

1. To view more detailed information about a day, select the day.
  - a. You are brought to the Timesheet. You can see scheduled and worked time as well as any attendance points accumulated, if any
2. To view your team's schedule, click Team
  - a. In list format, you can see all team members and the days that they work for the given week you are viewing. You can change dates by selecting the icons in the bottom corners

## TIMESHEET

### 1. Click Timesheet

- a. Timesheet allows you to view individual days for more in-depth time and pay details. It is important to note that standby and on-call pay are both coded as on-call on the timesheet. If you select on individual days in the Schedule, it will bring you to the Timesheet for that day. From the timesheet activity, you are brought to today's date by default. You can change days from the Timesheet by selecting the icons on the bottom corners to move forward or backward.

Schedule **Timesheet** Transactions Shift Trade Request Self Scheduler Shift Billboard

August 22, 2019 Team Da

Time Code	Description	Hour Type	From	To	Hours	Job
UAT	Unallocated Time	UNPAD	7:00a	8:12a	2.12	1781
WRK	Work - Regular	REG	8:12a	8:17a	0.05	1781
MEAL	Meal	UNPAD	8:17a	8:18a	0.01	1781
WRK	Work - Regular	REG	8:18a	8:22a	0.04	1781

Late = Tardy so 0.5 ATTPT will display to the employee here.

## TRANSACTIONS

### 1. Click Transactions

- a. Transactions display clock details for individual days. You are brought to today's clock transactions by default.

Schedule Timesheet **Transactions** Shift Trade Request Self Scheduler

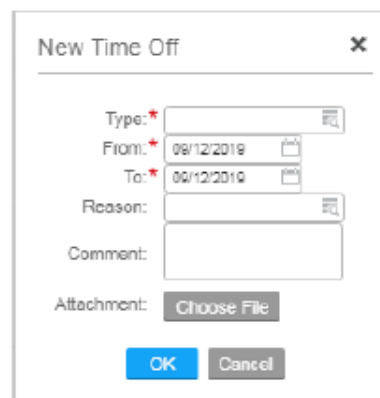
August 22, 2019

ACTIVITY	TIME	JOB/DOCKET DATA
Clock On	08/22/2019 09:12 AM	
TimeCode Change	08/22/2019 09:17 AM	MEAL
TimeCode Change	08/22/2019 09:18 AM	WRK
Clock Off	08/22/2019 09:18 AM	

## VACATION

The Vacation tab allows you to submit new time off requests and view approved or denied time off requests

1. Click Vacation on the top toolbar
  - a. You are brought to the current month's calendar view. You can see your approved, pending, denied and recalled days off indicated by different colors. On the right of the screen you can see your earned time balances
2. To submit a time off request, click a day in the calendar
3. In the Type field, select the magnifying glass
4. Select ET Sched or Special Request if you want a day off without using ET
  - a. If you only want to take a partial day off, you can select the partial day check box and enter a start and end time. If you are requesting multiple days off, you can update the from or to date to extend over multiple days. In the comments field, you can enter any comments you would like the scheduler or supervisor to see when responding to your time off request
5. Click OK
  - a. Your pending time off request appears on the calendar
6. To cancel a time off request, select the highlighted day in the calendar
7. Click Remove Request
  - a. The request no longer appears



**Workaround Tip:** If you are a 24-7 department, have employees always input partial day and start and end times for their shift. This makes trades and self-scheduling easier (otherwise—they are blocked for midnight to midnight of the same calendar day).

**Directors' ET Requests:** Effective 2020, Directors must submit an ET request via WFM and must also email a calendar invite to their VP and AA for ET requests.

## Mobility

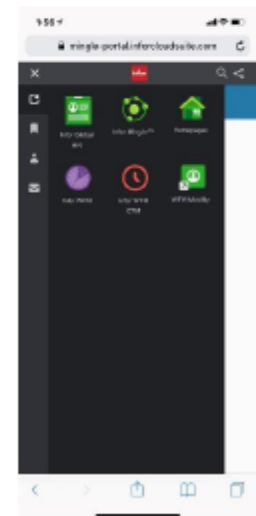
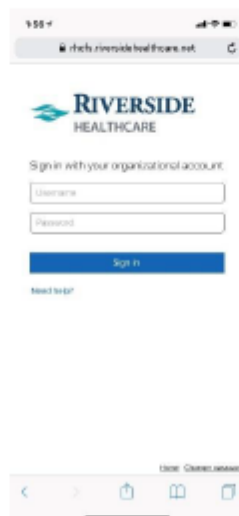
## MOBILITY

Infor Mobility can be accessed from anywhere with a mobile device through the Mobility web page. Mobility allows for sending and receiving Workmail messages, viewing your own schedule as well as your team members', submitting time off requests and attesting to your own timesheet. Certain staff have been set up to use Mobility to clock on and off.

## ACCESSING MOBILITY

To access Mobility, you will need to log in to Employee Self Service from Riverside's home page on your mobile device

1. Open Riverside's home page
2. Click More
3. Click Employee Self Service under "For Employees"
4. Click ADFS
5. Sign in using your Riverside network log in
6. Use two-factor authentication
7. Select the menu button on the top left of your screen
  - a. There are three icons for Infor:
    - i. Infor WFM: web page recommended for use by schedulers and supervisors
    - ii. Infor WFM ETM: web page recommended for employees using WFM from a computer
    - iii. WFM Mobility: web page recommended for employees using WFM from a mobile device
8. Click WFM Mobility



## HOME PAGE

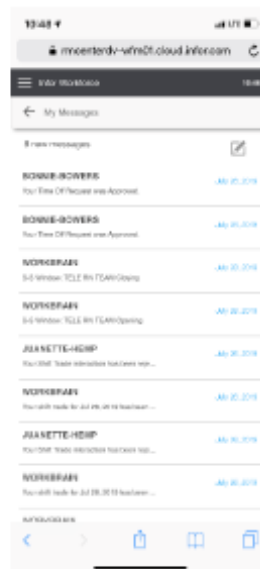
You can view your clock status, messages and the current day's schedule.



## MY MESSAGES

The My Messages section of the Home Page displays how many messages you have in your inbox

- To compose a message, click on the pencil icon
  - Instead of using paper edit sheets, you will submit time edits through a Workmail message in WFM
  - In the To field you will enter who you want to send this message to. Only supervisors will have the ability to adjust timesheets
  - In the subject line, enter a brief description about the message
  - Enter the body of the message
  - Click Send
  - Click Ok
- To view the messages in your inbox, you can click the Arrow from the Home Page
  - All messages are listed with the sender's name, date and time message was received, and the subject of the message. You can view a message by selecting on it
  - The message itself opens up for you to read, reply, forward, delete or take action on the message



## MY SCHEDULE

The My Schedule section on the Home Page shows you today's current schedule and date.

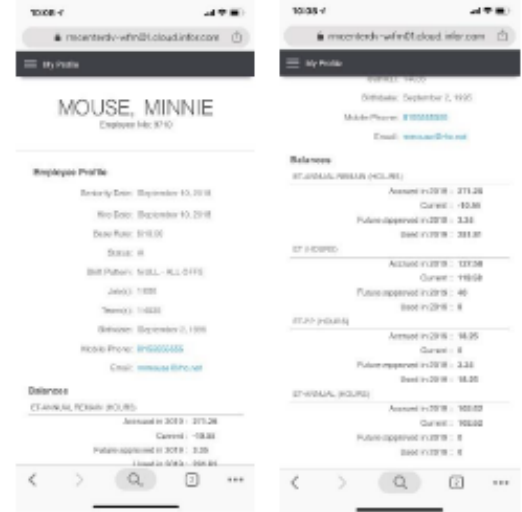
- To jump to the full schedule activity, you can click the schedule icon.
- To view this week's schedule, click the arrow.
  - The circular icon indicates a time off day.



## MY PROFILE

My Profile displays your employee data information as well as earned time balance information

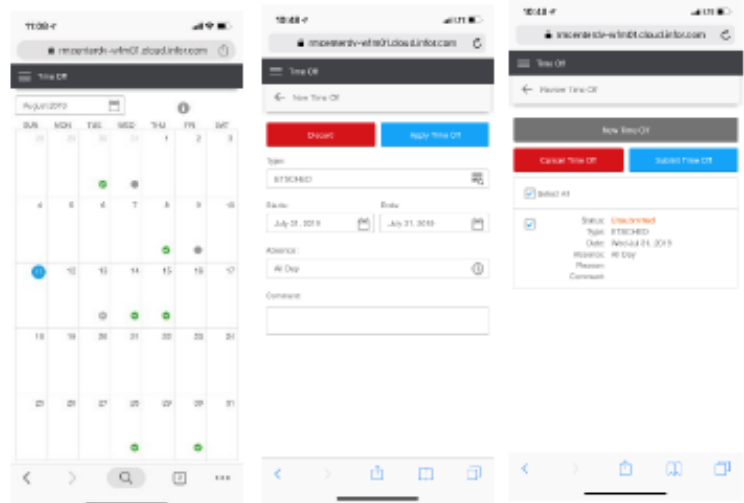
1. Click the Menu button
2. Click My Profile
3. You can view your employee details including your employee ID, hire date, job and department IDs, birthdate, mobile phone number and work email.
4. You can also view your individual earned time balances as well as projected balances at the end of the year



## TIME OFF

The Time Off activity is where you can submit time off requests as well as view approved, denied and recalled time off requests

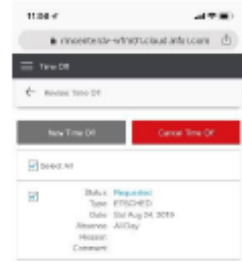
1. Click Menu
2. Click Time Off
  - a. You are brought to the current month's calendar view. You can see your existing time off requests and the pending or final status of those requests
3. To submit a new time off request, click the highlighted day in the calendar
4. In the Type field, click the magnifying glass
  - a. Choose ET Sched for days or times you want off that you want to use Earned Time
  - b. Choose Special Request for days or times you want off that you do not want to use Earned Time
5. You can adjust the start and end day if you want to extend this time off request over multiple days. You can also choose to submit a request for a





partial day by changing the Absence field to Partial and entering a start and end time for the request. You can add any comments you'd like the scheduler or supervisor to see once this time off request is submitted

6. Click Apply Time Off
7. Click Submit Time Off
8. The request appears with a blue dot on the calendar
9. To cancel a time off request, select the highlighted day in the calendar
10. Click Cancel Time Off
11. In the confirmation screen, click Ok
12. The time off request no longer appears



## MY SCHEDULE

My Schedule displays a weekly view of your schedule, allows for swapping shifts and picking up shifts from the Shift Billboard as well as viewing your team members' schedules

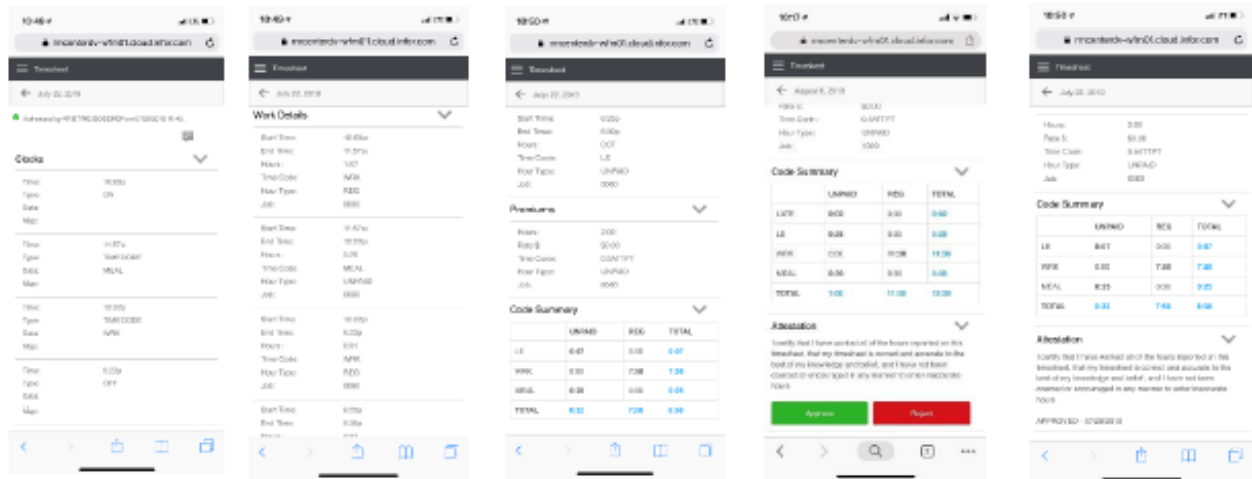
1. Click the Menu button
2. Click My Schedule
  - a. You are brought to the current week's schedule displaying shifts you are working on each day, as well as days listed as not scheduled and days that you are scheduled off which are designated by a circular icon. You can jump backward and forward weeks by using the arrows next to the date range



## TIMESHEET

The Daily Timesheet activity allows you to attest to your own daily time

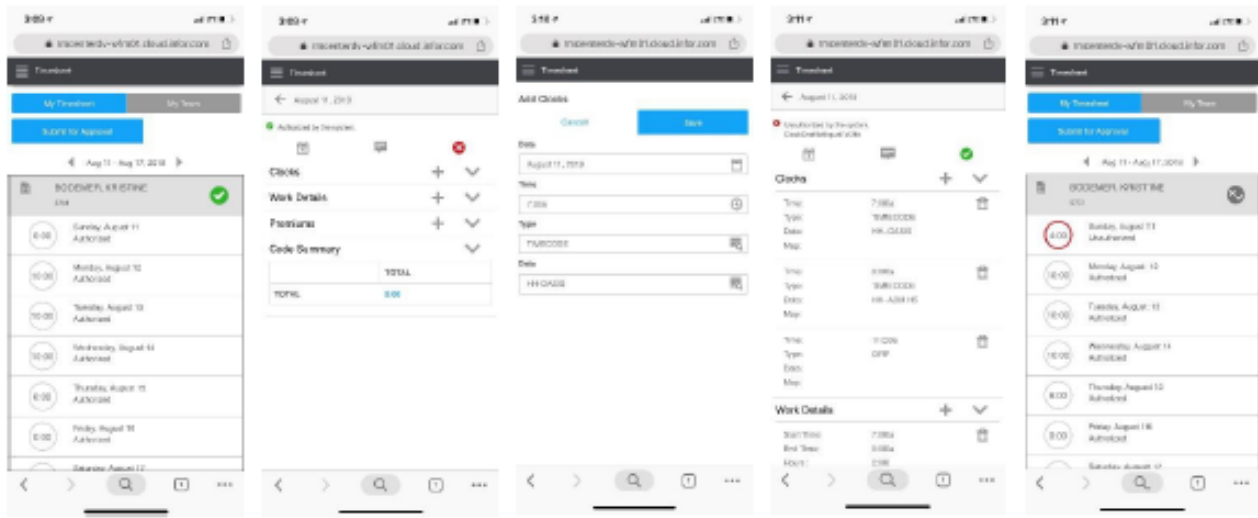
1. Click Menu
2. Click Timesheet
  - a. You are brought to the current week's timesheet. Timesheet attestation should occur at the end of every shift so any errors can be corrected right away. You can easily identify unauthorized days by the red circle around the worked hours. Days are marked as unauthorized if there was a time code error that was triggered. Time code errors can include late clock in and no clock in.
3. To view the details of a day's timesheet, click the day
  - a. You can view the clocks, if any for the day as well as work details
  - b. Work details include the hours, time codes, and hour types associated
  - c. The premiums section will display hours worked at a premium price, if any
  - d. The Code summary section displays total hours for each time code
4. If you agree with all clocks and time codes on your timesheet, you will click Approve. If you do not agree with an item on the timesheet, you will click Reject and send a Workmail message to your supervisor explaining where you believe the error occurred
5. Click Approve
6. Your timesheet attestation displays Approved with a date stamp



## HOME HEALTH ONLY: WEEKLY TIMESHEET

The weekly timesheet allows for time and visit codes to be entered on a weekly-view basis. For Home Health staff, when you open the timesheet activity, you will default to viewing the weekly timesheet only.

1. Click the Menu button
2. Click Timesheet
3. Click My Timesheet at the top
  - a. You are brought to the current week's timesheet. You can adjust the week by selecting the backward or forward arrows
4. You enter timesheet information for a specific day, click on the day
5. Click the plus sign next to clocks to begin adding clocks
6. Salary staff:
  - a. You do not have to add time clocks on your regularly scheduled salary days
7. Hourly staff:
  - a. Enter an On clock first, by entering the date, on time, and a type of On
  - b. You can add meals by entering a new clock with the appropriate date and time with the timecode of MEAL
  - c. You can end your meal by entering a new clock with the appropriate date and time with the timecode of WRK
  - d. Enter of Off clock by entering the date, off time and a type of Off
8. Pay per visit:
  - a. Add a clock with the appropriate date, a start time and a timecode designating the appropriate HH code. You can search using HH to find all of the Home Health specific timecodes.
    - i. The number of hours for pay per visit time codes designates the number of visits for that day
      1. Example: 7am-9am HH-OASIS time code = 2 hours = 2 HH-OASIS visits for that day
  - b. To add additional visits, add a new clock with the appropriate date, add the time x amount of hours after the first visit to appropriately designate the number of visits for the first timecode
  - c. When finished adding HH visit timecodes, add an off clock by entering the appropriate date, x amount of hours after the previous HH visit timecode using the type of Off
    - i. Example:
      1. 7am-9am HH-Adm5
      2. 9am HH-Adm6
      3. 12p Off
      - a. This timesheet would mean there were 2 Adm5 visits and 3 Adm6 visits
9. Click the back arrow once you are done entering all timecodes for that day
10. Continue adding timecodes for any other days that week that were not already entered
11. Once the week is complete, click Submit for Approval
12. Click Ok in the confirmation message window
  - a. Your supervisor will receive the timesheet in the Inbox to approve



## UPDATING PHONE NUMBER IN EMPLOYEE SELF SERVICE

1. Log in to Employee Self Service
2. Click My Profile
3. Click Personal Information
4. Under the Contact Information section, verify you have a Mobile phone number listed and that the phone number is accurate (you may have to click the forward error to move to the next page to view all numbers)
  - a. If the number is not accurate:
    - i. double-click the number to update it
  - b. If the Phone Number Method is not accurate:
    - i. Double-click the number
    - ii. Click Actions
    - iii. Click Inactivate
    - iv. Click My Profile
  - c. To add a new number:
    - i. Click Add Phone
    - ii. Add today in the Effective Date field
    - iii. Enter the Telephone Type of Mobile
    - iv. Enter the phone number
    - v. Click Ok
    - vi. Verify under Contact Information the new mobile number is listed



## Managing ET Requests

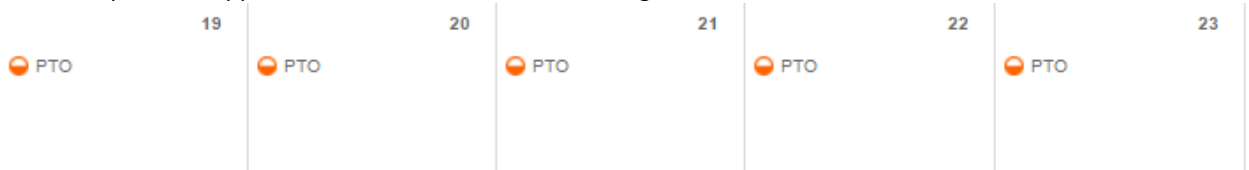
## Request Paid Time Off (ET)

### Process Description:

The following is the procedure for all employees to request paid time off (ET)

### Steps:

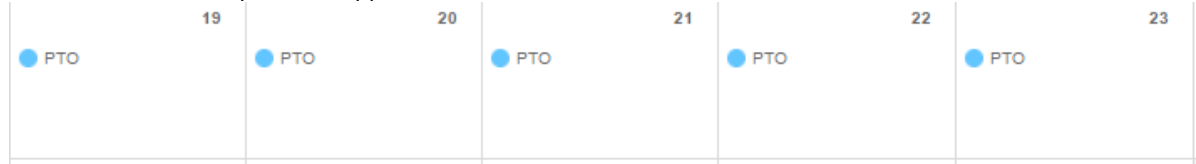
1. Select **Time Off Calendar** from the Header Menu.
2. Click on  **June 2019**  the next and previous arrows to move from month to month to find the start date of the ET request.
3. Click on a date on the calendar and a New Time Off pop window should display.
4. Select ET from the **Type** lookup list. Special Request was designed to allow employees to request to not be scheduled on a particular day (e.g. clinicals) where they do not need ET time. It pays nothing. Once selected the current balance should display to the right.
5. Leave the **Partial Day** check box un-selected for a full day request. For a partial day request select the check box next to **Partial Day**.
6. By default, the **End Date** will default to the **Start Date** for a 1 day request.
7. Confirm the **Start Date**
8. Select an **End Date**
9. If **Partial Day** was selected enter **Start Time** and **End Time**
10. Optionally, enter a **Comment**
11. Click **OK**.
12. The ET request will appear on the time off calendar in orange as follows



When the icons are orange, that means the request has not been submitted for approval.

13. Click **Submit** to send the request to the Supervisor for approval
14. If your ET request is:

- **Successful**, the ET request will appear on the time off calendar in blue as follows



The Supervisor will receive a work mail message with a link to the ET request time off

- **Unsuccessful**, a pop up window will display summarizing the request validation errors. Some errors include the configuration of the clock. Some errors include:
  - ET time off type may only be applied to scheduled work days.
  - Future balance ET violated
  - ET may not be requested for days in the past

15. Once approved the request will appear on the time off calendar in green as follows

19 ✔ PTO	20 ✔ PTO	21 ✔ PTO	22 ✔ PTO
-------------	-------------	-------------	-------------

## Approve/ Deny Paid Time Off (ET) Request

### Process Description:

The following is the procedure for **supervisors** to approve or deny requested paid time off (ET).

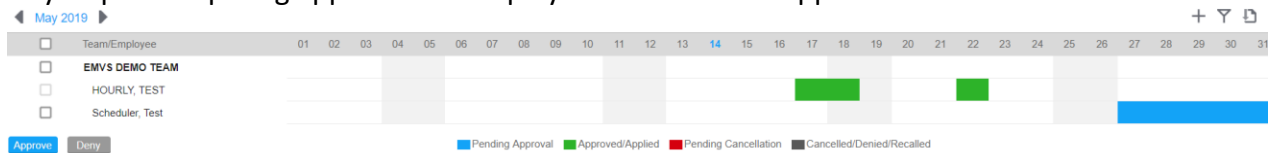
### Steps:

1. Login to WFM.
2. Select **Messages** from the Header Menu. Click on the message with Subject "A Time Off Request is submitted for your Approval". The details of the message should appear summarizing the dates for the ET request time off. Select the link "A time off request is pending your approval" to access the request

**or**

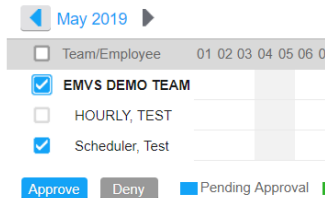
Click on **Time Off Approval** from the Header Menu

3. Any request requiring approval will display on the Time Off Approval form in blue as follows



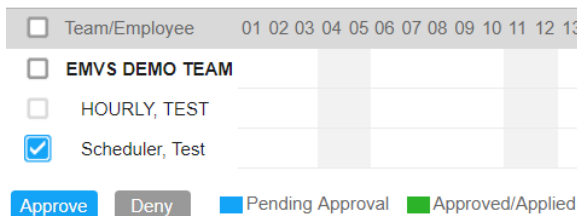
4. The ET request can be approved or denied as follows:

- To *approve or deny all requests for one or more teams* select the check box next to the team's name



- Select either **Approve** or **Deny** and enter optional comment in the **Comment** box and click **Submit**

- To *approve or deny all request for individual employees* select the check box beside the employee names



- Select either **Approve** or **Deny** and enter optional comment in the **Comment** box and click **Submit**



- To **approve part of a ET request**, click on the request (blue box), a window will open showing the individual days being requested off

Time Off Approval - Scheduler, Test ✕

	Status	Type	Date	Time	Reason	Comment	Submitted	Pay in advance
Approve ▼	Requested	ETSCHED	05/27/2019	All Day			05/14/2019 20:54	No
Approve ▼	Requested	ETSCHED	05/28/2019	All Day			05/14/2019 20:54	No
Approve ▼	Requested	ETSCHED	05/29/2019	All Day			05/14/2019 20:54	No
Approve ▼	Requested	ETSCHED	05/30/2019	All Day			05/14/2019 20:54	No
Approve ▼	Requested	ETSCHED	05/31/2019	All Day			05/14/2019 20:54	No

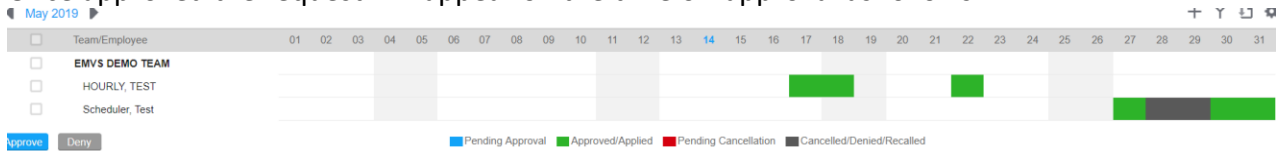
**Submit**

Close

To deny, select **Deny** from the dropdown list and select **Submit**. To approve, select **Approve** from the dropdown list and select **Submit**

Enter optional comment in the **Comment** box and click **Submit**

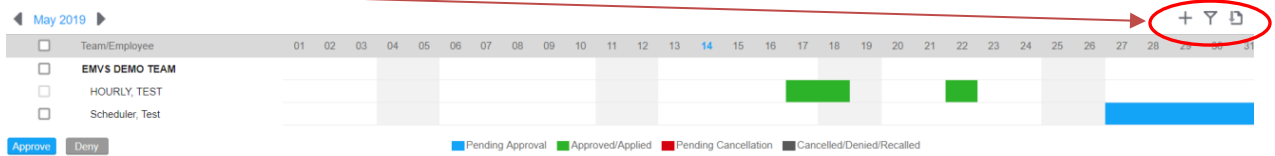
- Once approved the request will appear on the time off approval as follows



**Green** represents ET time off that has been **approved** and **grey** represents ET time off **denied**.

**Note:** The ET requested days denied will be removed from the employee's calendar.

### Hover to Discover the **Icons** on the upper right of the ET Approval Calendar



Add in an ET request for an employee (useful if the employee submitted incorrectly) Be sure to check Auto-approve to avoid WFM messages.

Allows you to filter by status of request (view Approved, Cancelled, Pending Approval, etc.)


Allows you to view requests by seniority, submission date, etc. This is useful for approving based upon skill mix for a unit.

## Cancel Paid Time Off (ET) Request

### Process Description:

The following is the procedure for all employees to cancel paid time off (ET).

### Steps:

1. Select **Time Off Calendar** from the Header Menu.
2. Click on  the next and previous arrows to move from month to month to find the start date of the ET request to cancel
3. Click on the **green** icon for any approved time off to bring up the **details of the approved time off request**.
4. Select the check box beside the day you would like to cancel

Cancel Time Off ✕

<input type="checkbox"/>	Status	Type	Date	Time	Reason	Comment	Submitted	Pay in advance
<input type="checkbox"/>	Approved	ETSCHED	06/24/2019	All Day			05/14/2019 21:03	No
<input type="checkbox"/>	Approved	ETSCHED	06/25/2019	All Day			05/14/2019 21:03	No
<input checked="" type="checkbox"/>	Approved	ETSCHED	06/26/2019	All Day			05/14/2019 21:03	No
<input checked="" type="checkbox"/>	Approved	ETSCHED	06/27/2019	All Day			05/14/2019 21:03	No
<input type="checkbox"/>	Approved	ETSCHED	06/28/2019	All Day			05/14/2019 21:03	No

Cancel Selected

5. Click on **Cancel Selected**
6. Any ET days being cancelled will appear as follows

24	25	26	27	28
<span style="color: green;">✔</span> ETSCHED	<span style="color: green;">✔</span> ETSCHED	<span style="color: red;">●</span> ETSCHED	<span style="color: red;">●</span> ETSCHED	<span style="color: green;">✔</span> ETSCHED
01	02	03	04	05

7. Click **Submit** to send the request to the Supervisor for approval
8. Once approved the original approved ET request will be removed from the employee's Time Off Calendar

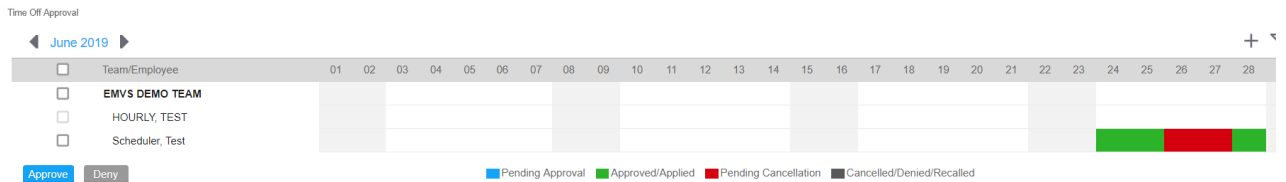
## Approve/ Deny A Cancel Paid Time Off (ET) Request

### Process Description:

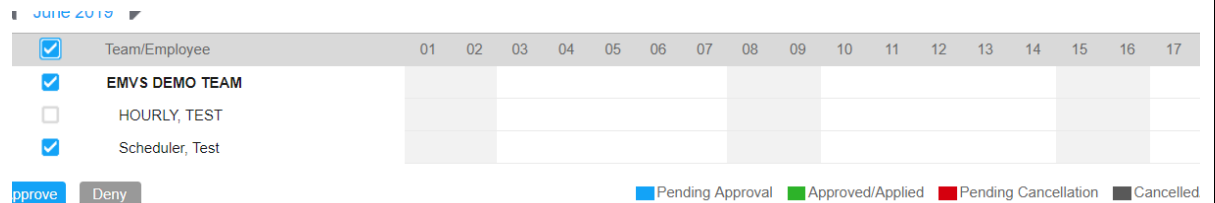
The following is the procedure for supervisors to approve or deny a cancel paid time off (ET) request.

### Steps:

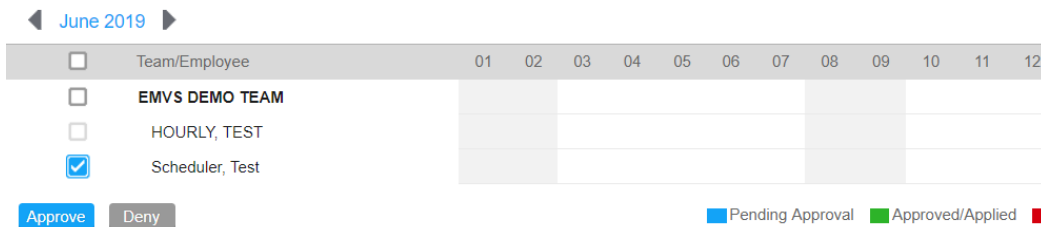
1. Login as Supervisor to WFM.
2. Select **Messages** from the Header Menu. Click on the message with Subject “A cancellation of approved time off request is submitted for your approval”. The details of the message should appear summarizing the dates for the ET days being requested to be cancelled. Select the link “A cancellation of previously approved time off is pending your approval” to access the request or
  - a. Click on **Time Off Approval** from the Header Menu
3. Any request for cancelling ET requiring approval will display on the Time Off Approval form in red as follows



4. The ET cancel request can be approved or denied as follows:
5. To approve or deny all request for one or more teams select the check box next to the team's name



- i. Select either **Approve** or **Deny**
  - ii. Enter optional comment in the **Comment** box and click **Submit**
6. To approve or deny all request for individual employees select the check box beside the employee names



Select either **Approve** or **Deny**

Enter optional comment in the **Comment** box and click **Submit**

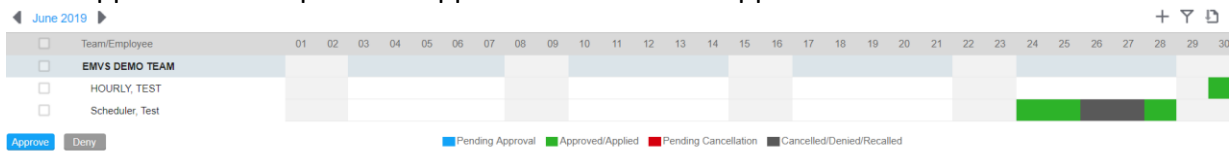
- To approve part of a ET request to cancel, click on the request (**red** box), a window will open showing the individual days being requested off

Time Off Approval - Scheduler, Test ✕

	Status	Type	Date	Time	Reason	Comment	Submitted	Pay in advance
<input type="button" value="Approve"/>	Cancellation Requested	ETSCHED	06/26/2019	All Day			05/14/2019 21:07	No
<input type="button" value="Approve"/>	Cancellation Requested	ETSCHED	06/27/2019	All Day			05/14/2019 21:07	No

Select **Deny** from the dropdown list for those days not approved to cancel and select **Submit**. Enter optional comment in the **Comment** box and click **Submit**

- Once approved the request will appear on the time off approval as follows



Request will go back to **Green** if the ET cancel request was denied and **grey** if the ET cancel request was approved.



**Note:** The ET requested days to cancel and approved will be removed from the employee's calendar.

# Timesheet Management: Managing Clocks/Basic Shift Overrides

## Add Clocks

<b>Process Description:</b>	This process describes the steps involved in adding clocks on the timesheet
<b>Objective / Expected Results:</b>	<ul style="list-style-type: none"> <li>• Select an employee timesheet and add the clocks.</li> <li>• Once the timesheet is submitted the clock punches will be applied to the timesheet and the work detail records should be updated accordingly.</li> </ul>

### Steps:

1. Select **Timesheet**
2. Select an employee from the **Employee** lookup
3. Select Date Selection Current Pay Period
4. Click **Load**
5. Choose a work day to enter clock punches manually
6. Click **+** to add a clock punch
7. Enter clock time (ex. 1200) using the **Time** field
8. Make sure clock punch type **ON** is selected in the **Type** drop down list
9. Hit the **Enter** key on the keyboard or click **ADD**
10. Enter clock time (ex. 2000) using the **Time** field
11. Make sure clock punch type **OFF** is selected in the **Type** drop down list
12. Hit the **Enter** key on the keyboard or click **ADD**
13. Click  to apply changes to timesheet
14. Click on the  beside the work day to view the work details and the applied changes

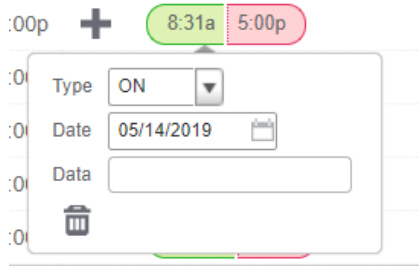
## Edit Clocks



<b>Process Description:</b>	This process describes the steps involved in editing clocks on the timesheet
<b>Objective / Expected Results:</b>	<ul style="list-style-type: none"> <li>• Select an employee timesheet and update the clocks.</li> <li>• Once the timesheet is submitted the clock punches will be applied to the timesheet and the work detail records should be updated accordingly.</li> </ul>

### Steps:

1. Select **Timesheet**
2. Select an employee from the **Employee** lookup
3. Select Date Selection Current Pay Period
4. Click **Load**

5. Click on the ON clock punch.  In this example, click on the green "8:31a"

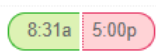

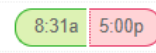





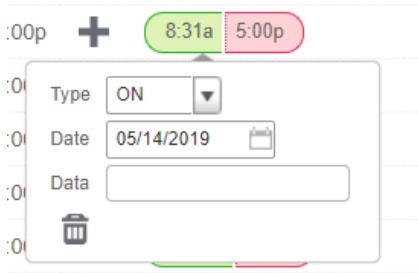
6. Update start time to 8:15a
7. Click  to apply changes to timesheet
8. Click on the  beside the work day to view the work details and the applied changes

## Delete Clocks

<b>Process Description:</b>	This process describes the steps involved in deleting clocks on the timesheet
<b>Objective / Expected Results:</b>	<ul style="list-style-type: none"> <li>• Select an employee timesheet and delete the clocks.</li> <li>• Once the timesheet is submitted the clock punches will be applied to the timesheet and the work detail records should be updated accordingly.</li> </ul>

### Steps:

1. Select **Timesheet**
2. Select an employee from the **Employee** lookup
3. Select Date Selection Current Pay Period
4. Click **Load**
5. Click on the ON clock punch.  In this example, click on the green “8:31a”
6. Click the 
7. Click on the OFF clock punch.  In this example, click on the red “5:00p”
8. Click the 
9. Click  to apply changes to timesheet
10. Click on the  beside the work day to view the work details and the applied changes











## Mark as Absent – Full Day Override

<b>Process Description:</b>	This process describes the steps used to mark an employee absent for the full day.
<b>Objective / Expected Results:</b>	Select an employee timesheet and mark the employee absent for the full day using the mark as absent functionality. Once the timesheet is submitted the absence time code changes will be applied to the timesheet and the work detail records will be updated accordingly.


### Steps:


1. Select **Timesheet**
2. Select an employee using the **Employee** lookup
3. Select Current Pay Period for the **Date Selection**
4. Click **Load**
5. Find a date where the employee is scheduled to mark as absent and click 
  
Mark as Absent
  

  

6. Select a time code using the **Mark as Absent** lookup
7. Click **OK**
8. The mark as absence icon  will turn blue  to show the employee is absent for the full day
9. Click **Submit** to apply to timesheet
10. Click  beside the work day to view the work details



## Override Shifts

<b>Process Description:</b>	This process describes the steps used to schedule an employee using a shift override to be applied for one or more days
<b>Objective / Expected Results:</b>	Select an employee timesheet and apply a shift override that will schedule the employee based on the shift start time and end time. Once the timesheet is submitted the schedule will be applied using the shift start and end times and applied to the days specified and the work detail records should be updated accordingly.

### Steps:

1. Select **Timesheet**
2. Select an employee from the **Employee** lookup
3. Select Current Pay Period for the **Date Selection**
4. Click **Load**
5. Click  next to a work day and select the **Shift** override

 Override - Shift: HOURLY, TEST - TESTHOURLY - 04/13

Shift	Start Date	End Date	Override Comment
	04/13/2019 	04/13/2019 	
<b>Submit</b>		Cancel	

6. Select a shift that is different from the currently assigned shift using the **Shift** lookup
7. Enter **Start Date** if the schedule change should apply to more than 1 day
8. Enter **End Date** if the schedule change should apply to more than 1 day
9. Optionally enter **Comment**
10. Click **Submit**










06/10/2017 Sat
08:00
08:00
8:00 - 16:00



## Ability to Manage Schedule Times


<b>Process Description:</b>	This process describes the steps used to schedule an employee using a schedule time override that can only be applied to one day—used with Basic Scheduling
<b>Objective / Expected Results:</b>	Select an employee timesheet and apply a shift override that will schedule the employee based on the shift start time and end time. Once the timesheet is submitted the schedule start and times will be applied to the timesheet and the work detail records should be updated accordingly.

### Steps:

1. Select **Timesheet**
2. Select an employee from the **Employee** lookup
3. Select Current Pay Period for the **Date Selection** or a **manual date range** for which you have a schedule built
4. Click **Load**
5. Click  next to a work day and select the **Schedule Time** override

 Override - Sched Times: HOURLY, TEST - TESTHOURLY - 04/08

Start Time	End Time	Start Time Date	Override Comment
<input type="text"/>	<input type="text"/>	04/08/2019 	<input type="text"/>

6. Enter **Start Time** (Ex. 0800)
7. Enter **End Time** (Ex. 1600)
8. Optionally enter **Comment**
9. Click **Submit**
10. Click  beside the work day to view the work details

## Creating a Basic Schedule

## Overview: Steps Required to Create a Basic Schedule

Follow these steps below to create and assign a schedule to an employee or a team using Basic Scheduling.

- 1) Create a Shift.
- 2) Assign the Shift (or shifts) to a Shift Pattern.
- 3) Go to the Timesheet for the employee you wish to assign the shift pattern to.
- 4) Click the employee's name to open the Employee Override page.
- 5) Assign the new shift pattern to the employee.

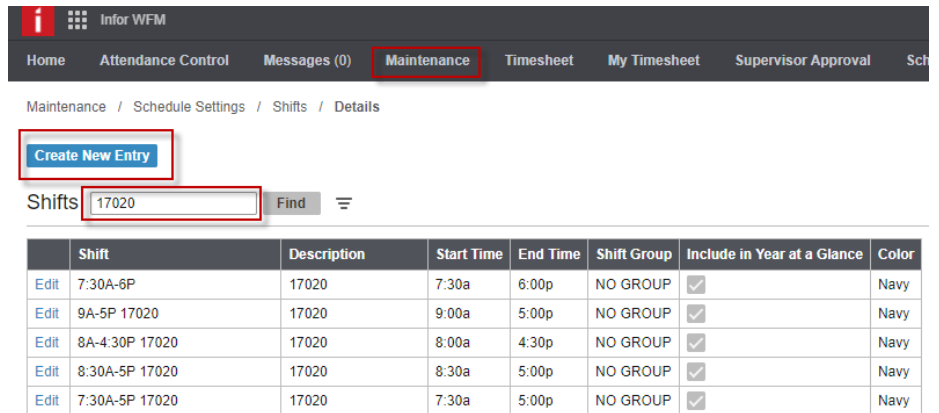
## Basic Scheduling: Creating a New Shift Label

To create a new shift label for use in assigning to a shift pattern:

7. Double-click ETM/Timeclock icon on computer desktop.
8. Use your network login and 2-factor Imprivata to log in.
9. Click on **Maintenance**.
10. Click **Schedule Settings**.
11. Click **Shifts**.

- a. Tip: You can use shifts created by another department/leader visible in your screen.

- b. Or, search the Description or Shift name by your department name or cost center number to locate previously created shifts as shown in the example below where 17020 is being searched for by typing in the number and clicking **Find**. Do NOT Edit other departments' shifts.



	Shift	Description	Start Time	End Time	Shift Group	Include in Year at a Glance	Color
Edit	7:30A-6P	17020	7:30a	6:00p	NO GROUP	<input checked="" type="checkbox"/>	Navy
Edit	9A-5P 17020	17020	9:00a	5:00p	NO GROUP	<input checked="" type="checkbox"/>	Navy
Edit	8A-4:30P 17020	17020	8:00a	4:30p	NO GROUP	<input checked="" type="checkbox"/>	Navy
Edit	8:30A-5P 17020	17020	8:30a	5:00p	NO GROUP	<input checked="" type="checkbox"/>	Navy
Edit	7:30A-5P 17020	17020	7:30a	5:00p	NO GROUP	<input checked="" type="checkbox"/>	Navy

12. Click **Create New Entry** to create a new shift (sample of what right looks like is on the next page). Any field with an \*asterisk is required. Complete the fields as follows:
  - a. **Shift:** This shift name must be unique. Add the cost center name or employee name to this unique shift in order to locate it later to assign it to a shift pattern.
  - b. **Shift Group:** No Group.
  - c. **Description:** Type your department cost center number. This will allow you to quickly search for your own shifts in the future associated with your own department and edit/change as needed.
  - d. **Include in Year at a Glance:** Checkmark the box—this allows you to use the Year at a Glance reports under My Reports for this shift.
  - e. **Start Time:** Make sure to specify AM or PM correctly.
  - f. **Color:** Choose a dark color so you and the employees can read it on the schedule.
  - g. **End Time:** Make sure to specify AM or PM correctly.
  - h. Click **SAVE**.
13. **Shift Break:** Add this section ONLY if your shift is 6.5 hours or greater whether a salaried or hourly staff member. This allows you to build in the planned 30 minute unpaid meal break as part of the shift. If the shift is less than 6 hours, do NOT complete this step.
  - a. **Start Time:** Choose AM or PM. If the employee does not take the break at this time, there is no issue. This is a planned placeholder on the schedule.
  - b. **End Time:** Choose AM or PM. If the employee does not take the break at this time, there is no issue. This is a planned placeholder on the schedule. It must be 30 minutes after the Start Time you entered above.
  - c. **Duration:** 30

- d. **Time Code:** Meal
  - e. **Hour Type:** Unpaid.
  - f. **Default Start:** Mirror what you entered in the Start Time.
  - g. Click **Save**.
14. Be sure to remember your exact shift name or write it down here:  
 \_\_\_\_\_ . You will need to know it EXACTLY for creating your shift pattern  
 in the next step.

Maintenance / Schedule Settings / Shifts / Details

[Create New Entry](#)

## Shifts - Details ...

Del

Shift \*  Shift Group \*

Description \*  Include in Year at a Glance

Start Time \*  Color

End Time \*

[Save](#) [Return to form listing](#)

Shift Break

Del	Start *	End *	Duration *	Time Code *	Hour Type *	Default Start (HH:MM)
<input type="checkbox"/>	<input type="text" value="12:00p"/>	<input type="text" value="12:30p"/>	<input type="text" value="30"/>	<input type="text" value="MEAL"/> <input type="button" value="Q"/>	<input type="text" value="UNPAID"/> <input type="button" value="Q"/>	<input type="text" value="12:00p"/>

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## Basic Scheduling - Creating a Shift Pattern

To create a new shift pattern that repeats every 7 days, 14 days or 21 days, follow these steps:

1. Double-click ETM/Timeclock icon on computer desktop.
2. Use your network login and 2-factor Imprivata to log in.
3. Click on **Maintenance**.
4. Click **Schedule Settings**.
5. Click **Shift Pattern**.



6. Type in the search box (see example to the right) your cost center number, department name, or another key word to search for a previously created shift pattern for your department. Click **Find**. Or, click on **Create New Entry** to create a new shift pattern for use in your department.

Maintenance / Schedule Settings / Shift Pattern / Details


**Create New Entry**

Shift Pattern  Find 

	Shift Pattern	Description	Start Date	Day Start	Shift Group
<a href="#">Edit</a>	7A-3:30P 17020	17020	07/28/2019		NO GROUP
<a href="#">Edit</a>	7:30A-5P 17020	17020	08/04/2019		NO GROUP
<a href="#">Edit</a>	8:30A-5P 17020	17020	07/28/2019		NO GROUP
<a href="#">Edit</a>	7A - 5:30P 17020	17020	07/28/2019		NO GROUP
<a href="#">Edit</a>	8A - 4:30P 17020	17020	07/28/2019		NO GROUP









- a. Reminder: Do NOT edit other departments' shift patterns.
7. To create a new shift pattern for 7 days (Sunday through Saturday), follow these steps:
  - a. **Shift Pattern:** Type the name of the shift pattern. This must be unique and you will need to remember it to assign it to the employee in the future.
  - b. **Description:** Type your department's cost center number this pattern will be used with so you can locate it for easily for future use.
  - c. **Start Date:** Date you want to make this shift pattern available for use (always pick a Sunday date).
  - d. **Day Start:** leave blank.
  - e. **Shift Group:** No Group.
  - f. Click **Save**.


8. Create the **Shift Pattern** Shifts next to associate the shift(s) with each day—one shift per day (example

shown to the right). Click the plus sign  seven times to create a one week pattern, click the plus sign fourteen times to create a two week pattern, etc. You have a limit of a 21 day pattern.

9.
  - a. In Day, make the first row: 1 (representing Sunday and the first day of the work week); 2 (representing Monday and the 2<sup>nd</sup> day of the workweek), 3 (representing Tuesday and 3<sup>rd</sup> day of the workweek) and so forth. Day 7= Saturday. See the screenshot for a Monday thru Friday shift pattern where the

Shift Pattern Shifts  Find 

Del	Day  *	Shift *	UDF 1
<input type="checkbox"/>	1	OFF	
<input type="checkbox"/>	2	7A-3:30P 17020	
<input type="checkbox"/>	3	7A-3:30P 17020	
<input type="checkbox"/>	4	7A-3:30P 17020	
<input type="checkbox"/>	5	7A-3:30P 17020	
<input type="checkbox"/>	6	7A-3:30P 17020	
<input type="checkbox"/>	7	OFF	

**Save**  Return to form listing Top



- employee works the same hours each day and is off on Saturday and Sunday of each week.
- b. Shift: For each row, choose 'OFF' if this employee does not work this day of the week or choose the SHIFT NAME you created earlier for each day the employee does work.
    - i. Tip: An employee can have more than one shift assigned in their repeating pattern. Refer to the second screenshot on the next page for an example.
      1. As a reminder: staff must have 8 hrs rest between midnight and midnight of the same work day, and may only work 16 hours per day, up to six days between Sunday and Saturday of the same calendar week by law in Illinois.
  - c. Click **Save**.

i Infor WFM
 
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Maintenance / Schedule Settings / Shift Pattern / Details

[Create New Entry](#)

Shift Pattern - Details ...

Del	Shift Pattern *	Description	Start Date *	Day Start	Shift Group *
<input type="checkbox"/>	7A-3:30P 17020	17020	07/28/2019		NO GROUP

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Shift Pattern Shifts  [Find](#)

Del	Day	Shift *	UDF 1	UDF 2	UDF 3	UDF 4
<input type="checkbox"/>	1	OFF				
<input type="checkbox"/>	2	7A-3:30P 17020				
<input type="checkbox"/>	3	7A-3:30P 17020				
<input type="checkbox"/>	4	7A-3:30P 17020				
<input type="checkbox"/>	5	7A-3:30P 17020				
<input type="checkbox"/>	6	7A-3:30P 17020				
<input type="checkbox"/>	7	OFF				

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Shift Pattern Shift Labor  [Find](#)

Shift Pattern Shifts	Shift Pattern *	Start Time	End Time *	Docket	Hour Type	Job	Time Code	Project	Cost Center Override	Activity	Team
No Records Found											

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**i** Infor WFM

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Maintenance / Schedule Settings / Shift Pattern / Details

[Create New Entry](#)

### Shift Pattern - Details ...

Del	Shift Pattern *	Description	Start Date *	Day Start	Shift Group *
<input type="checkbox"/>	7A-4:30P LAURA M	17020	08/23/2020		NO GROUP

[Save](#) [Return to form listing](#)

Shift Pattern Shifts  [Find](#)

Del	Day ▲ *	Shift *	UDF 1	UDF 2	UDF 3	UDF 4
<input type="checkbox"/>	1	OFF				
<input type="checkbox"/>	2	7A-4:30P 17020				
<input type="checkbox"/>	3	7A-4:30P 17020				
<input type="checkbox"/>	4	7A-4:30P 17020				
<input type="checkbox"/>	5	7A-4:30P 17020				
<input type="checkbox"/>	6	7A-11A 17020				
<input type="checkbox"/>	7	OFF				

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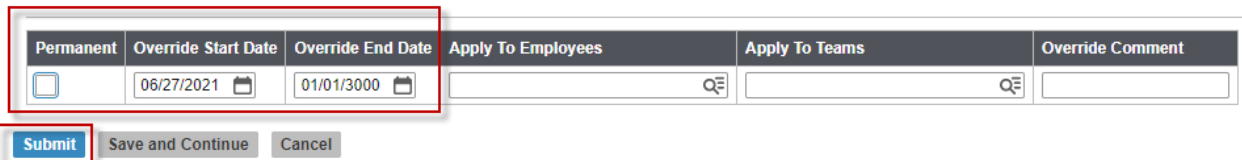
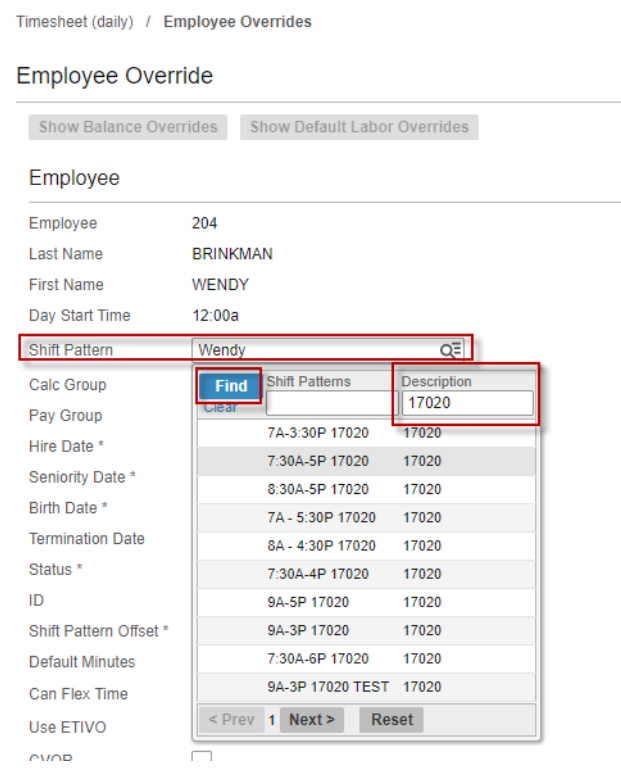
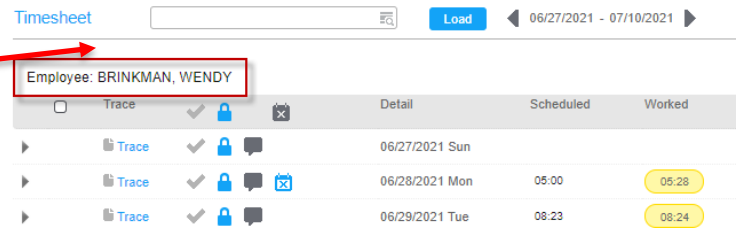
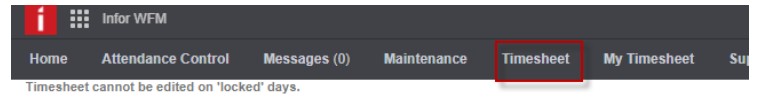
Shift Pattern Shift Labor  [Find](#)

Shift Pattern Shifts ▲ *	Shift Pattern *	Start Time ▲ *	End Time *	Docket	Hour Type	Job	Time Code	Project	Cost Center Override	Activity	Team
No Records Found											

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## Basic Scheduling: Assigning a Shift Pattern to One Employee via Timesheet-Employee Override

1. Double-click ETM/Timeclock icon on computer desktop.
2. Use your network login and 2-factor Imprivata to log in.
3. Click **Timesheet**.
4. Click on the **Employee's Name**.
5. This opens the **Employee Override** page where you can view ET balances, the employee's assigned/budgeted FTE and assign a new shift pattern for a short timeframe or permanently.
6. In the **Shift Pattern** box, click on the **Magnifying Glass** icon
  - a. Search by the **Shift Pattern Name** or, type the cost center number in the **Description** box if you have followed this recommendation in creating your shift patterns.
  - b. Click **Find**.
  - c. Click the **shift pattern** you intend to assign to the employee.
    - i. If the employee already has a shift pattern assigned, you may need to choose **Not Assigned** as the shift pattern to clear the old pattern before you can assign your changed pattern.
  - d. Scroll to the bottom of the Employee Override page to determine the dates of the shift pattern and to submit your changes.
7. **Remove** the checkmark from **Permanent**.
8. Choose the **Override Start Date** to begin (do not assign to previous pay periods or locked pay periods). This date should be a Sunday as that is the start of the work week.
9. Leave **Override End Date** as 1/1/3000 if this is going to be a long-term shift pattern. If you are only making this pattern for a shorter timeframe, then choose the Saturday date you want this shift pattern to end.
10. Click **Submit**.



- a. This returns you to the employee's timesheet to confirm the shift pattern has been correctly assigned.

**i. Troubleshooting Tips:**

- If you do not see the shift pattern reflected, refresh your screen or log out and log back in to WFM.
- If the employee had a previously assigned shift pattern, you may have to clear the old shift pattern by first assigning the Shift Pattern of **Not Assigned** (see Step 6.c.i. above).