Workforce Management (WFM)

Advanced Scheduling Guide

Revised: 11/2021

Table of Contents

Advanced Scheduling

Overview of MVS Scheduling

The Multiview Scheduler (MVS) module provides a consolidated scheduling interface that enables you to:

- create schedules either manually or automatically using auto-assign.
- analyze schedules to determine if and where changes are required.
- edit schedules, if required.
- publish or print schedule details.

The MVS is a collection of both scheduled shifts for employees on a home or temporary team, as well as unstaffed shifts for teams assigned to the specified schedule periods.
Schedule and shift details are created by:

- using employees' shift patterns and default jobs, and/or
- using the Create (Update) Unstaffed Shifts to automatically create unstaffed shifts, and/or
- using the MVS to manually create shifts and shift details

Using shift patterns, employees are assigned to shifts based on their default labor, which are displayed in the MVS.

Unstaffed shifts can be created based on the staffing requirements defined for the team(s) for the schedule period retrieved, using the Create (Update) Unstaffed Shifts process. You can also manually create unstaffed shifts from within the MVS to represent needs not predicted in the staffing requirements.

Using the MVS, schedulers can manually create a schedule from scratch or retrieve the shifts and shift details for a team or teams for a specific date range. The scheduler then reviews the schedule and, if necessary, manually adjusts the schedule details before publishing.
Manually adjusting the MVS schedule can include:

- Automatically assigning (using the auto assign function) or manually assigning employees to unstaffed shifts
- Manually adding or removing shifts from the schedule
- Adjusting and re-balancing the hours worked between different employees
- Manually editing the details of staffed/unstaffed shifts

Once satisfied with the edits, the supervisor publishes the schedule so that it can be viewed by the employees. Publishing the schedule also saves the details to the timesheet and, optionally, notifies affected employees or all employees of the schedule changes

Advanced Scheduling Process Overview

Schedule templates

Schedule templates are a powerful tool to determine staffing requirements for each week as well as for specific periods such as holiday weekends or local events.

There are two types of templates that we can use for schedule templates:

- Staffing requirement template
- Shift template

Overview of Audit Tracking and how MVS works within WFM

Audit tracking

Audit tracking is done through the Shift History feature of MVS. The Shift History feature displays the tracking of edits made to an assigned shift starting from its creation in the master rotation or one-time schedule, or from its creation as an ad hoc shift.

This audit log data helps both the employer and the employees to understand the reasons behind past scheduling decisions.

Schedule Compliance Rules:

Warnings appears with Yield icons as shown below.

We have the following rules for all NON-EXEMPT (hourly) staff turned on:

- Warning if scheduled over 40 hours
- Warning if scheduled more than 6 days in any week. This was the best that 'minimum 24 hours of rest per 7 days' could be built into the compliance.
- Warning if scheduled over FTE.

Overview of Steps Required to Create an Advanced Schedule

Follow these steps below in order to create and assign a schedule that will permit self-scheduling and staffing complexity/analytics.

Step	Procedure
1	Set a Team Schedule Period and Day Part. NOTE: You must have a day part in the shift configuration or it will not count towards coverage. ⚠️ If a schedule period currently associated to some teams is deleted, those teams revert to being associated with the default schedule period. The default schedule period cannot be deleted, though the period can be edited.
2	Define Team Job Qualifications (e.g. BLS, NRP, ECRN, TNCC/TNS, Licenses, ENPC, etc.) for each job. NOTE: This is not currently working so do NOT use this. It stops staff from even seeing shifts in self-scheduling (e.g. if ACLS is not current, you can't see the shift to pick it up).
3.	Set up your shift display labels. Then, complete Shift Configuration using those Shift Display Labels and Day Parts. NOTE: Be sure to add meal breaks within first 5 hours of each shift for unpaid, uninterrupted 30-minute meal break in the Break SubForm. This will allow you to better analyze productivity and will NOT require the employee to break at that time.
4.	Configure a Scheduled Staffing Requirements Template for each of your Teams.
6.	Create a Shift Template for Unassigned Shifts for your Team(s). (REQUIRED for Advanced Scheduling).
7.	Generate a Workload Target (Staffing Requirements Template) for your team(s) for the Schedule Period if one exits AND generate your Shift Template for your team. Be sure you generate for a full work week (Sunday through Saturday) for the amount of weeks you wish to generate a schedule. You cannot overlap dates (if you previously generated for 11/9/2021, you cannot overlap or generate again for 11/9/2021).

## Add an Ad Hoc Shift in Simple Edit Mode

Process Description:	Create a new shift in the ASV in Simple Mode - this is the longest way to create a schedule. If you are doing this step, then you need a consult to configure this shift and update your templates you are using.
Objective / Expected Results:	Successfully place a shift on the ASV

Steps:

1. Select **Scheduling > Multi-view Scheduler > Enhanced Schedule View > Advanced Schedule View**
2. In the Schedule Selection form choose your Team in the Unit selection
3. Choose Current Schedule Period in the Schedule Period selection or a manual date range.
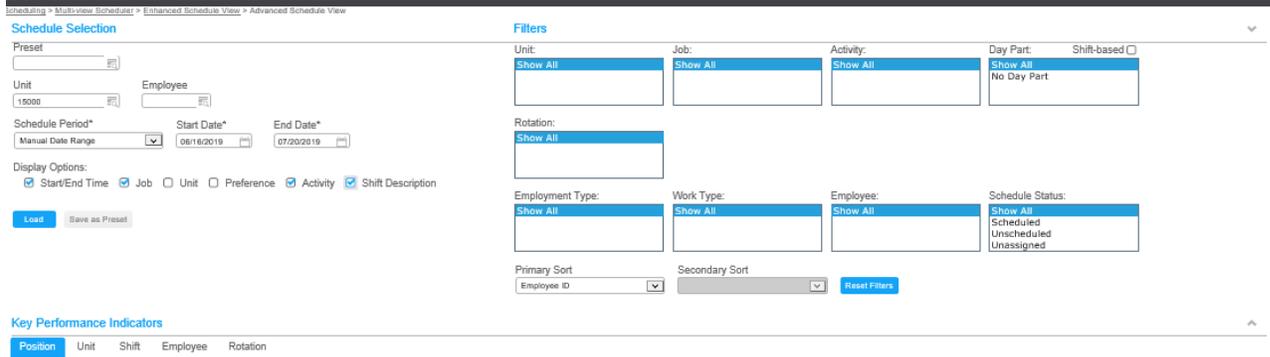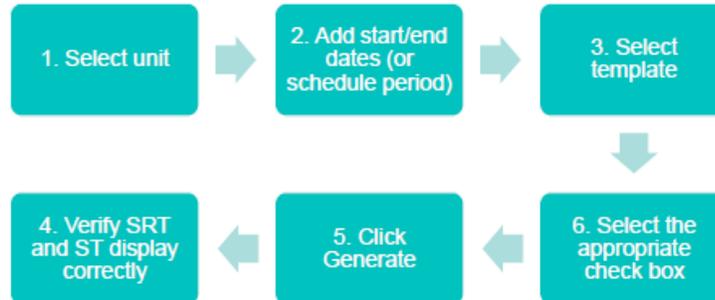

4. Click [Load]
5. In the icon menu in the top right of the calendar click the magic wand and make sure you are in Simple Edit mode
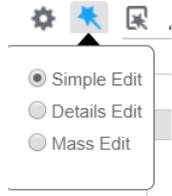
6. Click into any empty calendar cell to get a blank entry box
7. Type in your Configured Shift Display Labels, the <u>spelling and case must be perfect</u>, and hit TAB on your keyboard. If you do not have it perfect, you will get the error message of shift not found.
8. Your employee should have a new shift now assigned to them.

Overview: Generating a Schedule

Templates can be used anytime during the effective schedule periods, but you MUST generate the schedule template before viewing the requirements and shifts. The process of generating the staffing requirements or shift template is similar as shown in this high-level flowchart.

High-level overview of generating a schedule

Step	Step details
1	On the Unit tab, select the unit/team.
2	There are two options for the schedule period: • **Schedule Period:** Select the Schedule period for generating shifts. There are multiple schedule periods to choose from. • **Start and End Dates:** Select the start and end dates to generate the unassigned shifts or staffing requirements.
3	Select the template(s) to generate. You may choose both shift templates and staffing requirement templates.
4	Select one of the following check boxes: • **Generate Workload based on Staffing Requirements:** This generates the staff demand created from the Staffing Requirement template. Once generated, this information can be seen from the ASV.

	• **Generate Unassigned Shifts:** This generates unassigned shifts. The shifts are generated following one of the two methods below:
	  ○ **Create as unpublished shifts:** The unassigned shifts are sent to the ASV for review and assignment. These shifts must be published using the publish icon in the ASV. Unpublished shifts can be attached to a Self-Scheduling process.
	  ○ **Send to Relief Queue:** The unassigned shifts are sent to the ASV as published, unassigned shifts. They are also made available in the relief queue for assignment. These shifts cannot be attached to a Self-Scheduling process.

5	Clicking Generate completes the schedule template process.
6	When the templates are generated, the information is sent to their designated areas based on the selection you chose in the **Select the appropriate check box** step.

Generate a Workload Target to the ASV

Process Description:	The Advanced Scheduling module cannot provide coverage analysis unless a Requirements target has been generated for the Schedule Period being analysed. Always generate for Sunday through Saturday (the full work week). You cannot overlap dates.
Objective / Expected Results:	Generate a Requirements Template to the Current Schedule Period.

Steps to Generate a Workload Target to ASV:

1. Select **Scheduling > Multi-view Scheduler > Schedule Template > Generate Schedule**
2. Choose your Team in the Unit lookup
3. Dates for Last Generated Date – Workload will appear if they have been done before. If this is the first time this will be blank. Leave Generation Dates set to Schedule Period.

4. Click **Next**
5. Choose your Staffing Requirement Template as shown below.

6. Click **Next** to display this screen.

7. Click

Steps to Generate a Workload Target to ASV:

8. Click **Generate**
9. You should receive a success message that the workload was generated.
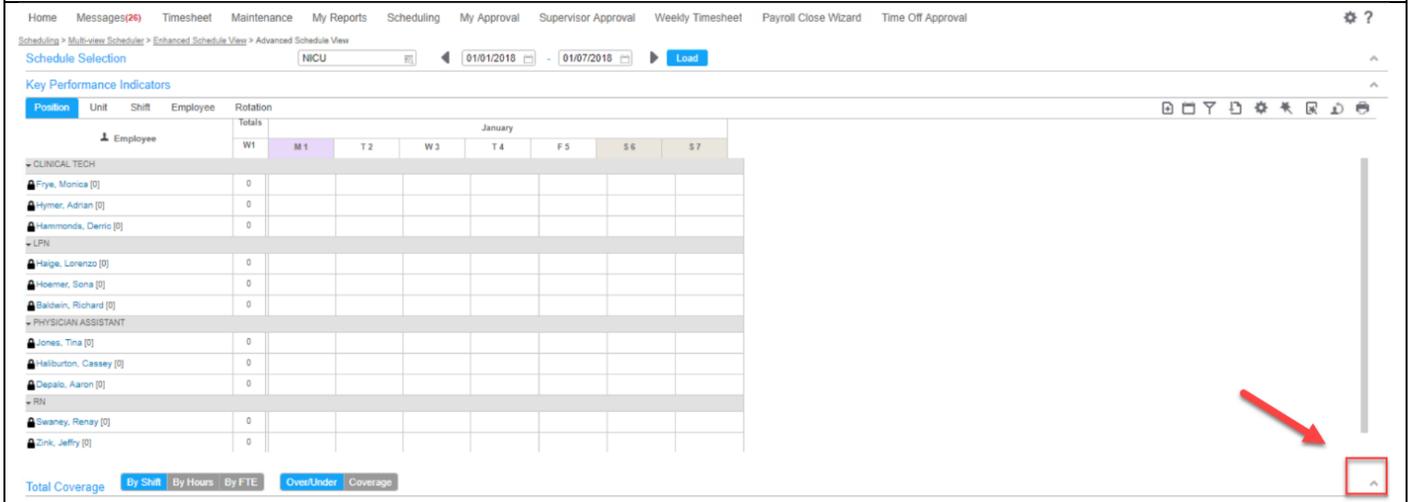10. Let's check our work. Navigate to **Scheduling > Multi-view Scheduler > Enhanced Schedule View > View Schedule**

11. Verify your Targets are in the coverage panel. Click ⁝⁝⁝ (Menu icon) on the lower right of your screen and browse the various options as shown to the right and as shown on the next page.

Display Coverage	Display Time	Display Employee Count
○ By Position	○ By Shift	○ By Over/Under
○ By Day Part	○ By Hours	○ By Coverage
	○ By FTE	

Generate a Shift Template	
Process Description:	Generating a Shift Template sends Unassigned work to your ASV This template is required for advanced scheduling and generates 'yellow shifts' to allow you to assign shifts to staff.
Objective / Expected Results:	Create Unassigned work by generating your Shift Template

Steps:

1. Select **Scheduling > Multi-view Scheduler > Schedule Template > Generate Schedule**
2. Choose your Team in the Unit lookup
3. Dates for Last Generated Date – Shifts will appear if they have been done before. If this is the first time this will be blank. Leave Generation Dates set to

   Generation Dates   ⦿ Schedule Period

4. Click [Next]
   Choose your Shift Template. If new the Last Generated date should be blank.

   ...cheduling > Multi-view Scheduler > Schedule Template > Generate Schedule

   Generate Schedule

Unit	Templates	Generate

   Unit   15000
   Dates   06/23/2019 **to** 07/20/2019

   Staffing Requirement Templates

☐	Staff Req Template	Last Generated
☐	ℹ OR Test	07/19/2019

   Shift Templates

☑	Shift Template	Remove Unassigned	Replacement Shifts	Last Generated
☑	ℹ OR Day Test	☐	☐	

   [Previous] [Cancel] [Next]

5. Click [Next]

   ⚠ If the Next button does not display, click the three vertical dots just above Workbrain Support in the right corner. Click the Zoom – (minus sign) to change the zoom level to 90%. The Next button should appear in the lower left of the screen. If not, continue to reduce the zoom until the button is visible.

6. Select

   ☑ Generate unassigned shifts
       ◯ Send to Relief Queue
       ⦿ Create as unpublished shifts

7. Click **Generate**
8. It may take a few seconds, wait for a success message.
9. Navigate to **Scheduling > Multi-view Scheduler > Enhanced Schedule View > View Schedule**
10. Verify that you have Unassigned Shifts (Yellow Shifts)

Scheduling > Multi-view Scheduler > Enhanced Schedule View > View Schedule

Schedule Selection — NICU — ◀ 01/08/2018 - 01/14/2018 ▶ Load

Key Performance Indicators

Position	Unit	Shift	Employee	Rotation

Employee	Totals W1	M 8	T 9	W 10	T 11	F 12	S 13	S 14
CLINICAL TECH								
Frye, Monica [0]	0							
Hymer, Adrian [0]	0							
Hammonds, Derric [0]	0							
UNASSIGNED								
	161.00	D12 / N12	D12 / N12	D12 / N12	D12 / N12	D12 / N12	D12 / N12	D12 / N12
LPN								
Haige, Lorenzo [0]	0							
Hoemer, Sona [0]	0							
Baldwin, Richard [0]	0							
UNASSIGNED								
	161.00	D12 / N12	D12 / N12	D12 / N12	D12 / N12	D12 / N12	D12 / N12	D12 / N12
PHYSICIAN ASSISTANT								

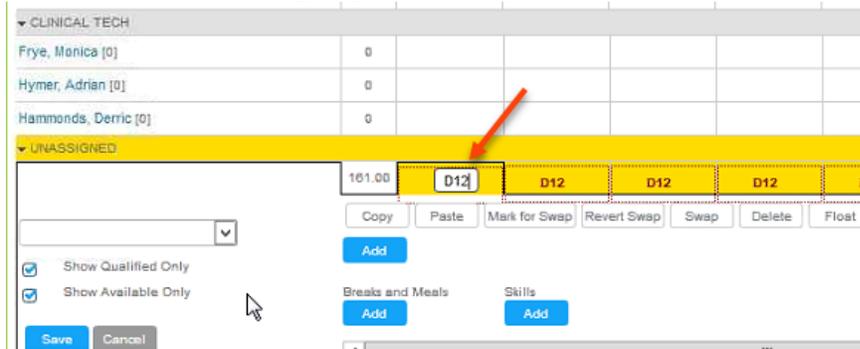## Assigning an Employee to Unassigned Shift

|	
Process Description:	In the ASV you can assign employees to your Unassigned Shifts
Objective / Expected Results:	Find employees for your unassigned work.

Steps:

1. Select **Scheduling > Multi-view Scheduler > Enhanced Schedule View > View Schedule**
2. Click your Magic Wand and set it to Details Mode (NOTE the Schedule is defaulted to Details Edit)

   ○ Simple Edit
   ● Details Edit
   ○ Mass Edit
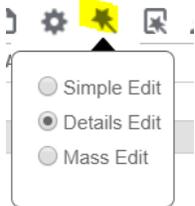
3. Click into the cell of one of your yellow shifts.

4. In the far left of the Details Pane, leaving Show Qualified and Show Available selected, click the

   ☑ Show Qualified Only
   ☑ Show Available Only
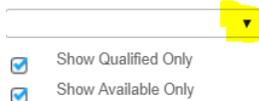
5. Choose an employee from your list.

6. Click **Save**
7. Click your Magic Wand and set it to Mass Edit Mode

   ○ Simple Edit
   ○ Details Edit
   ● Mass Edit

8. Click on two or more of your Unassigned Shifts, they should turn green. Leave them green.

9. Click the ✎ in your icon toolbar.
10. Choose Assign
11. Select an Employee from your list.

12. Click **Save**

Overview of the ASV (Advanced Scheduling View)

The ASV displays the schedule for a given date range. This view is used for final editing of the schedules before they are published to the employee's timesheet and for day-to-day shift management. The ASV displays all the parts of the master rotation and one-time schedule together.

You can do the following from the ASV:

- View shift assignments for each employee in the group selected
- Edit or add shift details individually or as a mass edit
- Assign employees to shifts
- Swap shifts
- Book-off employees absent from a shift
- Send a shift to a relief queue
- Create ad hoc shifts
- Kick off an Auto-Assignment process

The ASV is found at this path: **Scheduling > Multi View Scheduler > Enhanced Schedule View > Advanced Schedule View**.

There are five sections in the ASV:

- Schedule Selection panel
- Key Performance Indicators panel
- Calendar panel
- Function Icons menu
- Total Coverage panel

Schedule Selection

The Schedule Selection panel is the first panel that displays when you open the ASV. This panel is the filter for the Calendar panel.

The following table lists the required fields and optional filters in the Schedule Selection panel:

Field	Type	Description
Unit Or Employee	Required	In this field you are required to specify either the Unit or Employee or both. The Calendar panel will not display any information without at least one of these fields completed.
Schedule Period	Required	In this field you are required to select one of these seven options: • **Current Schedule Period:** The Start and End Dates are automatically completed with the current schedule period. • **Last Schedule Period:** The Start and End Dates are automatically completed with the last schedule period. • **Next Schedule Period:** The Start and End Dates are automatically completed with the next schedule period. • **Current Week:** The Start and End Dates are automatically completed with the dates of the current week. • **Last Week:** The Start and End Dates fields are automatically completed with the dates of the previous week. • **Next Week:** The Start and End Dates fields are automatically completed with the dates of the next week. **Manual Date Range:** When Manual Date Range is selected, you must manually enter the Start and End Dates.
Start Date	Required	This field identifies the first day displayed on the Calendar panel.
End Date	Required	This field identifies the last day displayed on the Calendar panel.
Filters	Optional	The following are options you can select from the Filters field before loading: • Unit • Job

Field	Type	Description
		- Activity - Day Part - Rotation - Employment Type - Work Type - Employee - Schedule Status

To use the panel, complete the required fields, add any extra filters if desired, and then click the **Load** button.

If you want to reuse the selections, you can instead click the **Save as Preset** button. This will save your selections as a new preset, which is a user-specific combination of schedule selection criteria.

To return to the same schedule selections you viewed last, go to **Scheduling > Multi View Scheduler > Enhanced Schedule View > View Schedule**. This is referred to as the ASV Quick Load.

Key Performance Indicators in the ASV

There are three categories of key performance indicators, as described in the following table.

Key performance indicator categories	Types within a category
Shifts	• **Filled Shifts**: Indicates the number of shifts and the percentage of shifts that are assigned • **Unfilled Shifts**: Indicates the number of shifts and the percentage of shifts that are unassigned • **Total Shifts**: Indicates the number of total shifts currently displayed on the Calendar panel
Hours	• **Filled Hours**: Indicates the number of hours and the percentage of hours that are assigned • **Unfilled Hours**: Indicates the number of hours and the percentage of hours that are unassigned • **Total Hours**: Indicates the number of total hours currently displayed on the Calendar panel
Totals	• **Total Cost**: Total cost of the current assignments, if costs are implemented • **Total Hours**: Total hours displayed on the Calendar panel

Calendar Panel Icons in ASV

There are ten icons in a toolbar that provide a specific function for the Calendar panel. The following table describes the function of each icon.

Icon	Function
New Ad Hoc	The New Ad Hoc icon displays the new Ad hoc window. The following fields are available for editing: • **Date**: Select the day the shift is added • **Unit** (optional): Indicates the team associated with the new shift. **Note**: This field populates information in the **Shift, Employee, and Job** fields. • **Shift** (optional): Select the shift to add • **Employee** (optional): Select the employee for the shift • **Job** (optional): Select the job for the shift
Book-Off	The Book-Off wizard window provides you with a common window for booking off individual employees using the Detail Edit mode or groups of employees using the Mass Edit mode.
Filter	The Filter icon is used to display the filter options for the calendar.
Sort By	The Sort By icon is used to further sort employees in the Calendar panel. There is a primary sort and a secondary sort, but the secondary sort only displays if the Employment Type or the Work Type is selected.
Display Options	The Display Options icon controls the information displayed in each cell. The following are options for display: • **Available**: Displays availability for each day on the Calendar panel if the Availability Management module is implemented. • **Start/End Time**: Displays the shift start/end times on the Calendar panel. • **Unit**: Displays the unit on each day of the Calendar panel. • **Preference**: Displays the preference on each day of the Calendar panel if preference is set up. Not used in most MVS implementations. • **Activity**: Displays the activity for each shift on each day of the Calendar panel.
Edit Mode	The Edit Mode icon is used to perform an edit. There are three edit options that can be performed from the ASV: • **Simple Edit** – The Simple Edit is used to make simple changes such as adding a shift via shift display label.

Icon	Function
	• **Details Edit** – Details edit is the most commonly used edit mode. Using the details edit, you can perform the following actions on each day of the Calendar panel: ○ Copy ○ Mark for Swap ○ Float ○ Book Off ○ Unassign ○ Add Shift ○ Shift History • **Mass Edit** - Multiple shifts can be selected at once. Shifts can be copied, duplicated, lengthened, shortened, new end time selected, unassigned, booked off, and assigned deleted (ad hoc only).
Auto-Assignment	When the Auto-Assignment feature is enabled, the Auto-Assignment icon is visible in the ASV. The Auto-Assignment icon is used to begin the Auto-Assignment process for the units displayed in the ASV.
Relief	The Relief icon is used to send selected shifts to the Relief Queue. The Edit Mode of the ASV must be the Mass Edit Mode.
Print	The Print icon is used to send the filtered and sorted schedule to the printer. You have the option to save the schedule to a portable document file format (pdf).
Publish	If the schedule is already published, this icon does not display in the functional icons. The Publish icon is used to publish a schedule. This action publishes the schedule to the employee timesheets. Schedule details appear on the employees' timesheets. Employees clock against these schedules and pay rules are applied accordingly.

Calendar Panel Details Edit Mode

The Calendar panel is the most important panel in the ASV. It is used to review and edit shifts. The Calendar panel has five different tabs:

- **Position:** Sorts employees based on the assigned job
- **Unit:** Sorts employees based on their team
- **Shift:** Sorts employees based on the shifts they are assigned to
- **Employee:** Sorts employees based on the employee
  Note: To further sort employee, use the Sort function icon at the top right of the ASV.
- **Rotation:** Sorts employees based on the rotation they are assigned to

Details Edit Mode

The details of each shift display in the Calendar panel. The most commonly used display for the Calendar panel is the Details Edit Mode. To display this mode, you must first select the Edit Mode function icon, and then select the Details Edit Mode option.

When using the detail edit mode, you are able to modify shifts. To access the shift display in the Calendar panel you must first select a shift.

In the Shift panel, there are four sections as described in the following table:

Section	Description
Employee Card	The Employee Card displays the following information about an employee: • Employee Name • Rotation/Schedule assignments • Employee ID • Employee Status • Pay Group • Calc Group • Jobs • Availability The Employee Card is also where the details can be saved or canceled. ⚠ You can also view employee information by hovering over the employee name in the Calendar panel.
Functional buttons	Functional buttons are used to perform shift modifications. • Copy copies a shift so that the properties can be pasted into another cell. When copied, the shift turns green. The pasted shift turns blue to designate this shift as a shift not assigned by the rotation

Section	Description
	• **Mark for Swap** marks the shift to be swapped with another employee. The shift for swap turns green. Employees must be qualified for swapping shifts.
	• **Float** is used to float an employee between teams for part or all of his/her shift. It is used most often when an employee has a job qualification that is difficult to schedule and the shift he or she works can be easily filled.
	• **Book-off** is used to remove a shift from an employee for that day and designate how to handle the shift. When the Book-Off button is selected, the Book Off Wizard displays.
	• **Unassign** is used to remove a swapped shift, copied shift, or a shift picked up by an employee. This option is not available for shifts assigned to employees by the one-time schedule. The schedule must be removed from the one-time schedule and processed back to the ASV.
	• **Add Shift** is used to add another shift to the employee's day.
	• **Shift History** is used to view the history of a shift.
	• **Delete** is used to delete a shift. The Delete button only displays if the shift is an ad hoc shift.
Shift Details	You can modify shift details such as start time, unit, position, skill or activity.
	You can add a new line for shift information by clicking the Add button that displays below the shift. For example, an employee is scheduled to work (WRK) all day. During the day, the employee is scheduled to go to training (TRN). This information can be entered as a separate line item.
Break Details	You can also add breaks and meals to a shift in the Shift panel of the calendar. Once added, they can be modified.

Total Coverage panel

The Total Coverage panel provides a view of the number of shifts that are scheduled versus the required shifts. This panel displays overall coverage, coverage by unit, coverage by position, and coverage by day part. You can look at this information in several ways:

- FTE
- Hours
- Over/Under
- Coverage

Booking Off Shifts

Book-off shifts or shifts that need assignment appear as yellow shifts in the ASV and can be found in the Unassigned section.

These shifts, as well as assigned shifts, can be assigned from the ASV, sent to the Relief Queue, or marked as Relief Not Needed and removed from the schedule.

The Book Off Wizard is the form for booking off shifts. The following table shows the three methods for using the Book Off Wizard in the ASV:

Method	Path	Description
One shift at a time	Edit icon (magic wand) > Details Edit	In the Details Edit mode, select a shift in the Calendar panel of the ASV, then use the book off functional button in the shift window to display the Book Off Wizard.
Groups of shifts	Edit icon (magic wand) > Mass Edit	In Mass Edit mode, select the shifts in the Calendar panel for the book off. These shifts can be for multiple employees. The Book Off Wizard displays with all shifts and employees whose shifts were selected.
Over a range of dates	Book Off icon (calendar)	From the Book Off Wizard, enter values in the three fields below and click Load: • **Employee:** Employee whose shifts are being relieved • **Start Date:** First date of the employee's book off • **End Date:** Last date of the employee's book off

Book Off Wizard

The following table lists and describes the fields available to edit when the Book Off Wizard is displayed.

Field	Description
Start Time	In this field, the start time is automatically entered as the original start of the shift. If the start time of the book off is different, the start time is entered in the field.
End Time	In this field, the end time is automatically entered as the original end time of the shift. If the end of the book off is different, the end time is entered in the field.
Book Off Code	The Book Off Code field indicates the Activity name.
Send to Relief Queue	The Send to Relief Queue field is the status the shift will acquire once the book off wizard is complete. Note: To map Relief Codes to the Book Off code, navigate to Scheduling > Multi View Scheduler > Advanced Settings > ES Data Definitions > Relief Activity Code.
Leave Reason	The Leave Reason field may be required. Note: To set up leave reasons, navigate to Scheduling > Multi View Scheduler > Advanced Settings > ES Data Definitions > Leave Reason.
Comments	This field is used to enter comments that may be required for the Book Off to proceed.

You may split the book off if there are multiple book-off codes in the shift. To split the shift, select the button.

The Book Off Wizard also provides information about the employee's balances. The balances are displayed in the lower left corner of the window. The balance is modified as the employee books and uses his/her citation and sick days.

The Book Off Wizard also displays shifts and leaves from outside of MVS. These shifts and leaves are view-only and cannot be booked off in the wizard.

Editing booked off shifts

Booked off shifts can be edited after they have been created, however, there is one restriction when editing. You cannot extend or shorten the start and end times. Otherwise, booked off shifts can be edited in the same way as regular shifts.

When you edit a booked off shift:

- The schedule details and LTA overrides are updated on the timesheet.
- A shift edit is recorded in the Shift history.
- Related relief shifts are unaffected.

- Multiple leave codes can be applied to a booked off shift. For example, a shift that has been booked off as a full sick day, can be split in two. One half of the shift can be a sick day and one half of the shift can be changed to vacation.

Canceling booked off shifts

You have the option to cancel a booked off shift if the relief shift created by the book off meets one of two conditions:

- The shift is not assigned an employee.
- The shift is assigned but not booked off further or swapped.

If the relief shift is not assigned, then you can cancel the booked off shift and remove the relief shift by selecting the Cancel Book Off option in the shift details. The original shift returns to the form that existed prior to the book-off transaction.

If the relief shift is assigned but not booked off further or swapped, then you have two options for managing the relief shift:

- **AR Relief** - The relief shift is set to the **Action Required** (AR) status, and is highlighted in orange. You can retain or remove the shift using the Relief Queue.
- **Retain Relief** - The relief shift is kept on the schedule for the relieving employee. The shift is converted into an ad hoc shift. The ad hoc shift has the same activity as the shift label. With this option, both the original employee booking time off and the relieving employee work shifts.

If the relief shift is already assigned, and is booked off further or swapped, then the originally booked off shift cannot be canceled. You must cancel the latest book-off or revert the latest swap.

Advanced Scheduling: Booking Off Staff (ET, IVO, Jury Duty, Bereavement, etc.) for Partial or Full Shifts

Whether a partial or full day absence, the WFM schedule drives the timesheet with automation rules that does math for us.

If the employee is already scheduled for the day and you are now 'booking off" the employee for part of his/her scheduled shift due to a calloff, IVO, or vacation time that was not requested via ETM or Mobility, then you do NOT need to enter in any hours but simply choose the correct timecode using the steps below. Let WFM do the math to pay the employee up this/her full schedule for the day whether a full or partial day and then just verify on the timesheet that it's correct.

Steps	What Right Looks Like
1. To book off a single shift, you need to be in Details Edit mode (click the Magic Wand). • *NOTE: To book off multiple shifts, you need to be in Mass Edit mode.* 2. Click the shift of the employee you wish to book off on the schedule as shown to the right. (please note, this step will unassign part or all of the shift to allow you to choose to reassign it to another employee) 3. Click **Book Off**	
4. You are brought to the book off wizard shown to the right with a sample of an employee calling off for the full shift of 7A to 4P (no need to adjust start/end times when a full shift of IVO/ET, or any calloff code. Read on for examples of partial shifts). • You can see the employee, shift and date you are entering a book off for as well as the employee's earned time bank. You can choose to book off the employee for part of his/her shift by	

Steps	What Right Looks Like
adjusting the start and end times as well as enter the book off code and leave reason.	
5. To adjust the start and end times, select in each corresponding field and enter the new start and end times, if appropriate, that they will be booked off for. 6. Click the selection box under book off code and enter a book off code 7. Leave the Relief Queue as Unfilled. 8. Click the selection box under leave reason and enter a leave reason. *Note: You now have the option to choose the Sick options for Employee Health in ASV view only for reporting purposes.* 9. Click Submit Below and to the right are some examples to illustrate this work for partial shifts. If a full shift, there is no need to edit the start or end times. o IVO Example #1 to the right: the employee is being IVOed starting at 3P for the remainder of their shift scheduled to end at 4P. So, IVO needs to START at 3P and end at 4P. o Example #2 to the right: Employee's shift starts at 7:30A and you IVO them for the first hour of the shift – post IVO starting at 7:30A and ending at 8:30A. Their clock punches will determine their work hours to be paid for the day.	**Example #1 – Partial IVO at End of Shift:** Book-Off Wizard 	Employee	Shift Label	Work Date	Start Time	End Time	Book-Off Code	Send To Relief Queue	Leave Reason
---	---	---	---	---	---	---	---
						UNFILLE	
	7:30a-4p	08/27/2019	3:00p	4:00p	IVO-UN	UNFILLE	| Employee Balance Info / Comments Balance Unit ET HOURS 0 ET-PP HOURS 0 ET-ANNUAL HOURS 0 Submit Cancel **Example #2 – IVO at Start of Shift:** Book-Off Wizard | Employee	Shift Label	Work Date	Start Time	End Time	Book-Off Code	Send To Relief Queue	Leave Reason
---	---	---	---	---	---	---	---
						UNFILLE	
	7:30a-4p	08/27/2019	7:30a	8:30a	IVO-ET	UNFILLE		 Employee Balance Info / Comments Balance Unit ET HOURS 0 ET-PP HOURS 0 ET-ANNUAL HOURS 0 Submit Cancel
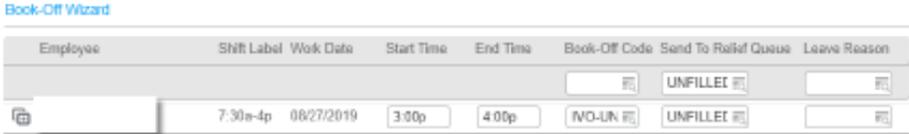
Steps	What Right Looks Like
○ **Example #3 to the right:** Employee is ill and leaving work early with a fever starting at 1P and was scheduled to leave at 4P. Choose Book Off with a start time of 1P and leave the end time at 4P and choose the code Calloff to pay ET or Calloff-Unpaid. Choose the correct Leave reason for a fever. **Again—click SUBMIT to view your changes. View the Timesheet to assure hours are calculated correctly.**	**Example #3 – Calloff at end of Shift:** Book-Off Wizard

Floating Shifts

The Float button can be viewed when editing a shift cell in Details Edit mode. Floating an employee is used to float an employee between teams for part or all of his or her shift. The Float button is used most often when an employee has a job qualification that is difficult to schedule and the shift he or she works can be easily filled.

The Float button opens the Float Wizard. The Float Wizard first displays in the Floating Shift tab. From the Floating Shift tab, you must enter information in the required fields.

The following table lists and describes the fields available to edit in the Floating Shift tab.

Field	Description
Work Date	The work date the float is moving to.
Unit	The team for which the float is available.
Position	The job for which the float shift is available.
Start Time	The start time of the float shift.
End Time	The end time of the float shift.

After completing field in the Floating Shift tab, there are two options to select:

- **Create New Shift:** This option allows you to choose a shift, activity and skill for the new shift.
- **Select existing unassigned shift:** This option only works if there is an unassigned shift on the Float From work date.

When you select Next, the Manage Relief tab displays. Select Next to confirm the float shift.