CREATE A SELF SCHEDULING PROCESS FOR PATIENT CARE SERVICES

Self scheduling processes are defined per team and can be used to allow employees to choose their work schedule from a selection of unpublished unassigned shifts. Employees must be eligible to work the job assigned to the shift.

Shifts sent to a self scheduling process are locked by the process and cannot be edited until the process closes.

CREATE SELF SCHEDULE GROUPS

Self Scheduling shifts are made available to Groups. You must create a group before you can have an open Self Schedule Process

1. Go to Scheduling / Self-Scheduling / Group
2. Press Create New Entry
3. Enter a Name and Description
4. Press Save
5. Add Employees to the Group Employees section. This is who will be able to self-schedule when creating the process. Currently, PCS has two separate groups for CNAs and Patient Safety Partners. These groups will need to continue to be updated with new hires, transfers and terminations.

Group - Details ···

Del	Group Name *	Group Description
☐	PCS SITTER/CNAS	PCS CNAs

Save   Return to form listing

Group Employee [   ] Find ≡

Del	Employee *	Eff Start Date	Eff End Date
☐	10806	01/01/1900	01/01/3000
☐	7897	01/05/2021	01/08/2030
☐	11176	01/05/2021	01/08/2030
☐	11209	09/01/2021	01/01/3000
☐	11632	08/01/2021	01/01/3000

CREATE A SELF SCHEDULE GROUP SET

If you have made multiple Self Schedule Groups, you can add them all to one group set and apply the entire group set to a self-scheduling process at once.

1. Go to Scheduling / Self-Scheduling / Group Set
2. Click Create New Entry
3. Enter a Name, Description and Team that this group set will apply to
4. Click Save
5. Add Groups created in the previous section to the Group Set under the Group Set Association section.

Scheduling / Self-Scheduling / Group Set

✓ Your changes have been saved.

Create New Entry

Group Set - Details ···

Group Set Name *	Group Set Description	Team *
TEST		17020

Save   Return to form listing

Group Set Association [   ] Find ≡

Del	Group Name *
☐	5E RN GROUP 2
☐	3 IMCU

Save ⊕ Return to form listing   Top

CREATE UNPUBLISHED SHIFTS

Only Unpublished and Unassigned Shifts can be sent to a Self Schedule Process. The best way to create these Shifts are with Shift Templates. Building Shift Templates can be found in the scheduling manual. Below is how to generate a template.

1. Go to Scheduling / Multi-view Scheduler / Schedule Template / Generate Schedule
2. Enter 14000 into the Unit field

a. Last Generated Date – Workload shows you the date that the workload was last generated through. The workload indicates how many staff you need per day, but not the shifts you need assigned.
  b. Last Generated Date – Shifts shows you the date the shifts were last generated through. These are the yellow shifts that show up on your schedule to assign.
3. Enter the dates you want to generate the yellow shifts for in the Generate Dates fields. Remember to always start on a Sunday and end on a Saturday because that is how the templates are built.
4. Click Next
5. Select the Staffing Requirement Template and Shift Template you want to generate
6. Click Next
7. Select the checkbox next to both **Generate Workload based on Staffing Requirements** and **Generate unassigned shifts**. Also select the radio button next to **Create as unpublished shifts**.
  a. Troubleshooting: When looking at the Last Generated Date for both workload and shifts, if only one of the dates is the date you want the schedule generated through, then you only need to select the templates and generate checkboxes for the one that does not have the correct date. For example, If the Last Generated Date – Workload is correct but the Last Generated Date – Shifts in not correct, you only need to select the Shift Template you want to generate and then select the checkbox next to Generate unassigned shifts and the radio button for Create as unpublished shifts.
8. Click Generate

VERIFY THE SHIFTS GENERATED

After generating your templates, you want to verify that the shifts appear appropriately on the schedule prior to creating your self-scheduling process.
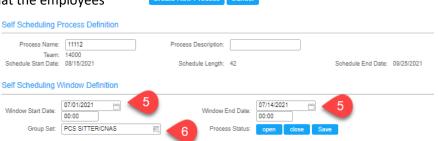
Go to Scheduling / Multi-view Scheduler / Enhanced Schedule View / Advanced Schedule View

1. Enter 14000 into the Unit field
2. Enter the dates of the next schedule period. You can only view up to 6 weeks at a time.
3. Click Load
4. Verify that yellow shifts appear under the correct jobs

CREATE A SELF SCHEDULING PROCESS

Go to Scheduling / Self-Scheduling / Process

1. Click Create New Entry
2. Enter 14000 in the Unit field
3. Enter a date range for the schedule. This date range will be the date of available shifts that can be sent to the Process.
4. Click Create New Process
5. Choose your Window Start Date and Window End Date
  a. A window is the range of time that the employees in your Group(s) will be able to access the self-scheduling process and select their shifts. Typically, these windows will be many days before the actual dates of the available shifts/schedule.
6. Enter Group Set PCS SITTER/CNAS. Both groups will pull in to the process.
7. Once you have window(s) and Group(s) entered, you can add opening and closing messages for your Group(s) to receive. You must update the Send Before Open and Send Before Close days to fall within your window and schedule period. This indicates how many days before your window opens and closes that an employee will receive the given message.

Group Name	Window Start	Opening Message	Send Bef. Open	Window End	Closing Message	Send Bef. Close	Process Statu
🗑 EMVS TEAM	04/10/2019 00:00	Default Opening Comment	60 Day	04/30/2019 00:00	Default Closing Comment	60 Day	

Add Window

⑦   ⑦

8. Next go to the Self Scheduling Shift Selection Form. It will be grouped by Jobs of your eligible Shifts.
   a. Click Offer all next to each job code's available shifts
9. Click Save. Your self-scheduling process will automatically open when the Window Start date and time occurs.

Self Scheduling Process Definition

Process Name: 12215   Process Description: [ ]
Team: 14000
Schedule Start Date: 10/02/2022   Schedule Length: 35   Schedule End Date: 11/05/2022

Self Scheduling Window Definition

Window Start Date: 09/22/2022 14:00   Window End Date: 09/30/2022 05:00

Group Set: PCS SITTER/CNAS   Process Status: pause close Save   ⑨

Group Name	Window Start	Opening Message	Send Bef. Open	Window End	Closing Message	Send Bef. Close Process Status
🗑 PCS SITTER	09/22/2022 14:00	Default Opening Comment	60 Da	09/30/2022 05:00	Default Closing Comment	60 Da pause close
🗑 PCS SITTER/CNAS	09/22/2022 14:00	Default Opening Comment	60 Da	09/30/2022 05:00	Default Closing Comment	60 Da pause close

Add Window

Self Scheduling Shift Selection

Display label	Start Time	End Time	Skill	Activity	10/02	10/03	10/04	10/05	10/06	10/07	1
⌃ 1740	Remove all				16/16	16/16	16/16	16/16	16/16	16/16	1
⌃ 7480	Remove all				4/4	4/4	4/4	4/4	4/4	4/4	4
⌃ 7481	Remove all				20/20	20/20	20/20	20/20	20/20	20/20	2

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10. Once the process opens, employees will be able to select shifts in the WFM ETM application during the open window time range for any Group that they belong to.

PUBLISH THE SCHEDULE

1. *After* the self-scheduling process is complete, you should review the schedule, make adjustments as necessary and then publish the schedule. To publish the schedule, follow the steps below.

   Go to Scheduling / Multi-view Scheduler / Enhanced Schedule View / Advanced Schedule View

2. Enter the cost center into the Unit field
3. Enter the dates of the next schedule period. You can only view up to 6 weeks at a time.
4. Click Load
5. Verify that shifts appear appropriately for the staff
6. Click the Publish icon in the top right (paper icon)

1. Why can't I see any of my shifts in the Self Scheduling Shift Selection section?
    a. Your shift template may not be generated for the self-scheduling date range. Open your schedule to verify there are yellow shifts available to be assigned for the given date range. If there are not yellow shifts on your schedule, jump to the Create Unpublish Shifts section to complete the steps.
    b. You may have published your shifts already. If yellow shifts appear on your schedule to be assigned but do not appear in self-scheduling, you may have already published those shifts. If this is the case, you will have to create a second shift template and re-generate it for the given time period.

2. Why can't my staff see the self-scheduling process?
    a. They may not be in one of the groups or group sets included in the self-scheduling process. Jump to the Create a Self Schedule Group to find the groups you have assigned in the self-scheduling process. Verify the given employee is included in one of the groups in your process.

3. What is the difference between schedule date and window date?
    a. The schedule start/end dates are the dates of the upcoming schedule that staff need to pick up shifts for. The window start/end dates are the dates that the self-scheduling process will be open for so that staff can pick their shifts.