

KRONOS TRAINING

CT SCHEDULING MANAGER

AGENDA

Getting Started

- Signing in
- Understanding the Kronos Navigator
- Viewing your information

Finding your team

- Search for an employee report
- Working with hyperfinds
- Working with Genies

Timecards

- Editing punches
- Editing pay codes
- Adding comments
- Adding rows
- Transfers
- Reviewing time off

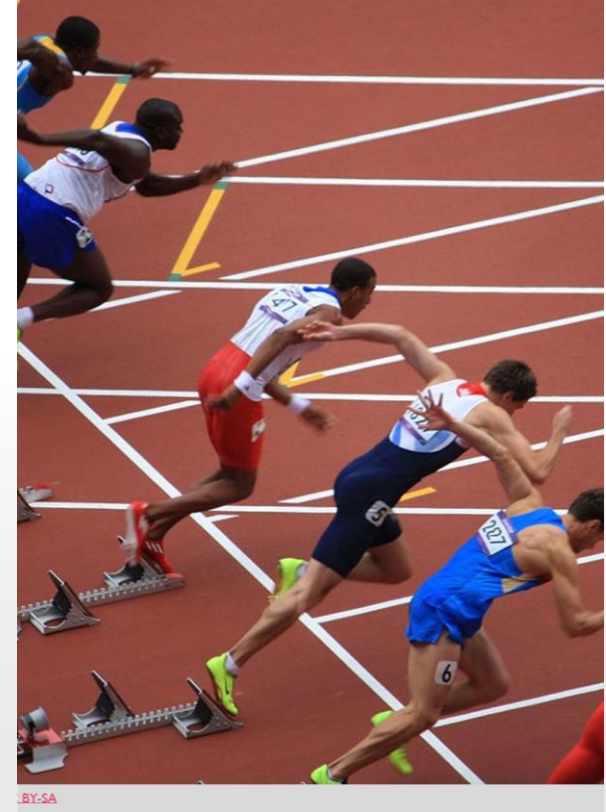
Schedules

- Adding schedules
- Adding a pattern
- Editing a schedule
- Finding your team hyper find
- Shift Transfer

Advanced Scheduler

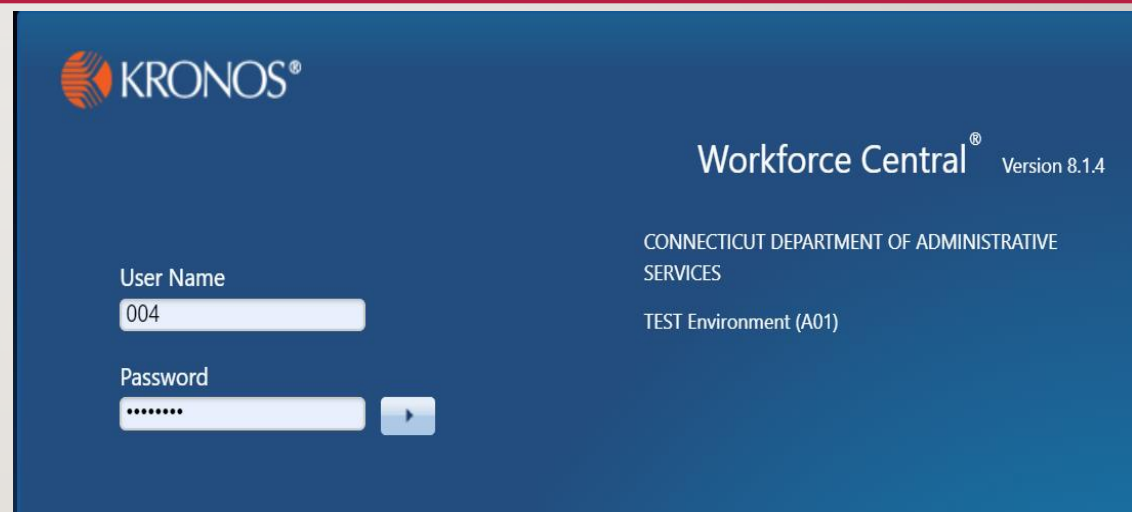
- Workload Planner
- VOT and MOT
- Finding Team location
- Assigning overtime shift
- Call List/Scheduling Ass.
- Shift Transfer
- Manage schedule posting
- Column sets
- Quick Actions
- Assigning/Unassigning shifts
- Changing views
- Priority Scheduling Engine
- Reporting

GETTING STARTED



GETTING STARTED – SIGNING IN

- Now that you have successfully swiped let's log on to Kronos.
- Open a web browser and enter:
 - <https://ctgov-tst.kronos.net/wfc/logon>
- Enter your username and password



The image shows the Kronos Workforce Central login interface. It features a blue background with the Kronos logo in the top left. The login fields are labeled 'User Name' and 'Password'. The 'User Name' field contains the text '004'. The 'Password' field contains a series of dots. To the right of the password field is a blue arrow button. Text on the right side of the screen identifies the system as 'Workforce Central® Version 8.1.4' and specifies the environment as 'CONNECTICUT DEPARTMENT OF ADMINISTRATIVE SERVICES' and 'TEST Environment (A01)'.

KRONOS®

Workforce Central® Version 8.1.4

CONNECTICUT DEPARTMENT OF ADMINISTRATIVE SERVICES

TEST Environment (A01)

User Name
004

Password
.....

GETTING STARTED – UNDERSTANDING THE KRONOS NAVIGATOR

The screenshot shows the Kronos Navigator interface. At the top, there is a navigation bar with the Kronos logo and a 'My Information' tab. A dropdown menu is open, showing 'Manage My Department Interfaces'. The main area displays a table with columns for Date, Schedule, Pay Code, Amount, In, Transfer, Out, and Shift. The table shows data for the week of January 3rd to 12th. A circled '1' is placed over the 'View' button, and a circled '2' is placed over the '+' button in the top navigation bar.

		Date	Schedule	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Shift	Daily	Period
+	x	Fri 1/03	8:00AM-4:00...											
+	x	Sat 1/04												
+	x	Sun 1/05												
+	x	Mon 1/06	8:00AM-4:00...											
+	x	Tue 1/07	8:00AM-4:00...											
+	x	Wed 1/08	8:00AM-4:00...											
+	x	Thu 1/09	8:00AM-4:00...											
+	x	Fri 1/10	8:00AM-4:00...											
+	x	Sat 1/11												
+	x	Sun 1/12												

1. Employee timecard:
Can add your own punches, add specific pay codes, and also approve your timecard
2. Clicking the ' + ' sign will bring you a list of the different modules you can access, as a timekeeper you can manage your department and export time reports

GETTING STARTED – UNDERSTANDING THE KRONOS NAVIGATOR

KRONOS

My Information + Manage My Department Interfaces

Loaded: 11:56 PM Current Pay Period

View Approve Timecard

Print Timecard Refresh Calculate Totals Save

	Date	Schedule	Pay Code	Amount	In	Transfer	Out	In	Transfer	Out	Shift	Daily	Period
+ x	Fri 1/03	8:00AM-4:00...											
+ x	Sat 1/04												
+ x	Sun 1/05												
+ x	Mon 1/06	8:00AM-4:00...											
+ x	Tue 1/07	8:00AM-4:00...											
+ x	Wed 1/08	8:00AM-4:00...											
+ x	Thu 1/09	8:00AM-4:00...											
+ x	Fri 1/10	8:00AM-4:00...											
+ x	Sat 1/11												
+ x	Sun 1/12												

1. Can use the drop down and the calendar icon to change the time period view
2. The buttons allow you to refresh, save, and print out your timecard information

GETTING STARTED – UNDERSTANDING THE KRONOS NAVIGATOR

1. User information and log off
2. Last timestamp and transfer allows you to execute a transfer and record a punch
3. Related Items menu: Through related items you can access all the different widgets that interface has to offer, as you cycle through my information, manage my department, etc the related items menu will update
4. Search: Can provide help with any look up you're having trouble with

Timekeeper Persona
Sign Out

My Timestamp

Last Timestamp:

Transfer:

☐ Cancel Deductions

Record Timestamp

My Timestamp

My Timecard

My Calendar

My Leave Requests

My Attendance

My Inbox

My Reports

My Audits

Transfer

Job
Labor Account
Work Rule

Job Transfer Labor Account Work Rule

Add Work Rule

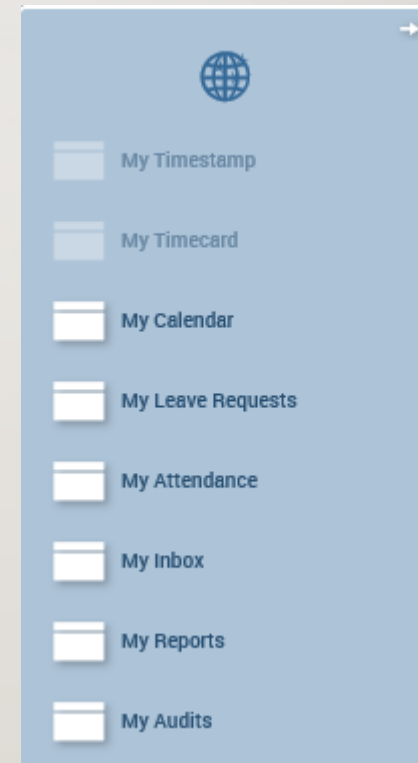
Search List

Reg Telecommuting 30 Min
Reg Telecommuting 45 Min
Reg Telecommuting 60 Min
Reg Telecommuting NL

Cancel Apply

GETTING STARTED –VIEWING YOUR INFORMATION

Through the related items menu on the right side of the screen you can access all your information



GETTING STARTED –VIEWING YOUR INFORMATION

Through the My Calendar widget you can view your calendar and see your daily schedule as well as make requests for time off

My Calendar			
January 5 - 11, 2020			
Day	Week	Month	Visibility Filter Request Time Off
Sun 1/05		Mon 1/06	Tue 1/07
8:00AM		8:00AM-4:00PM [8.00 h] Regular	8:00AM-4:00PM [8.00 h] Regular
9:00AM			
10:00AM			
11:00AM			
12:00PM			
1:00PM			
2:00PM			
3:00PM			

GETTING STARTED –VIEWING YOUR INFORMATION

Through the Request Time Off button in the My Calendar widget you can fill in start date, end date, pay code, and time unit.

You can also view your accrual bucket balances at the bottom of the screen in order to choose which pay code to use for your request, click **Submit** at the bottom when completed.

Request Time Off

Type: Time Off Request

		Start date	End date	Pay code	Time Unit	Start time	Daily Amount
+	×	1/07/2020	1/07/2020	Vacation	Full day		

Accruals on: 1/07/2020

Accrual	Balance
Bone Marrow Donor	56.0 Hour
Comp Time	0.0 Hour
Comp Time Holiday	0.0 Hour

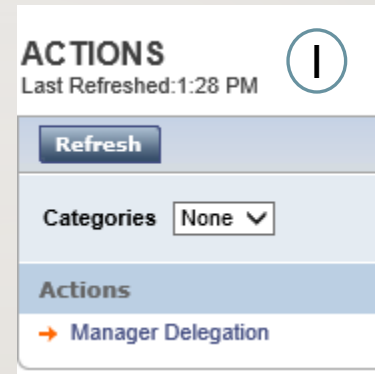
Cancel
Submit

GETTING STARTED –VIEWING YOUR INFORMATION

 My Attendance

Through the My Attendance widget you can see the actions available you

1. The only available action for timekeeper is Manager Delegation
2. After having clicked manager delegation, you choose the delegate, the timeframe, and the role you would like to delegate and then **Save & Close**



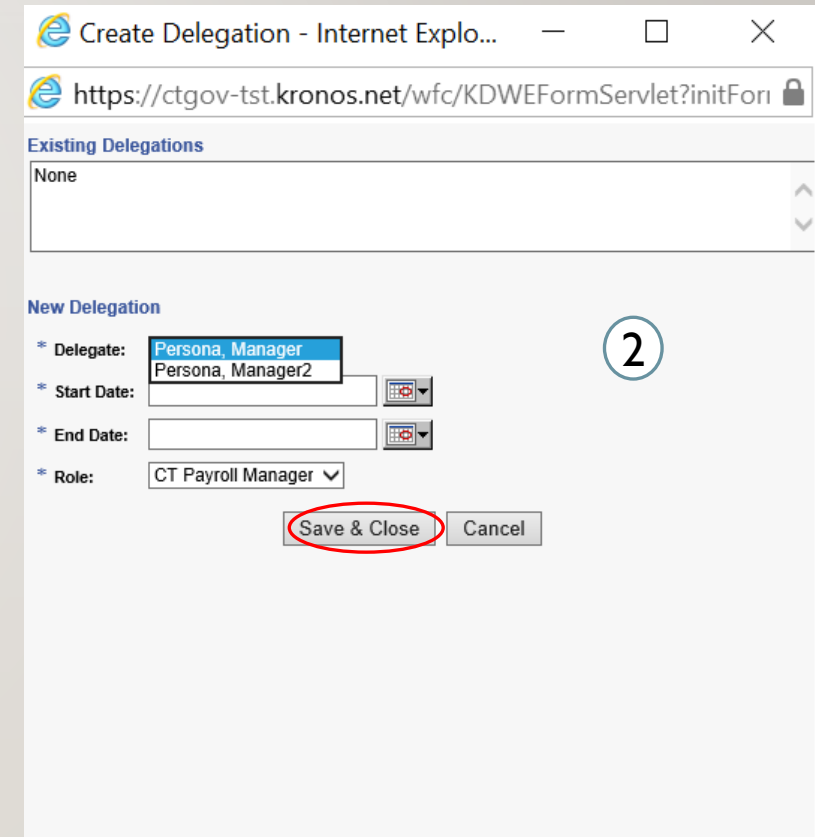
ACTIONS
Last Refreshed: 1:28 PM

Refresh

Categories None ▾

Actions

→ Manager Delegation



Create Delegation - Internet Explo...
https://ctgov-tst.kronos.net/wfc/KDWEFormServlet?initFor...

Existing Delegations

None

New Delegation

* Delegate: Persona, Manager
Persona, Manager2

* Start Date:

* End Date:

* Role: CT Payroll Manager ▾

Save & Close **Cancel**



GETTING STARTED –VIEWING YOUR INFORMATION

- Through the My Inbox widget you can see all your tasks and messages
- Tasks are things you need to do or have started but not completed, in this case a manager delegation form I began on the previous slide and did not complete
- Messages can be notifications from supervisors or updates about timecards/requests

INBOX
Last Refreshed: 1:35 PM

TASKS | **MESSAGES**

Edit → **Reassign** → **Refresh**

Status: **Active** ▼ As of Date: **12/08/2019** Categories: **All** ▼

From	Subject
Persona, Timekeeper	Manager Delegation, Request Form

GETTING STARTED –VIEWING YOUR INFORMATION

1. In the My Reports widget Schedule and Time Detail can be viewed by selecting the report and the Time Period and click **View Report**
2. To view My Accrual Balances and Projections select the report and fill in the As Of date then click **View Report**

1

My Reports

REPORTS Name: Persona, Timekeeper

View Report Primary Account

AVAILABLE REPORTS

Schedule Time Detail

Time Period Current Pay Period

Schedule Description Displays an employee

My Accrual Balances and Projections

2

My Reports

REPORTS Name: Persona, Timekeeper

View Report Primary Account

AVAILABLE REPORTS

Schedule Time Detail

Time Period Specific Date

My Accrual Balances and Projections

As Of

GETTING STARTED –VIEWING YOUR INFORMATION

Through the My Audits widget you can view different actions such as punching in as shown on the right, or all the categories listed on the drop down

My Audits

Category:

My Audits

My Audits
My Comments
My Overtime Requests
My Signoff and Approval
My Moved Amounts
My After Sign-Off Audits
My Corrections
My Activity Event Audits

Type of Edit:

Punch (Add/Edit/Delete)

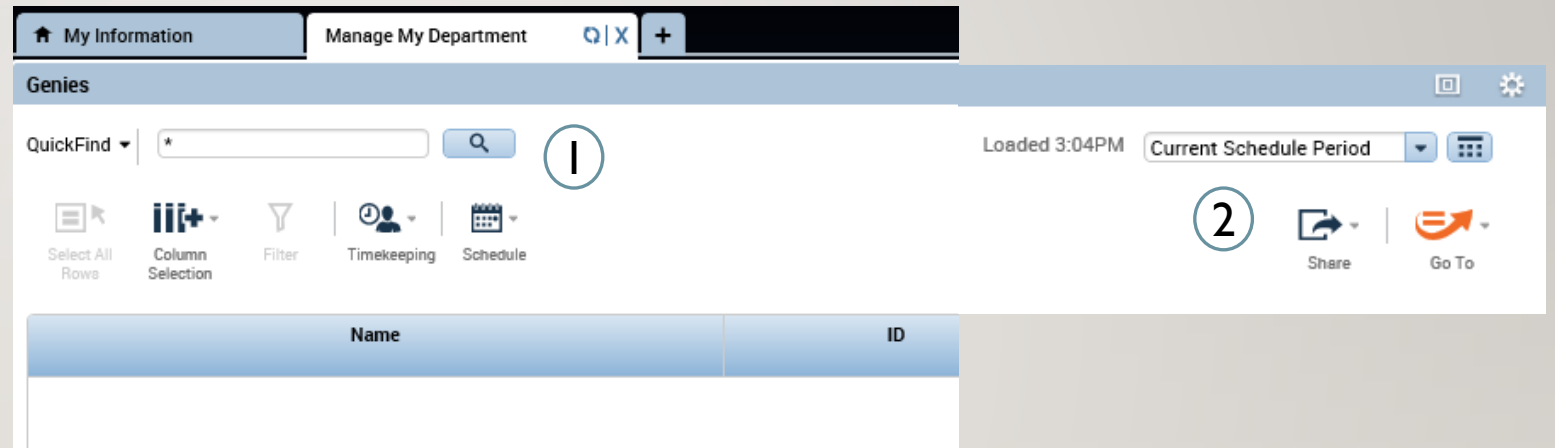
Time	Type	Account
52PM	Add Punch	

FINDING YOUR TEAM



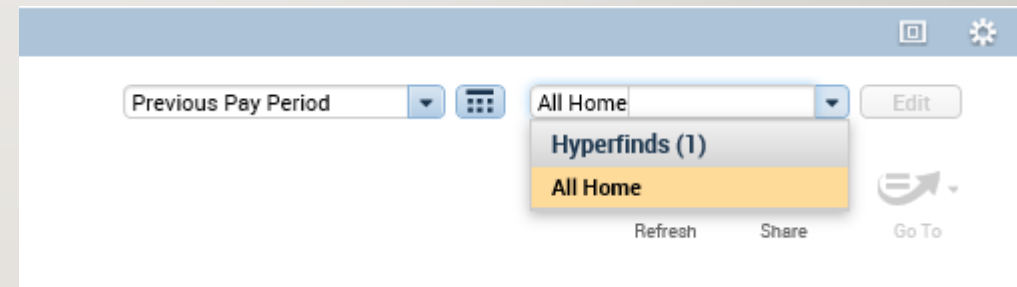
FINDING YOUR TEAM – SEARCHING FOR AN EMPLOYEE

1. Under the Manage My Department interface use the default QuickFind Genie and search for your employee. Type in the name of your employee or begin the search with '*' to search employees with their named ending in the following letters, end your search with '*' to find employees whose names start with the entered letters. Searching '*' will return every employee
2. This area allows you to change the desired timeframe, or share the employee information by exporting it to excel or csv. Go To allows you to select an employee and transition to the different Management widgets that will covered



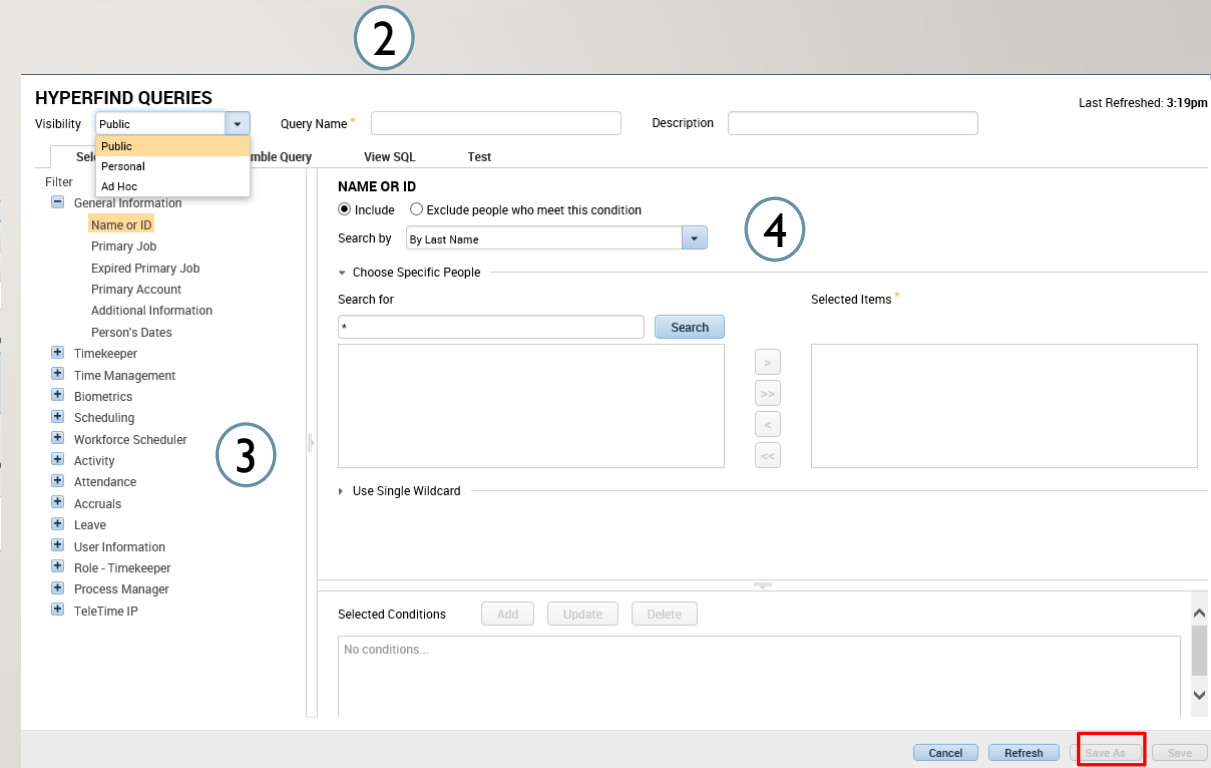
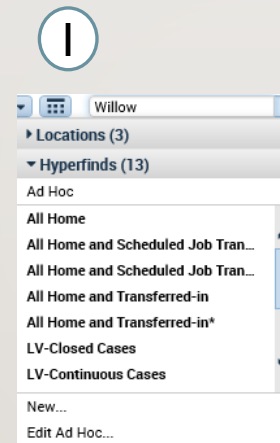
FINDING YOUR TEAM – WORKING WITH HYPERFINDS

- I. Under the certain widgets or genies you'll see the second drop down next to the timeframe selection. Using this drop down you can select standard hyperfinds that will help you simplify your search.



SCHEDULING –FINDING YOUR TEAM HYPERFIND

1. Under the locations drop down will be a list of hyperfinds, select the New button to create a new Hyperfind.
2. Select whether you want the Hyperfind to be public or private or ad hoc which is one that is available to everyone that can only be edited
3. Choose by what criteria you want to narrow down your employees whether it be timekeeper, attendance, etc and open their dropdown.
4. Choose whether you want your Hyperfind to include or exclude employees then fill in the dates and the specifics of what you want to search with, tap **Save As** to complete the hyper find creation.

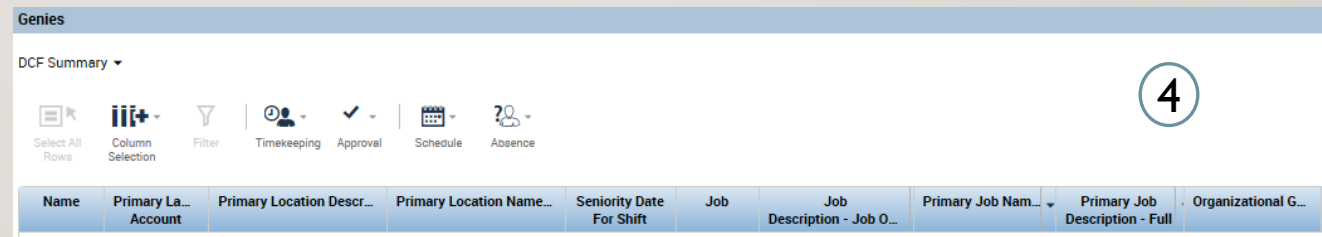
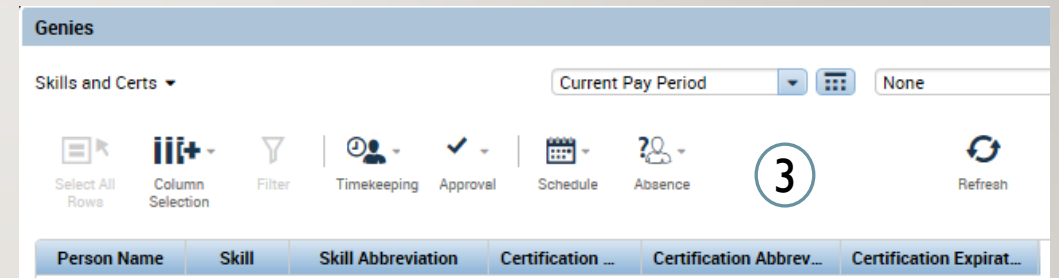
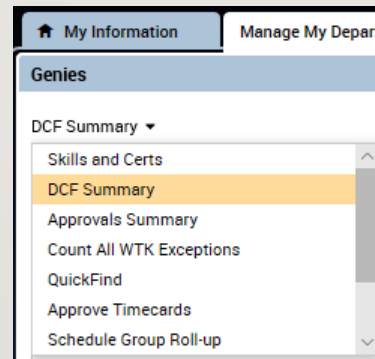


FINDING YOUR TEAM – EXERCISE I

PLEASE REFER TO THE
SCHEDULING MANAGER
EXERCISE GUIDE IN
ORDER TO PRACTICE
THE PREVIOUS
CONCEPT

FINDING YOUR TEAM – WORKING WITH GENIES

1. Under Genies you will see the drop down for all the available searches you can use
2. The two most useful will be Skills and Certs and DCF Summary
3. Skills and Certs will give you a summary of every skill and certification based on the selection of people you have chosen
4. DCF Summary gives you a summary for each employee including their labor account, location, and seniority date for shift



TIMECARDS



TIMECARDS – EDITING PUNCHES

1. Using the QuickFind Genie under Manage My Department search for the employee you want to see, then double click their name to open their timecard
2. Once in the timecard you can adjust the view change the timeframe and begin editing

My Information

Manage My Department

Schedules

Timecards

+

Genies

QuickFind

*lopez, steven

🔍

1

Select All Rows

Column Selection

Filter

Timekeeping

Schedule

Name	ID	
Lopez, Steven	200037	Sample/-/-/-/-/-/-/-/-

Timecards

Lopez, Steven

1 of 1

200037

2

View

		Date	Schedule	Pay Code	Amount
+	×	Fri 1/03			
+	×	Sat 1/04			
+	×	Sun 1/05			
+	×	Mon 1/06			
+	×	Tue 1/07			

TIMECARDS – EDITING PUNCHES

1. Once in the timecard, exceptions will be highlighted such as a missed in/out punch as shown on the right
2. Select the desired cell and enter the corrected time, hover over any exception to get an explanation of what the exception is

Timecards

Lopez, Steven

1 of 1

200037

View

		Date	Schedule	Pay Code	Amount	In	Transfer	Out
<div><div></div><div></div></div>	<div><div></div><div></div></div>	Fri 1/03				<div><div></div>8:00AM</div>		
<div><div></div><div></div></div>	<div><div></div><div></div></div>	Sat 1/04						
<div><div></div><div></div></div>	<div><div></div><div></div></div>	Sun 1/05						
<div><div></div><div></div></div>	<div><div></div><div></div></div>	Mon 1/06				<div><div></div>8:00AM</div>		12:00PM

TIMECARDS – ADDING COMMENTS

1. By default entered time will follow the Pay Rule that has been assigned to you and you will not need to enter pay codes for regular time/OT/ or Holidays
2. Once you select **Comments** choose Explanation from the drop down and then add the desired comment






The image shows two screenshots from a timecard system. The top screenshot is the 'Punch Actions' dialog box, which is open over a timecard grid. The dialog box contains fields for Date (1/03/2020), Time (8:00AM), Rounded Time (1/03/2020 8:00AM GMT-05:00), Override (In Punch), Time Zone ((GMT -05:00) Eastern Time (USA; Canada)), Exceptions (Unscheduled), Last Edit Date (1/08/2020), and Edit Made By (Persons, Timekeeper). At the bottom of the dialog box, there are four icons: 'Mark As Reviewed' (checkmark), 'Edit' (pencil), 'Comments' (speech bubble, circled in red), and 'Justify Exception' (star). A circled '1' is placed next to the 'Comments' icon. The bottom screenshot is the 'Comment' form, which has a title bar 'Comment'. Below the title bar, it says 'Comments (1) Add Comment'. There is a dropdown menu with 'Explanation' selected, and a text input field below it. A circled '2' is placed next to the text input field. At the bottom of the form, there are 'Cancel' and 'OK' buttons.

TIMECARDS – EDITING PAY CODES

1. By default entered time will follow the Pay Rule that has been assigned to you and you will not need to enter pay codes for regular time/OT/ or Holidays
2. Pay codes will need to be entered for exceptional situations such as the employee being unable to submit a leave/time off request. In the example on the right there was a delayed entry so you would enter the employee timecards and set the delayed time by entering the Amount and selecting Governor Granted Time Off











Genies

QuickFind ▾ *Lopez, steven 🔍

Select All Rows Column Selection Filter Timekeeping Schedule





Name	ID ▲	Primary Labor Account	Pay Rule
Lopez, Steven	200037	Sample/-/-/-/-/-/-	02 FT NSD STD 8

		Date	Schedule	Pay Code	Amount
		Fri 1/03			
		Sat 1/04			
		Sun 1/05			
		Mon 1/06			
		Tue 1/07		Governor Granted Ti...	2.0

TIMECARDS – ADDING ROWS

1. Click on the '+' to add a new row to a day.
This can be done if an employee took a couple hours off or if there's a delayed entry. Pay codes and regular scheduled hours need to be entered on different rows.

1

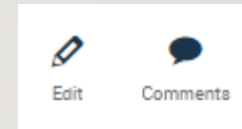
		Tue 1/07		Governor Granted Ti...	2.0
					

2. Once you enter the pay code for the time off and the regular hours worked the time will be automatically compiled on the right, you can see the sum of hours under the Daily column.

2

Shift	Daily
8.5	8.5
6.0	8.0

TIMECARDS – OVERRIDES AND CANCELLATIONS



1. Right clicking on a punch and selecting Edit, allows you to set an override, such as setting a new shift or adding a break
2. You can also cancel deductions, in scenarios where employees did not take a lunch because they had to continue working as shown here

Punch

Date: 9/02/2020

Time (h:mm) *: 5:00PM

Rounded Time: 9/02/2020 5:00PM GMT-04:00

Override: Out Punch

Time Zone: <None>

Cancel Deduction: Out Punch

Exceptions: New Shift

Comments:

Cancel OK

Punch

Date: 9/02/2020

Time (h:mm) *: 5:00PM

Rounded Time: 9/02/2020 5:00PM GMT-04:00

Override: Out Punch

Time Zone: (GMT -05:00) Eastern Time (USA; Canada)

Cancel Deduction: <None>

Exceptions: All

Comments:

Cancel OK

TIMECARDS – LUNCH EDITS FOR TIME OFF

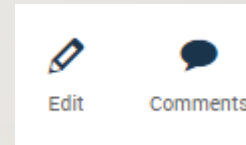
1. When an employee takes time off during the day they may not receive their automatic meal deduction due to the 6 hour shift length minimum for a lunch deduction
2. In this scenario you would make adjustments to the second set of punches to account for the taken lunch

8:00AM-9:00AM			8:00AM		9:00AM				1.0	
	Sick Appointments	2.5	9:00AM							
11:30AM-5:00PM			11:30AM		5:00PM				5.5	9.0

8:00AM-9:00AM			8:00AM		9:00AM			
	Sick Appointments	2.5	9:00AM					
11:30AM-5:00PM			11:30AM		12:00...	1:00PM		5:00...

TIMECARDS – LUNCH EDITS FOR TIME OFF

1. Right click on the punch you edited and select the Edit button
2. Select Explanation from the drop down and enter the reason for the manual adjustment



Comment

Comments (1) [Add Comment](#)

x

Explanation

▼

x

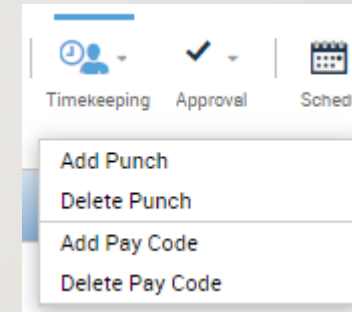
Employee lunch adjustment

[Add another note](#) [Add](#)

[Cancel](#) [OK](#)

TIMECARDS – GROUP EDITS

1. You also have options to add a punch or a pay code to a group of people
2. All you would need to do is select the employees you want to modify and choose then add in the punch or pay code. This can be useful in the LWGOV scenario to avoid having to manually add in every pay code



1

A screenshot of the main interface of the software. At the top, there is a 'QuickFind' search bar. Below it, there are several icons for different functions: 'Select All Rows', 'Column Selection', 'Filter', 'Timekeeping', 'Approval', and 'Schedule'. Below these icons is a table with two columns: 'Name' and 'ID'. The table contains four rows of data.

Name	ID
Morgan	463
Vanessa	481
Angel	469
Persona, Employee	003

TIMECARDS – NEGATIVE PAY CODES

Pay codes can also be used to edit accrual buckets. Rather than perform a whole reset after accidentally using a paycode, you can use a pay code with a negative value to add that time back to the accrual bucket

+	×	☰ Mon 5/11		Sick	-8.0
+	×		7:00AM-3:00PM		
+	×	Tue 5/12	7:00AM-3:00PM		
+	×	Wed 5/13	7:00AM-3:00PM		

TIMECARDS – DOLLAR AMOUNT PAY CODES

- Dollar amount TRCs need to be entered as hourly amounts as opposed to dollars in Core
- For example, if you were supposed to get 20.25 dollars of in charge pay **XIC01**, you would divide that by 2.25 and input 9 hours in Kronos

Mon 6/08		XIC01 - In Charge Pay 2.25	9:00
	7:00AM-3:00PM		

TIMECARDS – HOLIDAYS PAID ON A PASS DAY

1. Validate the correct holiday is being paid to the employee under **Totals**
2. If the employee is 3rd shift and needs to be paid on a pass day, use the pay code **Hol Comp Earned Pass Dy** 7HR, 7.5HR, 8HR



Totals	Accruals	Audits	Historical Corrections
Daily		Pay Code	
Pay Code	Amount	Wages	
Holiday	8:00	\$325.68	

		Date	Schedule	Pay Code	Amount
+	×	Sun 11/10			
+	×	Mon 11/11		Veteran's Day	8:00
+	×			Hol Comp Earned Pass Dy 8HR	8:00
+	×	Tue 11/12			

Totals	Accruals	Audits	Historical Corrections
All		Pay Code	
Pay Code			
Holiday Comp Earned on Pass Dy			

TIMECARDS – TRANSFERS

On the timecard between the in and out punches you can choose the transfer drop down, from there you can choose previously chosen work rules/labor accounts or search for an unused one

In	Transfer	Out
 8:00AM	 //DCF9111110001001	3:00PM 

Transfer

//DCF9111110001001

//DCF911111000100100

12 FT OT40 SDE3 DCF

Search...

Transfer

NameLopez, Steven

Job

Labor Account/////

Work Rule12 FT OT40 SDE3 DCF

Job Transfer

Labor Account

Work Rule

Add Labor Account

Clear All

Agency-Dept...

Employee ID-E...

Location:

Supervisor:

Combo Code:

Job:

Override Reas...

Cancel

Apply

TIMECARDS – LABOR ACCOUNT TRANSFERS

Labor Account Transfer: this can be done if you are working at a different location for a day or working a different position you want to charge to that different location. In this window you will enter every piece of information that changed in the transfer.

If you are working a different job at a different agency under a different supervisor, every labor level would need to be entered.

Transfer

Name	Lopez, Steven
Job	
Labor Account	/////
Work Rule	12 FT OT40 SDE3 DCF

[Job Transfer](#) | [Labor Account](#) | [Work Rule](#)

Add Labor Account

Agency-Dept-...

Location:

Combo Code:

Override Reas...

Employee ID-E...

Supervisor:

Job:

Clear All

Cancel

Apply

TIMECARDS - WORK RULE TRANSFER

- Work rule transfer: You get called in and there's a different pay rule for being called in, you would do a work rule transfer and enter the pay rule that should be applied to you for that day
- An example of this is OT Double time, in order for an employee to receive that pay you must enter a work rule transfer for **Mandated OT** using the employee's pay rule

Transfer

Name	Lopez, Steven
Job	
Labor Account	//////
Work Rule	12 FT OT40 SDE3 DCF

[Job Transfer](#) | [Labor Account](#) | [Work Rule](#)

Add Work Rule

Search List

01 EX

02a Civilian Managers

02b Sworn Managers

02 FT CT40 NSD

02 FT NSD

02 PT NSD

03 FT CT40 NSD

03 FT OT40 NSD

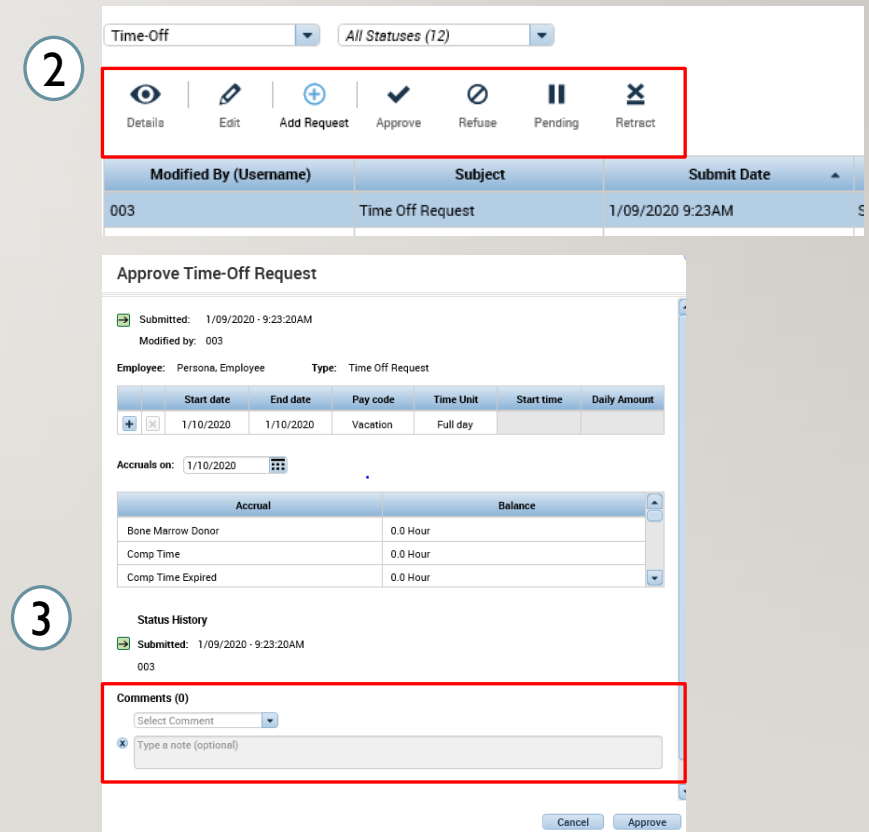
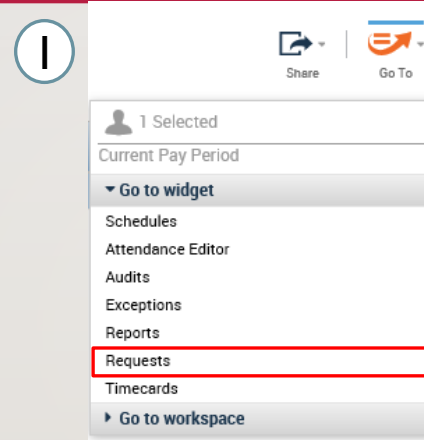
04 No OT NSD Other

05 NP-1 Holiday Not Required

10 FT OT40 SDE STD 7.5 MandOT
10 FT OT40 SDE STD 7 MandOT
10 FT OT7.5 NSD STD 7.5 MandOT

TIME OFF – REVIEWING TIME OFF REQUESTS

1. After finding the desired employee using the QuickFind, use the Go To button and select **Requests**
2. The following menu will appear with the options to **view, edit, approve, refuse, set as pending, and retract.**
3. Whichever item you choose will lead you to the following menu, where you can decide what to do with the request and then **add an optional comment** to explain the decision.



TIME OFF – TIME OFF REPORT

1. Use the QuickFind to find the employee you want to make changes for. Use the Go To button to access **Reports**
2. Through the reports interface select the Accrual Detail report and select **Run Report**

Genies

QuickFind ▾

🔍

Select All Rows

Column Selection

Filter

Timekeeping

Schedule

1 Selected

Current Pay Period

▾ Go to widget

Schedules

Attendance Editor

Audits

Exceptions

Reports

Requests

Timecards

▸ Go to workspace

REPORTS

SELECT REPORTS

CHECK REPORT STATUS

Run Report

Refresh

Create Favorite

Save Favorite

Duplicate Favorite

Delete Favorite

- All

Absent Employees (Data)

Accrual Balances and Projections (Data)

Accrual Debit Activity Summary

Accrual Detail (Data)

Accruals (Spreadsheet Export)

Accrual Summary

Attendance Analysis

Attendance Balances

ACCRUAL DETAIL (DATA)

Description

This report produces raw, unformatted data intended for use with Microsoft Excel. Sim Detail. Displays running accrual balances for each employee. For example, you can see effective dates.

People

Previously Selected Employee(s) ▾

Time Period

Range of Dates ▾

1/03/2020

1/16/2020

Output Format

Adobe Acrobat Document(.pdf) ▾

TIME OFF – TIME OFF REPORT

1. Switch to the Check Report Status tab and select the Accrual Detail report. Select the appropriate report and press View Report.
2. The report will download and show you all your accrual information

REPORTS

SELECT REPORTS

CHECK REPORT STATUS

View Report

Refresh Status

Delete

Name

Search

Report Name	Format
Accruals (Spreadsheet Export)	xlsx
Accrual Detail (Data)	pdf
Accrual Detail (Data)	pdf
Accrual Debit Activity Summary	pdf

Accruals (Spreadsheet Export)

Executed On: 1/09/2020 9:55AM

Data Up to Date: 1/09/2020 9:55AM

Printed For: 006

Time Period: 1/03/2020 - 1/16/2020

Untotalized Employee Count: 0

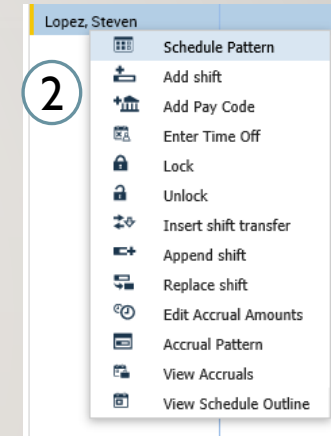
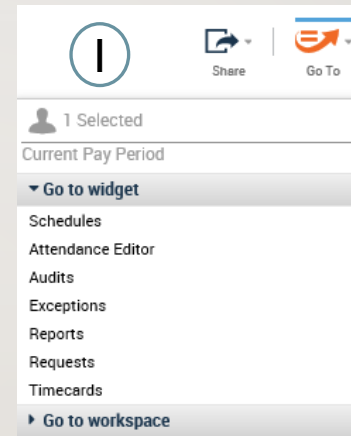
Employee	Reporting Period		Accrual Code		
Name	Start Date	End Date	Name	Unit	Opening Balance
Persona, Employee	1/01/2020	12/31/2020	Bone Marrow Donor	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Comp Time	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Comp Time Expired	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Comp Time Holiday	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Comp Time Holiday Expired	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	LV-CTFMLA	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	LV-CTFMLAMIL	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	LV-FMLA	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	LV-FMLAMIL	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	LV-Tracking	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Military Leave Active Duty	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Military Leave Training	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Olympics	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Organ Donor	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Personal	Hour	0.0
Persona, Employee	1/01/2020	12/31/2020	Red Cross	Hour	0.0

SCHEDULING



SCHEDULING – ADDING A SCHEDULE

1. After selecting an employee using the QuickFind, press the Go To button and select **Schedules**
2. Right click the name of the employee or one of the empty cells on the schedule and select Add shift. You can also left click on one of the cells and manually enter in a timeframe.
3. On the add shift window enter the type of shift, the date, the start time, and the end time. Select Apply to save your changes and add the shift to the schedule.

A screenshot of the 'Add Shift' form. The form is titled 'Add Shift' and contains several fields and a table. The 'Assigned to' field is set to 'Lopez, Steven'. The 'Shift Details' field shows '12:00am-1:00am(1.00h)'. The 'Primary Job' is 'None'. The 'Insert Template' dropdown is set to 'Regular'. The 'Shift Label' field is empty. The 'Repeat this shift for' field is set to '1' days. Below these fields is a table with columns: Start Date, Type, Start Time, End Time, End Date, Duration, Job Transfer, Labor Level Transfer, and Work Rule Transfer. The table has one row with the following values: 1/04/2020, Regular, 12:00am, 1:00am, 1/04/2020, 1.00, and empty cells for Job Transfer, Labor Level Transfer, and Work Rule Transfer. At the bottom of the form, there is a 'Comments (0)' section with an 'Add Comment' link, and 'Cancel' and 'Apply' buttons.

SCHEDULING – EDITING A SCHEDULE/TRANSFERS

1. Right click, and select **Edit Shift**. You can add multiple rows for different occurrences such as working a different position or going in on call. Add a row to add hours charged to a different job or hours that should be paid out differently than the pay rule assigned to you.
2. Perform a labor level transfer as previously done (slide 38) for working a different position or for working at a different location or perform a work rule transfer as previously shown (slide 38) for situations where your hours need to be paid out differently than they typically are due to bargaining unit rules.

Edit Shift

Assigned to
Lopez, Steven

Shift Details 10:00am-10:00am(0.00h)

Primary Job None

Insert Template

Shift Label

Repeat this shift for days

		Start Date	Type	Start Time	End Time	End Date	Duration	Job Transfer	Labor Level Transfer	Work Rule Transfer
+	x	1/03/2020	Regular	10:00am	4:00pm	1/03/2020	6.00			
+	x	1/03/2020	Regular	8:00am	10:00am	1/03/2020	2.00			

1

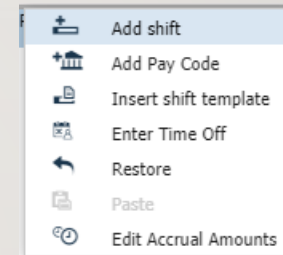
Comments (0) [Add Comment](#)

Cancel

Apply

SCHEDULING – EDITING A SCHEDULE/PAY CODES

1. Right click on the day and select **Add Pay Code**
2. From the pay code window you can select how much of the shift you want to add a pay code for, whether you want to override the shift, what pay code you want, and you have the option to attach a comment



Add Pay Code

Assigned to
Lopez, Steven

Effective Date:* 6/08/2020

Pay Code:* Administrative Leave Paid

Amount (HH:mm):* Full sched day

☐ Override Accrual Days:

☒ Override Shift

☒ Whole Shift ☐ Partial Shift

Start Time:* 7:00AM

Repeat for: 1 days

Transfer Job:

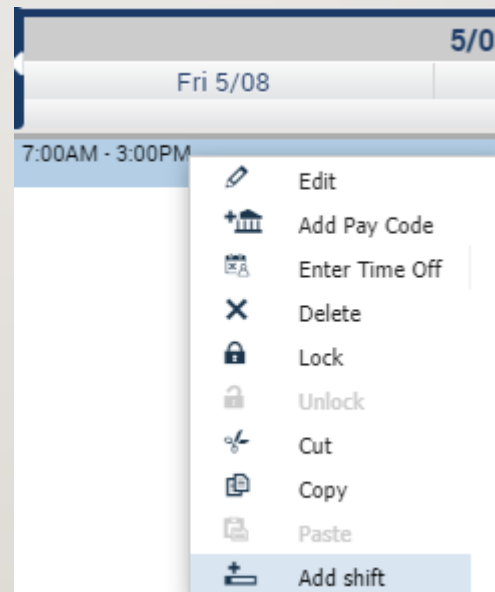
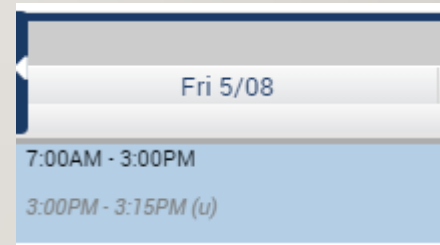
Transfer Labor Level:

Comments (0) [Add Comment](#)

SCHEDULING – ADDING A SHIFT/UNAVAILABLE TIME

1. Rather than add a complete schedule pattern you have the option to insert a single shift. Right click on the day you want to add the shift and select **Add shift**
2. For any time that an employee works outside of their scheduled time it needs to be entered as **unavailable**, the system will use this to break up the employees punches and distribute OT and shift differential

		Start Date	Type	Start Time	End Time	End Date	Duration
+	x	5/08/2020	Unavailable	3:00pm	3:15pm	5/08/2020	0.25

SCHEDULING – EDITING A SCHEDULE – OFF TIME

1. Time that is not scheduled and needs to have a work rule transfer must use Off Time
2. For employees to be paid correctly, all time and work rules should be entered and scheduled before hand. If the employee is going to be using a work rule or labor account transfer such as when they get On Call, you would need to use Off Time.

1

The screenshot shows the 'Add Shift' form. At the top, it says 'Add Shift'. Below that, 'Assigned to' is set to 'Lopez, Steven'. To the right, 'Shift Details' shows '4:00am-7:00am(3:00h)' and 'Primary'. Below this, there is an 'Insert Template' dropdown and a 'Shift Label' input field. At the bottom, there is a table with columns: Start Date, Type, Start Time, End Time, End Date, and Duration. The table contains one row for 'Off' time on '7/01/2020' from '4:00am' to '7:00am' with a duration of '3:00'.

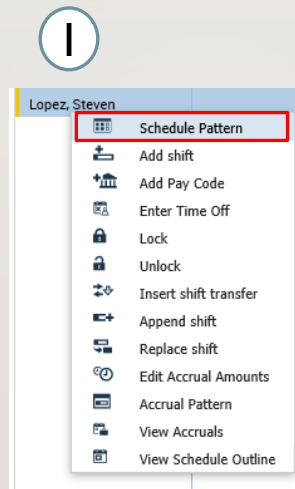
Start Date	Type	Start Time	End Time	End Date	Duration
7/01/2020	Off	4:00am	7:00am	7/01/2020	3:00

2

The screenshot shows a shift selection menu for 'Wed 7/01'. It lists three shift options: '4:00AM - 7:00AM (o)', '7:00AM - 3:00PM', and '3:00PM - 11:00PM'.

SCHEDULING – ADDING A SCHEDULE PATTERN

1. If instead of selecting insert a shift you select **Schedule Pattern**, you can create a schedule for an employee for these desired period of time and choose how often it would repeat. Start your pattern on a Friday since pay periods start on Fridays.
2. Fill in the anchor date which is the day the pattern begins and should be on a Friday due to the pay period. Then select the start date and the end date or check in the bubble for making the pattern repeat forever. After that you have the option to define the pattern for multiple weeks or for a certain amount of days and then you would fill in the desired schedules. If the employee has previous schedules on their account fill in the override other patterns button. Click Apply to save your changes.



A screenshot of the 'Schedule Pattern' configuration form. A circled number '2' is in the top right corner. The form includes the following sections:

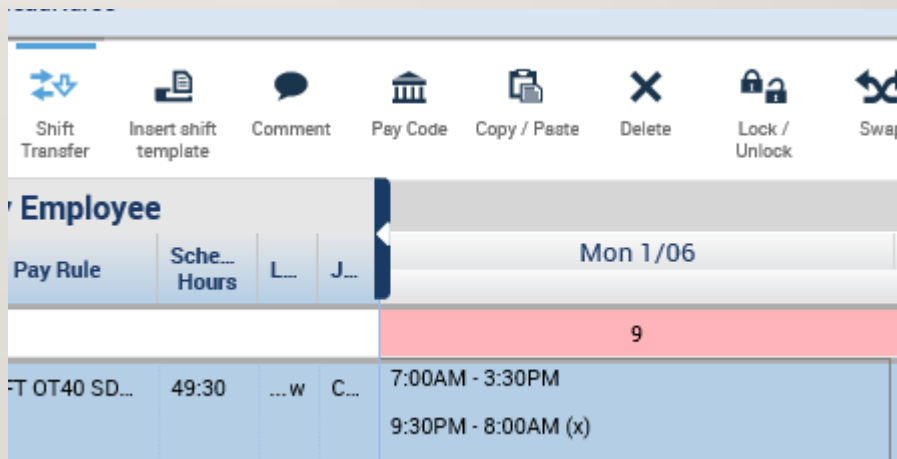
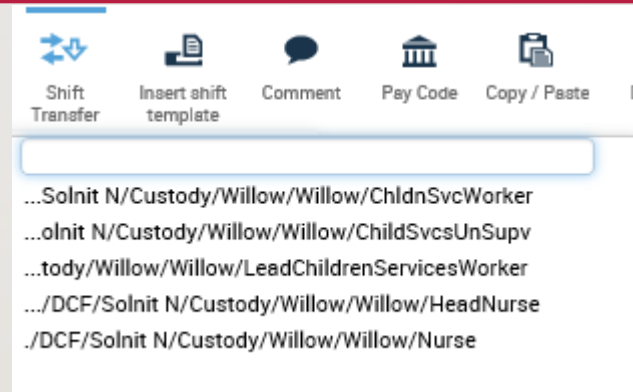
- Assigned to:** Lopez, Steven Primary job None
- Table Headers:** Start Date, End Date, Duration, Rotation
- Add Pattern:** Anchor Date: 1/03/2020, Start Date: 1/03/2020, End Date: (empty), Clear button.
- Frequency:** Forever (selected), Define Pattern for: 1, Week(s), Day(s), Override Other Patterns (checkbox).
- Buttons:** Add Shift, Add Pay Code, Shift Template, Pattern Template, Items in rotation (dropdown), Find.
- Table:** A table with columns for days of the week and rows for pattern entries.
- Buttons:** Cancel, Apply.

	No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
+	1							
+	2							

SCHEDULING – SHIFT TRANSFER

1. Tap the Shift Transfer button and it will show all available Transfer positions that you are eligible for
2. Click on the desired position, then click on the desired schedule you want to transfer. Once clicked the schedule will get an (x) next to it then click shift transfer again to stop transferring. If you hover over that scheduled time you will see the transfer you initiated.

1



2

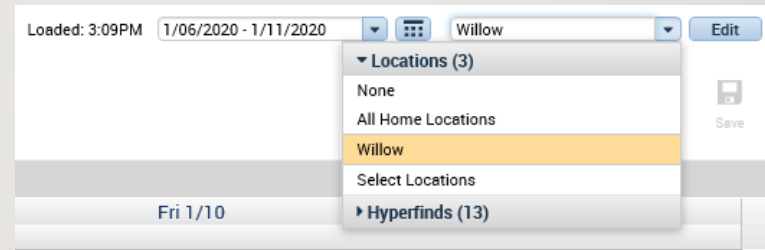


ADVANCED SCHEDULING

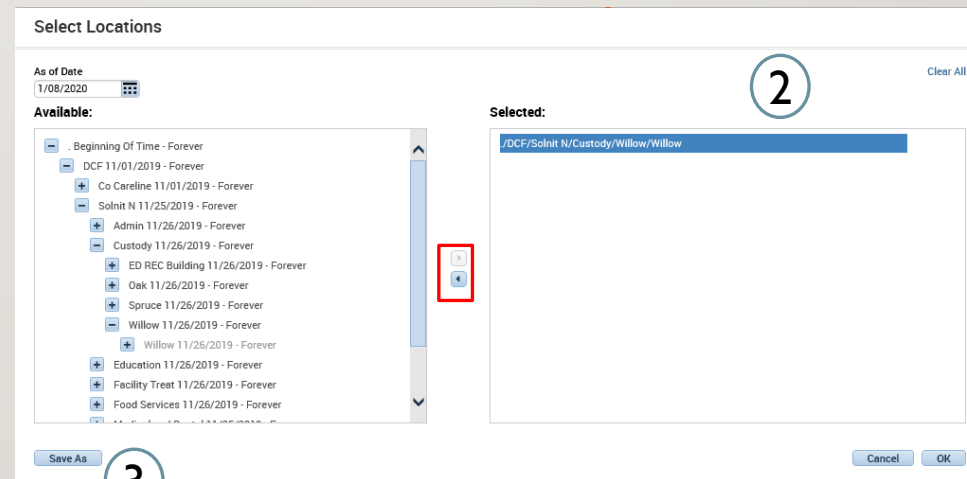


SCHEDULING –FINDING YOUR TEAM LOCATION

1. On the Schedules Widget click on the Locations dropdown and press select locations
2. This will get you to a window with every location, run through the drop down and select the desired location, in this case Willow at Solnit N, then use the **arrows in the middle** to move that to your Selected locations
3. Use the Save As button to save your selected location with a custom name so that it will appear in the drop down



1

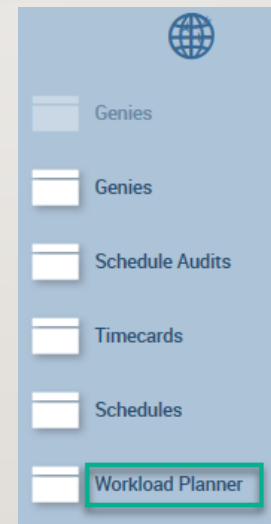


2

3

SCHEDULING – WORKLOAD PLANNER

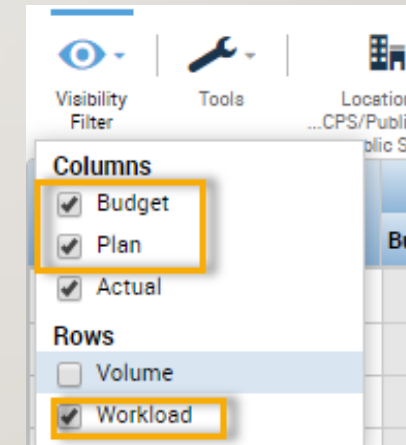
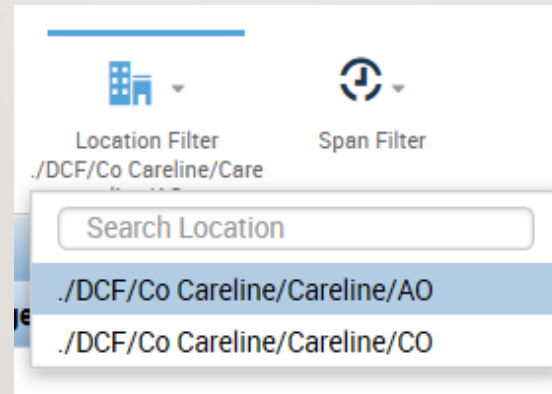
- Your staffing requirements are referred to as workload requirements in Workforce Scheduler and are stored in the Workload Planner. A Budget Workload is defined for each department. Then, when or if your staffing needs change, you can make adjustments in the Workload Planner.



Mon 12/02			Tue 12/03		
Budg...	Plan	Actual	Budg...	Plan	Actual
2	2		2	2	
2	2		3	3	
1	1		2	2	
1	1		1	1	







SCHEDULING – WORKLOAD PLANNER

1. After selecting your location, your default view will be the Budget, Plan, and Actual columns with the Volume and Workload rows
2. The most convenient view is that of **Budget** and **Plan** columns and the **Workload** row



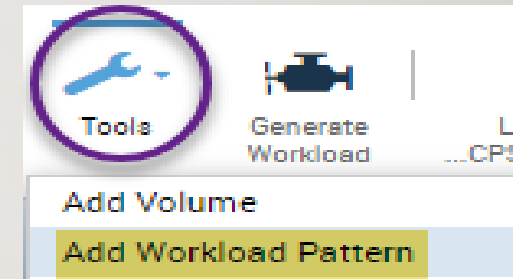
SCHEDULING – WORKLOAD PLANNER

Columns can be updated today and in the future only. Budgets are usually updated once a year and Plans can be adjusted as needed

Workload Planner									
Workload and Volume					Loaded: 9:46PM	Current Schedule Period		Careline	
 View By	 Visibility Filter	 Tools	 Generate Workload	 Location Filter /DCF/Co Careline/Careline/CO	 Span Filter				
Job	Span	Type		Mon 1/20	Tue 1/21	Wed 1/22	Thu 1/23	Fri 1/24	Sat 1/25
				Budget	Budget	Budget	Budget	Budget	Budget
UCASST	Careline SW Thi...	Workload							
ProcessingTe...	Careline SW First	Workload		1	1	1	1	1	1
ProcessingTe...	Careline SW Se...	Workload							
ProcessingTe...	Careline SW Thi...	Workload							
SocialWorkSup	Careline SW First	Workload		3	3	3	3	3	2
SocialWorkSup	Careline SW Se...	Workload		2	2	2	2	3	2
SocialWorkSup	Careline SW Thi...	Workload							
SW-SoclHuma...	Careline SW First	Workload		22	22	22	22	22	5
SW-SoclHuma...	Careline SW Se...	Workload		8	8	9	8	9	6

SCHEDULING – WORKLOAD PLANNER PATTERNS

1. To create a pattern of your workload use the Tools button and select **Add Workload Pattern**
2. Patterns allow you to automatically enter workloads for the future if your budgets don't frequently change



Workload Pattern

Location : ./DCF/Co Careline/Careline/CO

Start Date	End Date	Type
1/20/2020	1/02/2021	Budget

Edit Pattern

Start Date : * 1/20/2020 End Date : * 1/02/2021 ☐ Save as plan
☐ Forever

Job	Span	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Holiday
SocialWorks...	Careline SW ...	2	3	3	3	3	3	2	2
	Careline SW ...	2	2	2	2	2	3	2	2
	Careline SW ...								
SW-SocliHum...	Careline SW ...	5	22	22	22	22	22	5	
	Careline SW ...	6	8	8	9	8	9	6	



Cancel Apply

SCHEDULING – WORKLOAD PLANNER PATTERNS

1. Highlight the pattern you previously created and click on **Copy Pattern**
2. Create a new start date (today or in the future) make the desired changes and click apply
3. Any previous pattern will be end dated to coincide with the new start date you chose

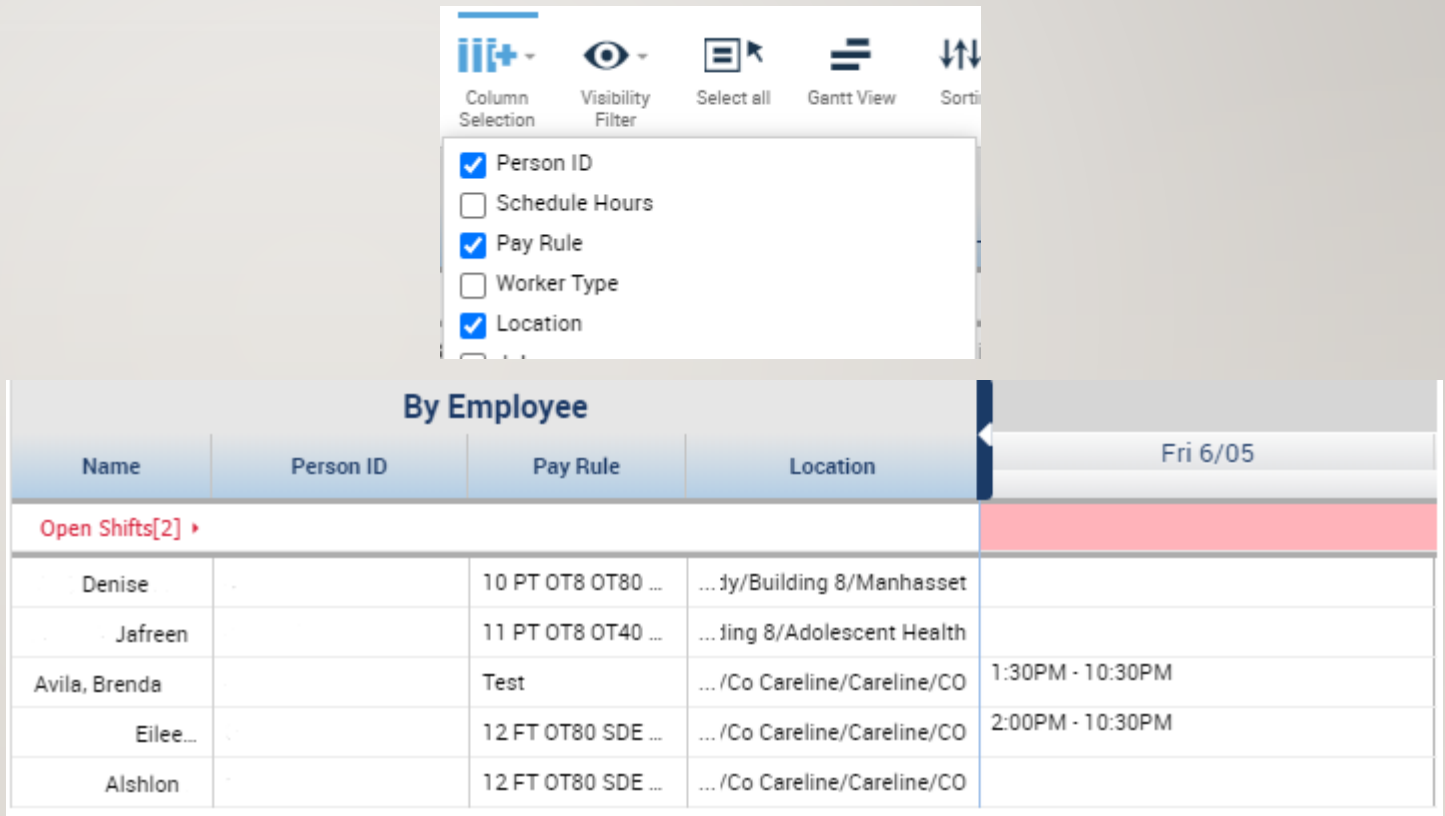
Workload Pattern

Location : Boston Med/BMC/BMCPs/Public Safety/Public Safety

	Start Date	End Date	Type
 	11/05/2019	5/31/2020	Budget

SCHEDULING – COLUMN SETS

Column sets will allow you to change your view. This will help you when scheduling if you want to do so by seniority, or MOT/VOT date having both in the view would help you greatly

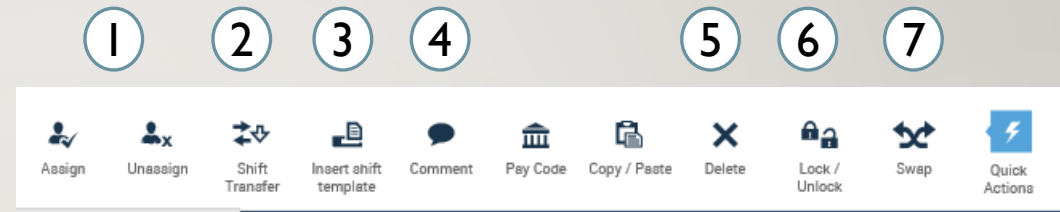


The screenshot shows a scheduling application interface. At the top, there is a toolbar with icons for Column Selection, Visibility Filter, Select all, Gantt View, and Sort. Below the toolbar, a dropdown menu is open, showing a list of columns with checkboxes: Person ID (checked), Schedule Hours (unchecked), Pay Rule (checked), Worker Type (unchecked), and Location (checked). Below the menu, a table titled "By Employee" is displayed. The table has columns for Name, Person ID, Pay Rule, and Location. A date filter "Fri 6/05" is applied to the right side of the table. The table shows a list of employees with their respective shift details. A red bar highlights the "Open Shifts[2]" section.

By Employee			
Name	Person ID	Pay Rule	Location
Open Shifts[2] ▶			
Denise		10 PT OT8 OT80ly/Building 8/Manhasset
Jafreen		11 PT OT8 OT40ling 8/Adolescent Health
Avila, Brenda		Test	.../Co Careline/Careline/CO
Eilee...		12 FT OT80 SDE/Co Careline/Careline/CO
Alshlon		12 FT OT80 SDE/Co Careline/Careline/CO

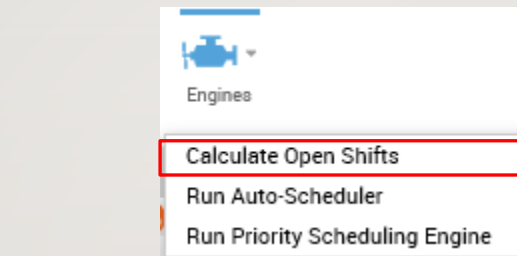
SCHEDULING – QUICK ACTIONS

1. **Assign/Unassign:** allows you to assign/unassign employees to an open shift
2. **Shift Transfer:** Allows you to change request a shift change with a specific employee
3. **Insert shift template:** If there are preselected shift schedules, choose one and paste it to any desired cell
4. **Comment:** Add explanation to a change made or to a selected schedule
5. **Delete:** Remove a schedule from a cell
6. **Lock and Unlock:** Allows you to make a schedule uneditable
7. **Swap:** Select two scheduled cells and swap the information in them

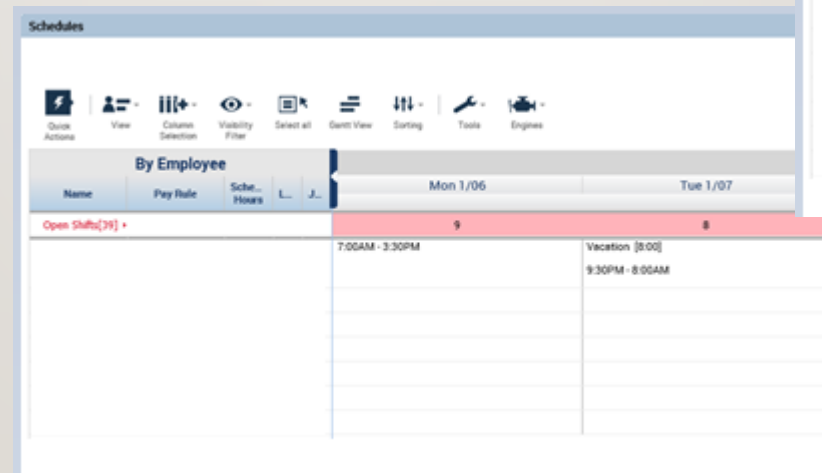


SCHEDULING – ASSIGNING/UNASSIGNING A SHIFT

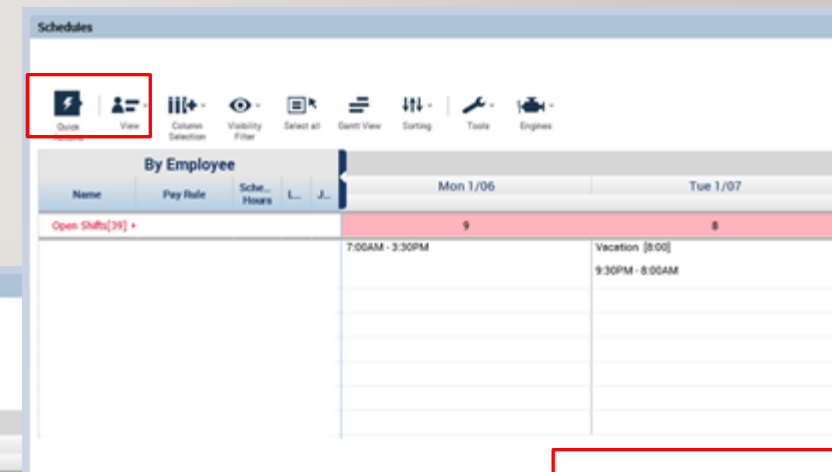
1. Open shifts will appear above each day and can be expanded to show specifics by clicking on the red bar. If no open shifts currently appear for your employees you can press the Engines button, and press **calculate open shifts**.
2. Click on the **cell** of an employee shift, then tap the **Assign/Unassign** buttons, this will then show you the list of open shifts and select the shift you want to assign to that employee. Though there are more intuitive methods we will cover in the following slides.



1



2



SCHEDULING –VIEWING SHIFT ASSIGNMENTS

1. Open the menu at the bottom and select the Daily Coverage tab
2. Choose the view you prefer and the job and time schedule, the interface will show you how many employees have been assigned each day for the selected shift

Staffing Assistant	Coverage	Daily Coverage	Metrics	Rule Violations	
View	Counts	Job	Custody/Willow/Willow/ChldnSvcWorker	Time Span	7a-330p
7a-330p		0/6	0/8		

SCHEDULING – SHIFT TEMPLATES

1. Right click on the associate's name and select **Scheduling Pattern**
2. Select Pattern Template and fill in the anchor date, start date, and the end date or box
3. Select **Apply**

By Employee

Name	Location
Open Shifts	
Astiasaran, Kri...	... /Solnit S/Custody/Buil
Orti	... /Solnit S/Custody/Buil
Rau	... /Solnit S/Custody/Buil
Availability	

Schedule Pattern

Assigned to: Primary job [./DCF-DCF91000/Solnit S/Custody/Building 8/Sachem/CSW]

	Start Date	End Date	Duration	Rotation
	2/09/2020	Forever	2 weeks	2 Weeks:7a - 330p(Sun,Tue,Wed,Thu,Fri,Mon,Tue,Wed,Thu,Sat)

Edit Pattern

Anchor Date: 2/02/2020 Start Date: 2/09/2020 End Date: Forever

Define Pattern for: 2 Week(s) Day(s) Override Other Patterns

Add Shift | Add Pay Code | Shift Template | **Pattern Template** | 7a-330p | Find

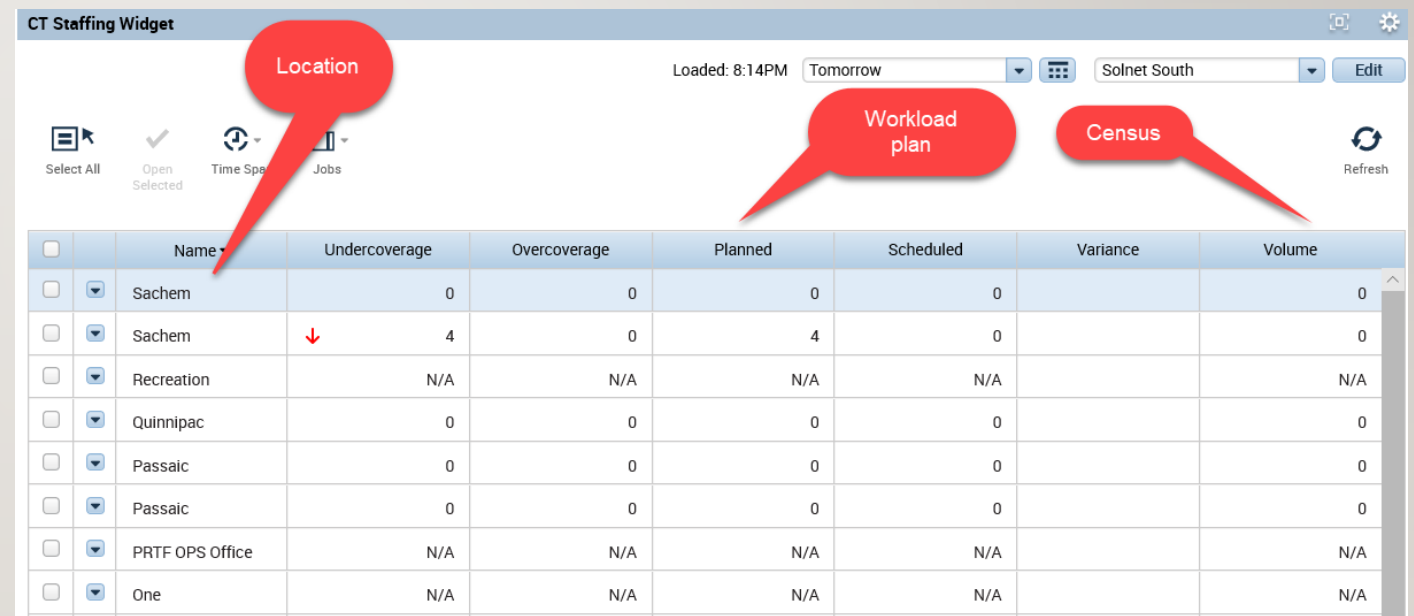
No.	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	7a-330p		7a-330p	7a-330p	7a-330p	7a-330p	
2		7a-330p	7a-330p	7a-330p	7a-330p		7a-330p

Cancel Apply

SCHEDULING – CT STAFFING WIDGET

Staff Management widget gives you quick access to your daily staffing plan so that you can make quick adjustments, such as when an employee calls out sick or you require more or less staff

Note: That this is a tool for daily operations, and should not replace the Schedule Planner or Schedule widget



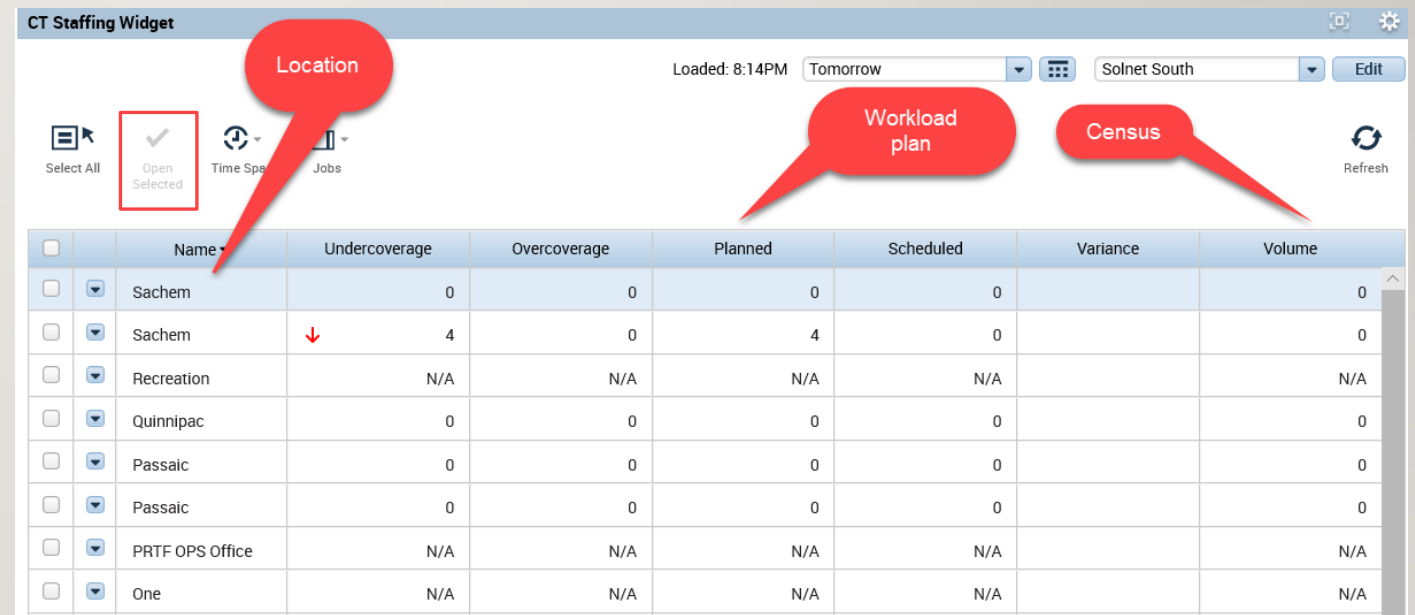
The screenshot shows the 'CT Staffing Widget' interface. At the top, it displays 'Loaded: 8:14PM', a date selector set to 'Tomorrow', and a location dropdown set to 'Solnet South'. Below this are buttons for 'Select All', 'Open Selected', 'Time Sp', and 'Jobs'. A table lists staffing data with columns for Name, Undercoverage, Overcoverage, Planned, Scheduled, Variance, and Volume. Red callout boxes point to the 'Location' dropdown, the 'Workload plan' button, and the 'Census' button.

	Name	Undercoverage	Overcoverage	Planned	Scheduled	Variance	Volume
<input type="checkbox"/>	Sachem	0	0	0	0		0
<input type="checkbox"/>	Sachem	↓ 4	0	4	0		0
<input type="checkbox"/>	Recreation	N/A	N/A	N/A	N/A		N/A
<input type="checkbox"/>	Quinnipac	0	0	0	0		0
<input type="checkbox"/>	Passaic	0	0	0	0		0
<input type="checkbox"/>	Passaic	0	0	0	0		0
<input type="checkbox"/>	PRTF OPS Office	N/A	N/A	N/A	N/A		N/A
<input type="checkbox"/>	One	N/A	N/A	N/A	N/A		N/A

SCHEDULING – CT STAFFING WIDGET

The opening screen is the Summary view. Summary view shows you the locations that you have access to and any staffing issues associated with them.

You can also see the workload plan, volume, and selected time period. Choose the locations you want to modify and select **Open**



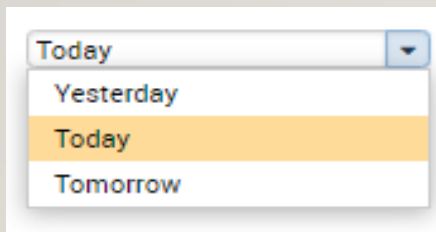
The screenshot shows the 'CT Staffing Widget' interface. At the top, it displays 'Loaded: 8:14PM', a date selector set to 'Tomorrow', and a location dropdown set to 'Solnet South'. Below this are three main buttons: 'Select All', 'Open Selected' (highlighted with a red box and a callout labeled 'Location'), and 'Time Spacing'. To the right of these buttons are two more callouts: 'Workload plan' pointing to a button and 'Census' pointing to a button. A 'Refresh' button is located on the far right. Below the buttons is a table with the following columns: Name, Undercoverage, Overcoverage, Planned, Scheduled, Variance, and Volume. The table contains eight rows of data for various locations.










	Name	Undercoverage	Overcoverage	Planned	Scheduled	Variance	Volume
<input type="checkbox"/>	Sachem	0	0	0	0		0
<input type="checkbox"/>	Sachem	↓ 4	0	4	0		0
<input type="checkbox"/>	Recreation	N/A	N/A	N/A	N/A		N/A
<input type="checkbox"/>	Quinnipac	0	0	0	0		0
<input type="checkbox"/>	Passaic	0	0	0	0		0
<input type="checkbox"/>	Passaic	0	0	0	0		0
<input type="checkbox"/>	PRTF OPS Office	N/A	N/A	N/A	N/A		N/A
<input type="checkbox"/>	One	N/A	N/A	N/A	N/A		N/A

SCHEDULING – CT STAFFING WIDGET – DETAIL VIEW

Detailed view shows you any variances in the staffing plan for the jobs at each location

Open the Quick Actions menu and select available employees to resolve these variances, select the date you want to change



								
Quick Actions	Available Employees	Sort	Time Span	Jobs	Shifts	Comfortable View	Summary	Refresh
Shifts Coverage Setting X								
Sachem				Manhasset				
↓ 4 ✓ 0 PLN 4 SCH 0 CEN 0				✓ 0 ✓ 0 PLN 0 SCH 0 CEN 0				
Job	Planned	Scheduled	Variance	Job	Planned	Scheduled	Variance	
CSUS	0	0	0	PRPSYC	0	0	0	
CSW	3	0	↓ -3	PSYCHI-PD	0	0	0	
CSWLEAD	0	0	0	PSYCHOCL	0	0	0	
Passaic				CMCU				
✓ 0 ✓ 0 PLN 0 SCH 0 CEN 0				↓ 1.15 ✓ 0 PLN 1.15 SCH 0 CEN 0				
Job	Planned	Scheduled	Variance	Job	Planned	Scheduled	Variance	
PRPSYC	0	0	0	AA	0.44	0	↓ -0.44	
PSYCHI-PD	0	0	0	APRN	0.35	0	↓ -0.35	
PSYCHOCL	0	0	0	LPN	0	0	0	

SCHEDULING – CT STAFFING WIDGET – DETAIL VIEW

- To fill an open shift with an employee from the Employee Pool, select the employee in the pool and drag the employee to the open shift
- Pay codes, **green type** indicates a pay code. Pay codes show only for employees for whom this is the primary location under the schedule on employee list
- Hover the cursor over the employee name to see a tooltip with the job details, and shift or zone time details, for the employee.

The top screenshot shows the 'Jobs' tab in the CT Staffing Widget. It displays a list of open shifts with columns for Name, Job, and Schedule. A dropdown menu is open, showing a list of employees with their names and job codes. The bottom screenshot shows the 'Shifts' tab, displaying a list of shifts with columns for Name, Job, and Schedule. A dropdown menu is open, showing a list of pay codes with their names and job codes.

Jobs Tab:

Name	Job	Schedule
Open Shift	CSW	7:00AM - 3:30... [2]
Open Shift	CSW	7:00AM - 11:00AM
Open Shift	CSW	11:30AM - 3:30PM
Open Shift	CSW	7:00AM - 3:30... [2]
Open Shift	CSW	7:00AM - 3:30... [2]
Open Shift	CSW	7:00AM - 3:30... [2]
Open Shift	CSW	2:45PM - 11:1... [2]

Shifts Tab:

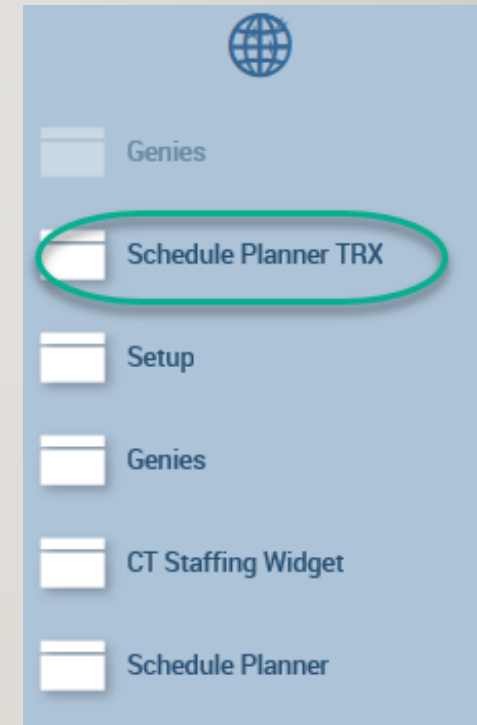
Name	Job	Schedule
Open Shift	AA	6:35AM - 3:00... [2]
Open Shift	AA	3:00PM - 5:00...

Pay Code List:

- ☒ All Jobs
- ☒ AA
- ☒ APRN
- ☒ CNA
- ☒ CSUS
- ☒ CSW
- ☒ CSWLEAD
- ☒ HN
- ☒ LPN
- ☒ MD

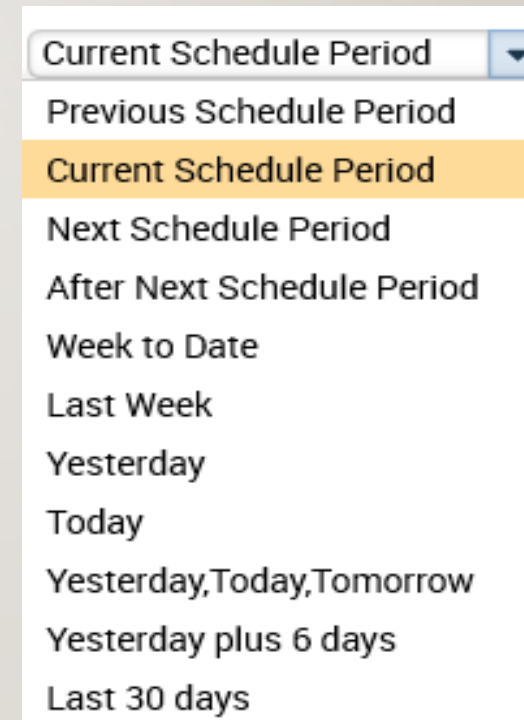
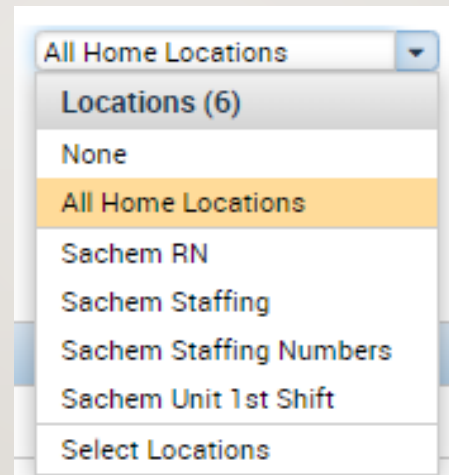
SCHEDULING – SCHEDULE PLANNER TRX

- Scheduler Planner TRX is specifically for presenting employees outside of the target area to fill openings.
- When using this planner, you will get a larger list of employees on the schedule.



SCHEDULING – STAFFING ASSISTANT/CALL LIST

- Use the Staffing Assistant/Call List to find the most appropriate employee to work an open shift, or replace an employee who can no longer work a shift
- First narrow down the Schedule Planner to your location and the desired scheduling period



SCHEDULING – CALL LIST/VOT AND MOT

- Open the Staffing Assistant tab
- Select the correct procedure set, in this case we chose **primary job and available**

Rule Violations Daily Coverage **Staffing Assistant**

Mon 4/13 7:00 am - 3:30 pm ...ding 8/Sachem/CSW Solneit South Sachem Edit 1-DCF Solnit VOT Primar... Load

No.	Outcome	Contacted On	Name	Schedule Hours	Pay Rule	Worker Type	Locat...	Job	Seni... For S...	VO...	MO...	Skill
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Rule Violations Daily Coverage **Staffing Assistant**

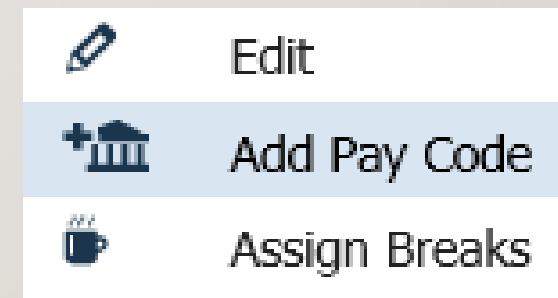
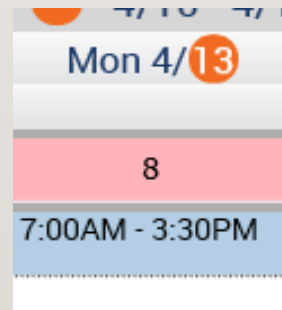
Mon 4/13 7:00 am - 3:30 pm ...ding 8/Sachem/CSW Selected Locations Edit 1-DCF Solnit VOT Primar... Load

No.	Outcome	Contacted ...	Name	Schedule Hours	Pay Rule	Worker Type	Location	Job	Senio... For S...	VO...	MO...	Skill	Certif...
1	Select	-		0.00	10 FT OT8 ...	Full Time	...ustody/Building 8/Sachem/.	CSW	1/06/1996				TACE, ...
2	Select	-		0.00	10 FT OT8 ...	Full Time	...Custody/Building 8/Acadia/.	CSW	2/24/1999				TACE, ...
3	Select	-		0.00	10 PT OT8 ...	Part Time	...Custody/Building 8/Acadia/.	CSW	1/14/2004				TACE, ...
4	Select	-		0.00	10 PT OT8 ...	Part Time	...Custody/Building 8/Acadia/.	CSW	3/18/2006				1st Aide...
5	Select	-		0.00	10 FT OT8 ...	Full Time	...ustody/Building 8/Sachem/.	CSW	12/13/20...				TACE, ...

SCHEDULING – SCHEDULING ASSISTANT/CALL LIST

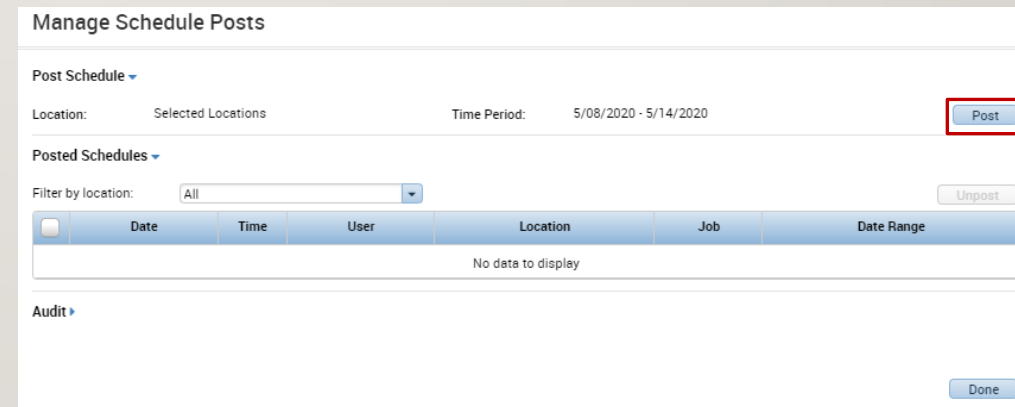
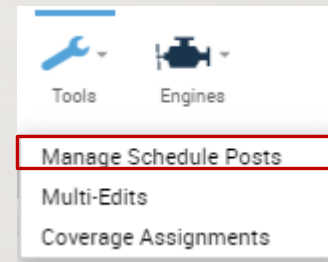
- The Staffing Assistant creates a list potentially filling all of the openings
- Select the desired outcome in each row of the staffing assistant to decide if you want to assign the shift
- On the shift itself you can add pay code “**Voluntary Overtime**”, but make sure the Override Shift option is unchecked, then click **Apply**

Rule Violations Daily Coverage Staffing Assistant					
Mon 4/13 7:00 am - 3:30 pm ...ding 8/Sachem/CSW Solneit South Sachem					
	No.	Outcome	Contacted On	Name	Sched Hour
<input type="checkbox"/>	1	Please Choose:	-	Bartell, Anthony	0.00
<input type="checkbox"/>	2	Accepted	-	Burnham, William	0.00



SCHEDULING – MANAGE SCHEDULE POSTS

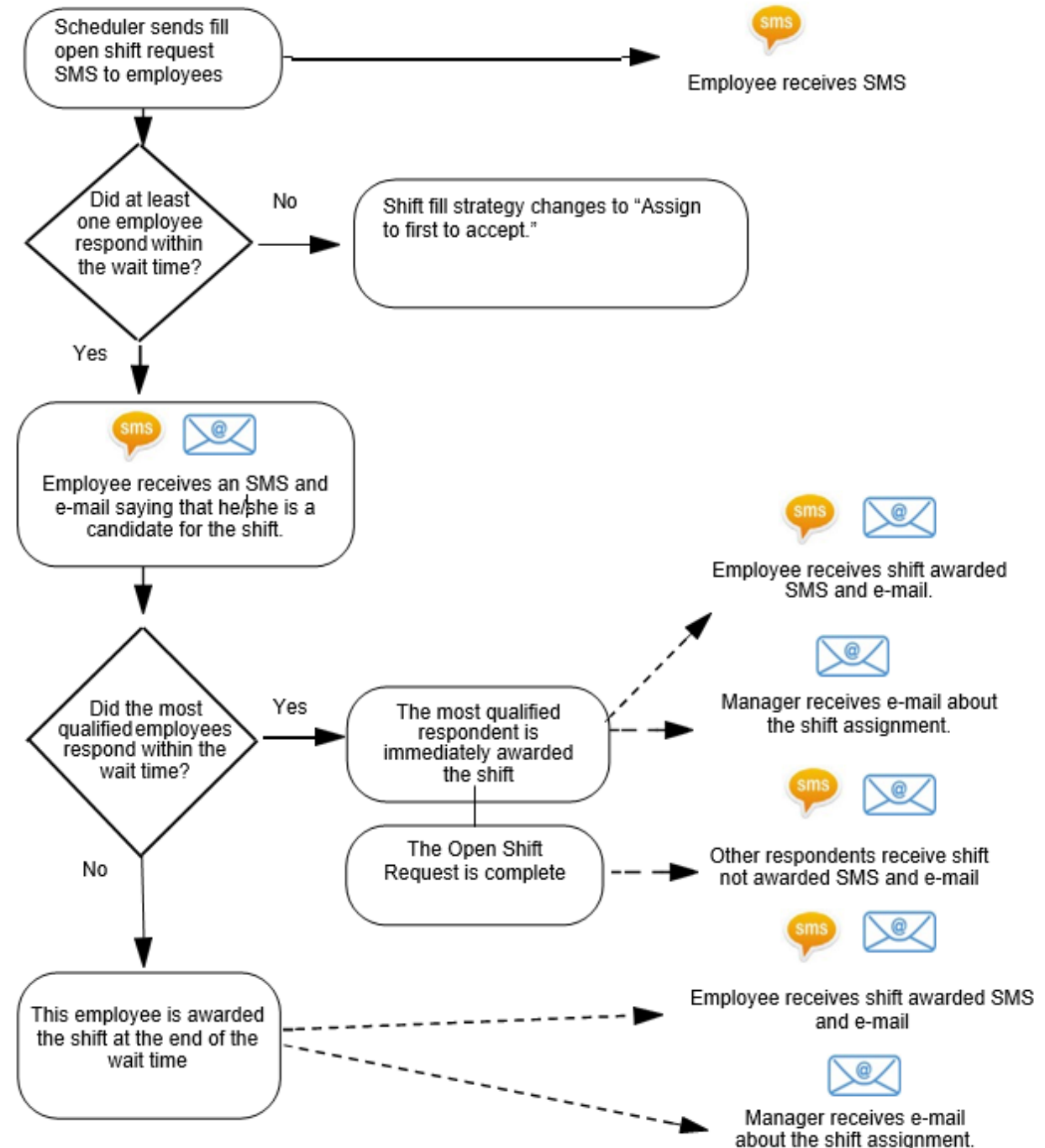
1. Once you have finished assigning all scheduled time, employees will be able to see those changes on their calendar, you may need to post your schedule for them to see this in the future
2. Navigate to **Tools** under schedule planner and select **Manage Schedule Posts**, here you will view the location and schedule and select **Post**

A screenshot of the 'Manage Schedule Posts' interface. At the top, there is a title 'Manage Schedule Posts'. Below it, there is a section 'Post Schedule' with a dropdown arrow. Under this section, there are two fields: 'Location:' with the value 'Selected Locations' and 'Time Period:' with the value '5/08/2020 - 5/14/2020'. To the right of these fields is a blue button labeled 'Post', which is highlighted with a red rectangular box. Below the 'Post Schedule' section, there is a section 'Posted Schedules' with a dropdown arrow. Under this section, there is a 'Filter by location:' field with a dropdown menu showing 'All'. To the right of this field is a button labeled 'Unpost'. Below the filter field, there is a table with columns: 'Date', 'Time', 'User', 'Location', 'Job', and 'Date Range'. The table is currently empty, and the text 'No data to display' is shown at the bottom of the table. Below the table, there is a section 'Audit' with a dropdown arrow. At the bottom right of the interface, there is a blue button labeled 'Done'.

SCHEDULING – SMS QUICK FILL LOGIC

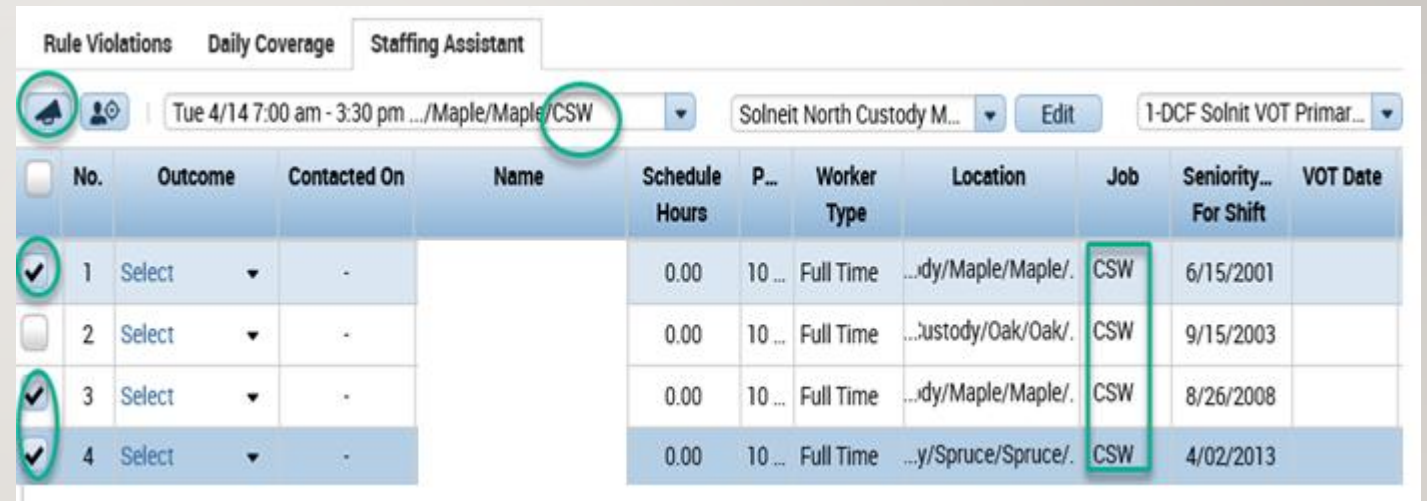
- Short Message Service (SMS) Quick Fill is a mobile solution to enable managers to fill open shifts quickly with the right staff.

Offer to All, Assign by Match Order

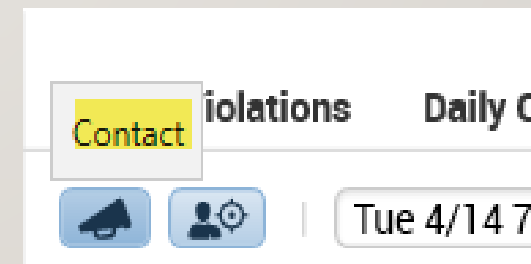


SCHEDULING – SMS QUICK FILL

- After selecting the location and the desired job, you will be able to select which employees you want to contact by selecting the boxes next to the employee number
- Once you select the group of employees, you can click the **Contact** button where you will later fill in the number of available shifts



Rule Violations Daily Coverage Staffing Assistant											
Tue 4/14 7:00 am - 3:30 pm .../Maple/Maple/CSW Solneit North Custody M... Edit 1-DCF Solnit VOT Primar...											
	No.	Outcome	Contacted On	Name	Schedule Hours	P...	Worker Type	Location	Job	Seniority... For Shift	VOT Date
<input checked="" type="checkbox"/>	1	Select	-		0.00	10 ...	Full Time	...dy/Maple/Maple/	CSW	6/15/2001	
<input type="checkbox"/>	2	Select	-		0.00	10 ...	Full Time	...ustody/Oak/Oak/	CSW	9/15/2003	
<input checked="" type="checkbox"/>	3	Select	-		0.00	10 ...	Full Time	...dy/Maple/Maple/	CSW	8/26/2008	
<input checked="" type="checkbox"/>	4	Select	-		0.00	10 ...	Full Time	...y/Spruce/Spruce/	CSW	4/02/2013	



SCHEDULING – SMS QUICK FILL

- After having selected the employees, fill in the number of shifts, a comment describing the shift, how to assign (by match order), and then the wait time. Select the bubble next to each employee name to select SMS
- Wait time offers shifts to all selected employees at once. If the most qualified employee accepts the shift, it is awarded immediately. Otherwise, all responses are pooled and the shift is awarded to the most qualified responder upon wait time expiration.
- Click Send

Contact

CSW CSW

1. 7:00AM [4:00]: **Regular** ./DCF-DCF91000/Solnit N/Custody/Maple/Maple/CSW
2. 11:00AM [0:30]: **Break**
3. 11:30AM [4:00]: **Regular** ./DCF-DCF91000/Solnit N/Custody/Maple/Maple/CSW

Employees to contact

Name	ID	SMS
		<input checked="" type="radio"/>
		<input type="radio"/>
		<input type="radio"/>

Parameters

Open shifts to assign:

How To Assign:

Wait Time (minutes):

Comment:

SMS Content:

31/113 characters left

SCHEDULING – SMS QUICK FILL – CONTRACT TRACKING

- Clicking the box next to the notify will show you contact tracking information, here you can see who the message was sent to and who accepted
- You can also run **Quick Fill Details Report** and **SMS Quick Fill Usage Summary Report**, under Reports to get more information

Contact tracking

All My Contact Tasks Time Period: 4/14/2020 - 4/16/2020 Contact Time Load

Contact Date and Time	Task	Status	Shift
4/14/2020 7:25 PM	Fill Open Shift	Completed	4/15/2020 [7:00AM - 3:30PM]

OK

THE END

Please refer to the Scheduling Manager job aids and the eLearnings for any further questions and don't hesitate to reach out to your local Kronos contact and your supervisors with any questions