ActiveRoster User Guide

Staffing and Scheduling

2021.2

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CONFIDENTIAL MATERIAL

Contents

Change Log

2021.2 - released November 2021

Topic	Description
Document	Branding updates; no content changes

Introduction

ActiveRoster provides real-time staffing information for individual departments or schedule groups. It allows you to see when your employees are scheduled to come in and where they should be working. ActiveRoster compares employee clockings to employee schedules, which helps you determine the employees that are scheduled and currently clocked in, who has not shown up for work yet, and who clocked in late or early.

When you have current, convenient staffing information, you can make fast, fair, and informed staffing decisions. Staffers can see actual coverage compared to the needed staff and can make scheduling and clocking changes immediately, all from a single screen.

Guide overview

This guide provides information about ActiveRoster and how to use its features.

- About the ActiveRoster screen (on the next page)

  This section explains basic information about the ActiveRoster screen.

- Using ActiveRoster (on page 8)

  This section explains how to use the different features of ActiveRoster and provides all the information you need to successfully use it. Working with ActiveRoster involves the following types of tasks:

  - Filter and sort the roster (on page 13)

    Use filters and sorting to help you view just the information you need at the moment.

  - Monitoring Employees (on page 11)

    View employee schedules and clockings, and view organization unit or schedule group details.

  - Working with transactions (on page 17)

    Add, edit, and delete clockings and schedules.

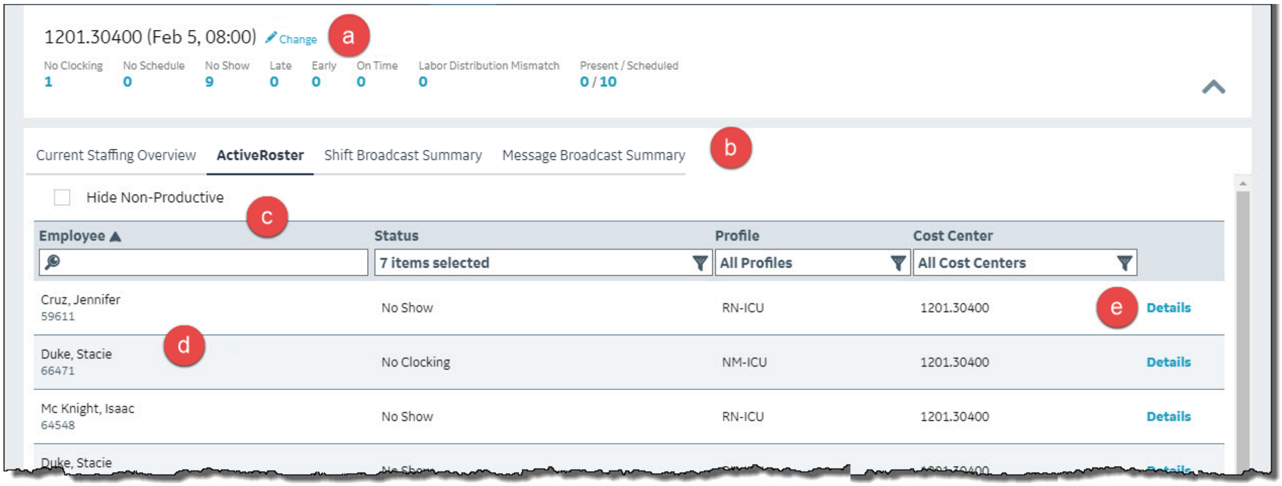
For information about setting up ActiveRoster, see the *ActiveRoster Administrator Guide*.

Audience

This guide is intended for those responsible for the day-to-day staffing needs of your organization. These individuals handle last-minute changes to schedules, anticipate workload requirements, and balance the needs of an organization unit with the staff’s abilities and schedule requirements.

At your facility, these individuals may benefit from using ActiveStaffer: Schedulers and Staffers, Central Staffing Office employees, and Department or Nurse Managers

About the ActiveRoster screen



a. Staffing summary

   At the top of the screen, you can view a summary of the organization unit or schedule group that you selected. The summary area shows the following information:

   - The organization unit or schedule group you are viewing and the date and time you specified
   - A pencil icon to change the organization unit, schedule group, or date you are viewing
   - Statuses and the number of employees in each status

   For more information, see View a summary of ActiveRoster information (on page 11).

b. Navigation tabs

   Use these tabs to switch between the ActiveRoster, Current Staffing Overview, and Broadcast Summary screens.

c. Employee filters

   Use the filters and sorting options to change the list of employees, such as those with a particular status or those in a certain organization unit or profile.

   For more information, see Filter and sort the roster (on page 13).

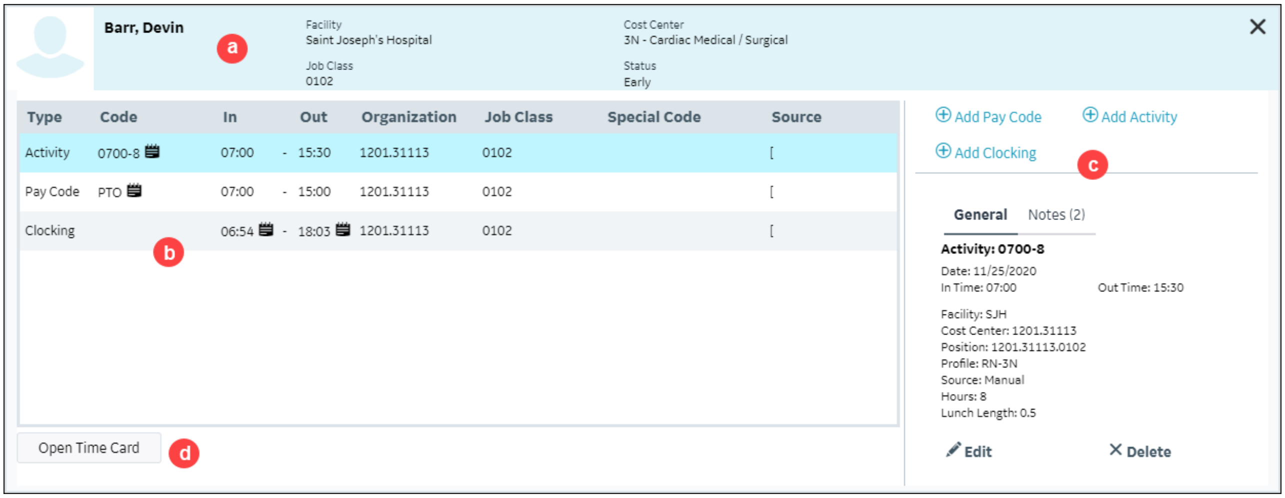
d. Employee roster

   The roster shows the employee's name, code, ActiveRoster status, and scheduled profile and organization unit. The items in the Status column are totaled and shown in the summary area at the top of the screen.

   For more information, see View the roster (on page 13).

e. Employee transaction details

   Click the **Details** link on an employee row to view the employee transaction details screen.



The Details screen includes the following information:

a. Header area showing the employee’s information

b. Activity and clocking information (left side of the screen)

   Click a schedule or clocking row to view the details in the right pane.

c. Details area (right side of the screen) displays clocking details where you can add, edit, and delete the selected schedule or clocking

   The word Request appears under the activity code for shift requests and under the clocking time for clocking requests.

d. The Open Time Card button opens a new, separate tab in the browser that shows the employee's Time Card Screen (TCS).

   This is helpful when you need additional employee information.

For more information, see View employee transaction details (on page 14).

Using ActiveRoster

The section that follow give you details about these ActiveRoster tasks:

- Open ActiveRoster (below)

  Open ActiveRoster to view the groups of employees you would like to monitor.
- Monitoring Employees (on page 11)

  View employee schedules and clockings, and view organization unit or schedule group details.
- Working with transactions (on page 17)

  Add, edit, and delete clockings and schedules.
- View the ActiveRoster report (on page 21)

  Information about the Employees Clocked In report.

Open ActiveRoster

Tip

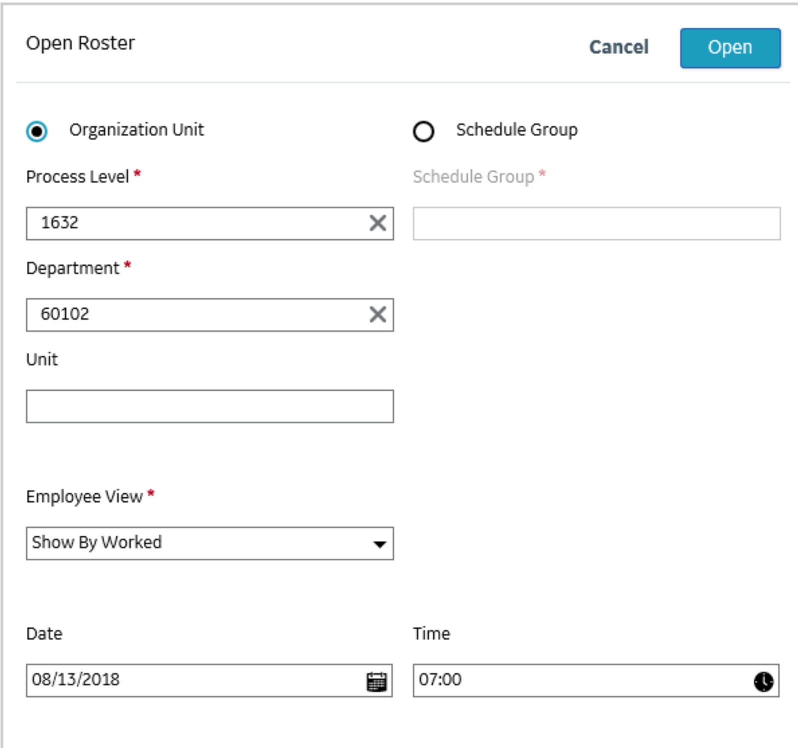
This initial information about setting preferences is optional. If you do not have the appropriate permission to update these settings, contact a system administrator for assistance.

If you routinely access ActiveRoster for the same organization unit or schedule group, you can set a preference for that information to automatically fill when you open ActiveRoster so that you do not have to enter it every time. Note that default organization units and schedule groups also set the defaults for your other search screens in the system.

To create schedule groups, navigate to **Configuration > Scheduling > Schedule Group**.

To enable a default organization unit or schedule group, navigate to:

- **Preferences > My Preferences > Default Organization Unit**
- **Preferences > My Preferences > Default Schedule Group**



Open ActiveRoster

Tip

In addition to the following steps, you can also open ActiveRoster by first opening the Current Staffing Overview screen and then clicking the ActiveRoster tab.

To open and view ActiveRoster, complete the following steps.

1. Navigate to **Actions > Scheduling > ActiveRoster**.

   The Open Roster dialog box appears.

2. Select the **Organization Unit** or **Schedule Group** option.
3. Select the desired organization unit or schedule group.

   As you type, the list of options in the menu are filtered based on what you enter.

4. If needed, select one of the following options in the **Employee View** field:
   - **Show by Worked**

     Show employees working in the selected organization unit regardless of their home labor distributions.

   - **Show by Home**

     Show employees whose home labor distribution matches the selected organization unit regardless of where they are working.

Example

Eight RNs in Department A123 are scheduled. Six are scheduled in A123 and two are floating elsewhere. In addition, one employee from B987 is floating into A123.

With the Employee View option set to Show by Worked, seven RNs appear in the roster (six plus the float from B987).

With the Employee View option set to Show by Home, eight RNs appear (all eight from A123; the float from B987 does not appear).

5. If needed, enter a different date and time.

   By default, ActiveRoster opens to today's date and the current time.

6. Click **Open**.

To change to a different organization unit, schedule group, or date, complete the following steps.

1. Click the pencil icon next to the current unit and date.

   The Open Roster dialog box appears.

2. Complete steps 2 - 6 from the previous set of steps.

Monitoring Employees

Monitoring employees involves the following types of tasks:

- View a summary of ActiveRoster information (below)
- View the roster (on page 13)
- Filter and sort the roster (on page 13)
- View employee transaction details (on page 14)

If you only have Time and Attendance, see Time and Attendance-only environment (on page 16).

View a summary of ActiveRoster information

At the top of the screen, you can view a summary of the organization unit or schedule group. The summary area shows the following information:

- The organization unit or schedule group you are viewing and the date and time you specified
- A pencil icon to change the organization unit, schedule group, or date that you are viewing
- Statuses and the number of employees in each status

Note

Your organization has set the guidelines that determine how some of the information is categorized. For example, your organization unit has defined how many minutes before and after a shift's start time that an employee is considered early or late. For more information, see a manager or system administrator.

The following status fields show the number of instances for each:

- **No Clocking**

  An employee has a schedule and has not clocked in but is not yet considered late.

This can happen for two reasons:

- The schedule appears in the current window of time but is still in the future. For example, it is 07:52 now and the employee is scheduled to start at 08:00.
- The schedule's start time has passed but it is not yet considered late. For example, the schedule's start time was 08:00 and it is now 08:03. If the employee clocks in now, the status changes to On Time. However, if the employee clocks in after the on-time threshold (such as 08:16), the status changes to Late. If the employee does not clock in, the status changes to No Show.

- **Not Scheduled**

  An employee clocked in but did not have a schedule at that time.

- **No Show**

  An employee has a schedule but has not yet clocked in (after the organization unit's predetermined threshold).

- **Late**

  An employee clocked in late (after the organization unit's predetermined threshold).

- **Early**

  An employee clocked in early (before the organization unit's predetermined threshold).

- **On Time**

  An employee clocked in on time (within the organization unit's predetermined threshold).

- **Labor Distribution Mismatch**

  An employee clocked in to an organization unit or a profile that is different from what was scheduled.

- **Present/Scheduled**

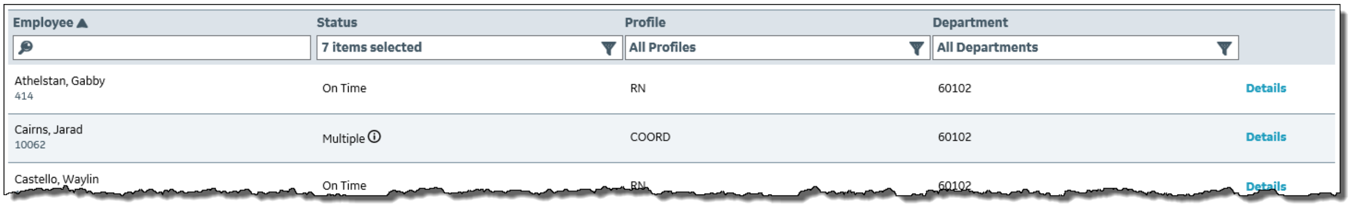
  Shows the number of present employees (clocked in) and the number of employees scheduled.

  The Present value represents all employees clocked in to the organization unit regardless of where the employee is scheduled or whether the employee even has a schedule.

Tip

Click a status field to filter the roster by that piece of information. For example, click Late to view just those employees currently considered to be late. For more information about filtering, see Filter and sort the roster (on the next page).

View the roster



The roster shows the employee's name, code, ActiveRoster status, and scheduled profile and organization unit.

The statuses help you determine if employees were on time, late, or early, and whether employees clocked in to the organization unit or profile they were scheduled in. The items in the Status column are totaled up and shown in the summary area at the top of the screen.

For details about the statuses, see View a summary of ActiveRoster information (on page 11).

Note

If **Multiple** appears in the Status column, then there are at least two statuses that apply to the employee. For example, if the employee clocked in to a unit that is different than the unit they were scheduled in, they would have one status of, for example, On Time and a second status of Labor Distribution Mismatch.

Hover over the information symbol ⓘ to view the items that are causing Multiple to appear.

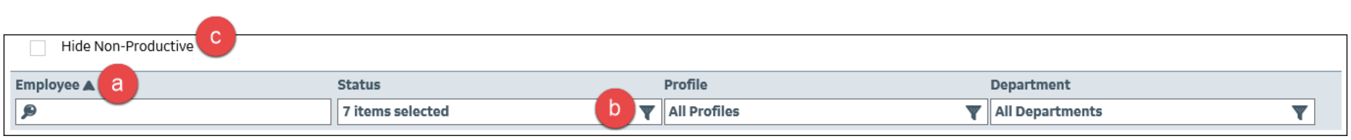
The roster lists employees who match any of the following criteria:

- Clocked in or clocked out
- Scheduled
- Clocked in and scheduled
- Nonproductive (such as scheduled PTO and training)

Tip

Click the page buttons above the roster (on the right side) to move forward or back through the pages of the roster.

Filter and sort the roster



The roster has the following sorting and filtering options:

a. Column sort

Click a column heading to sort the roster by that column. Click again to re-sort the column. The arrow indicates ascending or descending order.

You can sort by multiple columns by holding `CTRL` as you select columns.

b. Column filters

Filter the list by making selections in the Employee, Status, Profile, and organization unit boxes. You can filter the Employee column by typing an employee name or entering an employee code.

The items in the Status column are totaled and shown in the summary area at the top of the screen.

c. Non-productive filter

When you select the **Hide Non-Productive** option, only productive transactions are shown.

A transaction can only be considered productive if the employee is currently clocked in. Therefore, a transaction cannot be considered productive in the following situations:

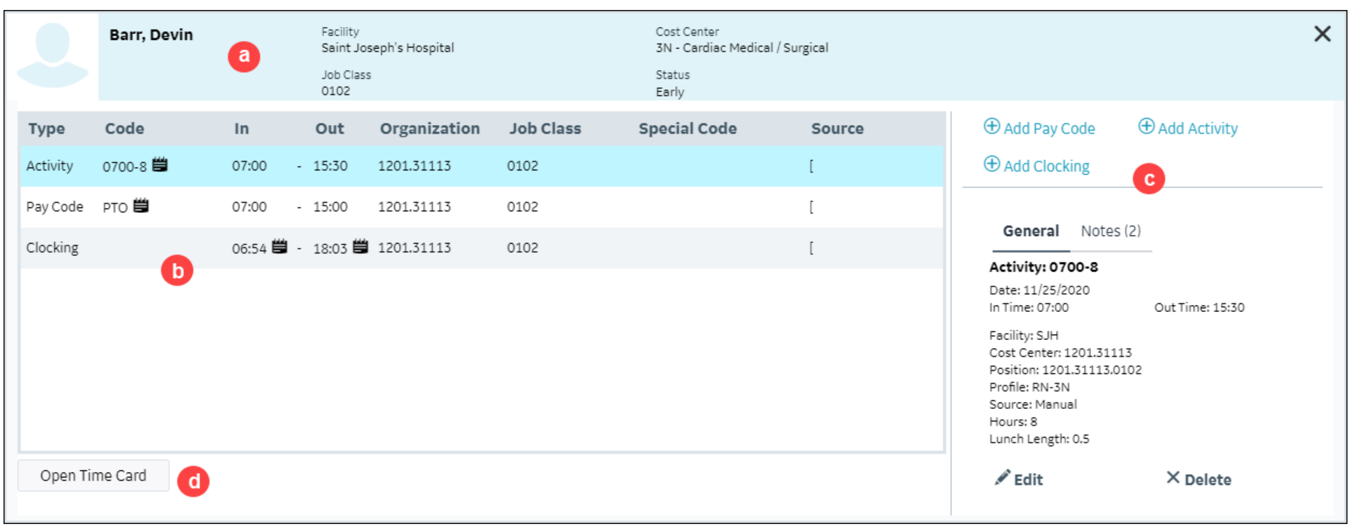
- Status of No Show or No Clocking
- Status of On Time, Early, Late, or No Schedule but the employee has already clocked out

- Summary status (not shown in the previous image)

Click a status field in the summary area to filter by that piece of information.

For more information, see View a summary of ActiveRoster information (on page 11).

View employee transaction details



The schedule and clocking details give you more information about the individual transactions and how they affect the overall status of the organization unit or schedule group.

- To view an employee's schedules and clockings, click the corresponding **Details** link.

The Details dialog box includes the following information:

a. Header area shows the employee’s name, labor distribution, and ActiveRoster status

b. Schedule and clocking information (left side of the dialog box)

   Click a schedule or clocking row to view the details in the right pane. For information on editing existing schedules or clockings, see Edit a transaction (on page 18).

   - **Type**

     Activity (schedule), Clocking, or Pay Code

   - **Code**

     The activity code or pay code

   - **In** and **Out**

     Start and end times of the schedule or the times of the clocking

   - **Organization** and **Job Class**

     The organization unit and job class that the employee is scheduled in or clocked in to

   - **Special Code**

     Any special code added while clocking

   - **Source**

     The original transaction source, such as a device (and its number) or manual entry

     An asterisk with the source symbol indicates that details of the transaction have been updated. For example, if the time or organization unit was changed or a special code was added, the asterisk would appear.

c. Add, edit, and delete functions and the details of the selected schedule or clocking (right side of the dialog box)

   The word Request appears under the activity code for shift requests and under the clocking time for clocking requests.

   For more information, see Working with transactions (on page 17).

d. Open Time Card button

   If you need additional employee information, clicking the button opens a new tab in the browser that shows the employee's Time Card Screen (TCS).

Time and Attendance-only environment

The look of ActiveRoster does not change when you only have Time and Attendance. For example, clockings and schedules still appear and function as normal. However, if you do not download schedules from a third-party scheduling system or use Rotating Work Schedules in Time and Attendance, there are some differences from what is described in other sections of this guide.

If no schedules are present, only clocking information appears on the ActiveRoster screen. In this situation:

- When an employee clocks in, the Status is always Not Scheduled, which means the employee clocked in but did not have a schedule.
- The Labor Distribution Mismatch does not calculate mismatches since no schedule data is present to compare to the clocking.
- The Scheduled field always shows zeroes since no schedule data is present.

Working with transactions

You can work with employee transactions (clockings, pay codes, and activities or schedules) without leaving ActiveRoster to go to the Time Card Screen (TCS) or Schedule screen.

From ActiveRoster, you can complete the following tasks:

- Add a transaction (below)
- Edit a transaction (on the next page)
- Convert an activity to a pay code (on the next page)
- Delete a transaction (on page 19)
- Add and cancel transaction notes (on page 19)

Note

The following items apply when working with transactions:

- Your assigned authorization roles and data access levels determine your access to employees and your ability to work with transactions. Any role assigned to you that allows you to add, edit, or delete activities and pay codes allows you to do the same on the ActiveRoster. For any authorization questions or issues, see your manager.
- After saving your transaction changes, the summary area at the top of the screen shows updated status totals. If a validation warning occurs when attempting to save, you may be able to override the warning.
- If you need additional employee information while viewing an employee's transaction details, click **Open Time Card** to open a new tab in the browser that shows the employee's Time Card Screen (TCS).

Add a transaction

For more information about transactions, see Working with transactions (above).

To add a pay code, clocking, or schedule from ActiveRoster, complete the following steps.

1. From the roster, click the **Details** link for the desired employee.

   Alternatively, from the Search Employees field, search for and select an employee.

   The details dialog box appears.
2. Click **Add Pay Code**, **Add Clocking**, or **Add Activity** (for a schedule).
3. Enter the appropriate information for the transaction.

   Fill in the information, as needed, on the available tabs in the details dialog box, such as General, Attendance+, and Notes.

> **Tip**
>
> The employee's home labor distribution is populated, but may be different than the organization unit you are currently viewing.

4. Click **Add**.

Edit a transaction

For more information about transactions, see Working with transactions (on the previous page).

> **Note**
>
> Clockings cannot be edited if you have a system integrated with a third-party time and attendance system.

> **Note**
>
> You cannot edit or delete requests (for transactions, trades, offers, etc.); they are read-only.

To edit an existing transaction from ActiveRoster, complete the following steps.

1. From the roster, click the **Details** link for the desired employee.

   Alternatively, from the Search Employees field, search for and select an employee.

   The details dialog box appears.

2. Click the row for the transaction you want to update.

   The details of the schedule or clocking appear in the right pane.

   The word Request appears under the activity code for shift requests and under the clocking time for clocking requests.

3. Click the edit link.
   - **Edit -** Available for schedules
   - **Edit In** or **Edit Out -** Available for clockings to edit either the in or the out clocking

4. Edit the appropriate information for the schedule or clocking.

   Update the information, as needed, on the available tabs in the details dialog box, such as the General, Attendance+, and Notes tabs.

5. Click **Save**.

Convert an activity to a pay code

For more information about transactions, see Working with transactions (on the previous page).

You can convert an activity to a pay code from the transaction details dialog box. For example, if an employee is scheduled to work, but calls in sick, you can change the activity to a pay code, such as PTO. To do so, complete the following steps.

1. From the roster, click the **Details** button for the desired employee.

   The details dialog box appears.
2. Click the row for the activity you want to convert.

   The details of the activity appear in the right pane.
3. Click **Edit**.
4. Click the **Convert to Pay Code** link.
5. Make the desired changes for the pay code and then click **Save**.

Delete a transaction

For more information about transactions, see Working with transactions (on page 17).

To delete an existing transaction from ActiveRoster, complete the following steps.

1. From the roster, click the **Details** link for the desired employee.

   The details dialog box appears.
2. Click the row for the transaction you want to delete.

   The details of the schedule or clocking appear in the right pane.

   The word Request appears under the activity code for shift requests and under the clocking time for clocking requests.
3. Click the appropriate delete link, and then accept the confirmation message.
   - **Delete -** Available for schedules
   - **Delete In** or **Delete Out -** Available for clockings to delete either the in or out clocking

Add and cancel transaction notes

You can add notes to an employee's transaction (activity or pay code) to log comments about it. For example, information about why an employee was late or left early or any situation impacting the transaction.

Tip

Your assigned data access determines your ability to view, add, or cancel transaction notes. For any authorization questions or issues, see your manager.

Add a transaction note

To add a transaction note, complete the following steps.

1. From the roster, click the **Details** link for the desired employee.
2. Click a transaction (activity, pay code, or clocking).

   The right pane shows the General tab with details of the transaction.
3. Click **Edit**.
4. Click the **Notes** tab.

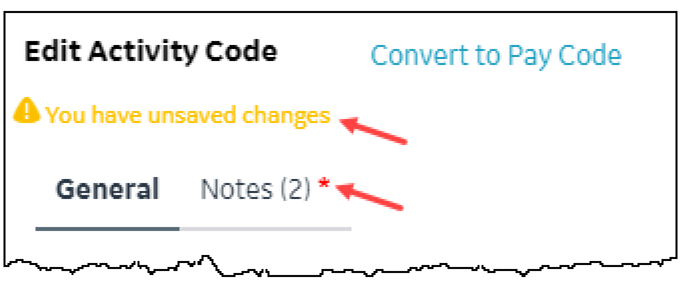
   The Add Note section is expanded.
5. Enter your note.
   - You can select a **Predefined Note Code** and the entire message is entered for you automatically.
   - You can enter your own **Subject** and a message in the **Text** field.
6. Click **Save**.

   The note icon appears next to the corresponding activity, pay code, or clocking. Hover on the note icon to view the most recent note and the total number of transaction notes.

   The note icon is removed if someone cancels the transaction note.
7. When finished, click **X** to close the dialog box.

Tip

If you make changes to the transaction or add a new transaction note, but then switch between the General and Notes tabs before saving, a message reminds you that you have unsaved changes and the tab with the unsaved changes shows an asterisk.



View a transaction note

To view a transaction note, complete the following steps.

1. From the roster, click the **Details** link for the desired employee.
2. Click a transaction (activity, pay code, or clocking).

   The right pane shows the General tab with details of the transaction.

3. Click the **Notes** tab.

   The Notes label shows the total number of active and canceled notes.

4. To view notes that have been canceled, select the **Show Canceled Notes** option.

   The note shows the label "Canceled".

5. When finished, click **X** to close the dialog box.

Cancel a transaction note

To cancel a transaction note that no longer applies, complete the following steps.

1. From the roster, click the **Details** link for the desired employee.
2. Click a transaction (activity, pay code, or clocking).

   The right pane shows the General tab with details of the transaction.

3. Click **Edit**.
4. Click the **Notes** tab.

   The Add Note section is expanded.

5. Expand **Note History**.
6. Click the box for one or more notes, or click **Select All**.
7. Click **Cancel Selected**.

   Once canceled, the note is still associated with the transaction. Click **Show Canceled Notes** to see it. The note now shows the label "Canceled".

8. When finished, click **X** to close the dialog box.

View the ActiveRoster report

There is one report specific to ActiveRoster:

- Employees Clocked In (on the next page)

  This report lists the employees who were clocked into the system or scheduled to be present in the selected organization unit at the date and time entered.

Employees Clocked In

This report lists the employees who were clocked into the system or scheduled to be present in the selected organization unit at the date and time entered.

> **Note**
>
> This report is only available when ActiveRoster is purchased and requires **AR Application Indicator System Standard 2** to be set to either **S** or **L** (which enables ActiveRoster and determines from where the clocking data is loaded).

The report headings display the organization unit code and description. The report is broken down by Present Employees and Scheduled But Not Present employees

Report fields list the employee name, job class (or profile if employee is not present), phone number, in time (actual for present employees, scheduled hours for those not present), whether the time is considered Productive, whether there is a mismatch between scheduled and clocking labor distributions and the facility (if unit labor distributions are included).

> **Note**
>
> Employees, organization units, job classes, and special codes included in this report must be previously set up to be monitored. For more information, see *ActiveRoster Administrator Guide*.

Report parameters include the following options:

- **Organization unit or Schedule Group:** Select the proper option button to either search for results by organization unit or by schedule group. Enter the values in the fields.
- **When Start Date:** The calendar date to be included in the report. Any employee schedules that overlap the point in time specified in the **When Start Date/ When Start Time** fields.

  > **Note**
  >
  > Employee schedules may include those that began on the day before the date entered in this field, if that schedule is still a current schedule in the entered date and time. For example, if night shift employees work 23:00 April 2 to 07:30 April 3, the employees shift that began on April 2 is still current at 7:00 am on April 3.

- **When Start Time:** The time on the When Start Date that should be included in the report.
- **Show Home Phone:** Indicate whether to display the employees' home phone numbers on the report (yes/no).
- **Home Employees Only:** Indicate whether to display only employees whose Home labor distribution is included in the report (yes) or to also include non-home employees who are working in the labor distribution (no).

- **Show <Leaf> Employees in <Branch>:** Select whether to include employees whose home organization unit is at the Leaf level, such as unit, if the parent Branch level organization unit, such as department, is selected.
  - When this parameter is set to **No**, employees whose Home is at the leaf level are not considered a Home employee at the branch level. They are shown on the report at the leaf level.
  - When this parameter is set to **Yes**, employees whose Home is at the leaf level are now considered a Home employee at the branch. They are shown on the report at the parent branch level that is associated with the employees <leaf> level.

Employees Clocked In at 03/31/2010 07:00

Wednesday, March 31, 2010 15:56 (Data gathered at 03/31/2010 15:56)

Facility: 1 - Northside Department: 51008 - Medical/Pediatrics

Present Employees

Employee	Job Class	In Time	Productive	Mismatch	FAC	DPT
Gaunt, Lee	104	07:00	✓			
Mears, Megan	102	07:00	✓			
Trenton, Doris	101	07:00	✓			
White, Catherine	100	07:00	✓			

Scheduled but not present

Employee	Profile	In Time	Productive	Mismatch	FAC	DPT
Anderson, Bertha	CNA	07:00 - 15:30	✓			
Wilkes, Amanda	RN	07:00 - 15:30	✓			