Current Staffing Overview User Guide

Staffing and Scheduling

2021.2

April 2022
Revision: 2

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Contents

Change log

2021.2 - updated April 2022

Topic	Description
Select employee notification preferences (on page 31)	Clarified information about replying to decline a shift

2021.2 - released November 2021

Topic	Description
Various topics	Wherever transactions are shown on the Current Staffing Overview, we updated the corresponding places in this document to explain the logic that was used to determine which transactions are shown, such as a 24-hour window versus specific coverage periods.

Introduction

The Current Staffing Overview helps you manage your day-to-day staffing needs for a single unit or for multiple units (in a Schedule Group). It allows schedulers to view staffing situations and to fill immediate shift shortages for the next day or two. Although the Current Staffing Overview can be used farther into the future, its real strength lies in helping you fill current shifts.

The Current Staffing Overview provides essential information that enables schedulers to:

- Review coverage, staffing needs, and census
- Identifying under- and overstaffed situations that you can address
- View currently scheduled employees
- Compare qualified employees who could potentially fill shift needs
- Review information to help you decide who to call in or call off
- Broadcast open shifts and accept responses for open shifts (if licensed for the Open Shift Notification module)
- Broadcast custom messages to scheduled employees or to all employees in an organization unit (if licensed for the Open Shift Notifications module)
- Add, edit, and delete schedule events, such as Activities
- Add schedule notes and transaction notes to log comments about staffing situations affecting a coverage period or employee transactions

Guide overview

This guide provides information about the Current Staffing Overview and explains how to use its features.

- About the Current Staffing Overview screen (on page 7)

  This section explains basic information about the Current Staffing Overview screen.

- Using Current Staffing Overview (on page 18)

  This section explains how to use the different features of the Current Staffing Overview and provides the information you need to successfully use it.

- Sending message and open shift notifications (on page 29)

  This section explains how to broadcast messages using Open Shift Notification.

  Open Shift Notification is an optional module. The ability to broadcast message and open shift notifications to employees and have them reply depends on whether your organization is licensed for this module.

- Viewing reports (on page 49)

  This section explains the reports related to the optional Open Shift Notification module.

Tip

For more information about setting up the Current Staffing Overview, see the *Current Staffing Overview 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.

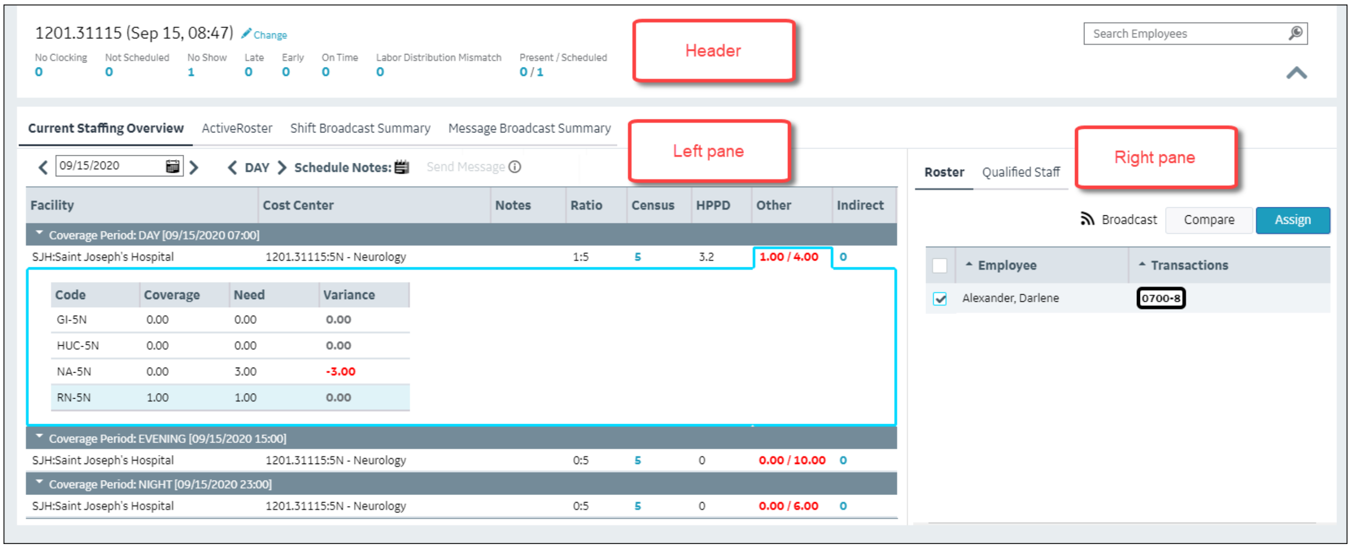
At your facility, these individuals may benefit from using the Current Staffing Overview:

- Schedulers
- Staffers
- Central Staffing Office employees
- Department or Nurse Managers

About the Current Staffing Overview screen

The Current Staffing Overview screen is organized into the following areas:

- Header (below)
- Left pane: Staffing details (on the next page)
- Right pane: Roster tab (on page 10), Qualified Staff tab (on page 11), and Assign and Compare buttons (on page 13)



Header

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 that you are viewing
- Status counts

> **Note**
>
> Clicking any of the status values takes you to the ActiveRoster tab. For more information, see the *ActiveRoster User Guide*.

- The broadcast summary screens show the broadcast notifications that have been sent. These links are only available if your system is licensed for Open Shift Notification.
  - The Shift Broadcast Summary tab shows a list of broadcasts that have been sent, the broadcast statuses, and the employee response statuses.
  - The Message Broadcast Summary tab show a list of message broadcasts that have been sent, along with details about the messages.

- A search field that allows you to search for employees. The purpose of the search is to view schedule details and make quick transaction updates for an employee while you are working on the Current Staffing Overview. With this ability, you do not have to leave the screen; simply make any needed updates for the employee and return to working where you were.

  Select an employee from the results to display employee information, a two-week calendar, and their transactions.

  - Transactions shown in the Transactions column include those that start at any time during the day the Current Staffing Overview is open for.

    > **Example**
    >
    > You are on the Current Staffing Overview for 9/2 and you search for and select an employee. Any transactions that start between 00:00 and 23:59 on 9/2 are shown.

  - The two-week calendar shows the employee's scheduled transactions for each day.

  For information about the transactions shown on the calendar, see the Transactions (on page 17) table below.

  From the two-week calendar, you can assign the employee to a transaction (activity or pay code).

Staffing details

> **Tip**
>
> Use the arrows above the table to navigate to a different day or coverage period.

The staffing details on the Current Staffing Overview screen are arranged in the following ways.

- Rows are organized first by coverage period and coverage period start time, then by organization unit.

  The coverage periods shown in these rows are for the coverage set that you selected when you opened the Current Staffing Overview, which may be the default or a non-default coverage set. Note that if you selected a non-default coverage set, the coverage periods shown in these rows may not match the coverage periods you see when you expand the rows to view details since the details always show the default coverage period.

- The columns contain the following information.

  > **Tip**
  >
  > Click a value in any of the fields to display the employees in the Roster pane who have scheduled activities. If an employee has other activities that overlap the coverage period you are viewing, those activities also appear in the Roster.

  - Organization unit codes and descriptions

    The broadcast icon appears next to an organization unit when a message notification has been sent to employees in that unit.

- Ratio

  The employee-to-patient ratio represents the number of scheduled employees compared to the number of patients (from the most recent census download). The values in the ratio are rounded to the nearest whole number.

  Example

  A ratio of 1:5 could indicate many different scenarios, such as:

  - One nurse and five patients
  - Two nurses and ten patients
  - Two nurses and nine patients. This is a nurse-to-patient ratio of 2:9, or reduced to 1:4.5, and then rounded to 1:5.

- Census

  Click a census value to view the details.

- HPPD

  Hours per patient day (HPPD) is an alternate way to view the ratio of scheduled effort to patient census. It represents the number of hours scheduled in direct patient care per patients on the unit. If your department maintains target or budget HPPD numbers, you can compare these to the scheduled HPPD values in the Current Staffing Overview screen.

  Note

  HPPD is calculated by dividing the sum of the hours of scheduled activity codes that count toward coverage (activity code indicator SS Solution Standard 2 set to Y) by the census value. When the census is 0, HPPD is shown as 0.

- Caregiver Utilization (%)

  The Caregiver Utilization value indicates a comparison of scheduled employees to the optimal staffing target, shown as a percentage. The ideal value is 100. A value under 100 indicates low utilization (overstaffed), while a value over 100 indicates high utilization (understaffed).

  The Caregiver Utilization is calculated as follows:

  [(Sum of the qualifying profile needs) / (Sum of the qualifying profile coverage)] x 100

  Note

  The Caregiver Utilization column may not be enabled for your organization.

- Profile Groups with Coverage and Need

> **Note**
>
> The Other column includes all profiles that are not part of a profile group.
>
> The Indirect column includes employees whose coverage is classified as indirect patient care.

Click a coverage/need value to view the details. This opens a box with coverage, need, and variance values, broken out by profile. Also shown is a header with the organization unit's default coverage period information.

Click a profile row to display the employees in the Roster pane who have scheduled activities in the selected Profile Group. If an employee has other activities that overlap the coverage period you are viewing, those activities also appear in the Roster.

The broadcast icon appears next to the profile group when a message notification has been sent to employees in that profile group. The broadcast icon also appears on a profile's row when a message notification or an open shift notification has been sent to employees in that profile.

Roster tab

Click a value in any of the fields in the staffing details area to view employees on the Roster tab.

The information in the Roster includes:

- Employee name and primary phone number
  - **(F)** appears next to the names of employees who came from a float department.
  - The boxes next to the employee names are used to make selections for the Assign and Compare buttons (on page 13).
- Transactions (unavailability, activities, and pay codes)
  - To appear in the Roster list, employees must have a transaction in the coverage period you are viewing. Any transactions that overlap the prior coverage period and the following coverage period also appear.
  - Requests are shown with a flag symbol.
  - The word Extra appears as a label under schedules that are determined to be extra shifts.
  - Requested and approved Unavailability transactions appear as follows:

    Approved Unavailability: 

    Approved Recurring Unavailability: 

Requested Unavailability:

Requested Recurring Unavailability:

Tip

Hover over a transaction to view more information about it. Click an activity or pay code to open a dialog box to edit or delete it.

Qualified Staff tab

Click a profile (within a profile group) to view employees on the Qualified Staff tab.

On the Qualified Staff tab:

- Click the filter symbol to open a list of filtering options.

  These filter options allow you to tailor the staff list to help you find the best matching employee for the shift. In addition, if you use Open Shift Notification, this allows you to quickly send a broadcast to a select group of employees. For example, you can filter for only qualification Level 1 and Receives Broadcast, then broadcast to this smaller group.

  - On Call - displays employees with an on-call activity code scheduled
  - Overstaffed - displays employees in an organization unit that is determined to be in an overstaffed situation
  - Float Staff - displays employees whose home labor distribution is a float organization unit
  - Productive Schedule - displays employees who are scheduled with productive schedules
  - Not Scheduled - displays employees who do not have a schedule or those who have scheduled activity codes with a length of zero hours
  - Matching Shifts - displays employees whose home labor distribution contains the same shift defined for the selected coverage period
  - Qualification Levels - displays employees who match the selected qualification level
  - Receives Broadcast - displays employees who have a phone or email notification method set up
  - Broadcast Not Sent - displays eligible employees who have not yet been sent an Open Shift Notification broadcast that overlaps the selected coverage period
- Sort the staff list within each qualification level by clicking the column names in the header row.

  There may be additional pages of employees; click the page numbers to move to the next set of employees.
- Broadcast open shifts to the selected employees via Open Shift Notification.

  Open Shift Notification is an optional module. The ability to broadcast open shifts to employees and have them reply depends on whether your organization is licensed for this module.

The information in the Qualified Staff list includes:

- Qualification level

  Profile qualifications allow your organization to define levels of requirements that an employee must meet to be included on the Qualified Staff tab. Administrators define these levels starting with employees whose profiles match exactly and then defining larger groups of employees by relaxing the requirement restrictions.

  > **Example**
  >
  > An administrator could set up profile qualifications for RNs in the Med/Surg department as follows:
  >
  > To fill RN vacancies in the schedule, administrators want exact matches first, then RNs from similar units (schedule partners), then RNs from similar jobs in dissimilar units (schedule partners), and then, in an emergency, any RN.

- Employee names and phone numbers
  - The boxes next to the employee names are used to make selections for the Assign and Compare buttons (on the next page), and for sending a broadcast via the optional Open Shift Notification module.
  - The phone number that displays is either the employee's Open Shift Notification phone number (if it is supplied on the employee's Preferences screen) or the employee's highest priority phone number from the employee record.
  - If an employee has been sent an Open Shift Notification broadcast that overlaps the selected coverage period, the symbol appears next to the name along with the number of notifications sent to the employee.

    Click the symbol to view details about the broadcast, such as the date, time, and organization unit.
  - **(F)** appears next to the names of employees who came from a float department.
- Transactions (unavailability, activities, and pay codes)
  - Transactions appear for the coverage period you are viewing. Any transactions that overlap the prior coverage period and the following coverage period also appear.
  - Requests are shown with a flag symbol.
  - The word Extra appears as a label under schedules that are determined to be extra shifts.
  - Requested and approved Unavailability transactions appear as follows:

    Approved Unavailability:

Approved Recurring Unavailability: 

Requested Unavailability: 

Requested Recurring Unavailability: 

> **Tip**
>
> Hover over a transaction to view more information about it. Click an activity or pay code to open a dialog box to edit or delete it.

- Group Variance

  A Group Variance value only appears for employees with existing transactions and shows whether the organization unit where the transaction occurs is over- or understaffed. This helps you make staffing decisions based on the staffing levels of the unit where an employee is scheduled. Because of this, the variance may not match the variance of the organization unit you are currently viewing.

  The Group Variance is determined as follows:

  Once the employee's scheduled profile is identified, the system determines whether the profile belongs to a Profile Group. If so, all the profiles for the Profile Group are processed as defined below and combined to determine the Profile Group Variance value.

  - The Need is found by checking the Staffing Plan for the selected profile, coverage period, and date.
  - The Coverage is found checking the schedule for the selected profile, coverage period, and date.
  - The variance is found by subtracting the Need from the Coverage. A negative value is considered understaffing and is shown in red. A positive value is considered overstaffing and is shown in blue. A zero value is considered even staffing and is shown in gray.

Assign and Compare buttons

The Assign and Compare buttons are available on Roster and Qualified Staff tabs.

Assign button

Assign (add) transactions to employees.

Compare button

> **Tip**
>
> Your assigned authorization roles and data access levels determine your access to employees on the Compare Staff dialog box. For any authorization questions or issues, see your manager.

Select at least one employee from the Roster, and then click the **Compare** button. From the Compare Staff dialog box, you can:

- Compare the staffing details of the selected employees, allowing you to make more informed staffing decisions.

  For information about the columns and transactions on the schedule, see Definitions on the Compare Staff dialog box (below) below.

- View a two-week calendar to see the employee's scheduled activities.

  To view the calendar, click the arrow to the left of an employee's name.

  - Click the left or right arrow to move ahead or back another two weeks.
  - Click a plus symbol to add a new schedule.

- Link to an employee's TCS (Time Card Screen) in a new browser window by clicking an employee's name.

- Assign transactions to employees.

- Add, edit, and delete activities.

- Broadcast open shifts to employees via Open Shift Notification.

  If an employee has been sent an Open Shift Notification broadcast that overlaps the selected coverage period, the symbol appears next to the name along with the number of notifications sent to the employee. Click the symbol to view details about the notification, such as the date, time, and organization unit.

  Select the employees to receive the notification and click the broadcast icon .

  Open Shift Notification is an optional module. The ability to broadcast open shifts to employees and have them reply depends on whether your organization is licensed for this module.

Definitions on the Compare Staff dialog box

The following table provides definitions for the columns in Compare Staff dialog box. The columns you see are determined by your organization.

Tip

For an FSA: You can determine which columns are visible with this system preference setting: **Preferences > System Preferences > Current Staffing Overview**.

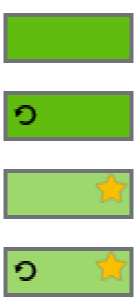
Column name	Definition
Employee	Includes the employee's name and phone numbers, an arrow icon to view the employee's calendar, and a selection box used to assign the employee. The phone numbers shown include those provided on the **Preferences > My Preferences > Open Shift Notifications** screen (shown first) and those provided on the **Employee > Phones** screen.

Column name	Definition
Transactions	Transactions appear for the coverage period you are viewing. Any transactions that overlap the prior coverage period and the following coverage period also appear. Hover on a transaction to view more details. **Tip** See the Transactions (on page 17) table that follows for more information about transactions.
Home Facility	The home parent organization unit from the employee's labor distribution record.
Home Department	The department-level organization unit from the employee's labor distribution record.
Projected Overtime	The employee's projected overtime hours for the week or the pay period that contains the date you are viewing. This is overtime that will occur in the future if the employee continues to work the scheduled shifts. It is based on the employee's existing clockings so far and the hours of future scheduled shifts. **Example** **Calculation and example for Weekly Hours:** Projected overtime hours = Calculated hours from clockings since the start of the week + scheduled hours remaining in the week - employee's weekly overtime value 1.75 = 25.75 + 16 - 40 **Calculation and example for Bi-Weekly Hours:** Projected overtime hours = Calculated hours from clockings since the start of the pay period + scheduled hours remaining in the pay period - employee's bi-weekly overtime value 4.5 = 68.5 + 16 - 80
Actual Overtime (by week)	The employee's actual overtime hours per week in the pay period that contains the date you are viewing. This is overtime that has been calculated and will be paid, based on the employee's existing clockings so far in the pay period.
Approved Hours	The approved hours value from the employee's labor distribution record.

Column name	Definition
Scheduled Hours	The total scheduled hours for the pay period that includes the date you are viewing.
Worked Hours	The worked hours for the pay period that includes the date you are viewing. **Tip** For an FSA: The worked hours are included when the pay code indicator System Standard 1 is set to Y.
Home Shift Code	The default shift code that the employee is assigned to.
Seniority Date	The seniority date value from the employee’s labor distribution record. When the employee’s labor distribution does not have a seniority date value, the employee’s hire date value appears in this column.
Seniority Hours	The accumulated number of hours of seniority for this employee. This field is filled in only if the organization tracks seniority hours here: **Employee > Labor Distribution > Seniority Hours**. If seniority hours are not tracked, the field is blank.
Last Call In	The date of the last occurrence of a call in for this employee. The last call in date is determined by the most recent occurrence of either: a) an activity code with indicator SS Solution Standard 17 set to Yes, or b) a pay code with indicator SS Solution Standard 14 set to Yes.
Last Call Off	The date of the last occurrence of a call off for this employee. The last call off date is determined by the most recent occurrence of either: a) an activity code with indicator SS Solution Standard 18 set to Yes, or b) a pay code with indicator SS Solution Standard 15 set to Yes.
Last On Call	The date of the last occurrence of on call for this employee. The last on call date is determined by the most recent occurrence of either: a) an activity code with indicator SS Solution Standard 19 set to Yes, or b) a pay code with indicator SS Solution Standard 16 set to Yes.
Last Float	The date of the last time a transaction (activity or clocking) occurred in a non-home department for this employee. Employees whose home organization unit is a float unit do not have dates in this field. Float units are determined by the organization unit indicator SS Solution Standard 4 being set to A.
Last Float Hours	The hours associated with the most recent occurrence of a float transaction (activity or clocking). Employees whose home organization unit is a float unit do not have hours in this field. Float units are determined by the organization unit indicator SS Solution Standard 4 being set to A.

Transactions

The following table provides more information about the information found in the Transactions column.

Item	Description
Pay code PTO	Pay codes have a black border and black background.
Activity 1845-12	Activities have a white background. Borders are blue (default) or as defined by your organization.
Alternate STDBY ABSENT	Alternate pay codes have a white block added on the left side. Alternate activities have a black block added on the left side.
Request 1845-12	Requests have a flag symbol before the text.
Custom time [ABSENT]	If a transaction has custom, non-default times associated with it, the text is in square brackets [example].
Extra 1845-12 Extra	The Extra label appearing under an activity alerts you that this activity is considered an extra shift for the employee, giving you an additional piece of information when making decisions, such as calling off.
Unavailability 	Requested and approved Unavailability transactions appear as follows: • Approved Unavailability • Approved Recurring Unavailability • Requested Unavailability • Requested Recurring Unavailability
Multiple [ABSENT]	Transactions can have multiple properties, such as a pay code that is still a request and for a custom, non-default time.

Using Current Staffing Overview

Working with the Current Staffing Overview involves the following types of tasks:

- Open the Current Staffing Overview (below)

  Open the Current Staffing Overview to start using its features.
- Create default preferences (on the next page)

  Set preferences for how the Current Staffing Overview opens each time.
- Update census and needs (on page 20)

  Make changes to the current census and needs values.
- Add and cancel schedule notes (on page 21)

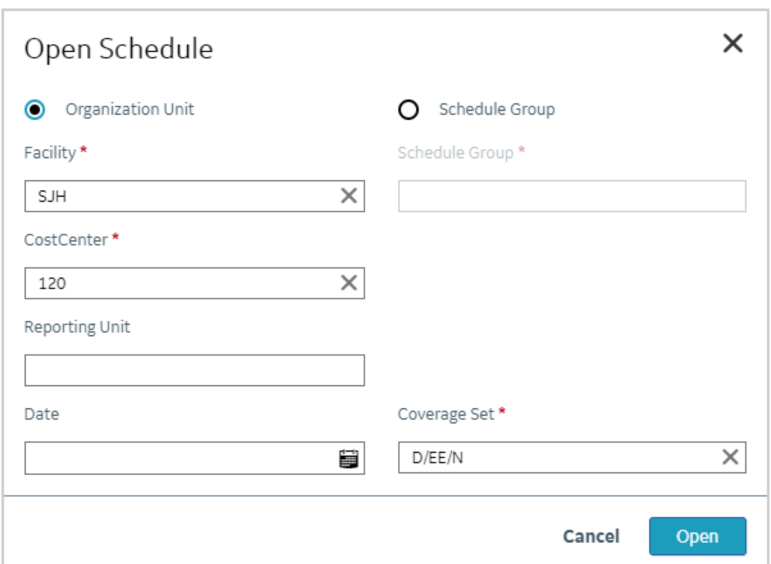
  Log comments about conditions or staffing situations affecting a coverage period
- Compare employees (on page 22)

  View details about selected employees to help make staffing decisions.
- Working with transactions (on page 24)

  Add and updates employee transactions.
- Add and cancel transaction notes (on page 26)

  Log comments about situations affecting an employee's transaction (activity or pay code)

Open the Current Staffing Overview



Open the Current Staffing Overview

To open the Current Staffing Overview, complete the following steps.

1. Navigate to **Actions > Scheduling > Current Staffing Overview**.
2. In the Open Schedule dialog box, enter the information to open the desired Current Staffing Overview.
   - Choose the **Organization Unit** or **Schedule Group** option.
   - Organization Unit information (trunk, branch, and, if needed, leaf levels)
   - Schedule Group
   - Date
   - Coverage Set
3. Click **Open**.
4. If needed, navigate to a different day or coverage period with the arrows above the table.

> **Tip**
>
> To view different data, click the pencil icon next to the current unit and date. Repeat steps 2 and 3.

Create default preferences

> **Tip**
>
> The following information about setting preferences is optional.

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

Set a default organization unit

To set a default organization unit, complete the following steps.

1. Navigate to **Preferences > My Preferences > Default Organization Unit**.
2. Enter the information for the default organization unit.
3. Click **Save**.

Set a default schedule group

To set a default schedule group, complete the following steps.

1. Navigate to **Preferences > My Preferences > Default Schedule Group**.
2. Click in the **Schedule Group** field and select from the Field Look Up Values list.

3. In the Override Default Organization Unit field, select **Yes** or **No**.
   - **Yes -** if a default organization unit is also set, the default schedule group is selected initially
   - **No -** if a default organization unit is also set, the default organization unit is selected initially
4. Click **Save**.

Update census and needs

Staffers can modify the census values so that the system can recalculate and accurately reflect staffing needs. For example, census might be downloaded four times per day, but situations can change more frequently, requiring you to have more current data to make staffing decisions.

Similarly, you can update the staffing needs after recalculation. This may be needed if the recalculated needs to do not match actual patient needs.

Update census and needs

To update the census or staffing needs, complete the following steps.

1. If needed, use the arrows to select a different day or coverage period.
2. In the staffing details area, click a value in either the Census column or a profile group column.

   The row expands to show more details.

   > **Tip**
   >
   > When you hover over editable fields in the expanded details, a pencil icon appears to indicate which fields can be updated manually.

3. Click in a field and update the value as needed.
   - Census: For the appropriate acuity levels, update the value in the Census field.
   - Needs: For the appropriate profiles, update the value in the Need column.

   After you enter a value, the new value is saved automatically and the screen refreshes to show any effects of the change. For example, if you change the need, the screen updates the other values that are impacted, such as the Variance, Ratio, HPPD, and Caregiver Utilization fields.

   In addition, if you update the census, the needs are recalculated automatically.

Add and cancel schedule notes

You can add schedule notes to log comments about conditions or staffing situations affecting a coverage period. For example, information may be about census, weather, holidays or other events causing staffing variations.

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

Add a schedule note

To add a schedule note, complete the following steps.

1. Click the icon next to Schedule Notes.

   The Schedule Notes dialog box appears and displays any existing notes.

2. Click **Add Note**.
3. Enter the details of the schedule note in the appropriate fields.
   - Enter a Coverage Period if the note applies only to one coverage period.
   - Enter the schedule note details either by selecting a Predefined Note Code or entering a Subject and Text.

     Previously-defined settings determine whether you can edit the text of a predefined note.
4. Click **Add**.

   The Schedule Notes dialog box appears again and shows the note you just added. From here, click **Add Note** to add another or click **Close** to return to the Current Staffing Overview.

   The icon appears for the coverage periods with schedule notes.

View a schedule note

To view existing schedule notes, complete the following steps.

1. Click the icon in the Notes column.

   The Schedule Notes dialog appears and displays the existing notes.

2. To view the text of the note and additional details, click the appropriate note.
3. To view notes that have been canceled, select the **Show Canceled Notes** option.

Cancel a schedule note

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

1. Click the icon in the Notes column.

   The Schedule Notes dialog appears and displays the existing notes.

2. Select the boxes for the notes you want to cancel or select the **Select All** option.

3. Click **Cancel Selected**.

   The canceled notes no longer appear on the Current Staffing Overview. However, they are still retained and can be viewed again by selecting the Show Canceled Notes option in the Schedule Notes dialog box.

Compare employees

With the Compare feature, you can view and compare currently scheduled employees and unscheduled employees who are qualified to fill shift needs. This allows you to make more informed staffing decisions.

> **Tip**
>
> Your assigned authorization roles and data access levels determine your access to employees on the Compare Staff dialog box. For any authorization questions or issues, see your manager.

Compare employees on the Roster or Qualified Staff tabs

To compare employees, complete the following steps.

1. Click the coverage/need values for the desired profile group.

   All the employees scheduled in the profile group for the department appear in the Roster. No employees appear on the Qualified Staff list.

   For more information about the details (such as field definitions and filter explanations) in the Roster and Qualified Staff tabs, see Roster tab (on page 10) and Qualified Staff tab (on page 11).

2. To view only the employees scheduled in a specific profile instead of the entire profile group, click a profile row.

   > **Note**
   >
   > To compare employees on the Qualified Staff list, this step is required.

3. In the Roster or the Qualified Staff list, select the employees you want to compare.

4. Click **Compare**.

   The Compare Staff dialog box appears.

   For information about the fields in the Compare Staff dialog box, see Definitions on the Compare Staff dialog box (on page 14)

5. Move to one of the following sections when you determine what you are doing next with the compared employees.

   - Add, edit, and delete transactions. See Working with transactions (on page 24).
   - View a two-week calendar to see the employee's scheduled activities. See Working with transactions (on page 24).

- Broadcast open shifts to employees. See Sending message and open shift notifications (on page 29).

Approve or deny a request to work

> **Tip**
>
> Your assigned authorization roles and data access levels determine your access to employees and your ability to view, approve, and deny requests to work. For example, you need a role (such as SS Supervisor or its equivalent replicated role) with the Request to Work policy and its Approve and Deny attributes enabled. And on the role, you would need data access to the appropriate organization units and employees.
>
> For any authorization questions or issues, see your manager.

To approve or deny a request to work, complete the following steps.

1. Select the request to work you want to approve or deny.

   > **Tip**
   >
   > A request to work appears as a transaction with a flag symbol and no background color, such as  .

   You can select requests from these locations:

   - Roster tab
   - Qualified Staff tab
   - Compare Staff dialog box (on the Roster or Qualified Staff tab)

     The Transactions column shows transactions that overlap the coverage period you are viewing. Any transactions that overlap the prior coverage period and the following coverage period also appear.

   - Two-week schedule (expand an employee on the Compare Staff dialog box or select an employee from the Search Employees field)

     The two-week calendar shows you the employee's scheduled transactions for each day.

   After selecting a request, the Request to Work dialog box appears with the details about the selected request.

   In some situations, a warning message appears at the top of the dialog box. The message states, "This request is for a coverage period, organization unit, or profile that differs from your original view." It reminds you that the request to work is outside the specifics of your current view and that approving or denying the request might impact a different situation and may not be noticeable in your current view.

2. In the Request to Work dialog box, complete the desired actions:
   - **Reviewer Comments** (optional)

     Enter comments about your decision.

     Click **Save Comment** if you are still reviewing the request or need to come back to it later. If you click Approve or Deny instead of Save Comment, your comment is also saved.
   - **Approve** or **Deny**

     If approved, the request to work becomes a published schedule for the employee, and the needs and coverage values are updated.

     If denied, the request to work is removed from the Current Staffing Overview.

     Whether approved or denied, if the employee has enabled the event subscription to notify them after a request's status has changed, the notification is sent to the employee. The notification preference is found here: **Preferences > My Preferences > Event Subscriptions > Employee Transactions > ReqToWorkStatChg (Employee Request to Work Status Change)**.
   - **Delete** (if available to you)

     Take care when deleting requests. They will be deleted completely and can no longer be searched for or reported on. For example, you might use this when a mistake was made during the initial request.

     The leading practice, in most situations, is to deny the request instead of deleting it.
   - Click **X** to close the dialog box without making any changes.

Working with transactions

You can work with employee transactions (activities and pay codes) without leaving the Current Staffing Overview.

From the Current Staffing Overview, you can complete the following tasks:

- Assign (add) a transaction (on the next page)
- Edit or delete a transaction (on the next page)

Tip

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 Current Staffing Overview. For any authorization questions or issues, see your manager.

Assign (add) a transaction

Once you have identified the needs you want to fill, you can assign open shifts to qualified employees. In addition, you can add pay codes to employees.

If your organization is licensed for Open Shift Notification, you can use it to assign employees to open shifts. For information, see Sending message and open shift notifications (on page 29).

Assign shifts to employees

To assign, or add, a transaction (activity or pay code) to an employee, complete the following steps.

1. Select the employees to assign to the shift.

   > **Tip**
   >
   > You can select multiple employees. Transactions you assign will be added to all selected employees.

   You can select employees from these locations:

   - Roster tab
   - Qualified Staff tab
   - Compare Staff dialog box (on the Roster or Qualified Staff tab)

     The Transactions column shows transactions that overlap the coverage period you are viewing. Any transactions that overlap the prior coverage period and the following coverage period also appear.
   - Two-week calendar (expand an employee on the Compare Staff dialog box or select an employee from the Search Employees field)

     The two-week calendar shows you the employee's scheduled transactions for each day. To view the calendar on the Compare Staff dialog box, click the arrow to the left of the employee's name. If needed, click the left or right arrow to move ahead or back another two weeks.
2. Click the **Assign** button, or from the two-week schedule, click the plus symbol.
3. In the Create Transaction dialog box, select the **Activity** or **Pay Code** option.
4. Update the fields with the details about the transaction.
5. Click **Save**.

   The new transaction is validated and assigned to the employee.

Edit or delete a transaction

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

To edit or delete a transaction (activity or pay code), complete the following steps.

1. Select the transaction you want to edit or delete.

   You can select transactions from these locations:

   - Roster tab
   - Qualified Staff tab
   - Compare Staff dialog box (on the Roster or Qualified Staff tab)

     The Transactions column shows transactions that overlap the coverage period you are viewing. Any transactions that overlap the prior coverage period and the following coverage period also appear.

   - Two-week schedule (expand an employee on the Compare Staff dialog box or select an employee from the Search Employees field)

     The two-week calendar shows you the employee's scheduled transactions for each day.

   After selecting a transaction, the Modify Transaction dialog box appears with the details about the selected transaction.

2. In the Modify Transaction dialog box, either:

   - Edit the transaction by making the desired changes and then click **Save**.
   - Delete the transaction by clicking **Delete** and then confirm the deletion.

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.

You can add, view, or cancel notes from several locations. Transactions from the following locations can be used for any of the actions explained just after this list.

- Roster tab
- Qualified Staff tab
- Compare Staff dialog box (on the Roster or Qualified Staff tab)

  The Transactions column shows transactions that overlap the coverage period you are viewing. Any transactions that overlap the prior coverage period and the following coverage period also appear.

- Two-week schedule (expand an employee on the Compare Staff dialog box or select an employee from the Search Employees field)

The two-week calendar shows you the employee's scheduled transactions for each day.

Add a transaction note

To add a transaction note, complete the following steps.

1. Click a transaction (activity or pay code).

   The Modify Transaction dialog box appears with the General tab selected.

2. Click the **Notes** tab.

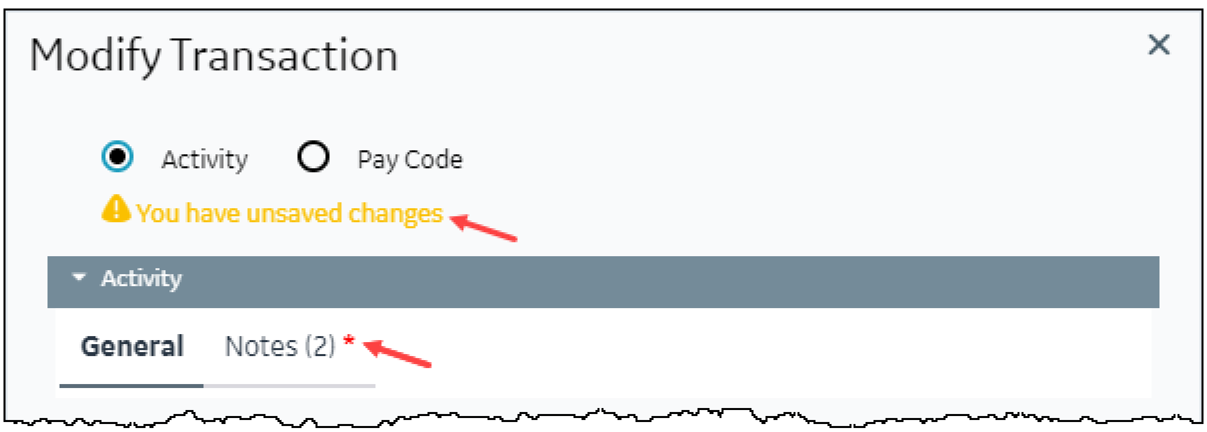
   The Add Note section is expanded.

3. 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.

4. Click **Save**.

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. Click a transaction (activity or pay code).

   The Modify Transaction dialog box appears with the General tab selected.

2. Click the **Notes** tab.

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

3. Expand **Note History**.

4. Click a note to see additional information, including the text of the note.
5. To view notes that have been canceled, select the **Show Canceled Notes** option.

   The note shows the label "Canceled".
6. 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. Click a transaction (activity or pay code).

   The Modify Transaction dialog box appears with the General tab selected.
2. Click the **Notes** tab.
3. Expand **Note History**.
4. Click the box for one or more notes, or click **Select All**.
5. Click **Cancel Selected**.

   > **Caution**
   > Do not click the Delete button at the bottom. This button deletes the entire transaction.

   Once canceled, the note is still associated with the transaction. Click **Show Canceled Notes** to see it. The note now shows the label "Canceled".
6. When finished, click **X** to close the Modify Transaction dialog box.

Sending message and open shift notifications

Note

Open Shift Notification is an optional module. The ability to broadcast notifications to employees and have them reply depends on whether your organization is licensed for this module.

Once employees enable their notification preferences, employees start counting toward the license count.

Open Shift Notifications gives you the ability to broadcast shift needs and other messages from within the Current Staffing Overview.

There are two types of notifications:

- Message notifications
- Open shift notifications

Notifications are sent to the selected employees via the broadcast methods decided upon by your organization. These methods may include a text message, an email, or a call from the interactive voice response system.

Message notifications

You can send custom messages to scheduled employees or to all employees in an organization unit. These messages can be used to, for example, supply information about an upcoming shift or to announce a pre-shift meeting. A message can be sent to any or all scheduled employees in an organization unit, a profile group, or a specific profile.

Open shift notifications

Each notification includes instructions on how to reply to the message to accept the shift. If an employee does not want to work the available shift, no action is required; they can disregard the message.

Depending on how your organization chooses to broadcast open shifts, employees who respond can either be accepted on a first come, first serve basis or be placed into a queue to be scheduled for the shift.

- First come, first serve

  When broadcasting for open shifts using the first come, first serve method, the first employees to respond are awarded the shifts until the shifts are filled. Once all the available shifts are given to responding employees, further responses to the message are disregarded and those employees receive a message indicating that the shifts are no longer available. The employees who receive the available shifts are automatically added to the schedule. No action is needed by a manager or staffing coordinator.

Example

Two available shifts are broadcast to four employees. Samantha and Luis reply first. They receive messages that they are awarded the shifts and are automatically added to the schedule. David replies, but not in time. He receives a message that the shifts are no longer available. Sofia cannot work the shift and disregards the message (no response is needed).

- Queue

  When broadcasting for open shifts using the queue method, all responses are placed in a queue. Using the queue method gives someone the opportunity to review the qualifications of those who want to fill the shift. This option requires a nurse manager or staffing coordinator to accept employees' requests for open shifts. When this happens, those employees receive messages indicating they received shifts, which are then added to the their schedules. Everyone else receives a message stating that the shifts have been filled.

Example

Two available shifts are broadcast to four employees. Samantha, Luis, and David reply. After reviewing the respondents' information, you select David and Samantha because they best match the need of the unit. They receive messages that they are awarded the shifts and are automatically added to the schedule. Luis receives a message that the shifts are no longer available. Sofia cannot work the shift and disregards the message (no response is needed).

Tasks

Using Open Shift Notification involves the following types of tasks:

- Subscribe to event notifications (on the next page)

  For managers and schedulers: Receive notifications for broadcasted shifts when certain events take place.

- Select employee notification preferences (on the next page)

  For employees: Select your preferred notification methods

- Broadcast a message notification (on page 33)

  Send a notification with a message to scheduled employees.

- Broadcast an open shift notification (on page 37)

  Send a notification of available shifts to a group of employees.

- View and update open shift notifications (on page 40)

  View details and make changes to a previously sent broadcast.

- Schedule queued employees (on page 42)

  Schedule employee who responded to work a shift.

- View the Shift Broadcast Summary (on page 43)

  View shift notification broadcasts that have been sent, the broadcast statuses, and the employee response statuses. Also, schedule employee who responded to work a shift.

- View the Message Broadcast Summary (on page 47)

  View message broadcasts that have been sent and the text of the messages.

Subscribe to event notifications

Managers and schedulers can receive event subscription notifications for their broadcasted shifts. There are two event subscriptions that you can subscribe to: when an employee accepts a shift and when open shifts are filled.

> **Note**
>
> You need a role assigned with the Open Shift Notifications policy, such as the SS Staffer role (or its equivalent replicated role).

Subscribe to event notifications

To subscribe to the event subscriptions, complete the following steps.

1. Navigate to **Preferences > My Preferences > Event Subscriptions** and expand the **Staffing** card.
2. As needed, select the **Portal** and **Email** options.

   You will receive a notification whenever an event occurs for a shift that you broadcasted.

   - Employee Accepted Open Shift Broadcast - your message states "Employee Name accepted 1 of X Open Shifts available."
   - Close Open Shift Broadcast - your message states "All Open Shifts available were accepted. Open Shift is closed."
3. Click **Save**.

Select employee notification preferences

Before broadcasting open shifts or message notifications, make sure that employees have set up their preferences for receiving the notifications.

The following steps must be completed by each employee who will receive notifications.

1. Navigate to **Preferences > My Preferences > Open Shift Notifications**.
2. If it is not already selected, select the **Notify me** option.

3. Enter your numbers and email address in the notification methods you wish to use.

> **Note**
>
> The notification methods available are determined by your organization.
>
> In addition, notification methods that are required display an asterisk. You need to select them and enter values to continue.

- Text Number - The system sends a text message to your mobile phone number with the message or details about the shift with a number to reply to.

  The number must be 10 digits and entered as either xxxxxxxxxx or (xxx) xxx-xxxx.

  For more information about using a text number, see the section below, Using a text number to receive notifications.

- Email Address - The system sends an email with the message or details about the shift.

  When you receive an email with an Open Shift Notification, click the link in the email or paste the link into a browser. Then in the browser window, click **Request** to confirm that you want to work the shift. Click **Decline** (or simply ignore the email) to indicate that you do not want to work the shift.

- Phone Number - The system calls your phone number and gives you the message or details about the shift.

  The number must be 10 digits and entered as either xxxxxxxxxx or (xxx) xxx-xxxx.

4. Click **Save**.

Using a text number to receive notifications

The following information explains what happens if you use a text number to receive message or open shift notifications.

- After you save your text number as described above, you will receive a text message for verification.
  - Reply with YES to opt in and start receiving notifications.

    You will receive another message confirming that you opted in.
  - Reply with STOP or CANCEL to opt out and stop receiving notifications.

    You will receive another message confirming that you opted out.
  - Reply with HELP to get resources for more information.
- When a notification is broadcasted (sent out), you will receive a text message.
  - Message notifications: The message starts with NO REPLY and is designed to provide information to you. You cannot reply to it.
  - Open shift notifications: Reply with the indicated number (PIN) to request the shift. You can reply with NO and the indicated PIN (for example, NO 203127) to decline the shift. You will receive a text message that acknowledges your reply.

When declining, these variations are treated as decline:

Uppercase or lowercase NO (NO PIN, No PIN, and no PIN are fine)

The number of spaces between NO and the PIN (no spaces or spaces are fine)

The sequence in which the word NO is used with the PIN (NO before PIN and NO after PIN are fine)

When declining, these variations are not treated as decline, and do not result in an error or in being scheduled:

Note: Do not use these variations; they are presented only as examples.

A space within the PIN

Reordering the digits in the PIN

The use of text or characters other than NO

- If you save a different text number on the Open Shift Notifications screen, you will receive a new verification text message that you need to reply YES to in order to start receiving notifications.

Broadcast a message notification

You can send a message notification to scheduled employees or to all employees in an organization unit.

Broadcast a message notification to scheduled employees

Being able to send a message to certain scheduled employees can be a benefit to your organization. For example, you can give employees information about an upcoming shift or let them know where and when to meet at the start of a shift.

A read-only message can be sent to any or all scheduled employees in a branch-level organization unit (such as a Department or Cost Center), a profile group, or a specific profile, and who have set up and enabled notification preferences.

Note

Message notifications are one-way messages. Employees receive the notification but cannot reply to it.

To send a message notification, complete the following steps.

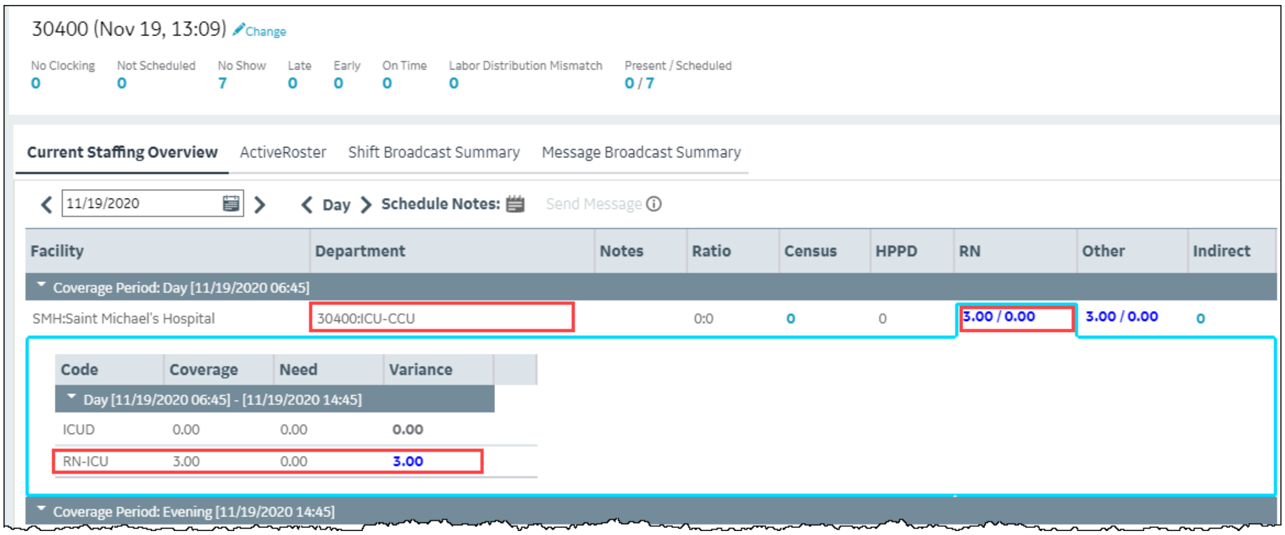
1. Click the **Roster** tab.

   Message notifications can only be sent to employees who are already scheduled, as shown on the Roster tab.

2. On one of the rows, click a department code, the coverage numbers for a profile group, or a specific profile.

> **Note**
>
> You cannot send message notifications to employees by selecting the Other profile group. However, you can send messages to employees in individual profiles within the Other profile group.

The area you click determines which employees appear on the Roster tab.



3. From the Roster, select the employees who will receive the message.

   In addition, you can select employees from the Compare screen.

   a. Select employees from the Roster.

   b. Click **Compare**.

      The Transactions column shows transactions for the coverage period you are viewing. Any transactions that overlap the prior coverage period and the following coverage period also appear.

      Expand an employee row to view a two-week calendar to see the employee's scheduled transactions for each day.

   c. Select the appropriate employees from the Compare screen and continue with the next step.

4. Click the broadcast icon .

5. Your next step depends on what you clicked in step 2.

   a. If you clicked a department code or profile group, skip to step 7.

   b. If you clicked a profile, move on to step 6.

6. At the top of the Message dialog box, select the **Message** option.

   The Transactions column shows transactions for the coverage period you are viewing. Any transactions that overlap the prior coverage period and the following coverage period also appear.

   Expand an employee row to view a two-week calendar to see the employee's scheduled transactions for each day.

7. In the Broadcast dialog box, fill out the broadcast details.

   The organization unit and Profile fields are read-only.

   > **Tip**
   >
   > Be as brief as possible with the subject and text to help prevent difficulties with reading long messages via a text message on a phone.

   - Broadcast Date and Broadcast Time - To broadcast immediately, leave these fields blank. Otherwise, enter the date and time that you want to send the broadcast message.
   - Subject - Enter the heading for your message. The maximum number of characters is 64.
   - Text - Enter your message. The maximum number of characters is 256.

8. If needed, update the selected employees in the list.

   Employees who have not set up notification preferences or who have temporarily or permanently turned off notifications cannot be selected. They will not receive the notification.

9. Click **Submit** to send the message to the employees you selected.

   After clicking Submit:

   - The Broadcast dialog box closes and the broadcast icon appears on the corresponding organization unit, profile group, or profile row.

     To view a previously-sent message notification, click the broadcast icon. If there are multiple notifications, select the correct one in the Select Broadcast dialog box.

     The Broadcast Shift dialog box opens. The notification details are read-only; you cannot add or remove employees, or edit, cancel, or rebroadcast the message.

     You can also view details of previous broadcasts on the Message Broadcast Summary tab. See View the Message Broadcast Summary (on page 47).

Broadcast a message to all employees in an organization unit

Being able to send a message to all employees in an organization unit can be helpful for distributing department-wide communications. For example, you can send a message regarding a certain situation that applies to only a specific organization unit and ensure that only the employees in that unit receive the message.

A read-only message can be sent to:

- Organization units at the branch level (such as a department) or the leaf level (units under a department)
- All employees who have a primary home labor distribution in that organization unit and who have set up and enabled notification preferences

A message sent to a department will go to all employees in the department and to all employees in units under the department (if used). However, a message sent to a unit will go only to all employees in the unit (not to employees in its parent department nor to any sister units under the same department).

Note

Message notifications are one-way messages. Employees receive the notification but cannot reply to it.

To send a message notification, complete the following steps.

1. On one of the rows, click an organization unit code.

   The Send Message link is not available to click until you first select a department or unit code.

2. Click the **Send Message** link.
3. In the Broadcast Message dialog box, fill out the broadcast details.

   The organization unit fields are read-only.

   Tip

   Be as brief as possible with the subject and text to help prevent difficulties with reading long messages via a text message on a phone.

   - Broadcast Date and Broadcast Time - To broadcast immediately, leave these fields blank. Otherwise, enter the date and time that you want to send the broadcast message.
   - Subject - Enter the heading for your message. The maximum number of characters is 64.
   - Text - Enter your message. The maximum number of characters is 256.

4. If needed, update the selected employees in the list.

   Employees who have not set up notification preferences or who have temporarily or permanently turned off notifications cannot be selected. They will not receive the notification.

5. Click **Submit** to send the message to all the employees in the selected organization unit.

   After clicking Submit:

   - The Broadcast Message dialog box closes and the broadcast icon appears on the corresponding organization unit row.

     To view a previously-sent message notification, click the broadcast icon. If there are multiple notifications, select the correct one in the Select Broadcast dialog box.

The Broadcast Shift dialog box opens. The notification details are read-only; you cannot add or remove employees, or edit, cancel, or rebroadcast the message.

You can also view details of previous broadcasts on the Message Broadcast Summary tab. See View the Message Broadcast Summary (on page 47).

Broadcast an open shift notification

Instead of immediately scheduling an employee to an open shift, you can broadcast the available shift to a group of employees. The employees receive a notification about the shift and can reply if they are interested in working it.

To send an Open Shift Notification broadcast, complete the following steps.

1. If needed, change the day and coverage period.
2. Click the **Qualified Staff** tab.
3. Select the profile.
    a. Click a profile group, such as RN.
    b. In the expanded profile area, select a profile, such as RN2.

    A list of employees who are qualified to work appears in the list.
4. If needed, you can filter, sort, and compare employees to decide who will receive the broadcast message.

    For more information about the employee list, see Qualified Staff tab (on page 11).

    - Click the filter symbol to open a list of filtering options.

      These filter options allow you to tailor the staff list to help you find the best matching employee for the shift.

      For example, you can filter for only qualification Level 1 and Receives Broadcast, then select all the employees and broadcast to this smaller group.

        - On Call - displays employees with an on-call activity code scheduled
        - Overstaffed - displays employees in an organization unit that is determined to be in an overstaffed situation
        - Float Staff - displays employees whose home labor distribution is a float organization unit
        - Productive Schedule - displays employees who are scheduled with productive schedules
        - Not Scheduled - displays employees who do not have a schedule
        - Matching Shifts - displays employees whose home labor distribution contains the same shift defined for the selected coverage period
        - Qualification Levels - displays employees who match the selected qualification level

    - Receives Broadcast - displays employees who have a phone or email notification method set up
    - Broadcast Not Sent - displays eligible employees who have not yet been sent an Open Shift Notification broadcast that overlaps the selected coverage period
  - Sort the staff list within each qualification level by clicking the column names in the header row. There may be additional pages of employees; click the page numbers to move to the next set of employees.
  - Compare employee information by selecting at least one employee from the Qualified Staff list and then clicking **Compare**. From the Compare Staff dialog box, you can:
    - Compare the staffing details of the selected employees.

      The Transactions column shows transactions for the coverage period you are viewing. Any transactions that overlap the prior coverage period and the following coverage period also appear.

      Expand an employee row to view a two-week calendar to see the employee's scheduled transactions for each day.

      For information about the transactions, see the Transactions (on page 17) table.
    - Link to an employee's TCS (Time Card Screen) in a new browser window by clicking an employee's name.
    - Assign employees to open shifts. For more information about assigning employees, see Assign (add) a transaction (on page 25).
    - Broadcast open shift notifications to the selected employees.

      If an employee has been sent an Open Shift Notification broadcast that overlaps the selected coverage period, the symbol appears next to the name along with the number of broadcasts sent to the employee. Click the symbol to view details about the broadcast, such as the date, time, and organization unit.

  When done comparing, close the Compare Staff dialog box.

5. From the Qualified Staff list or the Compare Staff dialog box, select the employees you want to send the Open Shift Notification to.
   - The phone number that displays is either the employee’s Open Shift Notification phone number (if it is supplied on the employee’s Preferences screen) or the employee’s highest priority phone number from the employee record.
   - If an employee has been sent an Open Shift Notification broadcast that overlaps the selected coverage period, the symbol appears next to the name along with the number of broadcasts sent to the employee.

     Click the symbol to view details about the broadcast, such as the date, time, and organization unit.

6. Click **Broadcast** or the broadcast icon from the Compare Staff dialog box.
7. In the Broadcast Shift dialog box, fill out the broadcast details.
   - **Notification Type -** This option only appears for organizations that are set up to choose how to handle responses for each broadcast.
     - **Queue -** Places responders into a queue where a scheduler or manager can schedule them

       For information about scheduling queued employees, see View and update open shift notifications (on the next page).
     - **First Come First Serve -** Automatically fills open shifts with employees in the order of their responses
   - **Broadcast Date** and **Broadcast Time -** To broadcast immediately, leave these fields blank. Otherwise, enter the date and time that you want to send the broadcast message.
   - **Activity**, **Start Date**, **Start Time**, **Hours**, and **Lunch Length -** When you enter the activity code, these other fields are automatically updated. If needed, you can override the information.
   - **Shift Count -** This is the number of available shifts that you are trying to fill. The initial value in this field is based on the understaffing value for the profile.
   - **Response End Date** and **Response End Time** (only with the Queue Notification Type) - Displays the default amount of time prior to the start of the shift to stop accepting responses. If needed, you can override these values.

     Tip

     You can also schedule employees from the queue before the end of the response period. If all shifts are scheduled before the end of the response period, the response period automatically closes.
   - **Comment -** If needed, enter a comment that the receiving employees will see in the broadcasted message.
   - **Employee** list **-** Review the names and notification options, and select the employees you want to broadcast the open shifts to.

     You can only select employees who have a phone or email notification method set up.
8. If needed, update the selected employees in the list.

   Employees who have temporarily or permanently turned off notifications cannot be selected. They will not receive the notification.

9. Click **Submit** to send the open shift notification to the employees you selected.

   After clicking Submit:

   - Depending on how your organization has decided to handle schedule validation, you may or may not receive schedule validation alerts. If schedule validation (which uses the manual edit validation style) is enabled and there are validation issues, you can override the issues. As needed, select the ones you want to Override and click **OK**.
   - The Broadcast Shift dialog closes and the broadcast icon appears on the corresponding profile row. For more information about this icon, see View and update open shift notifications (below) below.

     You can also view details of previous broadcasts on the Shift Broadcast Summary. See View the Shift Broadcast Summary (on page 43).

View and update open shift notifications

Note

This section only applies to notifications for open shifts, not message notifications. Previously-sent message notifications are read-only.

You can view the details of a previously-sent broadcast and make changes to a broadcast, such as adding employees, removing employees, and deleting a broadcast.

For an explanation of the statuses you see for each employee who were a part of a broadcast, see Employee response statuses (on page 43).

View and update open shift broadcasts

Note

You can only view and edit open broadcasts for future shifts. Broadcasts that are closed or were for shifts occurring in the past do not have the broadcast icon and cannot be edited.

To view and edit a broadcast, complete the following steps.

1. Expand the appropriate profile group with the broadcast you want to view.
2. On a profile row, click the broadcast icon.

   The Broadcast Shift dialog box appears. Most of the details are read only.

   Tip

   For an FSA: You can determine which columns are visible with this system preference setting: **Preferences > System Preferences > Current Staffing Overview**.

Near the bottom are two tabs: Notified and Qualified.

- The Notified tab shows the list of employees who the broadcast was sent to. Here you can remove employees from the broadcast or schedule queued employees.
- The Qualified tab shows a list of employees who were not included in the broadcast but are qualified to work the shift. Here you can add employees to the broadcast or schedule qualified staff.
- Transactions appear for the coverage period you are viewing. Any transactions that overlap the prior coverage period and the following coverage period also appear.

On both tabs, you can view a two-week calendar to see the employee's scheduled activities for each day. To view the calendar, click the arrow to the left of an employee's name. On the calendar, click the left or right arrow to move ahead or back another two weeks.

3. To remove an employee from an Open Shift broadcast:
    a. Click the **Notified** tab.
    b. Select the employees you want to remove from the broadcast.

       If employees respond after being removed, they receive a message indicating that the shift is no longer available.
    c. Click **Remove Employee**.
4. To add additional employees to a broadcast:
    a. Click the **Qualified** tab.
    b. Select the employees you want to add to the Open Shift broadcast.
    c. Click **Add Employee**.

       The open shifts are broadcast only to the employees you selected. Employees who received the notification after the first broadcast (prior to this new broadcast) do not receive another message.

       The symbol  appears next to the employee's name along with the total number of broadcasts sent to the employee.
5. To delete the broadcast, click **Delete**.

   Deleted broadcasts affect employees in the following ways:

   - Employees with open statuses, such as Queued or Awaiting Response, can no longer be scheduled a shift sent in the broadcast.
   - Employees who respond to a broadcast that has since been deleted receive a message indicating that the shift is no longer available.
   - Employees who have already been scheduled through the broadcast (with statuses such as Scheduled or Claimed) keep their scheduled shifts. Their schedules are not deleted.

Schedule queued employees

You can view a list of employees who were sent an open shift notification for the selected coverage period and profile. The list shows whether employees have responded and provides their seniority date and hours. For an explanation of the statuses you see for each employee who were a part of a broadcast, see Employee response statuses (on the next page).

> **Note**
>
> Scheduling employees is only done with the Queue type of broadcast since the First Come First Serve type of broadcast allows employees to schedule shifts directly via their responses.

You can schedule queued employees from the Current Staffing Overview or the Shift Broadcast Summary.

From the Current Staffing Overview

To schedule queued employees, complete the following steps.

1. Expand the appropriate profile group with the broadcast you want to view.
2. On a profile row, click the broadcast icon .

   The Broadcast Shift dialog box appears.
3. Near the bottom, click the **Notified** tab.
4. Select the **Show only Queued Responses** option.
5. Select the employees who you want to schedule.
6. Click **Schedule**.

From the Shift Broadcast Summary

To schedule queued employees, complete the following steps.

1. Click the broadcast icon  for the appropriate broadcast.

   The Broadcast Shift dialog appears.
2. Near the bottom, click the **Notified** tab.
3. Select the **Show only Queued Responses** option.
4. Select the employees who will receive the shift.
5. Click **Schedule**.

View the Shift Broadcast Summary

Note

This screen is only available if your system is licensed for Open Shift Notification.

In addition, the information presented here only applies to notifications for open shifts, not message notifications.

The Shift Broadcast Summary shows a list of broadcasts that have been sent, the broadcast statuses, and the employee response statuses.

Employee response statuses

The following list shows you the possible response statuses that you will see for each employee after you send a broadcast. The statuses indicate which employees responded, if someone has received the shift, and other situations. Note that the statuses apply to either the Queue method or the First Come, First Serve method, except where noted.

- Awaiting Response: Employee has not responded
- Queued: (Queue method only) Employee responded prior to the shift being filled and the expiration of the broadcast, but is not scheduled (added to the queue)
- Scheduled: (Queue method only) Employee responded prior to the shift being filled and the expiration of the broadcast, and was scheduled the shift
- Claimed: (First Come, First Serve method only) Employee responded prior to the shift being filled and the expiration of the broadcast, and is scheduled for the shift
- Declined: Employee declined the shift
- Late Attempt: Employee responded but after the shift needs were met or after the broadcast expired
- Removed: Employee was removed from the broadcast after it was sent
- Could not contact: Employee did not respond to the initial text subscription notification or opted out when replying to the subscription notification

Changes to a sent broadcast

The types of changes you can make to a sent broadcast notification include:

- Removing employees from the notification
- Adding employees to the notification
- Deleting the broadcast
- Scheduling queued employees

It is important to understand what changes you can make and how they affect the employees who received the broadcast notification. When appropriate, that information is provided in the following tasks.

View the Shift Broadcast Summary

To view and use the Shift Broadcast Summary, complete the following steps.

1. From the Current Staffing Overview screen, click the **Shift Broadcast Summary** tab.
2. If needed, update the dates that the summary is using and click **Load Summary**.

   By default, the Shift Broadcast Summary includes two days of broadcasts starting with the date you selected when you opened the Current Staffing Overview. The maximum range is seven days.

   Broadcast notifications that fall within the selected date range appear in the list with information including:

   - Shift's start and end dates and times
   - Broadcast Date
   - Total Shifts (the number of shifts included in the broadcast)
   - Claimed (the number of shifts claimed by employees via the broadcast)
   - Status (the broadcast status, such as Closed, Available, Canceled, and Expired)
   - Profile
   - Organization units
   - An icon to open the broadcast details
3. Click a row to open the list to view the employees who the broadcast was sent to.

   The information in the list of employees includes:

   - Employee's name
   - Response status
   - Responded (date and time)
4. Click a broadcast icon to view broadcast details.

   The Broadcast Shift dialog box appears. Most of the details are read only.

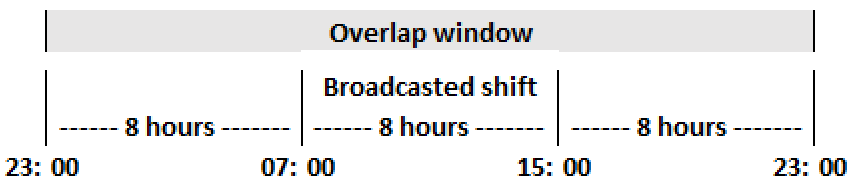
> **Tip**
>
> For an FSA: You can determine which columns are visible with this system preference setting: **Preferences > System Preferences > Current Staffing Overview**.

Near the bottom are two tabs: Notified and Qualified.

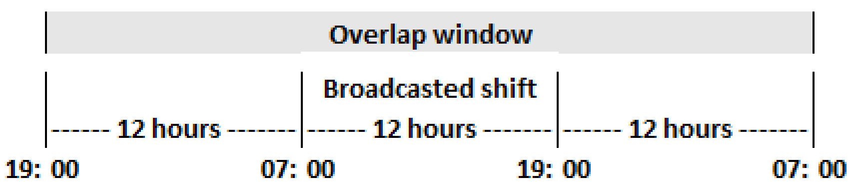
- The Notified tab shows the list of employees who the broadcast was sent to. Here you can remove employees from the broadcast or schedule queued employees.
- The Qualified tab shows a list of employees who were not included in the broadcast but are qualified to work the shift. Here you can add employees to the broadcast or schedule qualified staff.
- Transactions shown here include any that overlap the broadcast shift plus any that overlap a window of time defined as the start of the shift minus the shift's length and the end of the shift plus the shift's length.

Example

Broadcast shift was for eight hours starting at 07:00 on 9/2. Any transactions that overlap from 23:00 on 9/1 to 23:00 on 9/2 are shown.



Broadcast shift was for 12 hours starting at 07:00 on 9/2. Any transactions that overlap from 19:00 on 9/1 to 07:00 on 9/3 are shown.



On both tabs, you can view a two-week calendar to see the employee's scheduled activities. To view the calendar, click the arrow to the left of an employee's name. On the calendar, click the left or right arrow to move ahead or back another two weeks.

For information about the transactions, see the Transactions (on page 17) table.

Remove an employee from a sent broadcast notification

To remove an employee from a sent broadcast notification, complete the following steps.

1. Click the broadcast icon  for the appropriate broadcast.

   The Broadcast Shift dialog appears.
2. Near the bottom, click the **Notified** tab.
3. Select the employee you want to remove from the broadcast.

   If employees respond after being removed, they receive a message indicating that the shift is no longer available.

4. Click **Remove Employee**.

Add an employee to a sent broadcast notification

To add employees to a previously sent broadcast, complete the following steps.

1. Click the broadcast icon  for the appropriate broadcast.

   The Broadcast Shift dialog appears.

2. Near the bottom, click the **Qualified** tab.
3. Select the employees you want to add.
4. Click **Add Employee**.

   The open shifts are broadcast only to the employees you selected. Employees who received the notification after the first broadcast (prior to this new broadcast) do not receive another message.

Delete a sent broadcast notification

To delete a previously sent broadcast, complete the following steps.

1. Click the broadcast icon  for the appropriate broadcast.

   The Broadcast Shift dialog appears.

2. Click **Delete**.

   Deleted broadcasts affect employees in the following ways:

   - Employees with open statuses, such as Queued or Awaiting Response, can no longer be scheduled a shift sent in the broadcast.
   - Employees who respond to a broadcast that has since been deleted receive a message indicating that the shift is no longer available.
   - Employees who have already been scheduled through the broadcast (with statuses such as Scheduled or Claimed) keep their scheduled shifts. Their schedules are not deleted.

Schedule queued employees

You can view a list of employees who were sent an open shift notification for the selected coverage period and profile. The list shows whether employees have responded and provides their seniority date and hours.

The following statuses appear in the list for employees who were notified of an open shift.

- Awaiting Response - Employee has not responded. This remains the same after the open shift notification response period has ended.
- Declined - Employee responded after the shift was scheduled or after the open shift notification period was closed.

- Queued - Employee responded to work the shift.
- Scheduled - Employee was scheduled to work the open shift.
- Could not contact - This status occurs when the employee has only the Text Number option selected for receiving Open Shift Notifications but does not opt in via the follow-up text message (meaning, does not reply or replies with CANCEL).

Note

Scheduling employees is only done with the Queue type of broadcast since the First Come First Serve type of broadcast allows employees to schedule shifts directly via their responses.

To schedule queued employees, complete the following steps.

1. Click the broadcast icon  for the appropriate broadcast.

   The Broadcast Shift dialog appears.
2. Near the bottom, click the **Notified** tab.
3. Select the **Show only Queued Responses** option.
4. Select the employees who you want to schedule.
5. Click **Schedule**.

View the Message Broadcast Summary

Note

This screen is only available if your system is licensed for Open Shift Notification.

In addition, the information presented here only applies to message notifications, not open shift notifications (see View the Shift Broadcast Summary (on page 43)).

The Message Broadcast Summary shows a list of message broadcasts that have been sent, along with details about the messages. The notification details are read-only; you cannot add or remove employees, or edit, cancel, or rebroadcast the message.

View the Message Broadcast Summary

1. From the Current Staffing Overview screen, click the **Message Broadcast Summary** tab.
2. If needed, update the dates that the summary is using and click **Load Summary**.

   By default, the Message Broadcast Summary includes two days of broadcasts starting with the date you selected when you opened the Current Staffing Overview. The maximum range is seven days.

   Broadcast notifications that fall within the selected date range appear in the list with information including:

- Broadcast Date
- Subject
- Profile
- Organization units
- An icon to open the broadcast details 

3. Click a broadcast icon  to view broadcast details.

   The Broadcast Message dialog box appears. The details are read only.

   If the broadcast message was sent to an entire organization unit via the Send Message link, the following information does not apply. It only applies to message-type broadcasts sent to scheduled employees.

   Transactions shown in the Transactions column include those that start at any time during the day that the message broadcast was for.

   > **Example**
   >
   > You are on the Current Staffing Overview for 9/1 and you sent a message broadcast for 9/2. Any transactions that start between 00:00 and 23:59 on 9/2 are shown.

   You can view a two-week calendar to see an employee's scheduled transactions for each day. To view the calendar, click the arrow to the left of an employee's name. On the calendar, click the left or right arrow to move ahead or back another two weeks.

Viewing reports

Note

Open Shift Notification is an optional module. The ability to view the following reports depends on whether your organization is licensed for this module.

In addition, the information presented in the reports only applies to notifications for open shifts, not message notifications.

There are several reports relating to Open Shift Notification.

- Employees Configured for Open Shift Notification (on the next page)
- Open Shift Broadcast Details (Legal) (on page 52)
- Open Shift Broadcast Summary (on page 55)
- Open Shift Notifications Sent to Employees (Legal) (on page 57)
- Open Shift Notifications Sent (on page 59)

Employees Configured for Open Shift Notification

Can be Scheduled: Yes

Report Description

This report shows the employees that have and have not added their preferences for the two types of notifications: open shift notifications and message notifications.

Employees set preferences here: **Preferences > My Preferences > Open Shift Notifications**.

Report fields include:

- Organization unit
- Employee name and code
- Notification methods set in My Preferences - SMS, Email, and IVR correspond to the My Preferences fields of Text, Email, and Phone fields, respectively
- Status - shows the values of Active (employee's notifications are enabled), Paused (employee's notifications are turned off temporarily), or Opted Out (employee opted out of notifications permanently)
- Pause Date/Time (if applicable) - shows either the date an employee opted out or the date range an employee temporarily turned off notifications

Report parameters include the following options:

- The organization units or Schedule Group to include in the report
- Whether to include a graph

  This only applies when ALL is selected in the Show Configured Employees Details field (next bullet point).
- Whether to show employees who are Configured or Not Configured (default), or show All employees

  Employees who are not configured are shown in red on the report.

Report Example

Employees Configured for Open Shift Notification

November 23, 2020 14:03 Page 1 of 1

This report displays employee open shift notification preference configurations.

Facility: SJH - Saint Joseph's Hospital

Cost Center: 1201 - Pediatrics

Reporting Unit: 1201.3 - Peds/PICU

Employee	SMS	Email	IVR	Status	Pause Date/Time
Barry,Benny (15)	(555) 658-2226	s@b.com	(555) 658-2226	Paused	11/24/2020 05:23 - 11/24/2020 05:24
Brown,Kristina (70)	(555) 554-3210	a@b.com	(555) 554-3210	Paused	11/24/2020 04:57 - 11/24/2020 04:58
Ford,Christa (17)	(555) 554-0210			Active	
Frey,Josephine (20)	(555) 554-2210			Opted Out	11/24/2020 04:26

Open Shift Broadcast Details (Legal)

Can be Scheduled: Yes

Report Description

This report allows you to see the details of an Open Shift Notification broadcast, including information like who sent the broadcast, who responded to the broadcast and at what time, and who was awarded the shift. The information is sorted by organization unit, then by Date Sent with the most recent broadcasts at the top of each section.

The report is created for legal-sized paper.

> **Note**
>
> The reports only include past broadcasts that have expired. Broadcasts that are currently active or were set to be sent in the future and then manually canceled are not included.
>
> In addition, the data for the reports is updated every hour. Because of this, broadcasts that have expired within the past hour may not appear yet on the reports.

The report displays the following information:

Shift information rows

- The total number of broadcasts sent that are included in the report
- Dates and times when the broadcast was sent and when the broadcast was created and set to expire
- The type of broadcast (First Come First Serve or Queue)
- Who created and sent the broadcast
- Shift details, including the profile, activity code, start date and time, and length
- Comments included in the broadcast message
- Total Need and Total Filled

  For example, the broadcast may have been created for a total need of three people and two have responded to fill those needs.

Recipient information rows

Click the **+** icon at the beginning of a row to view information about the broadcast recipients, including:

- The number of No Response, Declined, and Accepted responses
- The employees who received the broadcast along with their employee codes

  Depending on how your system is set up, employee codes may be masked (shown as asterisks).

- The response to the broadcast

  Shifts that are successfully awarded to the employee are shown with one of the following responses:

  - First Come First Serve: Claimed
  - Queue: Scheduled

  Other situations show different responses, such as the employee has not yet responded or was not awarded the shift.

- The response date, time, and method, such as text, email, or phone
- Seniority date and hours

  If your organization stores this information, it may be useful to help make staffing decisions.

- The text, email, or phone number used to respond to the broadcast

  This information is entered by employees here: **Preferences > My Preferences > Open Shift Notifications**

Report parameters:

- The organization units or schedule group to include in the report
- The start and end dates for the date range to include in the report

  Broadcast information is kept in the system for one year. Because of this, no data older than one year is available to show on the report.

- The person who sent the broadcast (optional)
- An activity code to find broadcasts that were sent only for that activity (optional)
- A profile code to find broadcasts sent to a specific group of employees (optional)

Tip

You can only search for and view the information allowed by your assigned authorization roles and data access.

Sample report

Open Shift Broadcast Details (Legal)

August 5, 2020 13:37 Page 1 of 1

This report is a summary that lists all of the Broadcast Details that were sent between 07/20/2020 and 07/30/2020.

Total Number of Broadcasts: 15

Facility: SJH - Saint Jo's Hospital

Cost Center: 1201.301 - Nursing Administration Number of Broadcasts: 15

Date Sent	Date Created	Date Expired	Notification Type	Who Created	Profile	Activity	Shift Start	Shift Hours	Broadcast Comments	Total Need	Total Filled
⊟ 07/30/2020 04:17	07/30/2020 04:17	07/30/2020 05:24	First Come First Serve	Wolf, Adam	t	1100-12*	07/31/2020 06:00	2.00		1	1

Recipient Information **No Response: 0 Declined: 0 Accepted: 1**

Employee	Response	Response Date	Response Method	Seniority Date	Seniority Hours	Text	Email	Phone
Barry, Benny V (1548)	Late Response	07/30/2020 04:19	Email	02/25/2008	16384.05		sg@symplr.com	
Bonilla, Rex O (1807)	Claimed	07/30/2020 04:18	Email	08/10/2009	17328.38		sg@symplr.com	

Date Sent	Date Created	Date Expired	Notification Type	Who Created	Profile	Activity	Shift Start	Shift Hours	Broadcast Comments	Total Need	Total Filled
⊞ 07/27/2020 04:15	07/27/2020 04:15	07/27/2020 05:09	Queue	Support, System	t	1100-12*	07/27/2020 05:10	0.50		1	1
⊞ 07/27/2020 04:13	07/27/2020 04:13	07/27/2020 04:14	Queue	Support, System	t	0500-8	07/27/2020 04:15	0.10		1	0
⊟ 07/27/2020 03:39	07/27/2020 03:38	07/27/2020 05:59	Queue	Support, System	t	0700-10	07/27/2020 06:00	2.00		1	1

Recipient Information **No Response: 0 Declined: 0 Accepted: 1**

Employee	Response	Response Date	Response Method	Seniority Date	Seniority Hours	Text	Email	Phone
Barry, Benny V (1548)	Late Response	07/27/2020 03:43	Email	02/25/2008	16384.05		sg@symplr.com	
Blackwell, Glen D (1707)	Late Response	07/27/2020 03:43	Email	12/30/2008	14097.70		sg@symplr.com	
Bonilla, Rex O (1807)	Scheduled	07/27/2020 03:41	Email	08/10/2009	17328.38		sg@symplr.com	

The first red box shows an expanded broadcast record sent on 07/30/2020, with a Notification Type of First Come First Serve and two responses. Since only one shift needed to be filled, Rex claimed the shift by being first to respond.

The second red box shows a broadcast sent on 07/27/2020, with a Notification Type of Queue and three responses. Again, only one shift was needed. The person reviewing the queued responses awarded the shift to Rex, while the others responded after the shift was already awarded.

Open Shift Broadcast Summary

Can be Scheduled: Yes

Report Description

This report shows a trend of the number of broadcasts (open shift notifications) that were sent for an organization unit during a specified date range, and the percentage that were filled, unfilled, or canceled.

Report parameters include the following options:

- The organization unit to include in the report.
- The start and end date range of the report.
- Whether to include a detailed breakdown of the organization units within the selected organization

unit (Yes/No).

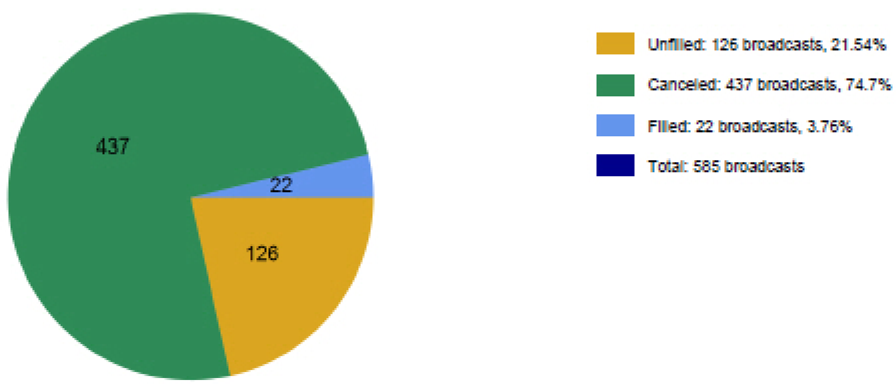
Open Shift Broadcast Summary

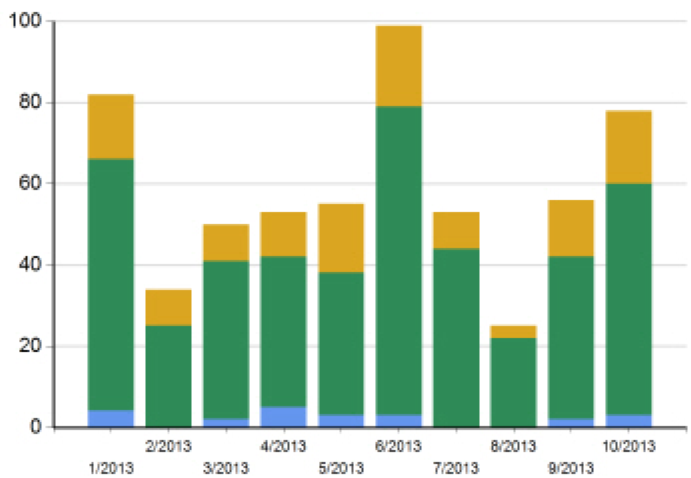
August 20, 2014 08:42:59 Page 1 of 3

This report shows open shift broadcast notifications with details from 1/1/2013 to 10/31/2013.

Total for Department: 6035 - NURSING - MEDICAL / ONCOLOGY

Number of Broadcast Notifications





Open Shift Notifications Sent to Employees (Legal)

Can be Scheduled: Yes

Report Description

This report allows you to see the details of the Open Shift Notification broadcasts sent to a specified employee, including information like shift details, who sent the broadcast, and the result of the employee's response. The information is sorted by organization unit, then by Date Sent with the most recent broadcasts at the top.

The report is created for legal-sized paper.

> **Note**
>
> The reports only include past broadcasts that have expired. Broadcasts that are currently active or were set to be sent in the future and then manually canceled are not included.
>
> In addition, the data for the reports is updated every hour. Because of this, broadcasts that have expired within the past hour may not appear yet on the reports.

The report displays the following information:

- Employee name and code, and the organization units selected in the report parameters

  Depending on how your system is set up, employee codes may be masked (shown as asterisks).
- Dates and times when the broadcast was sent and when the broadcast was created and set to expire
- The type of broadcast (First Come First Serve or Queue)
- Who created and sent the broadcast
- Shift details, including the organization unit, profile, activity code, start date and time, and length
- Comments included in the broadcast message
- The response date and time
- The response to the broadcast

  Shifts that are successfully awarded to the employee are shown with one of the following responses:
  - First Come First Serve: Claimed
  - Queue: Scheduled

  Other situations show different responses, such as the employee has not yet responded or was not awarded the shift.

Report parameters:

- The start and end dates for the date range to include in the report

  Broadcast information is kept in the system for one year. Because of this, no data older than one year is available to show on the report.

- The employee to include in the report

Tip

You can only search for and view the employees allowed by your assigned authorization roles and data access.

Sample report

Open Shift Notifications Sent to Employees (Legal)

August 18, 2020 09:56 Page 1 of 2

This report is a summary that lists all of the Broadcast Details that were sent between 08/01/2020 and 08/18/2020.

Employee Name: Guduru, Sowjanya (GS)

Facility: GSHC - Good Samaritan Health Center

Cost Center: 2901.30100 - Nursing

Reporting Unit: 2901.30100.1 - Hospital

Date Sent	Date Created	Date Expired	Notification Type	Who Created	Facility	Cost Center	Reporting Unit	Profile	Activity	Shift Start	Shift Hours	Broadcast Comments	Response Date	Response
08/13/2020 10:56	08/13/2020 10:56	08/13/2020 11:30	Queue	Wolf, Brian	GSHC	2901.30100	2901.30100.1	Lab Assistant	EVE15-23	08/15/2020 15:00	8.00		08/13/2020 10:57	Scheduled
08/12/2020 10:51	08/12/2020 10:51	08/12/2020 11:30	First Come First Serve	Wolf, Brian	GSHC	2901.30100	2901.30100.1	Lab Assistant	EVE15-23	08/13/2020 15:00	8.00		08/12/2020 10:52	Claimed

Open Shift Notifications Sent

Can be Scheduled: Yes

Report Description

This report shows a summary of all the broadcasts (open shift notifications) that were sent during the specified date range.

Fields include: organization unit, open shift count (the number of shifts sent), date and time sent, date and time created, profile, shift start, shift length, activity code, whether the shift is available, and who created.

Report parameters include the following options:

- The organization units to include in the report
- Date range

Report Example

Open Shift Notifications Sent

January 25, 2012 10:07 Page 1 of 2

This report is a summary that lists all of the Broadcasts that were sent between 01/01/2012 and 01/25/2012.

Open Shifts: 2

Facility: SJH - Saint Joseph's Hospital **Open Shifts: 2**

Cost Center: 1201.31115 - 5N - Neurology - Medical / Surgical / Trauma Open Shifts: 2

Date Open/Sent	Date Created	Profile	Shift Start	Shift Length	Activity	Is Available	Who Created
01/16/2012 09:51	01/16/2012 09:51	RN-5N	01/18/2012	10.50	0700-10	No	David Schmit
01/16/2012 10:09	01/16/2012 10:09	RN-5N	01/19/2012	10.50	0700-10	No	David Schmit

