



Minimum Staffing User Guide

Staffing and Scheduling

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Change Log

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Topic	Description
Document	Branding updates; no content changes

Introduction

Just as there are situations when certain kinds of employee schedules are limited to a maximum number, there may also be situations when a minimum number of certain schedules are required. To accommodate these situations, Staffing and Scheduling includes minimum staffing rules.

There are four minimum staffing rules available:

- Minimum Days Off
- Minimum Scheduled Hours
- Minimum Shift Equity
- Minimum Weekends

If a minimum staffing rule is created, employee schedule validation occurs. This validation determines whether an employee violates the rule. Violations are visible on various screens within the system, such as the schedule screen and the employee Monthly View screen.

This guide provides information about the different types of minimum staffing rules, employee schedule validation, setting up the rules, and working with rule violations.

Guide Overview

This guide provides information about Minimum Staffing rules and Employee Schedule Validation processing. It also covers the steps needed to set up Minimum Staffing rules and explains how to handle violations of the rules.

Who Will Benefit from This Guide

To complete the instructions in this guide, you need personnel who have the required access to make changes in the system, such as authorization roles and indicator settings.

At your facility, these individuals need to be involved:

- Functional System Administrator or system manager
This person makes or approves final decisions, assigns appropriate authorization roles, and recruits other personnel, as needed.
- Central Staffing Office representative or nurse managers who make staffing decisions
These individuals know the day-to-day staffing practices and issues relating to staffing. They also understand the need for proper daily maintenance and can advocate for improved daily maintenance and improved staffing practices.

At symplr, these individuals may be involved:

- Client Support associate
- Configuration Analyst

- Training Specialist

Related Documentation

The following documents are available to provide more in-depth descriptions and explanations of the Minimum Staffing and Employee Schedule Validation processing.

- Minimum Approved Hours - Daily.doc
- Minimum Approved Hours - Schedule Period.doc
- Minimum Approved Hours - Weekly-Bi-Weekly.doc
- Minimum Days Off.doc
- Minimum Shift Equity.doc
- Minimum Weekend.doc
- Period Determination.doc
- Schedule Period Determination.doc

How to Use This Guide

Organization

This guide contains background information before giving instructions on Minimum Staffing. There is some setup involved with the Minimum Staffing rules and a good understanding of the setup tasks will ensure a successful rollout of Minimum Staffing.

It is recommended that you read the [Minimum Staffing \(on the next page\)](#) section. After you are comfortable with the background information, you can begin configuring the system. The [Setting Up Minimum Staffing Rules \(on page 9\)](#) section gives you instructions needed for proper configuration.

Finally, the [Employee Schedule Validation \(on page 27\)](#) section explains how rule violations appear on the screen and provides information you need to successfully use Minimum Staffing.

Minimum Staffing

About Minimum Staffing Rules

This section provides more information about each of the minimum staffing rules.

Minimum Days Off

This rule informs managers, schedulers, and employees when employees have not been given the minimum number of days off within a specified time period. You set the required minimum number of days off and the length of the time period. You can also set whether the days off must be consecutive.

Example

Employees must be given four days off within every two-week time period.

Minimum Scheduled Hours

This rule informs managers, schedulers, and employees when employees have not been given enough scheduled time to achieve their approved hours less an allowed variance. This rule can be created to monitor daily, weekly/biweekly, or schedule period approved hours.

Example

An employee's approved hours are 40 hours per week. The rule is violated until the accumulated schedule hours pass the 40-hour minimum.

Minimum Shift Equity

This rule informs managers, schedulers, and employees when employees have not been given enough schedules distributed among day, evening, and night shifts. You set which activities count toward which shift and how many of each the employees must work.

Example

Employees must work two evening and two night shifts per schedule period.

Minimum Weekends

This rule informs managers, schedulers, and employees when employees have not been given enough weekend schedules to achieve their required minimum number. You can define what you consider a weekend and what makes a weekend shift. You can set how many schedules are required and how many weekends are required in a schedule period.

Example

Employees must work four weekend shifts per schedule period.

Working with Minimum Staffing

Minimum Staffing allows you to set up scheduling rules when employees are required to meet minimum levels of certain types of schedules.

Minimum Staffing Tasks

Working with Minimum Staffing involves the following types of task:

- Setting up the minimum staffing rules
- Assigning the rules to the desired employees
- Understanding Employee Schedule Validation
- Viewing rule violations from various screens

Setting Up Minimum Staffing Rules

Assign the Authorization Role

The following standard role (or its equivalent replicated role) must be assigned to those involved with setting up Minimum Staffing:

- AS Administrator

To assign the role to an employee, complete the following steps:

1. Select the Employee section.
2. Search for and open the desired employee records.
3. Under Employee Sections, click **Roles**.
4. Under Role Actions, click **Add**.
5. Click in the Authorization Role Code field, scroll through the Field Look Up Values in the right area, and select the AS Administrator role (or its equivalent replicated role).

The name of the role appears in the Authorization Role Code field.

6. Click **Save**.
7. Under Role Assignment Sections, click Data Access and then click **Add Org Unit Access**.
8. Select the highest-level organization unit that the manager has access to and click **Save**.
9. Click **Add Emp - Org Unit Access**.
10. Select the highest-level organization unit that the manager has access to and click **Save**.
11. Continue adding the needed data access for any remaining access buttons, such as Add PayCode - Org Unit Access.
12. If you opened more than one employee in step 2, click an arrow under Employee Navigator to move to the next employee and repeat steps 4 - 11.

Set the Activity Code Indicators

Using the following table as a guide, configure the appropriate activity codes for the minimum staffing rules you are setting up.

Minimum Staffing Rule	Activity Code Indicator	Definition	Options	Notes
Minimum Days Off	Schedule Standard 11	Worked Activity Code determination for Minimum Days Off	Y, N	Select Y for activity codes considered worked and N for codes not considered worked.

Minimum Staffing Rule	Activity Code Indicator	Definition	Options	Notes
Minimum Scheduled Hours	Schedule Standard 5	Determines which Activity Codes accumulate toward approved hours	Y, N	Select Y for activity codes that accumulate toward approved hours.
Minimum Shift Equity	Schedule Standard 1	Determines whether Activity Code is productive or non-productive	P, N	Select P for productive and N for non-productive activity codes.
	Schedule Standard 2	Determines which shift Activity Code is applied to for Shift Equity	D, E, N, O	D = Day code E = Evening code N = Night code O = Activity code has no affect on Shift Equity
Minimum Weekends	Schedule Standard 10	Qualifying Activity Code determination for Minimum Weekend	A, D, E, N, X	A = Code qualifies, any shift D = Code qualifies, Day shift E = Code qualifies, Evening shift N = Code qualifies, Night shift X = Codes does not qualify

To set the activity code indicators, complete the following steps:

1. Select **Configuration > Scheduling > Activity Code**.
2. Search for and open the appropriate activity codes.
The appropriate activity codes are those that you want to specifically qualify or disqualify for minimum staffing rules.
3. Click the **Indicators** tab and open the **Schedule Process** card.
4. Using the previous table, select the desired options in the appropriate activity code fields for the minimum staffing rules you are setting up.
5. Click **Save**.
6. If you opened more than one activity code in step 2, click an arrow under Activity Navigator to move to the next activity code and repeat steps 3 - 5.

Set the Pay Code Indicators

Using the following table as a guide, configure the appropriate pay codes for the minimum staffing rules you are setting up.

Minimum Staffing Rule	Pay Code Indicator	Definition	Options	Notes
Minimum Days Off	Schedule Standard 9	Worked Pay Code determination for Minimum Days Off	Y, N	Select Y for pay codes considered worked and N for codes not considered worked.
Minimum Scheduled Hours	Schedule Standard 3	Determines which Pay Codes accumulate toward approved hours	Y, N	Select Y for pay codes that accumulate toward approved hours.
Minimum Shift Equity	Schedule Standard 5	Determines whether Pay Code is productive or non-productive	P, N	Select P for productive and N for non-productive pay codes.
	Schedule Standard 1	Determines which shift Pay Code is applied to for Shift Equity	D, E, N, O	D = Day code E = Evening code N = Night code O = Pay code has no affect on Shift Equity
Minimum Weekends	Schedule Standard 8	Qualifying Pay Code determination for Minimum Weekend	A, D, E, N, X	A = Code qualifies, any shift D = Code qualifies, Day shift E = Code qualifies, Evening shift N = Code qualifies, Night shift X = Codes does not qualify

To set the pay code indicators, complete the following steps:

1. Select **Configuration > Time and Attendance > Pay Code**.
2. Search for and open the appropriate pay codes.

The appropriate pay codes are those that you want to specifically qualify or disqualify for minimum staffing rules.

3. Click the **Indicators** tab and open the **Schedule Process** card.
4. Using the previous table, select the desired options in the appropriate pay code fields for the minimum staffing rules you are setting up.

5. Click **Save**.
6. If you opened more than one pay code in step 2, click an arrow under Pay Code Navigator to move to the next pay code and repeat steps 3 - 5.

Configure the Assignment Codes

There are four minimum staffing rules that you can configure, which consist of the following assignment codes.

- Minimum Days Off
- Minimum Scheduled Hours
- Minimum Shift Equity
- Minimum Weekends

In addition, you can apply a standard minimum staffing rule to all organization units that use Staffing and Scheduling or modify a rule for specific organization units by replicating a standard assignment code. Replicating an assignment code creates a copy of an existing one, which you modify.

Tip

As with all assignment codes, there is an ALL rule that applies to everyone, which can be enabled at the organization level you choose, such as facility or department. However, if a rule is modified specifically for a particular organization unit, the ALL rule no longer applies to that organization unit.

Configure the ALL Rule for All Organization Units

To configure an assignment code, complete the following steps. Then move to the section of this guide specific to the assignment code you want to configure.

1. Click **Configuration > Assignments > Assignment Code**.
2. Click in the Assignment Source Code field and then complete either of the following:
 - To view a list of all the minimum schedule assignment codes, type **min**.
 - To view a specific assignment code, scroll through the Field Look Up Values and click the desired code.
3. Click **Search** and then open the desired assignment code.
4. Move to the section of this guide specific to the assignment code you are configuring.

Create a Replicated Rule for Specific Organization Units

To create a replicated assignment code, complete the following steps. Then move to the section of this guide specific to the assignment code you want to configure.

1. Click **Configuration > Assignments > Assignment Code**.
2. Click in the Assignment Source Code field and then complete either of the following:
 - To view a list of all the minimum schedule assignment codes, type **min**.
 - To view a specific assignment code, scroll through the Field Look Up Values and click the desired code.
3. Click **Search** and then open the desired assignment code.
4. Under Actions, click **Replicate**.
5. Enter the desired Effective Date, Code, and Description to identify this replicated assignment code.
6. Click **Save**.
7. Under Assignment Code Sections, click **Criteria** and under Assignment Code Actions, click **Add**.

This screen allows you determine which group of employees will be affected by this rule, such as an organization unit or a job class.

8. Enter information into the required fields and any other fields necessary to define the group of employees.

Example

Effective Date: 01/01/2010

Code: 1001

Description: 1001 Employees

Facility: 1

Department: 1001

9. Click **Save** and then under Assignment Code Sections, click **General**.
10. Move to the section of this guide specific to the assignment code you are configuring.

Minimum Days Off

After opening the ALL or replicated Minimum Days Off assignment code, complete the following steps:

1. Using the following table, enter the appropriate information on the Indicators and Parameters tabs.

Tip

If you are not using a parameter, leave the field blank.

2. Click **Save**.

Indicator or Parameter	Description	Options	Notes
I: Schedule Standard 1	Minimum Days Off processing determination	Y, N	Select Y to enable the Minimum Days Off rule.
P: Schedule Standard Integer 1	Minimum Days Off Period Length (in weeks)	Any numeric value	The number of weeks used to determine whether rule is violated, such as minimum 4 days off every 2 weeks.
P: Schedule Standard Integer 2	Minimum Days Off	Any numeric value	The minimum number of days off required in the period (set with the previous parameter), such as minimum 4 days off every 2 weeks.
P: Schedule Standard Integer 3	Minimum Consecutive Days Off	Any numeric value	Use if there is a required number of days off in a row, such as an employee must have 2 days off in a row.

Minimum Scheduled Hours

After opening the ALL or replicated Minimum Scheduled Hours assignment code, complete the following steps.

- Using the following table, enter the appropriate information on the Indicators and Parameters tabs.

Tip

Using the appropriate indicators, you can enable more than one method of minimum staffing rule processing.

Tip

If you are not using a parameter, leave the field blank.

- Click **Save**.

Note

For more information about which indicators and parameters to set, see the [Minimum Scheduled Hours Explanation \(on page 16\)](#) section that follows this table.

Indicator or Parameter	Description	Options	Notes
I: Schedule Standard 1	Minimum Approved Hours: Weekly/Bi-Weekly processing determination	Y, N	Select Y to enable the rule using approved hours during a weekly/biweekly period.
I: Schedule Standard 2	Minimum Approved Hours: Daily processing determination	Y, N	Select Y to enable the rule using the daily hours from employees' labor distributions.
I: Schedule Standard 3	Determines Minimum Approved Hours period day of week	1 - 7	If your pay periods are monthly or semi-monthly, select 1 - 7 to define the day of the week that begins your approved hours period.
I: Schedule Standard 4	Minimum Approved Hours: Schedule Period processing determination	Y, N	Select Y to enable the rule using approved hours during the schedule period.
P: Schedule Standard Date 1	Minimum Approved Hours Period Date	Any calendar date	Select a date corresponding to the beginning of a schedule period.
P: Schedule Standard Hour 1	Weekly/Bi-Weekly Approved Hours	Any numeric value	A value used to determine whether approved hours (from home labor distribution) are evaluated weekly or biweekly.
P: Schedule Standard Hour 2	Schedule Period Approved Hours	Any numeric value	The minimum number of hours in a schedule period used to determine whether the rule is violated.
P: Schedule Standard Integer 1	Weekly/Bi-Weekly Minimum Approved Hours Allowed Variance (minutes)	Any numeric value	The weekly or biweekly variance (in minutes) that determines whether the rule is violated.
P: Schedule Standard Integer 2	Daily Minimum Approved Hours Allowed Variance (minutes)	Any numeric value	The daily variance (in minutes) that determines whether the rule is violated.

Indicator or Parameter	Description	Options	Notes
P: Schedule Standard Integer 3	Schedule Period Minimum Approved Hours Allowed Variance (minutes)	Any numeric value	The schedule period variance (in minutes) that determines whether the rule is violated.
P: Schedule Standard Integer 4	Approved Hours Period Length (in weeks)	Any numeric value	The length (in weeks) of your approved hour periods within a schedule period.

Minimum Scheduled Hours Explanation

Minimum Scheduled Hours rules can be created for daily, weekly/biweekly, or schedule period approved hours. The following provides additional information about setting up the rules. The indicators and parameters referenced are the same as those found in the previous table.

Daily

- Set indicator Schedule Standard 2 to enable the rule.
- If needed, set parameter Schedule Standard Integer 2 to allow a variance when determining rule violations.

Example

Employees have 8 daily approved hours. Without a variance, total scheduled time on a day must be 8 or more hours or the rule is violated. However, you set the variance to 30 (minutes). With the variance, as long as an employee has 7.5 or more hours of scheduled time, the rule is not violated.

Weekly/Biweekly

- Set indicator Schedule Standard 1 to enable the rule.
- Set parameter Schedule Standard Hour 1 to determine whether the rule should evaluate approved hours weekly or biweekly when determining rule violations.

Example

On their labor distribution records, your employees have 80 Approved Hours. To make the rule evaluate approved hours on a biweekly basis, set parameter Schedule Standard Hour 1 to a lower number, such as 70.

To make the rule evaluate approved hours on a weekly basis, set the parameter to higher number, such as 90. In this case, since the Approved Hours (80) are less than the parameter value (90), the system will divide the Approved Hours by 2 to determine the weekly approved hours. $80/2 = 40$ hours per week of required scheduled hours.

- If needed, set parameter Schedule Standard Integer 1 to allow a variance when determining rule violations.

Example

Employees have 80 approved hours with biweekly evaluation. Without a variance, they must have 80 or more hours of scheduled time or the rule is violated. However, you set the variance to 120 (minutes). With the variance, as long as an employee has 78 or more hours of scheduled time, the rule is not violated.

Example

Employees have 80 approved hours with weekly evaluation. Without a variance, they must have 40 or more hours of scheduled time per week or the rule is violated. However, you set the variance to 90 (minutes). With the variance, as long as an employee has 38.5 or more hours of scheduled time, the rule is not violated.

- Set parameter Schedule Standard Date 1 to the date of a schedule period start date.
- If your pay periods are monthly or semi-monthly, set indicator Schedule Standard 3.

Note

For more information about setting parameter Schedule Standard Date 1 and indicator Schedule Standard 3, see the Period Determination document or contact symplr.

Schedule Period

- Set indicator Schedule Standard 4 to enable the rule.
- Set parameter Schedule Standard Integer 4 to define the length (in weeks) of your approved hour periods within a schedule period. This is used to break up a schedule period into smaller periods for easier use; however, the hours from the smaller periods still accumulate toward the schedule period total hours.

Example

Your schedule periods are six weeks. You set this parameter to 2 (weeks) so that the schedule period is broken into three shorter periods.

- Set the parameter Schedule Standard Hour 2 to the number of minimum approved hours for a schedule period.

- If needed, set parameter Schedule Standard Integer 3 to allow a variance when determining rule violations.

Example

Employees have 240 approved hours in a schedule period of six weeks. Without a variance, total scheduled time in a pay period must be 240 or more hours or the rule is violated. However, you set the variance to 180 (minutes). With the variance, as long as an employee has 237 or more hours of scheduled time, the rule is not violated.

Minimum Shift Equity

After opening the ALL or replicated Minimum Shift Equity assignment code, complete the following steps.

1. Using the following table, enter the appropriate information on the Indicators and Parameters tabs.

Tip

Using the appropriate indicators, you can enable more than one method of minimum staffing rule processing.

Tip

If you are not using a parameter, leave the field blank.

2. Click **Save**.

Indicator or Parameter	Description	Options	Notes
I: Schedule Standard 1	Minimum Shift Equity: Number of Schedules processing determination	Y, N	Select Y to enable the rule using a number of schedules, such as two schedules in a schedule period must be as night shifts. Works with parameters Schedule Standard Integer 1 - 3.
I: Schedule Standard 2	Minimum Shift Equity: Percentage of Hours processing determination	Y, N	Select Y to enable the rule using a percentage of hours, such as 20% of hours need to be as night shifts. Works with parameters Schedule Standard Percent 1 - 3.
I: Schedule Standard 3	Primary shift determination	D (day), E (evening), N (night)	Select the option for the shift that is considered primary. Works with parameters Schedule Standard Integer 4 & 5 or Schedule Standard Percent 4 & 5.

Indicator or Parameter	Description	Options	Notes
P: Schedule Standard Integer 1	Minimum Number Of Day Schedules per Schedule Period	Any numeric value	Works with indicator Schedule Standard 1.
P: Schedule Standard Integer 2	Minimum Number Of Evening Schedules per Schedule Period	Any numeric value	Works with indicator Schedule Standard 1.
P: Schedule Standard Integer 3	Minimum Number Of Night Schedules per Schedule Period	Any numeric value	Works with indicator Schedule Standard 1.
P: Schedule Standard Integer 4	Minimum Number Of Primary Shift Schedules per Schedule Period	Any numeric value	Works with indicator Schedule Standard 3.
P: Schedule Standard Integer 5	Minimum Number Of Off-Shift Schedules per Schedule Period	Any numeric value	The minimum number of non-primary shift schedules per schedule period. Works with indicator Schedule Standard 3.
P: Schedule Standard Percent 1	Minimum Percentage of Day Schedule Hours per Schedule Period	Any numeric value 1 - 100	Works with indicator Schedule Standard 2.
P: Schedule Standard Percent 2	Minimum Percentage of Evening Schedule Hours per Schedule Period	Any numeric value 1 - 100	Works with indicator Schedule Standard 2.
P: Schedule Standard Percent 3	Minimum Percentage of Night Schedule Hours per Schedule Period	Any numeric value 1 - 100	Works with indicator Schedule Standard 2.

Indicator or Parameter	Description	Options	Notes
P: Schedule Standard Percent 4	Minimum Percentage of Primary Schedule Hours per Schedule Period	Any numeric value 1 - 100	Works with indicator Schedule Standard 3.
P: Schedule Standard Percent 5	Minimum Percentage of Off-Shift Schedule Hours per Schedule Period	Any numeric value 1 - 100	The minimum percentage of non-primary schedule hours per schedule period. Works with indicator Schedule Standard 3.

Minimum Weekends

After opening the ALL or replicated Minimum Weekends assignment code, complete the following steps.

- Using the following table, enter the appropriate information on the Indicators and Parameters tabs.

Tip

Using the appropriate indicators, you can enable more than one method of minimum staffing rule processing.

Tip

If you are not using a parameter, leave the field blank.

2. Click **Save**.

Indicator or Parameter	Description	Options	Notes
I: Schedule Standard 1	Minimum Weekend: Minimum Schedules processing determination	Y, N	Select Y to enable the rule using a minimum number of weekend schedules in a schedule period. Works with parameter Schedule Standard Integer 2.
I: Schedule Standard 2	Minimum Weekend: Minimum Weekends processing determination	Y, N	Select Y to enable the rule using a minimum number of weekends. Works with indicator Schedule Standard 3.
I: Schedule Standard 3	Qualifying Weekend determination	B, C, L, N	<p>These values define a qualifying weekend and determine whether an employee meets the minimum number of weekends.</p> <div data-bbox="862 1003 1401 1203" style="border: 1px solid blue; border-radius: 10px; padding: 10px;"> <p>Note</p> <p>See the Qualifying Weekend Determination (on page 23) section that follows this table.</p> </div>
P: Schedule Standard Alpha 1	Weekend Schedule Determination	H, L, P, S or any combination (such as, HS or PS)	<p>These values determine which schedules are considered weekend schedules.</p> <div data-bbox="862 1318 1401 1518" style="border: 1px solid blue; border-radius: 10px; padding: 10px;"> <p>Note</p> <p>See the Weekend Schedule Determination (on page 24) section that follows this table.</p> </div>
P: Schedule Standard DOW 1	Weekend Start Day of Week	Any day of the week	Select the day that your weekend begins.

Indicator or Parameter	Description	Options	Notes
P: Schedule Standard DOW 2	Weekend End Day of Week	Any day of the week	Select the day that your weekend ends.
P: Schedule Standard Hour 1	Minimum Hours Overlap	Any numeric value	The minimum number of hours a schedule has to overlap a weekend day for it to count toward the rule.
P: Schedule Standard Hour 2	Minimum Schedule Length	Any numeric value	The minimum length that a schedule needs to be for it to count toward the rule.
P: Schedule Standard Integer 1	Minimum Weekends in Schedule Period	Any numeric value	The minimum number of weekends in a schedule period that need to have schedules in order to satisfy the rule.
P: Schedule Standard Integer 2	Minimum Weekend Schedules in Schedule Period	Any numeric value	The minimum number of weekend schedules needed in a schedule period in order to satisfy the rule. Works with indicator Schedule Standard 1.
P: Schedule Standard Integer 3	Minimum Weekends Shifts in a Weekend Period	Any numeric value	The minimum number of weekend shifts needed in a weekend in order to satisfy the rule. Works with indicator Schedule Standard 3.
P: Schedule Standard Time 1	Weekend Start Time	Any time of day, in 24-hour format	The time that your weekend begins.
P: Schedule Standard Time 2	Weekend End Time	Any time of day, in 24-hour format	The time that your weekend ends.

Indicator or Parameter	Description	Options	Notes
P: Schedule Standard Percent 1	Minimum Percentage Overlap	Any numeric value 1 - 100	The percentage that a schedule has to overlap a weekend day for it to count toward the rule.

Qualifying Weekend Determination

This section helps you understand the indicator Schedule Standard 3, "Qualifying Weekend Determination." This indicator determines whether an employee's weekend schedules qualify in order to satisfy the rule.

The options for this indicator are: B, C, L, and N. This indicator works with parameters Schedule Standard Integer 1 and Schedule Standard Integer 3.

Indicator Option	Definition	See Example #
B	Qualifying Weekends are defined by the Consecutive Same Shifts method	1
C	Qualifying Weekends are defined by the Consecutive Days method	2
L	Qualifying Weekends are defined by the Same Shift method	3
N	Qualifying Weekends are defined by the Number of Qualifying Weekend Schedules method	4

Example

Weekend = 00:00 Saturday to 23:59 Sunday

Parameter Schedule Standard Integer 1, "Minimum Weekends in Schedule Period" = 2

Parameter Schedule Standard Integer 3, "Minimum Weekend Shifts in a Weekend Period" = 2

Activity Codes used in examples: 0700-8 (07:00 for 8 hours, DAY) and 1500-8 (15:00 for 8 hours, EVE)

Schedule Period = 4 weeks (four sets of Saturdays and Sundays are used in the tables)

Qualifying schedules are in **bold**.

- Consecutive Same Shifts method** - consecutive days and same shifts (Day, Eve, Night) for the weekend

Saturday1	Sunday1	Sat2	Sun2	Sat3	Sun3	Sat4	Sun4	Qualified?
0700-8	0700-8			0700-8	0700-8			Yes

Saturday1	Sunday1	Sat2	Sun2	Sat3	Sun3	Sat4	Sun4	Qualified?
1500-8		0700-8	0700-8		1500-8	0700-8	0700-8	Yes
0700-8	1500-8			0700-8	0700-8	1500-8	1500-8	Yes
0700-8	0700-8	0700-8		0700-8		0700-8	1500-8	No

2. **Consecutive Days method** - consecutive days and any shifts for the weekend

Saturday1	Sunday1	Sat2	Sun2	Sat3	Sun3	Sat4	Sun4	Qualified?
0700-8	0700-8			0700-8	1500-8			Yes
1500-8		0700-8	1500-8		0700-8	1500-8	0700-8	Yes
	1500-8	0700-8		0700-8	0700-8	1500-8		No

3. **Same Shift method** - any days and same shifts for the weekend

Saturday1	Sunday1	Sat2	Sun2	Sat3	Sun3	Sat4	Sun4	Qualified?
0700-8	0700-8			0700-8	0700-8			Yes
0700-8		0700-8	0700-8	1500-8	1500-8		0700-8	Yes
	0700-8	0700-8	1500-8	0700-8	0700-8	0700-8		No

4. **Number of Qualifying Weekend Schedules method** - any days and any shifts for the weekend

Saturday1	Sunday1	Sat2	Sun2	Sat3	Sun3	Sat4	Sun4	Qualified?
0700-8	1500-8			0700-8	0700-8			Yes
	1500-8	1500-8	0700-8	0700-8		0700-8	0700-8	Yes
	0700-8	1500-8		1500-8	0700-8		1500-8	No

Weekend Schedule Determination

This section helps you understand the parameter Schedule Standard Alpha 1, "Weekend Schedule Determination." This parameter defines exactly what you consider a weekend schedule to be.

The options for this parameter are: H, L, P, S, and any combination of these. To combine determination methods, enter the letter combination in the Schedule Standard Alpha 1 field without spaces or punctuation, such as HS or PS.

Parameter Option	Definition	Works With	See Example #
H	Minimum Hours Overlap	P: Schedule Standard Hour 1 and day & time parameters	1

Parameter Option	Definition	Works With	See Example #
L	Minimum Schedule Length	P: Schedule Standard Hour 2 and day & time parameters	2
P	Minimum Percentage Overlap	P: Schedule Percentage Overlap and day & time parameters	3
S	Starts Within	P: Schedule Standard DOW 1 & 2 and Schedule Standard Time 1 & 2	4

Examples:

1. H = 4, weekend starts at 23:00 on Friday

Schedule = 19:00 for 8 hours	Overlaps by 4 hours	Qualifies
Schedule = 19:00 for 6 hours	Overlaps by 2 hours	Does not qualify

2. L = 8, schedule is on the weekend

Schedule = 08:00 for 8 hours	Qualifies
Schedule = 08:00 for 6 hours	Does not qualify

3. P = 50 (50%), weekend starts at 23:00 on Friday

Schedule = 19:00 for 8 hours	Overlaps by 50%	Qualifies
Schedule = 19:00 for 6 hours	Overlaps by 33%	Does not qualify

4. S, weekend starts at 23:00 on Friday and ends at 23:00 on Sunday

Schedule = 23:00 on Friday for 8 hours	Qualifies
Schedule = 19:00 on Friday for 8 hours	Does not qualify
Schedule = 23:00 on Sunday for 8 hours	Does not qualify
Schedule = 19:00 on Sunday for 8 hours	Qualifies

Create a Selection Style

Selection styles define the rules used in many scheduling features, including minimum staffing. Create a Schedule Period Validation selection style for your minimum staffing rules by completing the following steps.

1. Click **Configuration > Scheduling > Selection Styles**.
2. Under Actions, click **Add**.
3. Enter a Code and Description to identify the selection style.
4. In the Type field, select **Schedule Period Validation** and click **Save**.
5. Under Selection Style Sections, click **Qualification**.
6. Based on the types of minimum staffing rules you are creating, drag the appropriate selections from Available Rules to the Selected Rules area.
7. Click **Save**.

Example

If you are creating Minimum Days Off and Minimum Weekend staffing rules, drag both selections to the Selected Rules area.

Update the Staffing Configuration

After you have created a Schedule Period Validation selection style, add it to the appropriate Staffing Configurations by completing the following steps.

1. Click **Configuration > Scheduling > Staffing Configuration**.
2. Search for and open the appropriate staffing configurations.
The appropriate staffing configurations are for the organization units that you want to add the selection style to.
3. Click in the Schedule Period Validation Selection Style field and then select the appropriate selection style from the Field Look Up Values list.
4. Click **Save**.
5. If you opened more than one staffing configuration in step 2, click an arrow under Staffing Configuration Navigator to move to the next staffing configuration and repeat steps 3 and 4.

Employee Schedule Validation

About Employee Schedule Validation

The rules define the parameters of what you consider to be minimum staffing. Employee schedule validation is the process that determines whether employees are complying with or violating the rules. When employees and schedulers add and edit schedules, the validation occurs.

The employee schedule validation process uses a certain Selection Style to analyze the details of a schedule, compare the schedule to other schedules in the schedule period, and determine whether the minimum staffing rule has been met.

If a rule is violated, a message informs the employee or scheduler of the violation and corrections can be made. The messages appear on the employee self schedule screen and on the schedule screen.

Working with Employee Schedule Validation

The employee schedule validation process runs in the background checking for rule violations. The process does not run continuously, however. It runs in approximately one-minute intervals.

When the system determines that a minimum staffing rule is being violated, a message appears to inform you. This section of the guide provides information about where to view the messages and how to force an instant employee schedule validation.

Employee schedule validation violations appear on the following screens.

- Schedule screen
- Employee's Current Schedule screen
- Employee's Self Schedule screen
- Employee's Monthly View screen

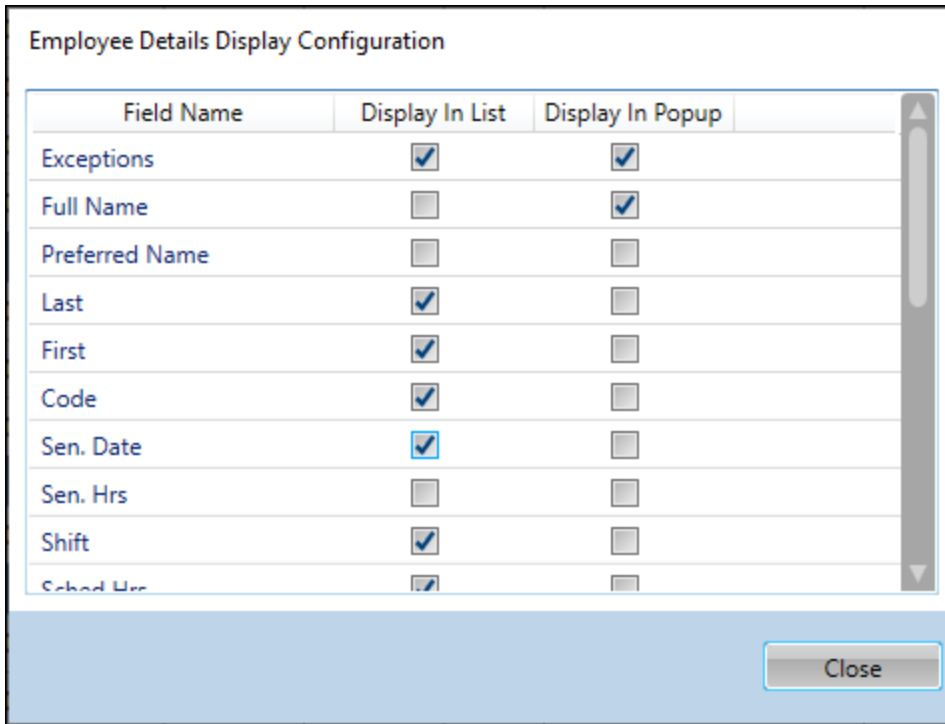
Schedule Screen

On the schedule screen, violations appear as an exclamation point icon  in the Exceptions column.

If you do not see the Exceptions column, use the Show/Hide Details option to display it. Complete the following steps.

1. In the Employee Information area, right-click and select the **Show/Hide Details** option.

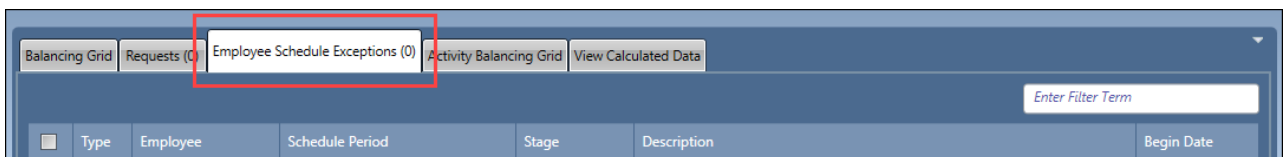
The following dialog box appears.



2. For the Exceptions field, select **Display In List** and/or **Display In Popup**.
3. When finished, click **Close** to save the selections.
4. If needed, drag the column header left or right to position the column in the appropriate spot.


View All Violations (Exceptions)

- Click the **Employee Schedule Exceptions** tab.



- The total number of exceptions appears in parentheses.
- A list appears with the details of the exceptions, such as employee information and the type of violation.

View an Employee's Violations (Exceptions)

- Click  in the appropriate employee's row.
 - The employee's violations appear on the Employee Schedule Exceptions tab.
 - The employee's name appears in the filter field. View all employee exceptions by clicking **X** in the filter field.

Highlight Affected Period

- To view the period that the violation affects, click a box on the Employee Schedule Exceptions tab.
 - The affected period, such as a week or entire the schedule period, appears in yellow in the schedule grid.

Validate Employee Schedule

After making changes, such as adding, editing, and deleting schedules, the employee validation process determines if any minimum staffing rules are violated. However, instead of waiting for the next instance of the process to run, you can force the validation to occur immediately.

- Right-click on the row for the employee you are validating and click **Validate Employee Schedule**.
 - If a violation occurs, the Exceptions column and the Employee Schedule Exceptions tab are updated.

Employee Current Schedule and Self Schedule Screens

On the employee's Current Schedule and Self Schedule screens, minimum staffing rule violations appear above the schedule grid. Included in the message is the number of scheduled and required schedules.

Validate Me Now

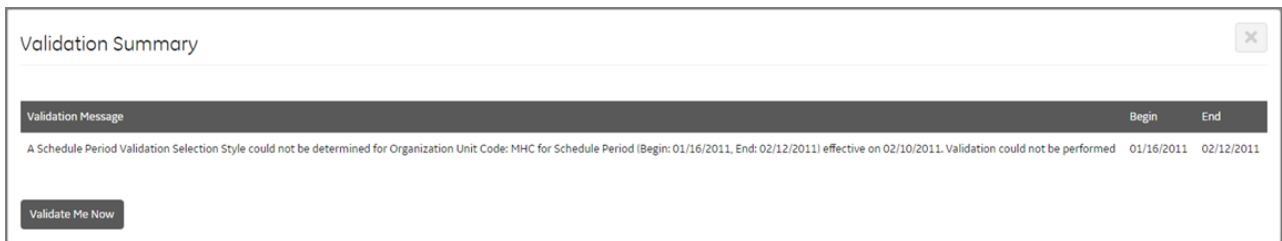
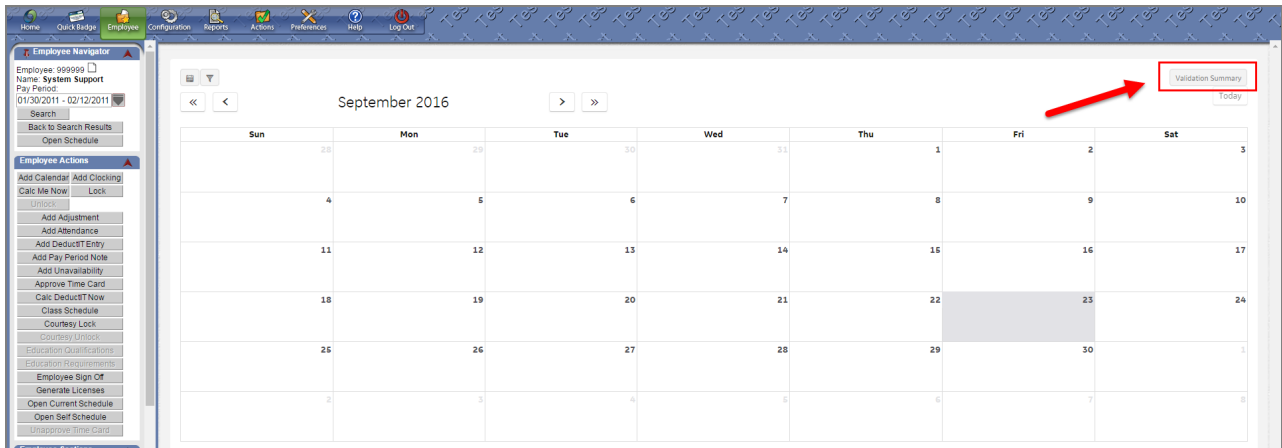
After making changes on the self schedule screen, the employee validation process determines if any minimum staffing rules are violated. However, instead of waiting for the next instance of the process to run, you can force the validation to occur immediately.

- Under Self Scheduling Actions, click **Validate Me Now**.
- If a violation occurs, the appropriate message appears above the schedule grid.

Employee Monthly View Screen

On the employee's Monthly View screen, minimum staffing rule violations appear in the Validation Summary dialog.

- Click the **Validation Summary** button.
- Included in the message is the number of scheduled and required schedules.



Validate Me Now (monthly view)

After making changes on the Monthly View screen, the employee validation process determines if any minimum staffing rules are violated. However, instead of waiting for the next instance of the process to run, you can force the validation to occur immediately.

- Click the **Validation Summary** button and in the dialog that appears, click **Validate Me Now**.
- If a violation occurs, the appropriate message appears in the Validation Summary dialog.