GE Healthcare

Centricity™ ShiftSelect® v2017.1

Employee Guide

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Introduction

GE Healthcare has always focused on partnering with our clients to position them to achieve identified organizational goals and outcomes through creation of an effective staffing strategy infrastructure. We offer SaaS-based, participatory workforce management solutions that are delivered quickly and generate sustainable ROI. Our commitment has always been to continued improvement of our software to assist clients in achieving optimal outcomes.

About this Guide

This document is intended for staff using Centricity ShiftSelect® and contains instructions for all of the major functions an employee might perform within the solution. It begins with an overview of the software and provides step by step instructions on how to use the solution. If you come across a question that isn't answered in this guide, contact your Manager or Organization's Functional System/Application Administrator for help. A separate Administrator Guide is available for those responsible for managing Centricity ShiftSelect.

The best way to use this guide is to read all of the introductory material, which will familiarize you with important concepts and terms in Centricity ShiftSelect. The rest of the guide serves as a training manual on how to use the solution.

This guide can be printed out in its entirety, or click on any underlined links to go directly to the chapter or section containing specific information in which you are interested. This guide is also available to you under the program's Help menu header.

What is Centricity ShiftSelect?

Centricity ShiftSelect is a web-based application that matches qualified healthcare workers with available shifts. It provides centralized, facility-wide access to both scheduled and open shifts throughout the organization.

Features include:

- Intuitive, easy-to-use user Interface for all staffing and scheduling functions
- World class open shift management, including:
  - Skill-based matching of shifts to staff

- Multiple phase open shift posting

  Shifts posted in this way can be initially restricted to specific staff members by criteria such as home unit, status, and seniority

- Customized alerts for shift awards, edits and cancels, as well as staff ability to set notifications for preferred shifts

- Robust incentive management, including affinity-based ShiftRewards® program
- Basic credentialing and census based targets

Definitions

The following is a list and description of the terms used in Centricity ShiftSelect. Some of these terms may be familiar and some are specific to Centricity ShiftSelect. Read this entire section before moving on to the training section.

It is important to note that all data in this guide are fictitious, and the data values defined by your organization will be different than those shown here.

Current Experience

Users indicate their Current Experience levels when completing profiles and managers validate the accuracy of these selections when approving profiles. Current Experience is defined as the ability to perform the skill at this moment. It does not mean that the employee was able to perform this skill in the past.

Current Experience levels include:

- No experience
- Less than 1 year
- 1 year or greater

When a position is built requiring one or more skills, an employee must have experience for each required skill. Positions are generally built with the minimum skill level of less than 1 year of Current Experience, but this will vary based on the skill and the position being created.

Employee Profile

Employees must have an active Profile to view and request shifts. Profiles contain basic employee demographics and information about the employee's home unit, level of care, FTE status, skills, and current experience.

A Profile completed by an employee during enrollment is in pending status until it is activated by a Shift Administrator (generally, the manager of the employee submitting the Profile). Employees with active Profiles can view and request open shifts in any department for which they are

qualified (such as having the Skills in their profile that match those for the position used to post the shift).

Profile statuses include:

- Active
- Home Unit(s) Only

    The profile is active. Shift visibility is limited to the employee's home unit, as listed in the profile.

- View Only

    The profile is active. Employees can view all shifts for which they are qualified. Shifts cannot be requested.

- Inactive

    The profile is no longer active and the employee cannot sign in to view or request shifts.

Hospital/Facility

A hospital (or facility) is the highest-level physical location in the organization. A hospital in Centricity ShiftSelect can be an actual hospital or facility, a clinic, an outpatient center, a hospice, a section of a hospital, or even a group of buildings. A hospital will have many units (or departments) within it. Each shift is defined for a specific hospital and unit.

Position

Positions are used to schedule and post shifts. The concept of Positions is central to much of Centricity ShiftSelect's functionality.

Positions consist of the following components:

- Job title

    The primary job title associated with the shift being posted, such as an RN shift. The Position may also be offered to other job titles, such as an RN shift being offered to LPNs.

- Level of care

    The level of care associated with the shift being posted, such as a Med Surg RN.

- Differentiator descriptor

    A particular type of shift within a level of care requiring more specialized skills (example, a Med Surg – Chemo RN)

- Minimum skills and/or credentials required for staff to see the shift

    The minimum experiential skills a staff member must have in order to view and request, or be scheduled for, the shift (example, Med Surg).

- Non-required skills and/or credentials

  Skills and/or credentials that would help the resource awarding a shift to make a decision between two people both meeting the minimum requirements (differentiators for selection).

Once a Position has been defined, it can be used repeatedly to schedule and fill different shifts in various departments.

Job Title

A Job Title is a type of resource used to provide patient care and is used when creating and staffing shifts.

Examples of Job Titles include:

- RN, LPN, CNA, US
- Patient Care Tech, Surg Tech, Lab Tech, Pharm Tech
- CRNA, PA, Nurse Practitioner
- Paramedic
- Pharmacist

Level of Care

A Level of Care is a collection of similar departments. It is used, for example, during position setup and for reporting. Level of Care is one of the ways staff may view shifts they are qualified to request.

Examples of Levels of Care include:

- Maternal Child Health
- Surgical Services
- Med Surg
- Emergency Services
- Pharmacy Services

Shift Award

Shifts that have been requested by one or more individuals can be awarded to the employee deemed most appropriate by the Shift Administrator performing the award. Shifts can remain open to requests up to one hour before they begin (this setting is determined by the organization during implementation). Shifts can be awarded at any time after they open, but it is best to award all shifts prior to the time they close to new requests so that requestors are clear about what is expected of them and not confused or dissatisfied by shifts that remain unawarded.

Different actions take place when a shift is awarded, including:

- The person awarded is automatically removed from any other shifts with signup periods that overlap the time period of the awarded shift.
- An optional e-mail is sent to one or more of the following people: the employee who was awarded the shift, the manager of the employee awarded the shift, and/or the manager of the unit for which the shift was posted.

Shift

A Shift is a period of time to be worked on a specific unit/location and date and can be scheduled to, or requested by, staff with the required skills. Shifts are created using either default scheduling positions or open shift management templates. An example of a Shift is Med Surg RN, Unit 4E, General Hospital, from 07:00-19:00 on August 3, 2011, with $10.00 bonus.

Each Shift has a posted wage rate as defined by the organization. The minimum time period for a Shift is one hour. The maximum time period for a Shift is configurable. Typical Shift lengths are 8 or 12 hours. On call Shifts cannot be set for more than 24 hours at a time.

Many people can request a Shift, but only one person can be awarded the Shift. If more than one person is needed for a single unit/location at the same time, identical Shifts can be created when posting the open needs.

Shifts can also be posted to span two or more signup phases. The first phase can be limited to certain staff members from a specific home unit or facility, or who have a specific job title, level of care, seniority, or employee status. If no one bids on the phase, Shifts can automatically open subsequent phases to a broader group of staff members. Single and multiphase Shifts are created using shift templates containing all of the information needed to post these Shifts.

Signup Period

The Signup Period is the time interval during which employees can request a posted shift. At the end of the Signup Period, the shift is:

- Awarded to a single employee,
- Automatically moved to a subsequent phase, or
- Closed.

Note: A multiphase shift may have several Signup Periods before it is closed.
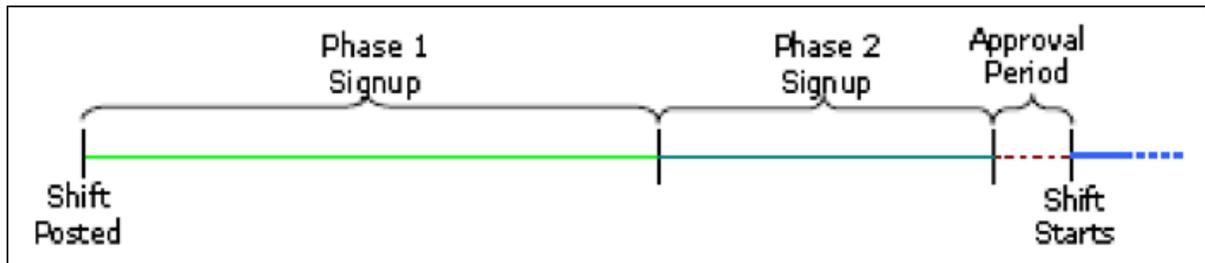
Note:

An administrator with the appropriate permissions can post shifts and set a future signup start date and time. Shifts posted with a future signup start date will automatically open to requests on that date and time. Shifts posted without a future signup start date and time will automatically open immediately upon posting.

Tip: A Signup Period cannot start before the current date and time and can last for up to 90 days. The Signup Period must end at least one hour before the actual shift start time.

A Signup Period (or phase) has one of three following statuses.

- Pending

  The shift and Signup Period have been defined but the Signup Period has not yet started.

- Active

  The Signup Period is in progress and employees are able to view and request the shift.

- Closed

  The Signup Period has ended and staff can no longer view or request the shift.

Employees submitting requests for a shift can retract their requests until the Signup Period closes.

Skills and Credentials

Skills

Skills are experiential levels of ability, as defined by your organization. Skills are a combination of the minimum requirements needed to view and request shifts and those that might differentiate one employee from another at the time of shift award. Skills can range from broad to specific, depending on the level of detail defined within the organization.

Examples of Skills include:

- Med Surg
- Critical Care
- Telemetry
- ACLS

- Eligible for OR call
- Scrub
- Circulate

Employees can only view and request a shift when they have the minimum Skills defined for the position used to post the shift. For this reason, it is important that Skills be defined carefully during initial setup.

The following image shows how the relationship between the Skills defined for a position and those saved in the employee staff profile determines the ability for employees to see qualified shifts.
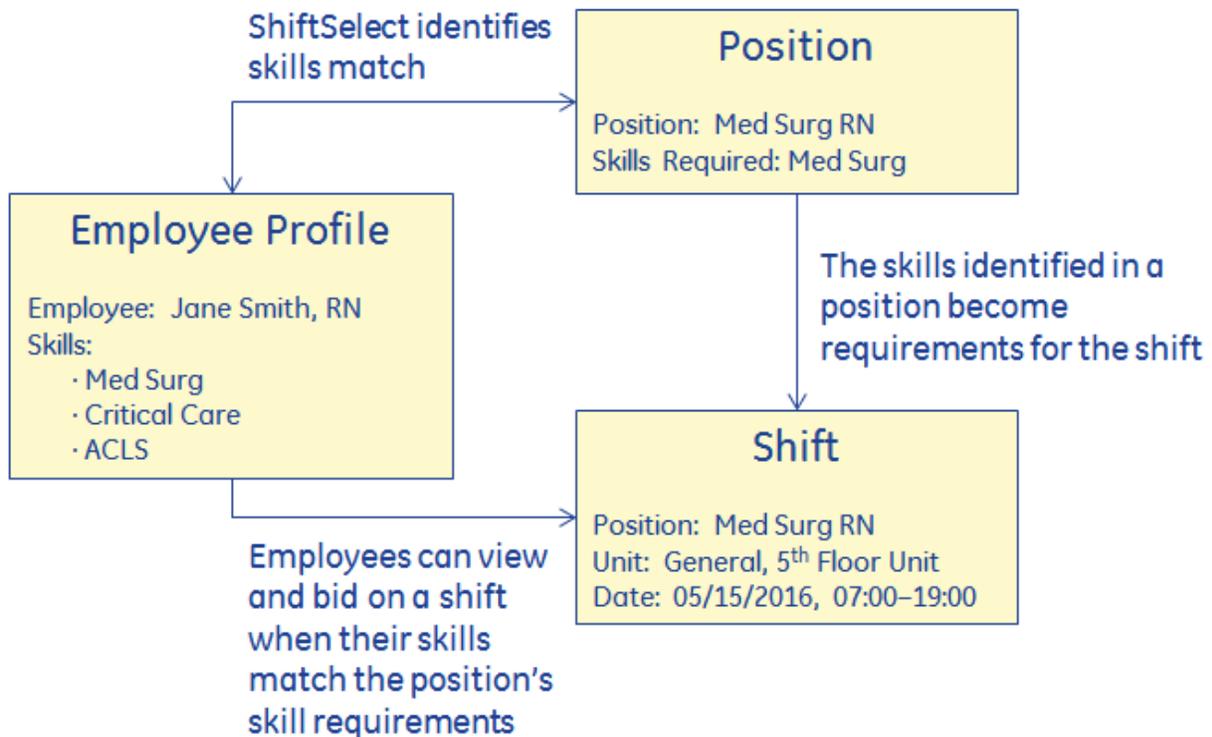
Credentials

Credentials are qualifications that prove authentication for a defined attribute. In Centricity ShiftSelect, credentials have an expiration date, may or may not stop the ability of an employee to be scheduled beyond that date, and may or may not also be defined as a skill. Some examples of credentials might be:

- RN Licensure
- Critical Care Competency
- ACLS
- ANCC Certification.

Like skills, a credential may be valued as a minimum requirement for a position, which will allow only employees with that credential as current in their profiles to see shifts posted with that position.

Unit/Location

A Unit/Location is a unit or department within a facility and is used during position setup, for filtering shift lists based on an individual's home department or Unit/Location of the shift, and for reporting. Each facility can contain one or many Unit/Locations and these are generally associated with a specific cost center. Staff member profiles use Unit/Locations to indicate their home unit, but this information does not automatically exclude the individual from requesting shifts.

Examples of Unit/Locations include:

- Labor and Delivery
- Operating Room
- 4 North Medical
- Emergency Department
- Pharmacy

Getting Started

This section helps you learn how to enroll (create a profile) and provides information about how to use Centricity ShiftSelect on a daily basis. Although many of the functions in this section are completed when you first begin using Centricity ShiftSelect and as you are just getting started, you might need to refer back to this section if you haven't logged in for a while or want to make profile or password changes.

Enroll in Centricity ShiftSelect

A system administrator will provide you with the URL to type in to the address field on your internet browser. In some instances, there may be a link from your facility intranet that you can use as well. When you have successfully reached the Centricity ShiftSelect site, you can save the site to your favorites so it will not be necessary to retype the address each time you want to sign in to Centricity ShiftSelect.

To enroll in Centricity ShiftSelect, complete the following steps.

1. Launch the web browser and enter the address of your Centricity ShiftSelect site (or click on the intranet link provided by your facility).

Note: Do not use "www" in the address.

The login window appears.

2. Since you do not have an account yet, click **Create One Now**.

The first Profile screen appears.

Tip: Enrollment takes only a few minutes, but make sure you fill in all the required fields, which are marked with an asterisk (*).

3. Enter information in all the fields in Step 1 of the profile creation.

- Employee ID - given to you by your organization)
- Username - must be one word with no spaces or any of the following special characters: # & % : +
- Password (entered twice) - minimum number of characters is defined by your organization; password is case sensitive, only one word with no spaces or any of the following characters: # & % : +
- Security Question - select one from the list and enter your answer

4. Click **Continue**.

The next step in profile creation is entry of data into the Personal Demographics section.

1. Enter information in all fields.

Tip: Although only the First and Last name are required it will be beneficial for you to complete all fields.

- First Name, Middle Initial, and Last Name
- Mailing Address, City, State, and Zip Code
- Primary and Secondary phone number, and whether these phones accept text messages
- Main and Second email address

Note: Email addresses allow you to be notified about shifts awarded and shifts available.

2. Select your preferred methods of notification for **Last Minute Availability** (by phone, text, and email).

3. Enter your Position Details.

- The Hospital/Facility you work in
- Home Unit/department
- Primary Job Title
- Level of Care
- Hire Date (format mm/dd/yyyy)
- Base Pay Rate
- Employee Status
- FTE Status (such as 1.0, 0.9, and 0.5)
- Enter any information you feel necessary in the Comments field

4. Click **Continue**.

The next in profile creation is entering your current experience.

1. For each skill, select the proper experience level (**No Experience**, **Less than 1 year**, or **1 year or greater**).

Note: Only select skills that are current and can be adequately performed by you at this point in time.

2. Click **Continue**.

3. For each credential, enter the appropriate information for the criteria that apply to you.

4. When you are finished, click **Submit**.

5. On the Thank You dialog, click **Done.**

Signing In

Before you can sign in to Centricity ShiftSelect, request the Centricity ShiftSelect URL and an administrative user name and password from the appropriate person.

To sign in, complete the following steps.

1. Launch Internet Explorer from the Start menu.

2. In the browser's address bar, enter the URL.

    The sign-in window appears.

3. Enter your user name and password and then click **Sign In**.

Tip: The **User Name** and **Password** fields are case sensitive. If you have trouble signing in, make sure Caps Lock is turned off on your keyboard.

Overview of the Home Page

After signing in, the Home page appears. The Home page consists of two main areas: the top menu bar and the main contents.

Menu Bar

The menu bar (**a.** in the previous screen shot) at the top of the screen allows access to the various areas in Centricity ShiftSelect and consists of the following options.

- Home

    The Employee Home Page serves as the first point of contact for a logged in user. Sections contain information of interest, such as announcements from your manager and what shifts can be viewed and requested. Sections can be collapsed or expanded using the arrows next to each.

- My Calendar

    The My Calendar tab enables employees to view and request shifts, enter requests for time off, and manage personal time via a set of configurable display options.

- Unit Schedule

    Employee view of the unit schedule is governed by a permission set at the unit/department level. If this permission is turned on for your department, you will see a tab labeled Unit Schedule. Generally, the Unit Schedule is printed and available for staff members to view at any time. The date and time the schedule printed displays on the screen.

- My Rewards

    View your rewards both pending and past transactions. This choice is available to you only if your organization is using ShiftRewards®.

- My Profile

    Click the My Profile tab to change your address, phone number, email address, or password.

- Search

    Use search features to find shifts by entering a shift ID number, a specific date, or a day of the week. Employees can identify and save information about preferred shifts and can receive notifications when shifts matching their preferences have been posted.

- Help

    Contains links for additional support. A copy of this guide is available here, too.

- Logout

    Logout and exit Centricity ShiftSelect.

Note: Do not use the X in your browser to close Centricity ShiftSelect. This could cause an incomplete logout.

Page Content

The following areas make up the Home page (**b.** through **e.** in the previous screen shot).

b. My Shift Summary

View summaries of different types of shifts for your unit/location.

c. My Commitments

Track the list of hours made toward any commitments that have been set up for you in Centricity ShiftSelect.

d. My Calendar

Select to view or print your calendar for a specified date.

e. Announcements

Read information posted by the Centricity ShiftSelect Application Administrator and/or department manager.

Using Centricity ShiftSelect for Daily Activities

This section describes activities that you might do on a regular, day-to-day basis, such as requesting shifts, checking the calendar, or searching for shifts that suit your needs.

View the My Calendar Page

Your calendar allows you to see all shifts for a selected timeframe, which can be one month, one week, one day, or a list. You can see what days you are scheduled to work, which shifts have been requested, and shifts that are open and may be requested. There are a number of display options that allow you to customize your view. You can print the calendar at any time or save it to a file on your computer. Setting the calendar options will determine how the printed calendar appears. If your organization allows you to, you can also enter requests for time off (Holiday, PTO, Vacation, etc.) and alert your manager that you could be available to come in to work if needed (call if needed).

To view your calendar, click the **My Calendar** link.

Your Calendar displays with a view of the current month of shifts. Each shift listed is color-coded to represent the following:

- Dark blue indicates a scheduled shift.
- Light blue indicates an awarded shift.
- Yellow indicates an on-call shift.
- Red indicates a Non-duty shift.
- Sage green indicates that the shift was requested, but has not yet been awarded.
- Bright green indicates a shift you are qualified for, but have not yet requested.
- Purple indicates a personal event you have entered on your calendar.
- White indicates a shift you have offered as available to work if needed.

Your Calendar shows the following for each day:

- The times of the shifts (such as 0700-1900 and 1500-2300).
- The department where the shift will be worked.

Calendar Display Options

Calendar display options allow you to control what shows on the calendar at any given time. The calendar is pre-set with default display options. Additional items can be selected to show a customized view of the information on the screen.
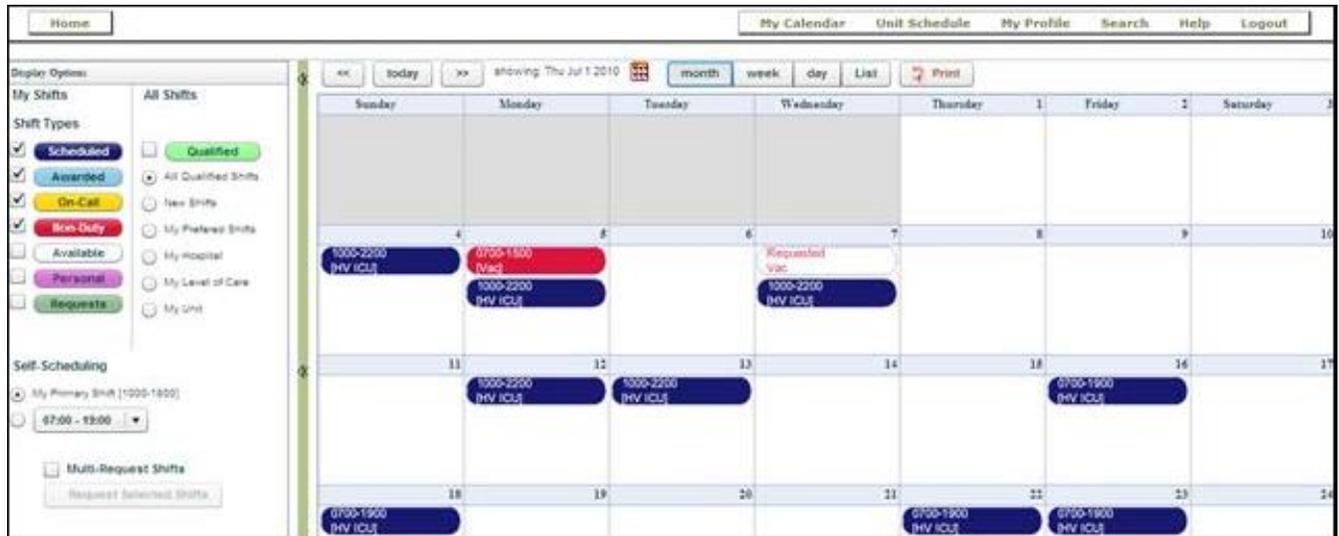
The Calendar Display Options allow you to choose:

- My Shifts: Shift Types

  - Scheduled - shifts that you have been scheduled to work (these may have been either manager or self-scheduled)
  - Awarded - open working shifts you requested and have been granted
  - On Call - shifts that you have been scheduled as on call (these may have been either manager or self-scheduled), as well as awarded on-call shifts
  - Non Duty - shifts that you have been scheduled to not work (these may have been either manager scheduled or non-duty requested and approved or denied
  - Available - specific shifts for which you have made yourself available (in the absence of a manager posted shift)
  - Personal - specific personal events that you have logged on their calendar
  - Requests - shifts that you have requested

- All Shifts

  - Qualified - Selecting this box displays all shifts posted as Open that you are qualified to view and request

    Viewable shifts on the list are governed by which radio button is selected.

  - All Qualified Shifts - every open shift you are qualified to view and request
  - New Shifts - every open shift you are qualified to view and request posted since last sign-in session
  - My Preferred Shifts - open shifts meeting the search criteria set by you (under Quick Search)

- My Hospital - qualified open shifts that match your home hospital
- My Level of Care - qualified open shifts that match your level of care
- My Unit - qualified open shifts that match your home department
- Self-Scheduling

  - My Primary Shift - filters self-scheduling shifts by your primary shift (as defined in the profile)

    Posted self-schedule shifts appear for the primary shift assigned to the user. If there is no primary shift assigned or no self-schedule shifts posted for the primary shift, non-primary shift self-schedule shifts will appear.
  - Shift Times - filters self-scheduling shifts by the times of other posted self-scheduling shifts
- Multi-Request Shifts

  - The Multi-Request Shifts option enables you to request more than one shift at a time. When the option is selected, the Request Selected Shifts button becomes visible, enabling you to request all selected shifts at one time.

Navigating the Calendar

Use the following information to help you understand how to use the My Calendar page.

- Use the date selectors to move to a specific date: **today** and 🗓️
- Use **<<** and **>>** to move to the previous or next day, week, or month.
- Use the calendar view buttons to display all the shifts in one **month**, **week**, **day**, or in a **list**.

Tip: The one month view is the default view. It may be helpful to use the one week view to see all the shifts available based on the display options you set.

- Hover over any shift to view a ToolTip with the details for that shift.

- Double-click any shift to display more details about the shift. Click **Close** when finished.

  The following screen shot is an example of the shift details of an awarded shift.

- To see more of the calendar, collapse the Display Options panel by clicking the arrows (⏮) on the green dividing bar between the calendar and the Display Options. Click them again to expand the Display Options panel.

Print the Calendar

What appears on the screen is what you will see when the calendar is printed, so be sure to set the display options before printing.

To print the calendar page, complete the following steps.

1. Set all the display options according to what you want to see on your printed calendar page.
2. Set the calendar date and select the view to be printed (month/week/day).
3. When all display options and view settings are final, click **Print**.

   The PDF Print Options dialog appears.
4. Make any needed changes and then click **Generate PDF**.
5. After opening the PDF, you can print it and save the file to your local hard drive

Tip: If you get a download blocker message, click the message bar and then click Download File to allow the file to download.

Use the Quick Search

The Quick Search section is located below the Display Options and allows you to search for specific shifts and set shift preferences. You can also set email or text notifications to be sent automatically when shifts matching your preferences are posted.

To search shifts and set preferences, complete the following steps.

1. Click the **Quick Search** bar under Display Options.

    The Quick Search options appear.

2. Select the desired search options.
3. Click **Search** to search based on your settings.

View My Commitments

The My Commitments section is located below the Quick Search section and allows you to view and track the awarded hours against any requirements set for that employee status.

- To view and track commitments, click the **My Commitments** bar under the Quick Search bar.

    The My Commitments panel appears.

Display Options		
Quick Search		
My Commitments		
Commitment	**Awarded**	**Required**
Total Work - Regul	0	24

Request an Open Shift from My Calendar

Qualified shifts that an employee can view and request are accessed from Shift Lists, My Calendar, Search, or Quick Search.To search for a shift on a specific date, see Using Search Features (on page 35).

To request an open shift from the My Calendar, complete the following steps.

1. Click **My Calendar** from the menu bar.

2. Select the **Qualified** option and then any other options in the Display Options panel to display open shifts for which you qualify.

    Your calendar populates with the shifts available for you to request.

3. Double-click the shift you would like to request.

    The shift detail screen appears for the selected shift.

4. If you believe this shift would result in overtime, select **Check this box if award of this shift will put you in overtime**.

5. If desired, in the **My Comments** box, enter any comments that you would like your supervisor to be aware of when considering your request.

6. Click **Request this Shift**.

7. Click **OK** in the confirmation message.

8. To confirm your request, click **Requests** in the My Shifts display option panel and verify your request is on the calendar.

Request a Partial Open Shift from My Calendar

If your organization is set up to allow it, certain shifts can be requested as partial shifts, meaning a request can be entered to work a certain number of hours beginning at the start of the shift or ending at the end of the shift.

Note: You must request part of a shift that either begins at the posted start time or the posted end time. Requesting a partial shift in the middle of a shift is not permitted.

To request a partial shift, complete the following steps.

1. Click **My Calendar** from the menu bar.

2. Select the **Qualified** option and then any other options in the Display Options panel to display open shifts for which you qualify.

    Your calendar populates with the shifts available for you to request.

3. Double-click the shift you would like to request.

    The shift detail screen appears for the selected shift.

4. If you believe this shift would result in overtime, select **Check this box if award of this shift will put you in overtime**.

5. If desired, in the **My Comments** box, enter any comments that you would like your supervisor to be aware of when considering your request.

6. In the Partial Request line, select the type and length of the partial shift from the drop-down menus.

    *   I want to work at: Beginning or End
    *   I want to work for: several choices of shift lengths, such 4 hours, 5 hours, etc.

Note: The number of hours available in the menu are determined by your organization.

7. Click **Request Part of this Shift**.

8. Click **OK** in the confirmation message.

Request Multiple Shifts from My Calendar

To request a partial shift, complete the following steps.

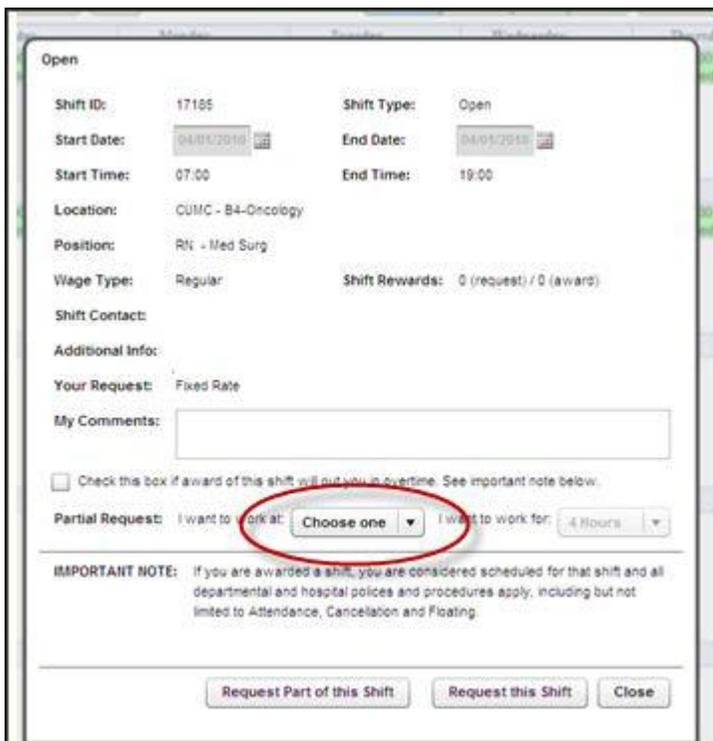1. Click **My Calendar** from the menu bar.

2. Select the **Qualified** option and then any other options in the Display Options panel to display open shifts for which you qualify.

   Your calendar populates with the shifts available for you to request.

3. In the Display Options, select the **Multi-Request Shifts** option.

4. Click each shift you would like to request.

   The shifts change from Qualified to Multi-Req.

5. After selecting all the shifts you would like to request, click **Request Selected Shifts**.

   The shifts now appear as requested.

6. Click **OK** in the confirmation message.

Request a Self-Scheduling Shift from My Calendar

To request a self-scheduling shift, complete the following steps.

Note: You will not be able to self-schedule more shifts than the maximum weekly hours determined by your manager. If you try to schedule more than the maximum hours, you will receive an error message.

1. Click **My Calendar** from the menu bar.

2. Posted self-schedule shifts appear for the primary shift assigned to you.

   If there is no primary shift assigned, or no self-schedule shifts posted for the primary shift, non-primary shift self-schedule shifts will appear.

3. Click the shift you want to self-schedule.

4. To select multiple self-schedule shifts:

   a. In the Display Options, select the **Multi-Request Shifts** option.
   b. Click each shift you would like to request.

   The shifts change from Needed to Self Scheduled.

5. After selecting all the shifts you would like to self-schedule, click **Request Selected Shifts**.

   The shifts now appear as self-scheduled.

6. Click **OK** in the confirmation message.

Request an Open Shift from My Shift Summary

The My Shift Summary section of the Home page consists of a table with information about shifts broken down into multiple categories and the number of shifts that fall into each category. When clicked, the links take you to a list of the shifts in that category.

To request an open shift from the My Shift Summary, complete the following steps.

1. From the Home page, click one of the links in My Shift Summary area.

▼ My Shift Summary	
Awarded Shifts . . .	0
Requested Shifts . . .	0
Shifts Not Awarded . . .	0
All Shifts . . .	294
New Shifts . . .	0
In my level of care . . .	274
In my hospital . . .	0
In my unit(s) . . .	0
All Scheduled Shifts . . .	0
Productive . . .	0
On Call . . .	0
Non-Duty . . .	0

- Awarded Shifts - shifts awarded to you
- Requested Shifts - shifts you have requested
- Shifts Not Awarded - shifts you requested that were awarded to someone else
- All Shifts - all open shifts for which you qualify
- New Shifts - any shifts posted since your last sign in session
- In my level of care - open shifts for which you qualify that match the level of care listed in your profile
- In my hospital - open shifts for which you qualify that match the hospital/facility listed in your profile
- In my unit - open shifts for which you qualify that match the unit/department listed in your profile
- All Scheduled Shifts - all shifts that are scheduled for me in the current scheduling period
- Productive - all scheduled working shifts
- On Call - scheduled shifts that are on-call
- Non-Duty - scheduled shifts that are non-working shifts, such as PTO and FMLA
- Self-Scheduling Shifts - open shifts that are available for me to self-schedule

After clicking, the appropriate page appears with a list of shifts.

Shift ID	Shift Type/ Subtype	Position/ Hospital	Level of Care/ Location	Shift Day/Date Time Duration	(Needs)/ Requests	Wage	Points Bid/ Award
131908	Open	RN - LPN - Western Medical	OB - Women's Health	01/24/10 Sun 07:00 - 19:00 [12 Hrs]	0	Regular	0 / 0
131909	Open	RN - LPN - Western Medical	OB - Women's Health	01/24/10 Sun 07:00 - 19:00 [12 Hrs]	0	Regular	0 / 0
131910	Open	RN - LPN - Western Medical	OB - Women's Health	01/24/10 Sun 07:00 - 19:00 [12 Hrs]	0	Regular	0 / 0
131911	Open	RN - LPN - Western Medical	OB - Women's Health	01/24/10 Sun 07:00 - 19:00 [12 Hrs]	0	Regular	0 / 0
131912	Open	RN - LPN - Western Medical	OB - Women's Health	01/24/10 Sun 07:00 - 19:00 [12 Hrs]	0	Regular	0 / 0
131913	Open	RN - LPN - Western Medical	OB - Women's Health	01/24/10 Sun 07:00 - 19:00 [12 Hrs]	0	Regular	0 / 0
131728	Open	RN - LPN - Western Medical	OB - Women's Health	01/25/10 Mon 07:00 - 19:00 [12 Hrs]	0	Regular	0 / 0
131729	Open	RN - LPN - Western Medical	OB - Women's Health	01/25/10 Mon 07:00 - 19:00 [12 Hrs]	0	Regular	0 / 0
131730	Open	RN - LPN - Western Medical	OB - Women's Health	01/25/10 Mon 07:00 - 19:00 [12 Hrs]	0	Regular	0 / 0
131731	Open	RN - LPN -	OB - Women's Health	01/25/10 Mon 07:00 - 19:00 [12	0	Regular	0 / 0

Shifts in My Unit [Showing 1 - 50 of 240 shifts]

1 2 3 4 5 6 7 8 9 10

Tip: Click a column header to resort the list based on that column.

- Shift ID - each time a shift is posted, it is assigned a unique identifier

Tip: The Shift ID can be used when searching for specific shifts or when troubleshooting issues.

- Shift Type/Subtype - denotes the category of the shift being viewed (open, scheduled, on call, etc.) and any subtype associated to the shift (charge, float, etc.)
- Position/Hospital - denotes the position to be filled and the hospital for which the shift has been posted
- Level of Care/Location - denotes the service and department for which the shift has been posted
- Shift Day/Date Time Duration - denotes the day of the week, date and time of the shift, and total hours for the shift
- (Needs) Requests - denotes the number of requests already on the shift

Note: You can see how many users, but not who, requested the shift. "(Needs)" represents self-scheduled shifts and "Requests" represent open shifts.

- Wage - denotes how the shift will be paid

Note: Regular (base) rate generally means employee base rate plus any applicable differentials. Any incentives offered for the shift will be displayed here.

- Points Bid/Award - if the organization is using ShiftReward points, the number of points available for shift request/award

2. Double-click any shift to request that shift.

   The request dialog appears.

3. Click **Request this Shift**.

4. Click **OK** in the confirmation message.

   The shift appears as requested and the number in the Requests column is updated.

Tip: This procedure can be repeated until all desired shifts are requested.

   •

Request a Self-Schedule Shift from My Shift Summary

To self-schedule a shift from the My Shift Summary, complete the following steps.

1. From the Home page, click the Self-Scheduling Shifts in the My Shift Summary.

   A list of the open self-schedule shifts appears.

Shift ID	Shift Type/ Subtype	Position/ Hospital	Level of Care/ Location	Shift Day/Date Time Duration	(Needs)/ Requests	Wage
14417	Open Self-Scheduled	RN - LPN - SRMC	Med Surg - HV MS	12/18/09 Fri 07:00 - 15:00 [8 Hrs]	2/0	Regular
14333	Open Self-Scheduled	RN - LPN - SRMC	Med Surg - HV MS	12/18/09 Fri 07:00 - 15:00 [8 Hrs]	2/0	Regular
14249	Open Self-Scheduled	RN - LPN - SRMC	Med Surg - HV MS	12/18/09 Fri 07:00 - 15:00 [8 Hrs]	2/0	Regular
14415	Open Self-Scheduled	RN - LPN - SRMC	Med Surg - HV MS	12/18/09 Fri 15:00 - 23:00 [8 Hrs]	2/0	Regular

2. Double-click the desired shift.

3. Click **Request this Shift**.

4. Click **OK** in the confirmation message.

Add an Employee-Initiated Event

Three types of shifts can be initiated by employees: personal time, available time, and requests for non-duty time off. The process for entering these events is similar to requesting an open shift except you must click in a blank portion of a calendar page date. The ability to enter one or more types of employee-initiated events is determined by your organization.

Place a Non-Duty Request

Employees can submit a wide variety of client-defined types of time off for approval. Some of these may be usual occurrences (such as PTO, vacation, and holiday) and some may be more specific to an organization or department (such as education, seminar, stay late, swap request, etc.). Be sure to have the Non-Duty display option set so that you can see any non-duty requests that you have entered (or those that have been approved).

1. Click **My Calendar** from the menu bar.

2. Double-click the blank calendar day for which entry will be made.

   The Request Detail dialog appears.

Request Detail

○ Personal

○ Available   Balance Last Updated: 05/10/2012 21:22

● Non-Duty   [Select Shift Subtype ▼]   PTO Balance: 147 Hrs

Helpful Hints: Choose Dates: ◄   November   2012   ►

Hold [Ctrl], then click to select multiple
dates in the calendar.To select dates   S   M   T   W   T   F   S
spanning multiple months simply select the   1   2   3
dates in the month, click the arrow to   4   5   6   7   8   **9** 10
advance to the next month and then hold   11 12 13 **14** 15 16 17
[Ctrl] key and click the desired dates in the   18 19 20 21 22 23 24
month.   25 26 27 28 29 30

Start Time: [1000]   (hhmm)   End Time: [2200]   (hhmm)

Comments: [   ]

                                                         [Request]   [Cancel]

3. Select the type of request from the available choices.

Note: The types of requests that can be made are determined by your organization.

4. Choose the date or dates for which you would like to make the request (hold down the CTRL key to select multiple dates).

Tip: Check your PTO balance to ensure you have enough time to take.

5. Validate that the times shown in the Start Time and End Time fields are correct for what you are requesting, add any desired comments, and then click **Request**.

6. In the Confirm Request dialog, click **Request**.

   Your request is routed to your manager for action.

Place a Personal Event

Placing a personal event on your calendar is useful for keeping track of important occasions.

Note: This type of event reminder is not visible to your manager.

Tip: Be sure to have the Personal display option set so that you can see any personal events that you have entered.

1. Click **My Calendar** from the menu bar.

2. Double-click the blank calendar day for which entry will be made.

    The Request Detail dialog appears.

3. Click the **Personal** option.

4. Enter the event title in the **Event** text box.

    This text appears on your calendar (and visible when printed).

5. Choose the date or dates for which you would like to make the request (hold down the CTRL key to select multiple dates).

6. Validate that the times shown in the Start Time and End Time fields are correct.

7. Click **Request**, validate that the information is correct, and click **Request**.

    The personal event appears in purple on your calendar.

Note: This is not a request and will not be seen anywhere but on your calendar.

Tip: Personal events can be added on days with other calendar events.

Notify a Supervisor of Available Time

Placing an available request on your calendar is useful if you would like to be called in on a particular date and time if there is a need for additional help and no shifts are currently posted. This type of event notification is visible to your manager when looking for last minute help on that particular date, time and department.

Tip: Be sure to have the Available display option set so that you can see any available events that you have entered.

To enter a shift as available to work, complete the following steps.

1. Click **My Calendar** from the menu bar.

2. Double-click the blank calendar day for which entry will be made.

    The Request Detail dialog appears.

3. Click the **Available** option.

4. Enter something to indicate your availability in the **Event** box (such as "Call me if you need me").

5. Choose the date or dates for which you would like to make the request (hold down the CTRL key to select multiple dates).

6. Validate that the times shown in the Start Time and End Time fields are correct.

7. Click **Request**, validate that the information is correct, and click **Request**.

    The available event appears in white on your calendar. Your available notification has been placed and is visible on your calendar. You will be notified if you are needed.

Retract a Shift Request

You can retract (or cancel) a request for a shift any time before it is awarded to you. It will be important to retract any requests for shifts you are not able to work as soon as possible in order to avoid any of these being awarded to you. It is also important to retract any available, non-duty, or personal events that no longer apply. Finally, if you have requested identical shifts and cannot work that shift, you must retract each one individually (there is no ability to retract each instance of an identical shift with one click).

To retract a shift request, complete the following steps.

1. Click **My Calendar** from the menu bar.

2. Click the **Requests** display option.

3. Double-click the shift with the request you would like to retract.

4. In the Requested dialog, click **Retract my Request**.
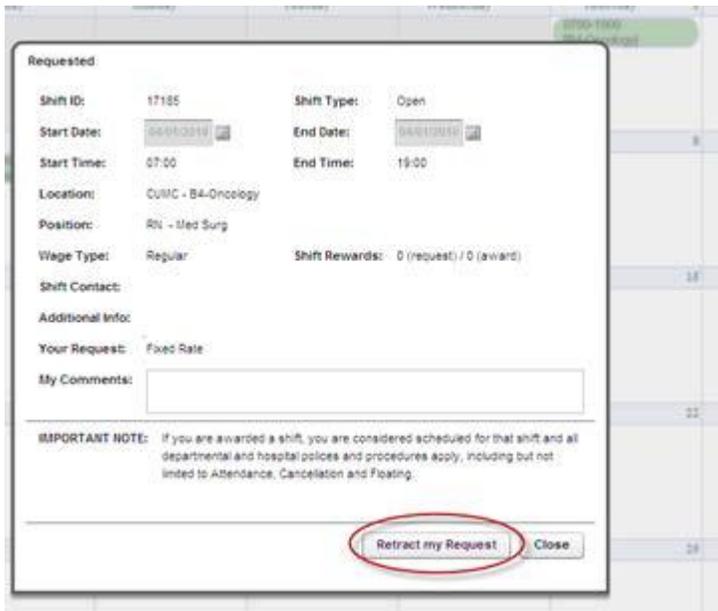
5. In the confirmation message, click **OK**.

   The shift no longer displays as requested and appears again as qualified when the Qualified option is selected.

Retract a Self-Schedule Request

Once self-schedule shifts are requested, managers have the option to approve or deny these requests. If a manager denies a self-schedule shift request and you have requested your maximum weekly hours, the denied shift must be retracted before additional shifts can be requested.

A denied self-scheduled shift appears as Denied.
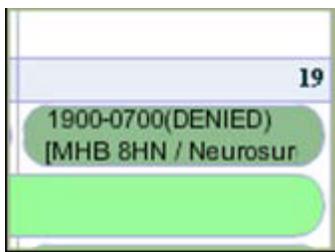
To retract a self-schedule request, complete the following steps.

1. Click **My Calendar** from the menu bar.

2. Double-click the shift and then click **Retract My Request**.

   The shift appears again as open to request.

Using Search Features

To access search features, click **Search** on the menu bar. You can search for a shift by Shift ID to view the details of a single shift or you can search by criteria, such as a date range, location, or job title.

Search for a Specific Shift

1. In the Find a Shift area, enter the **Shift ID**.

2. Click **Find**.

Search by Using Criteria

1. In the Search by Criteria area, select the criteria you want to use to search.

Note: Note about the Shift Starts During option: This option searches for shifts that occur during specified periods. There is one box for each of the shifts during a 24-hour period. Sample values are Day, Evening, and Night. Selecting one or more of these boxes restricts the list to shifts taking place during the selected times of day. If a shift overlaps multiple time periods, it appears in the search results only if 50% or more of the shift time takes place during the selected time period. For example, if the Day time period starts at 07:00 and the Evening period starts at 15:00, then a shift from 13:00 - 21:00 will not appear on a search for Day shift because only two hours of the shift occurs in the Day time period. A search for Evening shifts does list this shift, as six hours of the shift (more than 50% of the shift length) occurs during the Evening time period.

2. Click **Search**.

   A list of shifts appears. To sort the list, click a column heading to sort by that column heading.

   Depending on the search criteria, results show pending, open, or closed shifts.

Request a Shift from the Search List

After a search has been performed and the list of shifts appears, you can request a shift to work.

1. Locate the specific shift you would like to work and check the status icon to make sure you are qualified.

2. Click the shift ID of the shift you want to request.

   The request dialog appears.

3. Click **Request this Shift**, **Request Part of this Shift**, or **Request Identical Shifts** (not shown).

Note: The option to request identical shifts appears when the selected shift is one of a group of identical shifts. Always click the Request Identical Shifts button if it is available.

4. In the confirmation message, click **Done**.

View and Print the Unit Schedule

Viewing the Unit Schedule is governed by a permission set at the unit/department level. If this permission is enabled for your department, you will see the Unit Schedule link in the Menu bar.

To view and print the Unit Schedule, complete the following steps.

1. Click the **Unit Schedule** link.

2. Choose the desired scheduling period and type of paper (for display and printing).

3.

Tip: If you get a download blocker message, click the message bar and then click Download File to allow the file to download.

The schedule appears.

4. Update any Display Options to view the schedule in the way you prefer.

5. To print the schedule or view the schedule in a printable format, click **PDF View**.

Change My Profile Data

Employees with an active profile can change their demographic data and password at any time. Some organizations will also prompt an employee password change at specific intervals.

To change your demographic data or password, complete the following steps.

1. Click the **My Profile** link.

The Personal Demographics page appears.

Tip: You can change any of the information above the green line in the Personal Demographics area except uploading photographs. Contact your manager if you notice that any of the information below the green line is no longer accurate.

2. Click the **Skill Competencies** or **Credentials** links to view your skills checklist or credentials.

Note: These cannot be updated by the employee.

3. Click the Change Password link to change your password.

4. Enter the new password information in the fields provided.

5. When you are done making all the necessary changes, click **Save**.

6. In the confirmation message, click **OK**.

Reset Your Password from the Sign In Page

If you forget your password, you can reset it from the sign-in page, assuming you remember your user name and the answer to your security question.

To reset your password, complete the following steps.

1. On the sign-in page, click the **I've forgotten my Password** link.

2. On the next page, enter your **User Name**, select the correct **Security Question**, and enter your **Answer**.

Note: If you do not remember your user name and the answer to your security question, your manager will have to reset your password.

3. Click **Reset Password**.

4. Enter the new password information in the fields provided and then click **Save**.

5. In the confirmation message, click **Done**.