Einstein II Clinical Scheduler User Manual

For

Fastmed Urgent Care
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Scheduling Quick Tips

Initial Set Up

- Set up the hospital region
- Set up the site
- Set up the Shift
- Set up the Evaluation Master
- Set up the Skill
- Set up the Specialty
- Add employee in the system
- Assign employee to a site
- Assign specialties to the employee
- Evaluate employee, if required
- Add general notes for employee, if required
- Register employee in EII. The employees themselves can also do this step
- Assign a user access roll to the employee. This will decide what are the screens that the employee can access and the functions they can perform in Einstein II.

Schedule Creation

- Enter time-off requests in the unavailability screen. Employees can also enter their time-off requests directly.
- Enter availability requests in the availability screen. Employees can also directly enter their availability. Super users can also match employee’s availability to an open need by clicking on the “Match” link.
- Create and view open orders in the Schedule a Resource screen.
- Match employees to open orders in Add an Employee to Schedule screen. This screen can be accessed from the Schedule a Resource screen by clicking on “Show eligible employees”.
- Remove employee from schedule or float employee to another site, as required using the Remove-Float a Resource screen.

Skill Group

- For provider category site for provider skill we have skill group setup as NP, PA, DO and MD as one group.
- For clinical category site for Clinical front office skill setup as GSS and MA and Clinical back office setup as XT and RT as one group.
How to Log In To Einstein II


Enter required user name.

Enter the password provided by SAML authentication.
Clicking on the app Hallmark should redirect the user to E-II.
How to Navigate the Home Page

- The home page is divided into 4 sections for Clinical scheduler.
- At the top-left we have operational dashboards where clinical schedulers can predict the census and check if a site is understaffed or overstaffed.

**Operational Dashboard**

<table>
<thead>
<tr>
<th>Site</th>
<th>Staffed / Trend</th>
<th>Clinical Threshold</th>
<th>CFO (12hrs)</th>
<th>CFO (8hrs)</th>
<th>CBQ (12hrs)</th>
<th>CBQ (8hrs)</th>
<th>Clinical Staff Needed</th>
<th>Providers</th>
<th>Providers Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aberdeen</td>
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<td></td>
<td>73</td>
<td>1</td>
<td>1</td>
<td></td>
<td>Under</td>
<td>47</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Trend</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Staffed</td>
<td>47</td>
<td></td>
</tr>
<tr>
<td>Apex</td>
<td>Staffed</td>
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<td>40</td>
<td>1</td>
<td>1</td>
<td></td>
<td>Under</td>
<td>47</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Trend</td>
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<td></td>
<td></td>
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<td>47</td>
<td></td>
</tr>
<tr>
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<td>1</td>
<td></td>
<td>Under</td>
<td>47</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Trend</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Staffed</td>
<td>47</td>
<td></td>
</tr>
<tr>
<td>Boone</td>
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<td>1</td>
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<td>Under</td>
<td>47</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Trend</td>
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<td></td>
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<tr>
<td>Burlington</td>
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<td>Under</td>
<td>66</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Trend</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td>Staffed</td>
<td>66</td>
<td></td>
</tr>
<tr>
<td>Candler</td>
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<td>Trend</td>
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<td></td>
<td></td>
<td>Staffed</td>
<td>47</td>
<td></td>
</tr>
<tr>
<td>Cary</td>
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<td>40</td>
<td>1</td>
<td>1</td>
<td></td>
<td>Under</td>
<td>47</td>
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<tr>
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<td>Trend</td>
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<tr>
<td>Cary Tarrant</td>
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<td>47</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Trend</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Staffed</td>
<td>47</td>
<td></td>
</tr>
</tbody>
</table>

- Only the sites for which “Display in Dashboards” set to true in Admin-> Site screen will be displayed in the dropdown.
- In the middle of the home page, user has access the Bulletin Board to display any announcements to all employees who have access to the system. Only super users and Admins are allowed to enter and edit any messages in the bulletin board. All other users are read-only.

To write a message on the bulletin board, scroll your cursor over the bulletin board and left-click on the mouse. Type the required message and click on Save.

To delete an existing message in the bulletin board, select the message using the mouse cursor. Click on the “Delete” button on your keyboard. Click on Save.

In the middle of the page below the bulletin board, the system lists the available employees in the next 24 hours sorted by the time zones.
• Under the available employees the user can find the unfilled orders in the next 24 hours sorted by time zone.

<table>
<thead>
<tr>
<th>Available Employees in next 24 hrs - CST.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Start Date Time</strong></td>
</tr>
<tr>
<td>Chandler, Rachel</td>
</tr>
<tr>
<td>Adams, Brandon</td>
</tr>
<tr>
<td>Barnwell, Maria</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Available Employees in next 24 hrs - EST.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Start Date Time</strong></td>
</tr>
<tr>
<td>Anand, Staff</td>
</tr>
</tbody>
</table>

• On the right side of the home page users can find the following:
  o Count of employees who have not been assigned to any site and the count of employees who have not been assigned to a role.

<table>
<thead>
<tr>
<th>Unfilled Slots in next 24 hrs - CST</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Region</strong></td>
</tr>
<tr>
<td>North Carolina</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unfilled Slots in next 24 hrs - EST</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Region</strong></td>
</tr>
<tr>
<td>AZ Tucson</td>
</tr>
</tbody>
</table>

- Quick Information

- No. of employees not assigned to any site: 85
- Roles to be assigned: 8

- Next Maintenance – information on Einstein II updates that are coming in the future.
- Recent Releases – information on previous Einstein II releases.
- Our support email – support@einstein2.com. Users can send any questions, clarifications, and suggestions to this email ID.
- Link to the User Manuals – Manuals are made available to each user depending on their role set up in the system.
- The date the user last logged in to Einstein II.
How to Set Up Unit Profile

To Set Up Skill

- On the home page, hover over AdminMgmt and click on Skill.
- Select Region and Site for the skill set.
- Select the Skill Type from the drop down. If the skill is not found in the drop down, then enter the skill type in “Add skill name” and click on Add New.
- Selecting the “Is Parent” checkbox option will create a parent skill else child skill.
- Select the Evaluation Template applicable to the skill. This is an optional field.
- Select the working shift applicable to the skill.
- Enter the Skill Short Name used by the hospital. For example: the skill short name for Clinical Back Office is CBO.
- Enter the order in which you want the skill to be displayed in the screens in the skill dropdown.
- Enter the order of schedule for which the scheduler should pick the skill.

- Enter the options applicable to the skill. For example: FT.
- Click on Save.
On clicking save, the skill will be saved in a grid at the bottom of the screen. Individual records will be created for each status applicable to the skill.

To edit a skill, click on “Select” corresponding to the skill. Users can change the evaluation template applicable to the skill, the skill code used by the hospital and whether overtime applies to the skill/status. Click on Save after making the required changes.

Note: Any change to the evaluation template will be made applicable to all statuses in the skill. Any change to the skill code and overtime applies checkbox will be applicable only to the selected status in the skill.

Users can also delete a skill by clicking on “Delete” next to the corresponding record. A skill can be deleted only if no employee has been assigned to the skill.
<table>
<thead>
<tr>
<th>Client Skill Short Name</th>
<th>Parent Skill Short Name</th>
<th>Work shift</th>
<th>Order of Help</th>
<th>Order of Schedule</th>
<th>Options</th>
<th>Skill Code Used by Clin</th>
<th>Evaluation Template</th>
<th>FT/Overtime supplies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Debra</td>
<td>PSO</td>
<td>12 Hours</td>
<td>2</td>
<td>2</td>
<td>Agency</td>
<td>Yes</td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Debra</td>
<td>PSO</td>
<td>12 Hours</td>
<td>1</td>
<td>2</td>
<td>SD</td>
<td>Yes</td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Debra</td>
<td>CHS</td>
<td>12 Hours</td>
<td>1</td>
<td>2</td>
<td>PT</td>
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<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Debra</td>
<td>PSO</td>
<td>12 Hours</td>
<td>1</td>
<td>2</td>
<td>None</td>
<td>Yes</td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Debra</td>
<td>MA</td>
<td>12 Hours</td>
<td>2</td>
<td>1</td>
<td>Agency</td>
<td>Yes</td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Debra</td>
<td>MA</td>
<td>12 Hours</td>
<td>2</td>
<td>1</td>
<td>SD</td>
<td>Yes</td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Debra</td>
<td>MA</td>
<td>12 Hours</td>
<td>2</td>
<td>1</td>
<td>PT</td>
<td>Yes</td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Debra</td>
<td>MA</td>
<td>12 Hours</td>
<td>2</td>
<td>1</td>
<td>None</td>
<td>Yes</td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Debra</td>
<td>ST</td>
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<td>4</td>
<td>Agency</td>
<td>Yes</td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Debra</td>
<td>ST</td>
<td>12 Hours</td>
<td>4</td>
<td>4</td>
<td>SD</td>
<td>Yes</td>
<td></td>
<td>Yes</td>
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<tr>
<td>Debra</td>
<td>ST</td>
<td>12 Hours</td>
<td>4</td>
<td>4</td>
<td>PT</td>
<td>Yes</td>
<td></td>
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</tr>
<tr>
<td>Debra</td>
<td>ST</td>
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<td>4</td>
<td>4</td>
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</tr>
<tr>
<td>Debra</td>
<td>ST</td>
<td>12 Hours</td>
<td>4</td>
<td>4</td>
<td>PT</td>
<td>Yes</td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Debra</td>
<td>ST</td>
<td>12 Hours</td>
<td>4</td>
<td>4</td>
<td>None</td>
<td>Yes</td>
<td></td>
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</tr>
<tr>
<td>Debra</td>
<td>ST</td>
<td>12 Hours</td>
<td>3</td>
<td>3</td>
<td>Agency</td>
<td>Yes</td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Debra</td>
<td>ST</td>
<td>12 Hours</td>
<td>3</td>
<td>3</td>
<td>SD</td>
<td>Yes</td>
<td></td>
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</tr>
<tr>
<td>Debra</td>
<td>ST</td>
<td>12 Hours</td>
<td>3</td>
<td>3</td>
<td>PT</td>
<td>Yes</td>
<td></td>
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</tr>
<tr>
<td>Debra</td>
<td>ST</td>
<td>12 Hours</td>
<td>3</td>
<td>3</td>
<td>None</td>
<td>Yes</td>
<td></td>
<td>Yes</td>
</tr>
</tbody>
</table>
How to Set Up Staff Profile

To add an employee to the system

- On the home page, hover over UserMgmt and click on “Employee Details”.

- In the employee details screen, search if the employee record already exists. To search, start typing the name of the employee in “search employee”. If the employee already exists in the system, the name will automatically appear on the screen. Click on desired employee name.

- Employees can also set up in this screen if they would like to receive text/SMS on the preferred contact number or the alternate contact numbers. Please note that SMS/texts can only be sent to...
a mobile/cell phone number. The employees can also set up in this screen, if they would like to receive a voice broadcast to their preferred mobile number. This can enable the employees to receive voice messages for any urgent needs or other notifications, similar to the SMS/ texts option.

- If not, enter the employee details and click on Save.
- Note: Required fields have a red asterisk next to the field. Fields include:
  - First Name
  - Last Name
  - ID used by clinic
  - City
  - Hire Date
  - Preferred contact number
  - E-mail
  - Consider FTE value for
  - SMS/Text to be sent to
  - Schedule FTE Value

- User must enter base pay rate and start date of each employee. Only admin role has the privilege to enter the base pay rate for the users. Base pay rate is not visible for all other logins.

- Enter start and end times for availability restriction. This ensures that an employee who agreed to work night shifts is now giving availability only for night shifts and not for the day time.
- Note: When employees log in, if shift restriction was saved for them in the Employee Details screen, the start time and end time should automatically default to the start and end times given in the Employee Details Screen. If required, the user can change the start time and end time to any time WITHIN the shift restriction time, but, they cannot enter availability for any time outside the shift restriction time. Again, this ensures that an employee who agreed to work night shifts is
now giving availability only for night shifts and not for the day time.

<table>
<thead>
<tr>
<th>Availability Restriction.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Start Time:</strong> [ ]</td>
</tr>
</tbody>
</table>

- To edit an existing employee details, enter the employee name in the “Search Employee” box and click on “Get Details”. The employee details will be auto-populated. Once details are edited, click on Save.

<table>
<thead>
<tr>
<th>Inactive</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Inactive Start Date</td>
<td>10/07/2016</td>
</tr>
<tr>
<td>Inactive End Date</td>
<td>11/09/2016</td>
</tr>
</tbody>
</table>

- To inactivate an employee click on the Inactive checkbox. The start date of the inactivation will be defaulted to the current date and user can select the end date of inactivation. During the inactivation period system will not allow the user to get scheduled or accept availability or unavailability.
- To terminate an employee, click on the check box corresponding to the “Inactive”.
- Enter the Termination Date.
- Enter the termination notes if required.

<table>
<thead>
<tr>
<th>Terminate</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Termination Date</td>
<td>10/07/2016</td>
</tr>
<tr>
<td>Reason</td>
<td></td>
</tr>
</tbody>
</table>

- Note: An employee who is made inactive in Einstein II will not be able to log into the software. Also the employee cannot be scheduled for any future dates in Einstein II.
- When an employee is terminated, an end date is automatically given to all the regions/sites to which the employee has been assigned.

<table>
<thead>
<tr>
<th>Allow Template beyond 40 hours</th>
<th>Exclude for OT</th>
</tr>
</thead>
</table>

- Employee is selected for the option “Exclude for OT” will not be considered for overtime though he is scheduled over 40 hours in a week.
- System will allow the user to set preference for the employee beyond 40 hours if “Allow Template beyond 40 hours” is selected.
To Assign an Employee to a Site

- On the home page, hover over UserMgmt and click on "Employee Site Details".

- In the box next to "Search Employee", enter the name of the employee in which you want to assign site details. As you start typing, the employee name will automatically appear if he/she has been added in the system.

- Click on Get Assignments. If there are any previously entered assignments, the system will pull up the records. For new employees the system give notification stating, "No Details Found For This Employee."

- Click on the triangle corresponding to Region in which you want to assign the employee. The system will list all sites in the Region.

- If you want the employee to be assigned to a specific shift, click on the triangle corresponding to the site. System will list all shifts in the site in the tree view. Select the required shift.

- If you do not want to assign the employee to a specific shift, then click on the site to which you want to assign the employee. The system will automatically select all shifts for the employee.

- **Note: All FT and PT employees must be assigned a specific shift.**

- Select the skill type from the drop down.

- Select the option from the drop down.

- Enter the start date of the employee in the site. Note: the start date given here should be on or after the hire date given in the Employee Details screen.
• For all employees, the system will give a pop-up confirming the assigned site as Base unit for the employee.

• Click on Save. The record will be listed in the grid below.
• The system will also auto-populate the title pay code based on the skill and the status of the employee.

• To end an employee’s assignment to a site, click on “Select” and give an end date. Note: An end date can be given only if the employee is not already scheduled after the end date.
• Users have the option to simultaneously give end date to all sites to which the employee is actively assigned by clicking on the check box corresponding to “Apply End Date to All Records”.
• If the employee is scheduled beyond the end date in any one of the sites, the system will ask if to delete the future scheduling records, click "Yes."
• Once the records are deleted the system will ask if open orders are needed for the dates being deleted, click "Yes" to have open orders created, or "No" if no new orders are needed.
• If the employee has never been scheduled in the site, you can also click on “Delete” corresponding to the record.
• Employee cannot be scheduled to regular schedules until the orientation has been completed. Employee can only be scheduled to orientation schedules if the checkbox is not checked.
• To take an employee out of orientation, click "Select" on the corresponding record, check on the "Orientation Complete?" checkbox, and click "Save."
To Assign Specialties to an Employee

- On the home page, hover over UserMgmt and click on “Specialties”.
  
  In the box next to “Search Employee”, enter the name of the employee in which you want to add a specialty. As you start typing, the employee name will automatically appear if he/she has been added in the system.

- Click on Get Assignments. The system will list any specialties previously assigned to the employee.

- To assign a specialty, click on the check box corresponding to the specialty.

- Click on Save. The specialty will be listed in the grid below along with the date assigned.

- To remove a specialty assigned to the employee, uncheck the checkbox corresponding to the specialty. You will no longer see the specialty in the grid listed in the bottom section of the screen.
Note: When a new employee has been given a base site in the Employee Site Details screen, the site specialty will automatically be added in the Specialty screen. Any additional specialties will need to be entered manually.
To Assign a Role to the User

- Hover Over UserMgmt. Click on Assign Roles.

  - “Assign Roles” help to decide access levels for the user i.e. what are the screens that the user can see and what are the functions that he/she can perform in Einstein II. For Example: a Nursing Manager might be allowed to approve time-off requests in Einstein II while a nurse can only see his/her schedule.

- An employee can log into the system only if he/she has been assigned a role. If no role has been assigned, then system would give an error message “Waiting Authentication” when users attempt to log in.

- Click on User Management and Select Assign Roles

  - All employees who have registered in the system (for whom User ID and Password have been created), but have not been given roles would be listed in the table at the bottom of the screen as “unassigned”.

- You can filter the list of unassigned employees using the filter criteria given on the top – Region, site, skill, and employee name.

- To assign a role:
- Select the employee to whom you want to assign a role by clicking on the square box corresponding to the employee. Ensure that the square box is marked before proceeding.
- You can select multiple employees by clicking on multiple square boxes corresponding to the employees.
- Select a role for the employee.
- Ensure that the “write allowed” box is checked on. User will be able to save information in the system only if they have write access.
- Click on Save.

- An employee can view only those sites to which he/she has been assigned a role. For example: if an employee can work in site A and site B, but has been assigned a role only to site A, then the employee can view details only site A when he/she logs in.
- To edit an assigned role, click on “Assigned” tab on the top.
- System will list all employees who have been assigned roles. List of employees can also be filtered using Region, site, skill, and employee name.
- Click on “Select” corresponding to the record.
- Make the required change and click on save.
To Set Up Screen Access for User Role

- Hover Over UserMgmt. Click on User Roles.

- The User Role screen is used to set up the screen access for each type of users – Super Users, Central Schedulers, Site Managers and Staff. Users who have been assigned a role will be able to view only those screens to which they have access according to the User Roles screen.

- Click on User Mgmt and select Assign Roles.

- Select the User Role for which you want to set the screen access.

- Select the screens to which you want to provide access.

- Click on Save.
To make any changes, select the role again from the drop down on the top.
Check/un-check the required screens. Click on Save.
To Add Evaluation for an Employee

- On the home page, hover over UserMgmt and click on “Evaluation”.

- To pull up the details for an employee, start typing the employee name. System will list all applicable employees. Select the name of the required employee.

- The Region and the sites where the employee can currently work will be listed in the Region/site drop down.

- The evaluation template of the first Region/site will also be automatically listed.

- In the bottom section of the screen, the existing evaluations of the employee across all Regions and sites will be listed along with the grade, the Region/site for which the evaluation is applicable, who did the evaluation, the date of the evaluation, and comments, if any.

- Please note that historic evaluations in sites in which the employee is no longer actively assigned will also be listed.
• To add a new evaluation, enter the evaluation date at the top. The evaluation date cannot be in the future.
• Enter the name/role of the person who is conducting the evaluation.
• Based on the template assigned to the skill/site in the Admin – Skill screen, the system will automatically display the evaluation template in the screen.
• Click on the relevant grade for each question. The system calculated the average grade automatically. In case the question is not applicable to the employee, click on “N/A” for that question. The system will exclude that question while calculating the average.
• Enter comments, if any and click on “Save”.

![Evaluation Screen](image)

• The system will list an overview of the evaluation in the bottom section of the screen.
• To make changes to an existing evaluation, click on “Select” corresponding to the evaluation record. Make the relevant changes and click on Save.
To Add General Notes to an Employee:

- On the home page, hover over UserMgmt and click on “General Notes”.

- Start typing the employee name in the “Employee” field. As you start typing, the employee name will automatically appear if he/she has been added to the system.

- Enter the date. Date cannot be in the future.
- Type the required text in “General Note”.
- Click on Save. The note will be listed at the bottom of the screen.
- To edit a note, click on “Select” corresponding to the record. Make the required changes and click on Save.
- To delete an existing note, click on “Delete” corresponding to the record. Give OK in the delete confirmation box.
To Send Email or Text Message to Employees

- On the home page, hover over UserMgmt and click on “Group Mail”.

- Select Region, site, skill, and status from the drop down. The system will auto-populate all specialties applicable to the filter criteria.

- Select single or multiple specialties. You can select multiple specialties by pressing “Ctrl” and then clicking on applicable specialties.

- Click on “Show Employees”. The system will list all employees who match the filter criteria.

- Select the employees to whom you want to send the email. You can select all by clicking on the check box next to "Employee Name" in the header of the table.
• Select the radio button next to the type of communication needing to be sent, i.e. Mail, Test, etc.
• Type the Message in the Message box.
• Click on choose file to select a file for attachment, if required. Click on Attach. Note: Attachments only work when sending e-mail.
• Click on Send Mail.
Communication Preferences

- Hover Over UserMgmt. Click on Employee Communication Preferences.

In order to change the email/text preference for any event, click on the check box corresponding to the event type.

Note: SMS/Text will be sent to the number based on the selection in the field “SMS/Text to be sent to”. When user selects one of the numbers to which the employee wants to receive the SMS/text, system will display the number as given in the Employee Details screen. If the number is incorrect, the employee will have to call the staffing office to update contact information.

- Upon booking -- If users click yes, system will automatically send email/text whenever the employee is scheduled. In cases where part of the employee’s shift is cancelled, system will sent
email/text that the employee has been re-scheduled for the remaining time. In case of swap, system will send email/text that the employee has been re-scheduled for the new date.

- **Upon Cancelling** -- If users click yes, system will automatically send email/text when a shift is fully cancelled. For e.g. if a shift is scheduled within 24 hours from the current time and is fully cancelled system will send the email and text based on employee’s communication preferences.

- Employees can also set up in this screen if they would like to receive text/SMS on the preferred contact number or the alternate contact numbers. Please note that SMS/texts can only be sent to a mobile/cell phone number. The employees can also set up in this screen, if they would like to receive a voice broadcast to their preferred mobile number. This can enable the employees to receive voice messages for any urgent needs or other notifications, similar to the SMS/ texts option.

- **Change of unit assignment** – If users click yes, system will automatically send an email/text when the employee is floated.

- If users click yes, system will automatically send an email only for the site to which the employee has been floated. For e.g.: if an employee has been floated from Unit A to Unit B, the system will send a message stating "You have been re-booked in unit B for this date and this time".

- **System will not send an email that the schedule in unit A has been cancelled.**

- If the employee is floated for part of the time, and retained in the original unit for the remaining time, the system will send an email/text with the times for which the employee is scheduled in both the units after float.

- **In order to change the email/text preference for any event, click on the check box corresponding to the event type.**

- **Note:** SMS/Text will be sent to the number based on the selection in the field “SMS/Text to be sent to”. When user selects one of the numbers to which the employee wants to receive the SMS/text, system will display the number as given in the Employee Details screen. If the number is incorrect, the employee will have to call the staffing office to update contact information.
**Job sharing**

- On the home page, hover over UserMgmt and click on “Job sharing”.

  ![UserMgmt Menu]

  - Select From Region, From Site, From Skill and Option from where you want the job sharing setup to be given.
  - Select To Region, To Site, To Skill and the screen for which we want the job sharing setup to be given.

- If the skill does not exist in the To site where we want to setup the job sharing, system will restrict adding the combination.
To select a job sharing setup, click on the select hyperlink corresponding to the job sharing setup. User can update the required job sharing combination. Click on Save. Job sharing assigned to the site will be updated.

To remove any job sharing assigned to the Region/site/skill, click delete hyperlink corresponding to the job sharing setup in the grid. System will prompt for a confirmation. Clicking on “Ok” will delete the job sharing and will no longer be available in the grid.
How to Request Time Off

Create unavailability

- Hover Over UserMgmt. Click on User Roles.

- In the Unavailability screen, select the employee who has requested time-off. Start typing the name of the employee and the system will automatically list all applicable employees.

- For FT/PT/PRN and extern employees, by default, the system will display the start and end time as the start and end time for the shift assigned to them in the base unit.

- Select the date on the calendar. Multiple dates can be selected by just clicking on different dates.
- Enter the time of unavailability. If multiple dates are selected, the time entered will be accepted for all dates selected. If the employee is unavailable for the whole day, click on “full day” and the system will automatically update the unavailability time from 7:31 to 23:59. Full day checkbox is enabled only for flex employees.
- The “Start date “and the “End date” can also be specified rather than selecting multiple dates in the calendar. This will create unavailability from the start date till the end date as specified. For this, enter the start date and the end date in the fields below the calendar.
- The End date can also be given by choosing the number of days or weeks or months from the start date. For this, the “Start date” can be entered as required, as seen below the calendar. The number can be entered in the field next to the “End Date” and choose the option of months/ days / weeks from the drop down list.
- Select the reason for unavailability.
- Click on Save.
- Note: When the staff adds the unavailability for Full day, the VHP/ sick/scholarship and other reason codes that apply for FTE calculation, will be calculated for their base shift hours only excluding lunch hours and not for the full day. Ex: Base shift of employee 0730-1600, Employee
when given unavailability with FTE for full day check box, then it should calculate only base shift time.

- The grid will display the date and time of unavailability; the reason for unavailability along with Choice (First Choice, Second Choice or Third Choice) of their unavailability.
- When the unavailability is entered in the system, the super user can select any of the reason codes in the drop down list depending on the requirement (unpaid, education, conference etc). The reason codes for the unavailability vary for the Flex employees and the unit based employees (FT/PT/PRN and externs).
- When FT/PT/PRN externs employees log into the system to enter their unavailability, they can request unavailability using the reason codes.
- The number of unavailability requests that will be automatically approved for each shift can be entered by the manager in the “Employee Unavailability Request Approval By Shift” screen.
- Flex-On-call, Agency employees have automatic unavailability approval when it is requested.
- Users can delete any unavailability record by clicking on “delete” corresponding to an unavailability record.
- In case the employee has a previously entered availability record for the date and time in which the unavailability record is being entered, the system will give a pop up asking if users want to cancel the previously entered availability record.
- If you click OK, the availability record previously entered will be cancelled and the new unavailability record will be saved for the same date and time. If you click “Cancel”, then the new unavailability record will not be saved.
- Employees cannot enter unavailability for historic dates. Employees cannot delete any unavailability entered on their behalf by the manager and super user.
Unavailability Approval calendar view

- Hover Over Unavailability. Click on Unavailability approval calendar view.

<table>
<thead>
<tr>
<th>Template</th>
<th>Schedule</th>
<th>Availability</th>
<th>Unavailability</th>
<th>Administrate</th>
<th>Unapproved</th>
<th>Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unavailability Approval Calendar View</td>
<td>Show/Hide Region</td>
<td>Region</td>
<td>Arizona</td>
<td>Click on Unavailability</td>
<td>Click on Unavailability</td>
<td>Approved Approval</td>
</tr>
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</tr>
</tbody>
</table>

- This screen allows to view all unavailability requests (for all Sites) and give approval or deny all unavailability requests that will not be automatically approved by the system.
- Note: By default the system doesn’t auto-approve requests. Auto-approval requires additional set-up.
- The user can filter by region, Site, Skill, Shift, Reason and schedule period.

- When users enter unavailability on behalf of employees, they can either save the unavailability with pending status, or directly approve the unavailability.
- The requests (Pending/Approved/Unapproved) are displayed in a calendar view.
- Against each day in the calendar view, user can view unavailability with the approval status.
- The name of the employee, FTE value, Skill of the employee, unavailability timings, Unavailability reason code and the date are displayed in each cell corresponding to the day and the date on which the unavailability is created.

- When the unavailability is in pink color the status is pending, green denotes as approved and blue as unapproved.
- Clicking on the pending status which is in pink color will turn in to green color as approved.
- Clicking on the approved status of the unavailability will turn in to unapproved blue in color.
Clicking on unapproved status of the unavailability will turn to approve green in color.
Swap
How to Swap Employees

- Hover Over Unavailability. Click on SWAP

- Enter the employee name in the employee name field.

- In the swap screen, you can enter the “swap From” date in the fields given on the top of the screen.
- In the swap screen, you can enter the “swap to” date in the fields given on the the screen.
- Enter the details where user want to SWAP.
- Click on Get Eligible Employees.
- The system will populate the all the eligible employees in the employee dropdown list.
- The user has to click select one or multiple employees to initiate the request.
- Enter comments if needed.
- Click on Initiate Requests.

- The swap requests will be listed under “My Swap Request”. The system will display the Shift short name, Original Scheduled date, new shift scheduled, Employee name with whom you have initiated request, along with comments and Status of the request.
- This screen is applicable only for FT/PT and PRN employees.
- Please note that the swap requests cannot be initiated if the employee is scheduled for orientation.
- During Swap initiation, the system will display all the eligible shifts for the swap date selected except for Orientation, On Call and Charge Nurse (specialty checked at employee level).
- Swap requests will be automatically approved by the system, if “Swap approval request” is set to “Yes” in the Admin Management – Site screen. If the “Swap approval request” is set to “NO” then, system will save the swap request in pending status for the manager to approve.
- SWAP can be requested within the same group i.e. if we have setup Provider skill with child skills as NP, PA, DO and MD. Then when a PA employee is trying to initiate a request then in the eligible employees it should list all skills of employees for NP, PA, DO and MD, since they belong under Provider skill group.
How to Approve Swap Requests

- Hover Over Unavailability. Click on SWAP/WTC approval
  - Select the region and site from the Region/Site drop down.
  - On top, the system will list all the pending swap requests for the selected region and site.
  - At the bottom, the system will list all the swap requests that were approved or denied.
  - To approve the Swap request find the corresponding record and click “Accept”.
  - To deny the Swap request find the corresponding record and click “Deny”.

- To approve the Swap request find the corresponding record and click “Accept”.
- To deny the Swap request find the corresponding record and click “Deny”.
Availability

How to Sign Up for Availability

- Hover over Availability. Select Availability.

- Select the employee who wants to indicate the availability. Start typing the name of the employee and the system will automatically list all applicable employees.

- Note: User will not be able to book/schedule an employee who has not been oriented to unit in question. If this is attempted, the following message will appear: Employee has not been oriented in the site. Please schedule orientation and update the orientation status of the employee.

- Select the date on the calendar. Multiple dates can be selected by just clicking on different dates. Note: When date(s) are properly selected, date will be highlighted in yellow.

- If the availability is of type unit only then select “Unit only” checkbox option.

- Enter the time of availability. If multiple dates are selected, the time entered will be accepted for all dates selected.

- Click on Save.

- Individual records for each date will be displayed in the grid at the bottom of the screen. Only availability records from today onwards will be displayed. Please use the “Staff Availability Report” to view availability for any historic dates.

- If the same start time and end time are given, the availability record for 24 hours from the start time will be created. For example if on 12/15, start time is entered as 0700 and end time is entered as 0700, the availability record will be created from 12/15 7 A.M to 12/16 7 A.M.

- If the employee's availability is already matched to an open order, system will display the status of the availability record as “Booked” corresponding to the availability record. User will also be able to see the ID of the order to which the employee's availability is matched.
• If the employee's availability is not already booked/scheduled to an open order and there are open orders which the employee is eligible to fill, the system will display a link "Match" corresponding to the record.

• If there are no open orders to which the availability can be matched, the status will be empty.

• When users click on the “Match” link a new screen displaying all open orders the employee is eligible to fill (including float pool orders) for the indicated date and time of availability will be displayed. For each order, system will display the order ID, region, site, skill, schedule date, start and end times, priority, specialty, and on call status. Orders will be listed only if:
  o The skill of the order matches the employee
  o The employee has been oriented to the unit
  o Employee is actively assigned to the region and site
  o Employee matches at least 1 specialty of the order
  o The date and time of the order partially or fully match the date and time of the availability.

• At the time of booking, user can either schedule the employee with a regular status or as a “Charge Nurse” as required.

• System will display a "Book" button corresponding to each order for booking the employee to the order. Click on “Book” to match the employee's availability to the open order.

• System will display a prompt to confirm the schedule. When user clicks “Yes”, system will close this new screen and take the user back to the Availability screen for the employee.
- After booking, system will automatically update the status of the availability in the last column as “Booked” and display the order ID to which the availability was matched.
- All rules applicable in the "Indicated Availability" tab of the “Add employee to the schedule screen” will be made applicable when scheduling the employee from this screen.
- For e.g. system will display alert if the current booking will make the employee exceed 40 hours in the payroll week.
- If there is any remaining availability after matching it to the open order, system will display a prompt stating whether the remaining availability should be cancelled or not.
- For e.g.: assume an employee is available from 6a-11p and the open order is from 7a-7p.
- If user gives “Yes” for cancelling remaining availability, system will cancel the remaining availability from 6a-7a and 7p-11p.
- If user gives “No”, system will split employee’s availability into 3 records: 6a-7a, 7a-7p and 7p-11p. The status of the 7a-7p record will be “Booked” and system will display the link “Match” against the availability record from 6a-7a and 7p-11p if there are any open orders against which the availability can be matched.
- In the below mentioned cases, the system will display the open orders but will restrict users from matching the availability to the open order. Instead, system will display a link to the “Order Check” report:
  - In case there are no open orders to which the employee matches at least 1 specialty, the system will list open orders even if the specialty does not match. However, the employee must be actively assigned to the region/site and the employee’s skill must match in order for the order to be displayed.
  - In case the employee has a previously entered unavailability record for the date and time in which the availability record is being entered, the system will give a pop-up asking if users want to cancel the previously entered unavailability record.
  - If the employee has given unit only availability and been scheduled, then the schedule will be tagged with unit only assignment.
  - If you click OK, the unavailability record previously entered will be cancelled and the new availability record will be saved for the same date and time. If you click “Cancel”, the new availability record will not be saved.
  - If the site is setup as “self-scheduling”, then users cannot enter availability beyond max staffing considering template and rotation list. This is applicable only if the schedule period is in phase 1. Unit only availability will not be considered for self-scheduling counts.
  - In the unfilled slots screens it should list the Parent skill orders for the employees. i.e. for a child skill employee with skill NP it should load all the orders created for skill Provider.
How to view the Rotation List

- Hover over Schedule. Select Rotation list.

<table>
<thead>
<tr>
<th>Schedule</th>
<th>Availability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remove-Float Resource</td>
<td></td>
</tr>
<tr>
<td>Schedule a Resource</td>
<td></td>
</tr>
<tr>
<td>Advance To Next Phase</td>
<td></td>
</tr>
<tr>
<td>Rollback To Previous Phase</td>
<td></td>
</tr>
<tr>
<td>Rotation List</td>
<td></td>
</tr>
<tr>
<td>Run JR</td>
<td></td>
</tr>
<tr>
<td>Schedule adjustment</td>
<td></td>
</tr>
</tbody>
</table>

- For any site that has employee scheduled on a rotation list, then the same will be displayed in this rotation list report.
- The system will display the filter criteria for Region, Site, and skill.

### Employee Rotation List

<table>
<thead>
<tr>
<th>Start Date*</th>
<th>1/1/2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>End Date*</td>
<td>12/31/2016</td>
</tr>
</tbody>
</table>

- Region
  - AZ East Valley
- Site
  - Chandler - Arizona Ave - Clinical
- Skill
  - Clinical Back Office
- Shift
  - All items checked
- Holiday
  - All items checked

![Click to Save New Record](image)

- By default, the system will display current year in the year field.
- Below, the skill field, there are two radio buttons ‘Regular’ and ‘Holiday’.
- When the user selects all the filter criteria, the system will display all the details regarding employees who are on rotation list for regular schedules.
- If the user clicks on Holiday radio button, the system will display a list of employees who are scheduled on rotation list for holidays.
- The user can manually change the rotation list, by selecting the link ‘Select’ and selecting the required employee listed in the employee dropdown.
- The user can also add new records of the employees or other new hires to the rotation list by checking on the square box next to the “Click to save new Record”
- If the user wants to add a new record for the holiday rotation, user should check “click to save new record” and select the radio button, “Holiday”
• The system would now allow the user to choose the required employee from the Employee drop down list.

Choose the required holiday and the shift for which this employee prefers to work and enter the date that this rotation list/record applies and click on save.

This saves the record for that employee as a part of the holiday rotation.

Similarly, rotation for the regular shifts can also be entered into the system by selecting the “Regular” button and check on the “Click to save new record”.

Save the record after choosing the employee, entering the required shift and the date that this rotation applies (schedule period). This adds the new record to the rotation list.
Order creation and Manual Scheduling

How to Create an Open Order/ Slot

- Hover over Schedule. Select “Schedule a Resource”.

Create Orders

- By default the system will open the “Create Order” tab.

- Select the region/ site for which you want to create open orders.
- System will automatically list the first skill assigned to the site and the specialties for the same.
- Select the dates for which you want to create open slots. You can select multiple dates by clicking on the same.
- Select the Shift that you want to create open order from shift drop down displayed on the top right and system will automatically display the start and end time same as the shift selected.
- Based on the shift selected from the shift down, the system will display if the shift is On Call Or Regular.
- If you want to give high priority to the open order, select “High” from the priority drop down.
- Enter the no. of open orders to be created for each date in “Slots to be filled”.
- If the order is an on call order, then click on the check box corresponding to “On Call Order”.
- Click on Save.
• When users click on save, all fields other than “slots to be filled” will remain the same. Users can change any field as required to create a new order. If region/site is changed, then the system will automatically update the specialties.

• To clear all selection, click on “Clear” button. To clear the calendar for all dates selected, click on “Clear Calendar” button.

• Any order created will be listed in the bottom grid on the screen.

• Individual records will be created for each date with the slot to be filled (open order) as 1. For example: If 10/1, 10/2, and 10/3 was selected and the “slots to be filled” is 2, then 3*2=6 individual records will be created.

• Users will be able to view the most recent order created in the bottom grid. For e.g., if user creates 3 orders for site A, then the 3 orders will be listed in the bottom. Next, if the user creates 6 orders for different dates, then only the newly created 6 orders will be listed in the bottom.

• Users can continue to fill open orders newly created by clicking on “Show Eligible Candidates”. If the user fills an open order from this tab, then the system will come back to the “Create Orders” tab after filling the order.

• Users can also click on “Select” to edit an order.

• To cancel a newly created order, select the Reason for Cancelation and click on “Cancel Posting”.

• System will save the region, site, skill, time, and dates selected in the In case, the user creates a large number of records, then the system will list all newly created orders in multiple pages.

**View Orders:**

• The View Orders tab can be used to view all previously created open orders.

• By default, system will consider today’s date as start date and 7 days from today as end date and list all open orders within this date rage. The region/site/skill/specialty will be set up as All by default.

• Users can change the start date, end date, region, site, skill and specialty to view orders. All filter criteria will be saved until changed.

• Users can opt to give the end date if required. If end date is given, then all open orders between the start and end date will be listed. If no end date is given, then all open orders in the system after the start date will be listed.

• Users can also view open orders based on the order ID.
All orders in the table will be sorted by default by the schedule date, start time, and end time. Users have the option to sort by slot ID if required.

Users can continue to fill any open orders by clicking on “Show Eligible Candidates”. If the user fills an open order from this tab, then the system will come back to the “View Orders” tab after filling the order. The system will also come back to the same page number and the sort criteria used prior to filling the order.

To edit a previously created order in the “View Order” tab, click on “Select” corresponding to the record.

System will automatically take the user to the “Create Order” tab and the order details will be auto-populated.

Edit the required details and click on Save

System will take the user back to the “View Order” tab and display the edited record.

To delete an existing order,

Click on the drop down “Reason for Cancellation” and select a reason

Click on “Cancel Posting” corresponding to the applicable record.

Click OK in the delete confirmation box.
How to Fill an Open Order

- In the Schedule a Resource screen, view the order to which you want to match an employee.
- Click on “Show Eligible Candidates”.
- This will take users to a list of available/eligible list of employees who can match the open order.
- The region, site, skill, order start and end time, and the no. of open orders are auto-populated based on the details given earlier.
- On the top, the region/site/skill of the order will be listed along with the order ID, the start time and the end time.
- The screen has 2 tabs – “indicated availability” and “all eligible employees”.

To Select Eligible Employees:

- Eligible employees include all employees who satisfy the following criteria
- Should be assigned to the region/site
- Should match the skill of the order
- Should match at least 1 specialty given in the order.
- Should not be scheduled to work on the given date and time
- Should not have indicated unavailability to work on the given date and time.
- When you click on “All Eligible Employees” the system will list all employees who are eligible to fill the order along with the following information:
  - FTE value
  - Skill of the employee
  - The FT/PT status of the employee
  - The specialty of the employee
  - The specialty assigned to the order
  - Contact information of the employee – Preferred Contact Number and Alt Contact Number 1.
  - The last scheduled shift of the employee
  - The next scheduled shift of the employee
  - Total hours scheduled for the employee across regions/sites during the payroll week (excluding on call hours). The payroll week is considered to start at 12:00 A.M on Sunday and ends at 11:59 P.M. on Saturday. Note: if an employee is scheduled on Saturday from 7p-7a then the full shift (12 hours) will be considered as part of this payroll week
  - Total overtime hours scheduled for the employee across regions/sites during the payroll week (excluding on call hours, including orientation and non-staff time).
  - The evaluations score of the employee for the region/site
Any employee-specific general notes applicable – to view the general note, scroll your cursor over the check box corresponding to the employee.

Select the employee who you want to schedule. The system will display a message on top with the date and time the employee is scheduled.

Click on Save. The employee will be scheduled for the date and time selected. Also, the order will no longer appear in the Schedule a Resource screen as it is matched.

Note: When an employee is booked from the “eligible list” of candidates, then the employee will be matched to the entire order timing even if they have indicated availability for only part of the order time.

For example, an order is open from 7 A.M to 7 P.M. The employee is available only from 7 A.M to 3 P.M. If the user selects the employee to match the order from the “eligible list”, then the employee will be scheduled from 7 A.M to 7 P.M and their availability will automatically be updated to 7 A.M to 7 P.M.

If the employee has any remaining availability, system will give a prompt “do you want to cancel remaining availability”. The prompt will be displayed when the user selects an employee and clicks on the Save button.

If users click on “yes” system will cancel the remaining availability and book the employee.

If users click on “no”, system will not cancel the remaining availability, but will book the employee.

For e.g., if employee is available 7a-7p and slot is from 7a-3p, and users give “yes” for canceling remaining availability, system will delete the availability from 3p-7p and book the employee from 7a-3p.

For e.g., if employee is available 7a-7p and slot is from 9a-5p, and users give yes, system will cancel remaining availability on both sides (7a-9a, and 5p-7p) and book the employee from 9a-5p.

Before selecting an employee, users can also send customized email to multiple employees.

- Click on the checkbox corresponding to the employees. If the user clicks on the check box next to the “email”, then all employees listed in the screen will be automatically selected.
- Click on Email/Text Message
- Type the required email.

Click on Send. The user can also send the voice broadcast to multiple employees.

- Click on the button “Broadcast” below the list of the employees.
- This will send the voice broadcast to the employees who can receive the voice broadcast(check on as the preferred communication in the employee Details)
- Employees can indicate their availability during the voice broadcast which will be notified to the Staffing Coordinator Number.
If any of the employees give their availability for the open needs, then the open need will be filled by the available employee and the voice broadcast will be stopped.

- System will allow booking the employee until 11:59 P.M tonight.
- For e.g., If an employee’s ACLS is expiring on today (2/10/2012), then the employee cannot be scheduled beyond 11:59 P.M tonight. If the employee is available from 7p-7a shift, then the user will be able to book him/her only from 7 P.M to 11:59 P.M.
To Select an Employee who has Indicated Availability:

- Select the “Indicated Availability” tab on the top.
- System will list all employees who have indicated availability for the given date and time. Information displayed is similar to the information displayed for “all eligible employees. In addition, the available timings of the employee are displayed in the “indicated availability tab”.
- If shift restriction was saved for the employee in the Employee Details screen, then the start time and end time should automatically default to the start and end time given in the Employee Details Screen. If required, the employee’s start time and end time may be changed to any time WITHIN the shift restriction time, but they cannot enter availability for any time outside the shift restriction time. This basically ensures that an employee who agreed to work night shifts is now giving availability only for night shifts and not for the day time.
- Employees’ availability may either completely match the timing of the open order or partially match the open order. If the available timing does not match the complete open order, then the employee will be scheduled only for the timing for which he/she is available.
  - For example, an order is open from 7 A.M to 7 P.M. The employee is available only from 7 A.M to 3 P.M. If the user selects the employee to match the order, the employee will be scheduled only from 7 A.M to 3 P.M.
- Select the applicable employee.
- Click on Save.
- If the order is not completely matched, the system will automatically create an open order for the remaining timing.
  - For example, an order is open from 7 A.M to 7 P.M. The employee is available from 7 A.M to 3 P.M. The employee is matched to the order. System automatically creates an open order from 3 P.M to 7 P.M.
- If the employee has any remaining availability, system will give a prompt “Do you want to cancel remaining availability”. The prompt will be displayed when the user selects an employee and clicks on the Save button.
- If users click on “yes” system will cancel the remaining availability and book the employee.
- If users click on “no”, system will not cancel the remaining availability, but will book the employee.
- For e.g., if employee is available 7a-7p and slot is from 7a-3p, and users give “yes” for canceling remaining availability, system will delete the availability from 3p-7p and book the employee from 7a-3p.
- For e.g., if employee is available 7a-7p and slot is from 9a-5p, and users give yes, system will cancel remaining availability on both sides (7a-9a, and 5p-7p) and book the employee from 9a-5p.
Template

How to Set Standard Time Template

- Click Template from the menu tab.

- Site Managers can maintain employee set schedules in this screen, as well as reoccurring time off.

How to set the template for an employee

- The user can select the Region, Site, Base Shift and Skill in the filter criteria to view the standard time template screen.
- By Default, the system will select the 'Assign Shift' Radio button, which allows the user to select from the preexisting list of shifts in the site.
- If the shift timings needed aren't already built for the site, check on the "By Time" checkbox and enter the start and end time.
- If the By Time function is used, the record will be saved as the shift short name that most closely resembles the timings of a preexisting shift, and the new timings. Select against the employee name and days for which time template needs to be set such as Monday, Wednesday and Saturday. The system will set the template for the selected days in accordance to the shift selected for the employees with shift short name.
If user selects ‘By Time’ radio button, then the user has to enter the start time and end time at the top right and select the days to which the employee’s time template needs to be set.

Select the employee name

For e.g., if the user wants to assign a shift from 7:00 to 15:30 PM, ‘By Time’ then the user has to enter 7:00 in the start time and 15:30 PM in the end time.

Select the days for which the time template needs to be set, such as Monday, Wednesday and Friday.

If the user selects the Repeat the First Week Schedule, then the system will automatically update the remaining weeks with selected time template.

Click ‘Save’.

The system will update the employee schedule for the set timings in the template.

The system will also display the totals at the bottom for each of the shifts where the max staffing has been set.

The user can also set work preferences based on unavailability in the template. For e.g. If the employee is unavailable every Tuesday, then the user can save template as DNW days for Tuesday and the system will ensure that the employee is not picked or scheduled on Tuesdays.

If the user wants to delete the DNW days, select the check box corresponding to employee name and select “Delete DNW Days”.

At the bottom, the system will display the work preferences set for each employee with shift short name. Also, the totals against each shift. The system will also display the totals at the bottom for each of the shifts where the max staffing has been set.
At the bottom of the template screen, the system will display the total number of employees with set preferences for each shift vs. the required staffing level for that shift. This will help ensure that the work preferences are balanced across the schedule.

The number of employees with set preferences for any given shift on a specific day must be equal to or less than the required max staffing level.

This is only relaxed when 'Allow Census Beyond Max Staffing' is set to true in Admin>>Site Screen.

Employee’s time template is set for FT and PT employees. The system will give error message when the employee is scheduled for more than 40 hrs in a week excluding lunch time if applicable. The system will include any shift starting in the payroll week (Monday 12:00 AM – Sunday 11:59 PM) and will consider the entire shift.
Automatic Schedule Creation

Admin Mgmt – RUN JOB

- Hover over Schedule. Select “Run Job”.

- Einstein II automatically creates a schedule based on the employee preferences (template), availability, and manager-approved unavailability. Every night, the system runs a function to update the schedule based on any changes to employee profile, preferences, availability and approved unavailability.

- For Manual Run Job, the user can select Run Job under Schedule menu option.

- Select the Region and Site
- Click on RUN.

The following rules will be considered for the daily job for automatic schedule creation:

- Employee is actively assigned to the site
- Employee has the required skill
- The site has open needs – the required staffing level has not been reached
- Employee does not have any approved unavailability
- Employees cannot be scheduled beyond their FTE value.
- Payroll week definition is Sunday 12:00 AM to Saturday 11:59 PM
- Order of selection of employees:
  - Full time employees who have not exceeded 40 hours in a week (excluding lunch time)
  - Part time employees who have not exceeded 40 hours in a week (excluding lunch time)
  - Any per-diem employees who have not exceeded 40 hours in a week (excluding lunch time)
  - Agency employees who have not exceeded 40 hours in a week (excluding lunch time)
- Employee’s set schedule (template) given by managers will have a higher priority on execution of the daily job and any additional availability will be picked up subject to the rules given above.
Advance to Next Phase

- Hover over Schedule. Select “Advance to Next Phase”.

In Einstein II all schedules go through 3 phases

- Phase 1: The schedule is automatically created by the system based on employee work profile, work preferences, availability and unavailability. Note: The system will not schedule an employee beyond his/her FTE value. Phase 2: Managers can move a schedule from Phase 1 to Phase 2. In this phase managers complete the schedule.
- Posting: After the schedule is finalized by the managers, they can post the schedule. All employees can view the schedule only when it is “Posted” phase.
- Any unused availabilities of the staff will be deleted once the schedule is posted.
- Note: Texts/emails will be sent to employees when schedule has been posted. In case of any changes to the schedule, automatic emails/texts are sent to employees. The Advance to Next Phase screen is used to move the schedule to the next phase.

Moving schedule from Phase 1 to Phase 2: When the schedule is moved from Phase 1 to Phase 2, system will run the automatic schedule creation function one last time for that schedule period. The system will book availability, templated days or days off, unavailability, and any rotation data.

Moving schedule from Phase 2 to Posted (Phase 3): When the schedule is moved from Phase 2 to the “Posted” phase, system will send automatic email/text to employees in the site notifying that their schedules have been posted and the same can be viewed in Einstein II. Open orders are created based on the required staffing level.
Roll Back to Previous Phase

- Hover over Schedule. Select “Rollback To Previous Phase”.
- In case a schedule period is advanced to the next phase by mistake, the user can roll the schedule back using this screen. The only time a schedule cannot be rolled back to a previous phase is when it is a current schedule.
- When a schedule is moved from Phase 2 to Phase 1, all manual changes made to the schedule will be overwritten when the system runs the automatic schedule creation function based on the in-built rules.
Schedule Adjustment Screen

- Hover over schedule and click on “Schedule Adjustment”.

- Select the required Region and site and Skill. Schedule status (Posted/Phase 2) is displayed based on the schedule period selected.

- Click on Display schedule.

- The system will display schedules of all employees for the selected Region and site.
  - In the first column, the system will provide employee name.
  - The second column will provide Skill of the employee with their FTE value.
  - The third column will show the status of the employee.
  - At the bottom, the system will also display the Totals for any scheduling record for each shift for the skill selected. If ‘All’ skill option is selected, total for all the skills are displayed.
To Book Employee

- The user can book the employee, by selecting the book radio button option and the required shift that the employee should be booked to.
- Clicking on an empty cell corresponding to the employee name, cell should be populated with the shift short name with Brown color. Note: User can select as many cells as needed, including cells for different employees.
- Click on Save Schedule

- The system will save the schedule for the date and time selected corresponding to the employee name shown below.
- Note: If the additional shifts are still showing in the brown color then they haven't been saved. If the user navigates away from the page all unsaved changes will be lost.

<table>
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<tr>
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To cancel employee schedule with Unavailability reason Codes.

- The user can create unavailability for the employee, by selecting the create unavailability radio button option, the required start and end time, and the unavailability reason code desired. Clicking on an empty cell corresponding to the employee name, cell should be populated with the nearest shift short name. If the employee is already scheduled the shift will replaced by the unavailability reason code once saved.

- Click on Save Schedule

The system will display the unavailability reason code for the date and time selected corresponding to employee’s name in RED.
Approve/un-approve unavailable.

- The user can approve and un-approve unavailability for the employee, by selecting the approve and unapproved unavailability radio button option and clicking on an approved or unapproved unavailability cell corresponding to the employee name.
- Cell should be updated with approved if it is un-approved and vice versa.
- Click on Save Schedule

The system will display the unavailability with status of the required selection made.
- Note: If an unavailability is un-approved in this screen you will see the record with (U) in front of it for un-approved. This displays as a reminder to the manager that there was a request and it was denied, but does not show on the staff schedule.
Manual scheduling

- The user can book the employee, by selecting the ‘Manual scheduling’ checkbox option and giving the required start and end time that the employee should be booked to.
- Clicking on an empty cell corresponding to the employee name, cell should be populated with the start and end time with Brown color.
- Click on Save Schedule

- The system will save the schedule for the date and time selected corresponding to the employee name shown below.
### Transactional Duty

- The user can book the employee for ‘Transactional Duty’, by selecting the TD check box option and the required shift that the employee should be booked to.
- Clicking on an empty cell corresponding to the employee name, cell should be populated with the shift short name with Brown color.
- Click on Save Schedule

> **Transaction**  
> *The system will save the schedule for the date and time selected corresponding to the employee name shown above.*
Add availability

- The user can add availability, by selecting the availability radio button option and the required shift that the employee should give availability to.

- Clicking on an empty cell corresponding to the employee name, cell should be populated with the timings with Brown color.

- Click on Save Schedule
Regular to Charge Nurse/ Charge Nurse to Regular

- The user can book the employee, by selecting the ‘book’ radio button option, schedule status as ‘Charge Nurse’ and the required shift that the employee should be changed from Regular to Charge Nurse.
- From Schedule adjustment screen, click on the cell with scheduling record corresponding to the employee name for whom you would like to change the schedule from “Regular” to “charge Nurse”.
- Click on Save Schedule.
- The system will display the new scheduling record with a suffix of (CN) along with shift short name.
How to remove the schedule of an employee

- The user can remove the schedule of an employee, by selecting the remove radio button option.
- From Schedule adjustment screen, click on the cell with scheduling record corresponding to the employee name for whom you would like to remove the schedule.

- Click on Save Schedule.
- The system will display the cell with no scheduling record.

- If the schedule is in the posted phase, and the user is removing a scheduling record, an additional field populates at the top right of the screen. The system wants to know if an open order is needed. The system will default to Yes, so if no order is needed, the radio button "No" must be selected.
How to float an employee to a different Site

- The user can float the employee by selecting the float radio button option and clicking on the scheduling record corresponding to the employee name.

- Clicking on the scheduling record will trigger the "Float Schedule" popup.
- Select the Region and the site you want to float this employee, under the "To Region" and "To Site" drop downs.
- If necessary, change the start and end time to match the receiving sites open need.
- If the employee isn’t being floated for their full shift the system will ask if the remainder of the shift should be kept in their original site, or if it should be deleted.

- Click on Submit.
This will float the employee from the current site to the site selected.

Additional floating requirements:
- Managers floating employees must be set up as a Support Manager for the sites the employees are floating to.
- The employees must have site details for each Region they are able to float to.
- Along with site details, employees must also have the required specialty in the site they are floating to.
- Employee must have a scheduling record in his or her original site before the floating function can be used.
Show Paging

- When the option paging is selected, a maximum of 10 records per page will be displayed as shown below.
- The screen will be displayed as below.

Clear Timings

- Before saving the schedule if user wants to make changes on the modified cells, user can select the clear checkbox and click on the cell corresponding to the employee and the date.
- Clicking on the cell will clear the modified data.
- To continue booking, make sure to uncheck the "Clear Timings" checkbox.
Reports
Event Log Report

- This report lists all changes made to the following screens:
  - Availability
  - Unavailability
  - Schedule a Resource (creating open orders)
  - Remove-Float a Resource (schedule modification)

- The log can be viewed by the site/region, by the user who made changes, by the employee for whom changes were made, and by the screen in which the changes were made, and by the order number.

- Users also have the option of searching by “order number” as an additional filter criteria.

- This can be used to generate all events applicable to the given order number in a specific date range.

- System will also display the order number and order status, wherever applicable in a separate column, even when users are searching by other filter criteria.

- The system will display, wherever applicable, if an order is on call or regular.

- Enter the required details.

- Click on Show Details.

- To print the report, click on the drop down corresponding to “Export”.

- Select the required format. Click on Export.

- Click on OK in the message that appears in the screen.

- Click on File and Print.

- Click OK to Print.
Staff Availability Report

- Under Menu option “Reports”, select scheduling reports → Staff Availability report.
- This report is generated to see all employees who have entered availability in the system
  - For the given date range, or
  - Within the past 36 hours.

In the “Past Hours” tab, system will give additional filter option to search by a start date and end date. If users give a date range, then system will list all availability records entered in the past X no. of hours for the given date range.
  - For e.g., if the user gave past hours as "36" and start date as 1/7 and end date as 1/14, then report will list all availability records for the dates of 1/7-1/14 entered in the past 36 hours.

- Enter the required details.
- Click on Show Details.
- The report will be displayed in the bottom section of the screen.
- The order of the columns listed in the report will be: Availability Date, Start time and end time, Total Hours, Employee name, Option status, Skill, Employee specialty, and Comments.
- At the bottom of the report, the system will display the grand total hours.
- After the availability records for a specific date, system will display additional line spacing and a thick blue line to help users differentiate between the different dates.
- To print the report, click on the drop down corresponding to “Export”.
- Select the required format. Click on Export.
- Click on OK in the message that appears in the screen.
- Click on File and Print.
- Click OK to Print.
Staff Schedule by Shift

- This report is generated to view the schedule by region/site, by specialty, or by Option Status.
- To view the schedule of all FT/PT nurses, select the applicable FT/PT status in the filter criteria. Ensure that all the other filter criteria is set to “All”
- Select the region, site for which you want to view the schedule. Or, select the specialty/status for which you want to view the schedule.
- Enter the required date range.
- Click on Show Details.
- To print the report, click on the drop down corresponding to “Export”.
- Select the required format. Click on Export.
- Click on OK in the message that appears in the screen.
- Click on File and Print.
- Click OK to Print.
Staff List Report

- This report is generated to view the demographic/contact information of employees.
- The report can be filtered by employee name, by region, By site, by skill, or by status.
- Select the required filter criteria.
- Click on Show Details.
- The system will list the employee name, contact information, city, specialty, skill, and Option status.
- When users click on “Schedule By Site.” in the last column corresponding to an employee’s name, the system will automatically take users to the “Schedule by Site” screen. Users will be able to see the employee’s schedule in the “Schedule by Site” screen.
- To print the report, click on the drop down corresponding to “Export”.
- Select the required format. Click on Export.
- Click on OK in the message that appears in the screen.
- Click on File and Print.
- Click OK to Print.
Unit Profile Report

- This report is generated to view the admin set up of a unit/site – skill, specialties, credentials, and applicable evaluation template.
- The report can be generated for one site or for all sites in a region, or for all sites in all regions.
- To print the report, click on the drop down corresponding to “Export”.
- Select the required format. Click on Export.
- Click on OK in the message that appears in the screen.
- Click on File and Print.
- Click OK to Print.
Evaluations Submitted Report

- This report is used to view details of all evaluations submitted in a given date range.
- The report can be filtered by region/site, by skill, by employee specialty, by status, or by a given date range.
- All evaluation records for the employee will be displayed even if the employee is no longer actively assigned to a specific site.
- The report will display the average of total scores of all evaluations conducted for the employee in the given date range.
- The system will also display in the “Comment” column, the comments saved along with each evaluation in the user mgmt. evaluation screen.
- To print the report, click on the drop down corresponding to “Export”.
- Select the required format. Click on Export.
- Click on OK in the message that appears in the screen.
- Click on File and Print.
- Click OK to Print.
Unavailability By Reason Code Report

- This report is used to view all unavailability records for each employee.
- User can search unavailability records for a specific employee (both active and inactive) within a given date range using this option. User can further filter to view unavailability records with a specific reason code for the selected employee.
- The report also lists any employee whose schedule was cancelled due to unavailability or other reasons like “Filled Candidate Error”, etc.
- The report can be filtered by region/site, by skill, by employee specialty, by status, by unavailability reason code, and by date range.
- The user can also view unavailability record for active employees or all employees by selecting the respective radio button given below the filter criteria Options.
- The report can also view for specific employee by entering employee name.
- When entering unavailability with the reason code “Orientation”, user should check if the employee has active BLS certification as of the date of unavailability. If employee lacks BLS certification, system will display an error message “Employee does not have valid BLS certification. Do not allow the user to save the record”.
- To print the report, click on the drop down corresponding to “Export”.
- Select the required format. Click on Export.
- Click on OK in the message that appears in the screen.
- Click on File and Print.
- Click OK to Print.
Cancel Log Report

- This report is used to view all employees who are scheduled and later cancelled due to various unavailability reasons and other reasons such as “Cancelled due to Overtime”, “To Balance Schedule”, “Filled Candidate Error”, etc.
- The report also displays all float records -- an employee was scheduled in 1 site but later floated to another site.
- The report can be generated by region/site, by skill, by specialty, by Option status and by the cancelled date (date on which the record was cancelled).
- To print the report, click on the drop down corresponding to “Export”.
- Select the required format. Click on Export.
- Click on OK in the message that appears in the screen.
- Click on File and Print.
- Click OK to Print.
Order Status Report:

- This report is used to view the status of all the orders created in the system. The status of the order can be – Open, Filled, Cancelled, Cancelled with Filled.
  - Open: If an order is created and no employee is matched to the same, then the status of the order is open.
  - Filled: If an order is created and an employee has been matched to the same, then the status of the order is filled.
  - Cancelled: If an order is created and then cancelled before any employee was matched to it, then the status of the order is cancelled.
  - Cancelled with Filled: If an order is cancelled after an employee had been matched to it, then the status of the order is cancelled with filled.
- The system also lists the employee who was matched to an order for all orders with filled and cancelled with filled status.
- The report can be generated by region/site, by skill, by specialty, by Option status of the employee, by the status of the order, and by date range.
- Report will display 2 additional columns Shift Length and Time Indicator of Shift.
  - Shift Length” is the total no. of hours in the order. If order timing is from 7a-7p, length of shift is 12 hours.
    - “Time Indicator of the Shift” as AM, PM, NOC.
    - AM = 7a-3p
    - PM = 3p-11p
    - NOC = 11p-7
    - Note: When the order is open and canceled then the Options status for that order will be blank.
- To print the report, click on the drop down corresponding to “Export”.
- Select the required format. Click on Export.
- Click on OK in the message that appears in the screen.
- Click on File and Print.
- Click OK to Print.
Order Check Report

- This report is used to check if an employee is eligible match an order or not. For each of the conditions listed, the report details if the employee met the condition or not.
- Give the order ID (as shown in the Schedule a resource screen).
- Start typing the name of the employee. The system will automatically list all applicable employees.
  Select the relevant employee
- Click on Show details.
- To print the report, click on the drop down corresponding to “Export”.
- Select the required format. Click on Export.
- Click on OK in the message that appears in the screen.
- Click on File and Print.
- Click OK to Print.
On Call Report

- This report is used to view all on call orders entered in the system. The report can be filtered by:
  - Order: This lists all on call orders created in the system – open, cancelled, and filled, cancelled with filled. This also lists any employee who was previously scheduled for a regular order, but later made on call.
  - Employee: This lists all employees who have been scheduled on call for the given date range. It also displays any employee who was previously scheduled, but later cancelled.
- The report can be generated by region/site, by skill, by employee specialty, by Option status, by employee name, by order number, and by date range. When users search by “order number” all the other filter criteria entered will not be applicable.
- When searching by “Specialty”, the system will display region, site and option status as per filter criteria given in the report.
- To print the report, click on the drop down corresponding to “Export”.
- Select the required format. Click on Export.
- Click on OK in the message that appears in the screen.
- Click on File and Print.
- Click OK to Print.
Overtime Report

- This report lists all overtime shifts scheduled in a site along with the overtime hours incurred.
- Overtime is calculated as any hours incurred by an employee beyond 40 hours across all regions within a payroll week. The payroll week is considered to start at 12:00 A.M on Sunday and ends at 11:59 P.M on Saturday. Note: if an employee is scheduled on Saturday from 7p-7a then the full shift (12 hours) will be considered as part of this payroll week.
- For the employees who have given the setup as 8/80 for OT calculation, overtime is calculated as any hours incurred by an employee beyond 8 hours in a day or 80 hours for a 2 week period.
- The report can be filtered by region/site, by skill, by specialty, by Option, and by date range.
- To print the report, click on the drop down corresponding to “Export”.
- Select the required format. Click on Export.
- Click on OK in the message that appears in the screen.
- Click on File and Print.
- Click OK to Print.
Message History Report

- This report is used to search any historic emails sent from Einstein II.
- Filter criteria will be Message Sent By, Message Sent To, Message Sent Start Date, Message Sent End Date, and "Message Contains". Message Sent Start Date and Message Sent End Date will be mandatory filter criteria.
- Depending on the filter criteria chosen, report will display all applicable messages from the message table.
- If for e.g. "message contains" is given as "Hello", then all messages which include the word "Hello" in the given date range should be displayed.
- Columns in the report will include: Message Sent By, Message Sent To, Date and Time delivered, Message Subject, and Message Content.
- The message history report can be generated only for those messages sent on or after November 5th, 2013.
Weekend Hours report

- This report is used to view all weekend hours worked by the employee across regions during the given date range. Weekend definition is Friday 3 P.M to Monday 6:59 A.M.
- Note: User can filter by Option or Schedule Period.
- If a shift starts between the weekend times and if the majority of the hours fall between these times, it will be included as weekend hours.
- Any hours toward orientation or non-staff time will not be included in the report.
- Users have the option to select if “on call hours” should be included in the calculation of weekend hours.
Scheduled Hours report

- This report is used to view the total hours scheduled for an employee within a date range.
- Based on the date range given, report will display all scheduled hours for the employee across regions and sites.
- Users have the option to select if report should include on call hours scheduled or not.
- Any hours toward orientation or non-staff time will not be included in the calculation of the scheduled hours.
Weekend Hours Report

- This report is used to view all weekend hours worked by the employee across regions during the given date range. Weekend definition is Friday 3 P.M to Monday 6:59 A.M.
- Note: User can filter by Option or Schedule Period.
- If a shift starts between the weekend and weekday times and if the majority of the hours fall between this time, then it will be included as weekend hours.
- Any hours toward orientation or non-staff time will not be included in the report.
- Users have the option to select if “on call hours” should be included in the calculation of weekend hours.
- Note: The minimum requirement for the PC option is 8 weekend hours in 1 schedule period. Weekend definition for PC is Friday 11 PM to Monday 7 AM (Note: This is different from RN weekends. RN weekends begin Friday at 3 PM).
Unavailability Report

- Under reports menu option, click on "Unavailability report".
- The system will display Filter criteria: Start date and end date.
- Click on Show details.
- The system will display a calendar. For each date in the calendar, the system will display how many people have approved unavailability for first choice, how many have approved unavailability for second choice, and how many have approved unavailability for third choice.
- Similarly for each date, the system will display the number of employees with pending unavailability for first choice, second choice, and third choice.
- To print the report, click on the drop down corresponding to "Export".
- Select the required format. Click on Export.
- Click on OK in the message that appears in the screen.
- Click on File and Print.
- Click OK to Print.
Call Duty Report

- Under reports menu option, click on “Administrative Reports and Select “Call Duty Reports”.
- This report is to view the hours when employees were scheduled late day or on call and were called in to work (E.g. Employee is scheduled 7a-5:30p Late day shift. The end time of the late day is 6:30 am next day which means that employee will actually work from 7a-5:30p, but is expected to be available if required until 6:30 am next morning.
- Filter criteria for report: region, site, shift, skill, specialty
- Report column displays: employee name, region, site, skill, specialty, start time, end time, Duration (in hours). In the bottom, show total of duration.
- Details include when employee’s late day schedule is extended. The system will display only the duration for the extended hours in the report.
- Details include when employee who is scheduled to late day shift and is later booked on the same day to another shift within the end time of the late day time.
- In addition: the system will display any records for which the schedule status has been changed from on call to regular.
**Holiday Report**

- Under reports menu option, click on "Holiday report" Report to see which employees worked on the holidays.
- By default, the year will default to current year.
- The select the required from the filter criteria: Year Range (Start and end year), Region, site, skill.
- Click on Show details.
- Report is grouped by the shift: For each shift, separate grid is displayed as follows: Holiday Description; Holiday Date and employee scheduled in the 2nd column.
- The system displays the employee's name that was scheduled for the holiday in that year for a shift.
How to Set Up Provider

- Add employee to the system using User Mgmt – Emp. Details screen (refer to section “To Add Employee to the System”)
- Assign the employee to all regions and units in the User Mgmt – Emp. Site Details screen (refer to section “To Assign Employee to the System”)
  - Select skill as Provider (Ensure that the skill “Provider” is assigned to all regions and sites in the Admin – Skill screen)
  - Select status
  - Give start date of employee
- Assign user role as “Provider” using the User Mgmt – Assign Roles screen (refer to section “To Assign a Role to the User”)
  - Ensure to assign the provider role to all regions and units.
  - Ensure that “write allowed” is checked for all regions and units. If write access is not given even for one site, then the charge will not be able to save any information for any site in any screen.
How to Set Up Super Superuser:

- Add employee to the system using User Mgmt – Emp. Details screen (refer to section “To Add Employee to the System”)
- Assign the employee to any one site in the User Mgmt – Emp. Site Details screen (refer to section “To Assign Employee to the System”)
  - Select skill as “Superuser” *(Ensure that the skill “Superuser” is assigned to all regions and sites in the Admin – Skill screen)*
  - Select status
  - Give start date of employee
- Ask employee to register in the system using the Registration screen (refer to section “How to Register Employees in Einstein II”)
- Assign user role as “super user” using the User Mgmt – Assign Roles screen (refer to section “To Assign a Role to the User”)
- The system will automatically give access for that regions/ all sites in the system even though the role was assigned for only 1 region/site.