Einstein II Staff User Manual

For

Fastmed Urgent Care
# Table of Contents

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page #</th>
<th>Links</th>
</tr>
</thead>
<tbody>
<tr>
<td>How to Log-In into Einstein II</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>How to Navigate the Home Page</td>
<td>7</td>
<td>Video</td>
</tr>
<tr>
<td>Employee experience screen</td>
<td>11</td>
<td>Video</td>
</tr>
<tr>
<td>How to Indicate Availability</td>
<td>12</td>
<td>Video</td>
</tr>
<tr>
<td>How to Add Availability for a Specific Order</td>
<td>15</td>
<td>Video</td>
</tr>
<tr>
<td>How to Request Time-Off</td>
<td>17</td>
<td>Video</td>
</tr>
<tr>
<td>Show Site view</td>
<td>19</td>
<td>Video</td>
</tr>
<tr>
<td>How to View Set Preferences</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>How to Initiate/Accept SWAP request</td>
<td>21</td>
<td>Video</td>
</tr>
<tr>
<td>How to Initiate Giveaway</td>
<td>24</td>
<td></td>
</tr>
<tr>
<td>How to View the department Schedule</td>
<td>27</td>
<td>Video</td>
</tr>
<tr>
<td>How to View Rotation List</td>
<td>28</td>
<td></td>
</tr>
<tr>
<td>How to Edit your Personal Information</td>
<td>29</td>
<td>Video</td>
</tr>
<tr>
<td>Communication Preferences</td>
<td>30</td>
<td>Video</td>
</tr>
<tr>
<td>Holiday Report</td>
<td>32</td>
<td></td>
</tr>
<tr>
<td>Staff availability Report</td>
<td>33</td>
<td></td>
</tr>
<tr>
<td>Daily assignment Report</td>
<td>34</td>
<td></td>
</tr>
</tbody>
</table>
This document is protected by copyright and distributed under license restricting its use, copying, distribution, and de compilation. No part of this document may be reproduced in any form by any means without prior written authorization of Hallmark Health Care. Documentation is provided “as is” without warranty of any kind, either expressed or implied, including any kind of implied or expressed warranty of non-infringement of the implied warranties of merchantability or fitness for a particular purpose. Hallmark Health Care reserves the right to change any products described herein at any time, and without notice. Hallmark Health Care assumes no responsibility or liability arising from the use of products described herein, except as expressly agreed to in writing by Hallmark Health Care. The use and purchase of this product does not convey a license under any patent rights, trademark rights, or any other intellectual property rights of Hallmark Health Care.
Quick Tips

Initial Set Up

- Add availability using the “Employee experience” screen.
- If you want to view the open needs of the hospital and indicate availability for a specific order, use the “Employee experience” screen to view all open orders matching your profile.
- Indicate unavailability, if any, using the “Employee experience” screen.
- View your complete schedule using the “Schedule – Schedule by Department” screen.
How to Log In To Einstein II


Enter required user name.

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

- The home page is divided into 6 sections.

Next schedule
- On the top left of the screen, you can view your next schedule – date and time along with the location and department you are scheduled to work in.

Last Login time
- On the bottom right of the screen, you can view your last login – date and time.
Bulletin Board Message

- In the middle of the home page, super users can access the Bulletin Board to display any announcements to all employees who have access to the system. All the logged in staff can only view messages entered by Super User.

Support e-mail link and User Manual

- On the right-side of the home page, users can find our support email – support@einstein2.com. Users can send any questions, clarifications, and suggestions to this email ID.
- Link to the User Manuals – Both video tutorials and written documents are made available to each user.
Recent Releases

- Information on previous Einstein II releases.

Next Maintenance

- Information on Einstein II updates that are coming in the future.
Quick Links

- Number of swap requests initiated by you: Link with count of number of swap requests initiated by you. Clicking on the link will navigate to employee experience screen for more details.
- Number of swap requests initiated for you: Link with count of number of swap requests initiated for you. Clicking on the link will navigate to employee experience screen for more details.
- Number of WTC requests initiated by you: Link with count of number of WTC requests initiated by you. Clicking on the link will navigate to employee experience screen for more details.
Employee experience screen

- Click on Employee experience screen in the menu tab.

The name of the employee who has logged in will be auto-populated in the Employee text box. By default the schedule period falling in the current date is loaded in schedule period dropdown.
How to Add Availability

Availability

- Click on Employee experience screen in the menu tab.

- The name of the employee who has logged in will be auto-populated in the Employee text box. By default the schedule period falling in the current date is loaded in schedule period dropdown.

- Only the dates for which the schedule is loaded in the period dropdown will be enabled in the calendar. Historic dates will not be enabled in the calendar.
Select the dates for which you want to indicate availability in the calendar. To select – click once on the date. To de-select, click again on the selected date. Users can select multiple dates from the calendar.

Choose a shift from the shift dropdown.

Note: by default, in phase 1 and phase 2 employee can only add availability for a pre-existing shift unless the scheduler decides otherwise.

If the shift chosen is a regular shift the regular radio button will be filled in. If the shift selected is an on call shift the On Call radio button will be filled in.

Enter comments, if any.

Click on “Save”.

All dates for which you have indicated availability will be listed in blue in the schedule view and calendar view along with the start time, end time.
- If you have already indicated unavailability for any date for which you want to now be available, system will automatically update with the new availability timings.
- To delete an existing availability record, click on “x” corresponding to the date and time for which you want to delete your availability.

- Note: Employees cannot create or delete any availability for historic dates (prior to current date). Employees also cannot delete availability if the start time of the availability is within 48 hours. Please contact the staffing office in case of any concerns.
- 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.
Unfilled Orders
How to View Current Hospital Needs and Add Availability for a Specific Order

- Click on “Employee experience screen” from the menu tab.
- Click on the month view to view the schedule in month view.
- Select the option Slots by time to view the open orders.

- In this screen for month view, system will automatically list all open orders for which you are eligible to apply in the posted phase schedule period. Eligibility is computed based on whether you are assigned to work in the department, whether you match the skill set required, and whether you have the necessary specialty.
- When 7a7p is selected, all the open orders starting with 0700 will be shown.
- When 7p7a is selected, all the open orders starting with 1900 will be shown.
- When Show all option is selected, all the open orders for which the employee is eligible will be shown.
Note: If you have already indicated availability for a given date/time or if you have been scheduled to work for a given date/time, any open order matching that date and time will not be listed in this screen.

- You can indicate your availability to fill an order by clicking on “Open order” corresponding to the cell.
- When you click on “open order” system will automatically create availability for the date and time of the order.
- A message will be displayed that record is saved successfully.
- You can select more dates, if required.
- After you add availability for an order, you will no longer be able to view the order in the “Month view” screen.
- Note: When you add availability to a specific order, you are only indicating your availability. You are not automatically scheduled to work for that order until the staffing office matches you to that order. Adding availability only increases the probability of you being matched to the specific order.
Unavailability
How to Enter Unavailability Requests

- Click on “Employee experience” from the menu tab.
- Select the unavailability radio button option in the screen.

- Select the dates for which you want to enter your time-off requests.
- Enter the start time and end time for which you are unavailable.
- If you are unavailable for the whole day, click on the check box corresponding to “Full Day”. System will auto-populate your unavailability time as 0000 to 2359.
- Staff can give unavailability for the dates for which the schedule period is falling in the phase 1. Staff cannot enter unavailability for schedule periods falling in phase 2 and posted phase.

- Initially when the page loads the reason code will be “Please select”. You can choose the reason depending on the need.
- Enter comments, if required.
- Click on Save.
- All unavailability dates for the employee will be listed in the month view and schedule view along with the time of unavailability, reason.

- If you have already indicated availability for any date for which you are now unavailable, system will automatically update with the unavailability.
- To delete any unavailability, click on “x” corresponding to the date and time for which you want to delete your unavailability from the month view.

- Note: Employee will not be able to enter or delete any unavailability for historic dates (dates prior to today). Employees will also not be able to delete any unavailability record entered by the Admin, Super user, RDO, or Scheduler. If you want to cancel any unavailability entered by them, please contact the staffing office.
Show Site view

- Click on Employee experience screen in the menu tab.

- The name of the employee who has logged in will be auto-populated in the Employee text box. By default the schedule period falling in the current date is loaded in schedule period dropdown.

- Click on Month button on the top which will take user to the month view.

- Click on show site view.

- It will list all the employees or count of employees based on the setup.
Template

How to view set preferences

- Click on “Employee experience” from the menu tab.

- Select the schedule period which is in phase 1 or phase 2 from the schedule period dropdown.

- In the schedule view the template information is shown in black color and other department template with site short code prefixed to it in green color.

- In the Month view the template information is shown in black color.
SWAP
How to Initiate/Accept SWAP Requests

Initiate SWAP

- Click on “Employee experience” from the menu tab.

- Select the Swap radio button option in the screen.

- SWAP can be initiated only in posted phase schedule period.

- In the swap screen, you can enter the “swap from” date in the fields given on the top of the screen.

- The system will populate the details of schedule for the selected date.

- User has to enter the “To” date for which he want to initiate the SWAP.
- Once the user clicks on the “Get eligible employees, the system will display the Eligible employees that the employee can swap and eligible employees who are scheduled on the selected “Swap to Date”. Select the desired employee with whom you want to initiate swap.
- Enter comments if needed.
- Click on Initiate Request.

The same will be reflected in the month view.

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.
To accept/Deny swap request

- All the swap requests initiated for the staff will be listed in the grid.
- To accept the request, click on accept link corresponding to the details.

System will prompt a popup for confirmation, clicking on ok will change the status to pending manager approval.

- To deny the request, click on deny link corresponding to the details.
- System will prompt a popup for confirmation, clicking on ok will change the status to pending manager approval.
- Clicking on the ok the record will no longer be listed in the grid.
- This screen is available only for FT/PT employees.
- The swap request will be automatically approved by the system, if the department manager/staffing office accept automatic swap approvals in the system. Else the request gets saved as pending for the manager’s approval.
Giveaway
How to Initiate Giveaway Requests

- Click on “Employee experience” from the menu tab.

- Select the Giveaway radio button option in the screen.

- Giveaway can be initiated only in posted phase schedule period.
- In the giveaway screen, you can enter the “Giveaway” date in the fields given on the top of the screen.
- The system will populate the details of schedule for the selected date.

- Click on the select link corresponding to the schedule where you want to initiate Giveaway request.
- From the replacement employee web service pull the employee where you want to initiate the Giveaway.

- Click on Initiate request.

- Once the giveaway is initiated a message on the top should be displayed that record is saved and should be listed in the My Giveaway requests.
To delete the Giveaway request

- To delete an existing Giveaway initiated record, click on “delete” corresponding to the date and time for which you want to delete your giveaway.

- System will prompt a popup confirmation to delete the Giveaway request.

- Clicking on ok should delete the request and no longer be available. A confirmation message should be prompted that the request is deleted.
How to View Your Schedule

- On the home page, hover over schedule click on “Schedule by Dept”.

- System will automatically display your schedule for the current schedule period in a calendar view. System will display the time for the schedule corresponding to each date.

Please note the following color coding in your schedule:

- If your timing is displayed in black, then you are scheduled in the unit which is displayed on top of the schedule period.
- If you have indicated availability but have not been booked, the same will be displayed in BLUE.
- If you have indicated unavailability or your schedule was cancelled, the same will be displayed in RED.
- If your timings is displayed in green, then you are scheduled in other unit.
- If your timings is displayed in orange, then you are scheduled with randomizer.
- To view your schedule for a different period, select a different period in the “Schedule Period” drop down.
- To print the report, click on the Export to pdf button.

Click on “File” and print.
- Click “OK” to print.
How to View Your Rotation list

- On the home page, hover over schedule click on “Rotation list”.
  - To view the rotation list for regular day, select the radio button regular.
  - System should list all the rotation list available for the employee.
  
  ![Rotation List]

- To view the rotation list for holiday, select the radio button holiday.
  - System should list all the rotation list available for the employee for holidays.
How to Set Up Profile
To edit employee information in the system

- Hover over user Management and select Employee Details

- Initially when the screen is loaded all the details will be populated

- Employees can set up if would like to receive text/SMS. Confirm the email and phone number details in the preferred/alternate contact numbers and email fields. Please note that SMS/texts can only be sent to a mobile/cell phone number.

- Mandatory fields in the screen include first name, last name, ID issued by hospital, City, State, Email, Preferred contact number, SMS/Text to be sent to, Hire Date, Base Pay Rate and Base Pay Start Date which are greyed out and should be not editable.

- The base pay rate is only accessible for admin login only. Staff will not have access to view base pay rate added by admin.
Communication Preferences
- Hover over UserMgmt and click on Communication Preferences.

- 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 on 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 -- 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 the Entire Shift Scheduled in 24 Hours -- System will automatically send email/text is fully cancelled
- Change of unit assignment – System will automatically send an email/text when the employee is floated.
- System will automatically send an email only for the department 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.
- Communicate on approval/un-approval of unavailability – System will send an email communication on unavailability status whether it is approved or unapproved irrespective of any schedule period.
- 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 on 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.
Reports – Holiday Report

- Hover over Reports and click on Holiday Report.

  - Holiday report will show the schedule of employees where the employee is scheduled for holiday.

- 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.
Reports – Staff availability report

- Hover over Reports and click on Staff availability report.

- This report is for showing the availability of the employee for the given time period in the filter criteria.

- 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.
Reports – Daily assignment report

- Hover over Reports and click on Daily assignment report.

- This report is for showing the schedules of the employee for the given time period in the filter criteria.

- 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.