

Workforce Scheduler™ 8.0

Healthcare Self-Service for Scheduling

Employee Training

TIME & ATTENDANCE

SCHEDULING

ABSENCE MANAGEMENT

HR & PAYROLL

HIRING

LABOR ANALYTICS



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Importance and overview



After completing this session, you should be able to:

- Define employee self-service for scheduling
- Describe the benefits of using the calendar widget in Workforce Scheduler
- Access the calendar widget in Workforce Scheduler
- Navigate the calendar widget
- View schedule information
- View supporting tab information
- Describe scheduling tasks that can be performed within the calendar widget
- Describe the approval process that may occur when submitting scheduling requests

- Overview of employee self-service for scheduling in Workforce Scheduler
- Accessing the employee calendar in Workforce Scheduler
- Navigating the employee calendar
- Viewing schedule information
- Viewing supporting tabs
- Employee self-service for scheduling key tasks
- Request approval process

Overview of employee self-service for scheduling in Workforce Scheduler



- What is employee self-service for scheduling?
 - The process where employees submit schedule-related requests and manage their schedules using the employee calendar in Workforce Scheduler.



Benefits of employee self-service for scheduling in Workforce Scheduler



- The employee calendar allows you to:
 - View and manage your schedule quickly and easily.
 - Act on schedule related alerts, such as open or closed submission periods.
 - Filter on the types of scheduling information that you want to see, such as holidays and scheduled shifts.
 - View and sign up for shifts that are available and that you are qualified to work.
 - See who else is scheduled to work in your location, or which employees might be able to cover for you.
 - View coverage information for your location, which helps you decide whether to make a schedule request.
 - Submit schedule requests online and track the status of those requests in one place.

Accessing the employee calendar



Logging on to Kronos Workforce Central Navigator

1. Access the Kronos Workforce Central log on page from the intranet.
2. In the **User Name** field, enter your network user name.
3. In the **Password** field, enter your password.
4. Click the **right-facing arrow** or press the **Enter** key on the keyboard.

The My Calendar widget displays in your primary workspace.

KRONOS®

User Name

Password

▶

My Information

My Calendar

Current Schedule Period: June 24 - 30, 2018

Request Time Off More

Sun 6/24	Mon 6/25	Tue 6/26	Wed 6/27	Thu 6/28	Fri 6/29	Sat 6/30
Open (22)	Open (22)	Open (22)	Open (22)	Open (22)	Open (22)	Open (20)
7:00AM						
8:00AM						
9:00AM						
10:00AM						
11:00AM						
12:00PM						
1:00PM						
2:00PM						
3:00PM						
4:00PM						
5:00PM						
6:00PM						

Accrual Code	Reporting Period	Accrual Unit	Available Balance	Vested Balance	Probationary Bal...	Earned to Date	Taken to Date	Pending Grants	Planned Takings	Prior Ending Bal...	Prior End Vested	Prior
DR	1/01/2018 - 12/31/2...	Hour	0.0	0.0		0.0	0.0	0.0	0.0	0.0	0.0	0.0
PTM	1/01/2018 - 12/31/2...	Hour	80.13	80.13		0.0	0.0	0.0	0.0	58.2	58.2	

My Accruals Dept Schedule Coverage

Navigating the employee calendar



The screenshot shows the Kronos employee calendar interface for the week of July 15-21, 2018. The interface includes a navigation bar at the top with a 'Next Schedule Period' dropdown (A), view selection buttons (D), a date range 'July 15 - 21, 2018' with navigation arrows (B), a visibility filter button (C), and self-service buttons 'Request Time Off' and 'More' (E). Below the navigation bar is a calendar grid showing days from Sun 7/15 to Sat 7/21. The grid has a red header row with 'Open' counts: Sun 7/15 (4), Mon 7/16 (4), Tue 7/17 (4), Wed 7/18 (4), Thu 7/19 (3), Fri 7/20 (4), and Sat 7/21 (2). A yellow bar labeled 'Time Off VAC' is shown on Wednesday, and a blue bar labeled 'Self Scheduling JTS' is shown on Thursday. A '7:00AM' marker is on the left. A red box highlights the 'Request Time Off' and 'More' buttons (E). A red box highlights the view selection buttons (D). A red box highlights the date range and navigation arrows (B). A red box highlights the 'Next Schedule Period' dropdown (A). A red box highlights the visibility filter button (C). A red box highlights the 'Request status' row (F).

Sun 7/15	Mon 7/16	Tue 7/17	Wed 7/18	Thu 7/19	Fri 7/20	Sat 7/21
Open (4)	Open (4)	Open (4)	Open (4)	Open (3)	Open (4)	Open (2)
			Time Off VAC	Self Scheduling JTS		

A Show selection: This field displays the default configured time period. You can select other time periods, as applicable. You can also use the calendar icon to select a specific date or date range.

B Time filter: This field works with the Show selection and let you easily navigate to specific time portions. For example, if you have a four-week schedule period and are viewing the calendar by week, you can move between weeks using the arrow buttons.

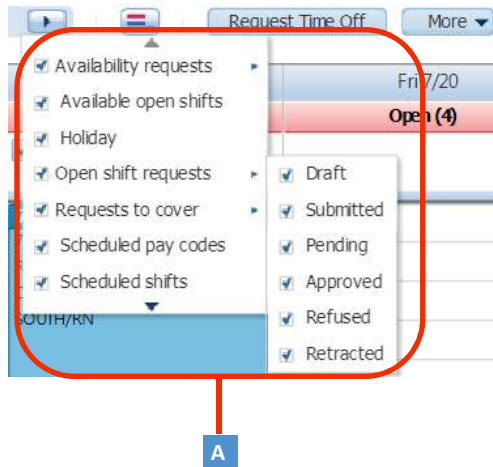
C Visibility filter: This button lets you choose the schedule items you want to see.

D Day/Week/Month views: These buttons let you view your time and schedule data in different formats, according to your needs.

E Employee self-service buttons: These buttons let you perform self-service tasks such as requesting time off or shift swaps. The More button contains a list of all request types that you can submit for the selected time period.

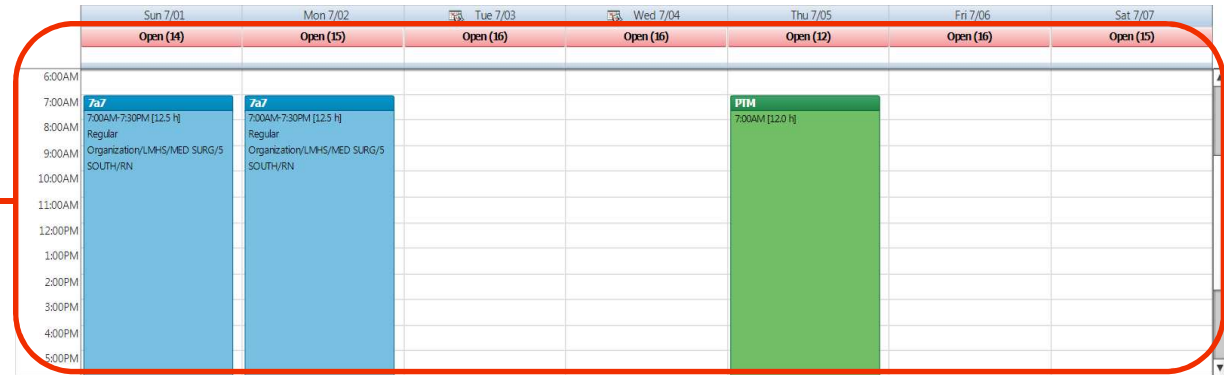
F Request status: This row displays your scheduling requests for the selected time period with icons that provide you with visual status information.

Viewing schedule information



A Filtering schedule items: The Visibility filter controls the types of items that are displayed in the calendar. You may have access to all or some of these options:

- Schedule requests, with selections for statuses
- Available open shifts
- Holidays
- Scheduled pay codes
- Scheduled shifts



Location: ...HS/MED SURG/S SOUTH Job: Time Label: Whole Shift Segmented Shift Hide unscheduled employees

Employee	Job	Sun 7/01	Mon 7/02	Tue 7/03	Wed 7/04	Thu 7/05	Fri 7/06	Sat 7/07
BROWN, LE-VETA G	PCT US		7:00AM-7:30PM			7:00AM-7:30PM	7:00AM-7:30PM	
BURD, STEPHANIE A	LPN							7:00AM-7:30PM
BURKHOLDER, MINDY L	RN	3:00PM-7:00PM	7:00AM-7:30PM			7:00AM-7:30PM		
CAMPBELL, STACY L	PCT US		7:00AM-7:30PM		7:00AM-7:30PM		7:00AM-7:30PM	

My Accruals Dept Schedule Coverage

B Scheduled shifts/pay codes: Within the calendar, your scheduled time is blocked out:

- A blue block indicates a scheduled shift; shift details appear inside the block.
- A green block indicates a scheduled pay code, such as vacation time; pay code start time and duration appear inside the block.
- A red bar at the top of a date column indicates available open shifts that you are qualified to work.

C Supporting tabs: Additional information related to scheduling

Viewing your location schedule



The screenshot shows the Kronos location schedule interface. At the top, there are several filters: a dropdown menu for 'Location' (set to '...HS/MED SURG/5 SOUTH'), a dropdown for 'Job', and two toggle buttons for 'Time' and 'Label'. Below these are two more toggle buttons for 'Whole Shift' and 'Segmented Shift', a refresh icon, and a checkbox for 'Hide unscheduled employees'. The main part of the interface is a table with columns for days of the week (Sun 7/01 to Sat 7/07) and rows for employees. The 'Employee' and 'Job' columns are highlighted with a red box labeled 'G'. A specific shift for 'BURKHOLDER, MINDY L' on Sun 7/01 is highlighted with a red box labeled 'H'. At the bottom, there are three tabs: 'My Accruals', 'Dept Schedule', and 'Coverage'.

Employee	Job	Sun 7/01	Mon 7/02	Tue 7/03	Wed 7/04	Thu 7/05	Fri 7/06	Sat 7/07
BROWN, LE-VETA G	PCT US		7:00AM-7:30PM			7:00AM-7:30PM	7:00AM-7:30PM	
BURD, STEPHAINA A	LPN							7:00AM-7:30PM
BURKHOLDER, MINDY L	RN	3:00PM-7:00PM	7:00AM-7:30PM			7:00AM-7:30PM		
CAMPBELL, STACY L	PCT US	7:00AM-7:30PM			7:00AM-7:30PM		7:00AM-7:30PM	

- The Dept Schedule tab shows you the schedules of the locations where you are eligible to work.

A Location: Select the location whose schedule you want to view. Locations where you are eligible to work appear in the list.

B Job: Use this list to filter on the jobs you want to see in the location schedule. All jobs for the selected location appear by default, even those that you are not qualified to work.

C Time/Label: Toggle between these buttons to display either shift times or shift labels in the schedule grid.

D Whole Shift/Segmented Shift: Toggle between viewing employees' entire scheduled shifts or separate lines for each segment in a multi-segment shift.

E Refresh: Click to refresh the schedule data.

F Hide unscheduled employees: Select the check box to filter out unscheduled employees from the location schedule; clear the check box to view all employees in the selected location.

G Sort options: Click the column headings to sort the schedule either alphabetically by employee name or by job.

H Transfer icons: Indicate transfers in (left) or out right) of the selected location; double arrows indicate other types of transfers, such as work rule.

Viewing location coverage information



A Job: .../MED SURG/5 SOUTH/RN **B** Zone **C** Refresh

Span	Sun 7/15	Mon 7/16	Tue 7/17	Wed 7/18	Thu 7/19	Fri 7/20	Sat 7/21
7a	0/2	3/2	2/2	2/2	2/2	2/2	1/2
7p	0/2	2/2	1/2	2/2	3/2	2/2	2/2

My Accruals | Dept Schedule | Coverage

- The Coverage tab shows you up-to-date coverage information for locations where you can work.
- Helps you to make schedule-related decisions that most benefit your organization, based on coverage needs.

A Job: Select the location and job for which you want to view coverage data. Your primary job and any jobs that are scheduled in the selected location appear in the list, including those that you are ineligible to work.

B Zone: Filter on the zones for which you want to view coverage data.

C Refresh: Click to retrieve the most recent coverage data.

D Coverage indicators: Each cell under a date shows the scheduled number of employees followed by the required number of employees for each selected zone on that date.

- Blank (no arrow) = coverage is met
- = under-coverage for this job and location
- ↓ = over-coverage for this job and location
- ↑

Employee self-service key scheduling tasks

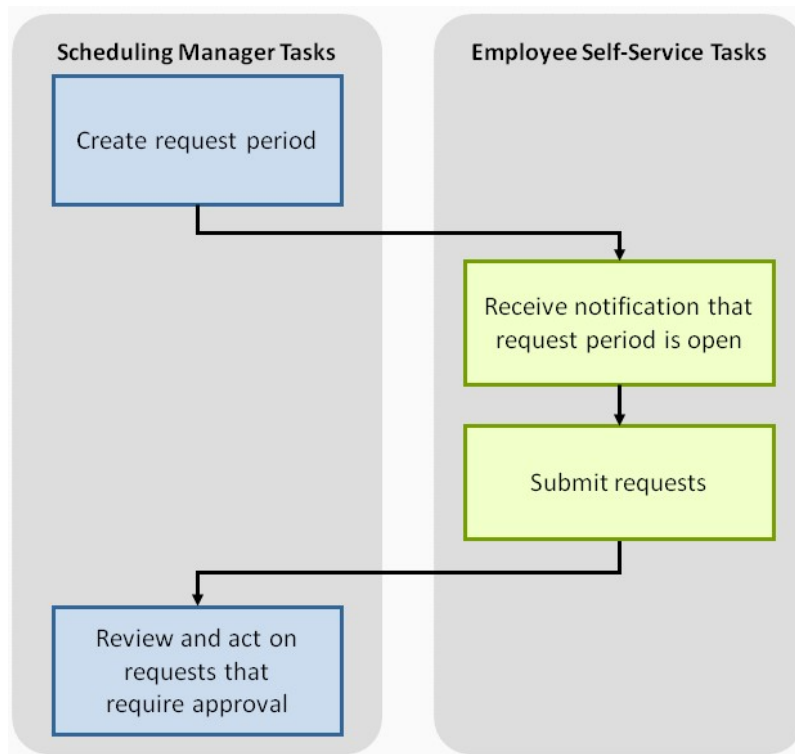


Request not to be scheduled	You can submit up to 3 requests to be off and not scheduled to work in a 6 week period	Request OFF
Request voluntary availability to work	You can submit a request that you are available to work a shift	Request to Work
Submit a self-schedule request	If used in your organization, you can perform shift sign-up from the employee calendar.	Request Self Schedule
Request to swap shifts	When you cannot work your scheduled shift, you can submit a request to swap shifts with another employee or with an open shift from the employee calendar.	Request Shift Swap
Request to have another employee cover your shift	When you cannot work your scheduled shift, you can submit a request to have another employee who is currently not scheduled to work, cover your shift from the employee calendar.	Request To Cover
Request to work an entire or partial open shift	If used in your organization, you can submit a request to work a partial or whole open shift from the employee calendar during an open shift request period.	Request Shift

Approval process for self-service scheduling requests



- Some types of requests require approval from your manager



- You can track the status of your requests in the employee calendar

Icon	Request status	Description
	Submitted	You have submitted the request to your manager <ul style="list-style-type: none"> You can retract the request at this point, if necessary
	Pending	Your manager has acknowledged the request and it is awaiting further action <ul style="list-style-type: none"> You can no longer retract the request
	Retracted	You or your manager has rescinded the request
	Approved	Your manager has approved the request
	Refused	Your manager has denied the request

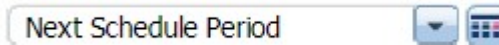
Submitting a self-schedule request



Selecting a time period

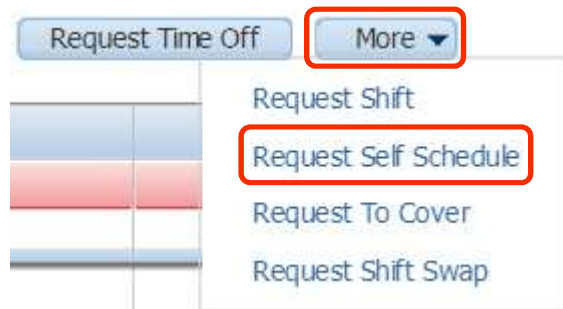
Set your calendar to the applicable time period to make the self-schedule request.

From the **time period** drop-down list, choose the time period that matches the shift sign-up period, typically the **Next Schedule Period**.



Accessing schedule sign-up

1. Click the **More** button and select **Request Self Schedule**.



2. Click **Close** on the Request period informational message.



Submitting a self-schedule request (Continued)



3. A grid appears that shows the available shifts that you could work. Review the available shifts to determine the shifts that you will select for your schedule.

7/22/2018 - 7/28/2018 | Time Label | Location All | Type Self Scheduling JTS | Draft Submit Cancel

Adjusted Request period: 7/01/2018 - 8/11/2018 | Deadline for submission: 7/06/2018 11:59PM

Sun 7/22	Mon 7/23	Tue 7/24	Wed 7/25	Thu 7/26	Fri 7/27	Sat 7/28
Primary [2] 7:00AM - 7:30PM Duration [12.5 h] RN [2 Available]	Primary [4] 7:00AM - 7:30PM Duration [12.5 h] RN [2 Available] 7:00PM - 7:30AM Duration [12.5 h] RN [2 Available]	Primary [4] 7:00AM - 7:30PM Duration [12.5 h] RN [2 Available] 7:00PM - 7:30AM Duration [12.5 h] RN [2 Available]	Primary [4] 7:00AM - 7:30PM Duration [12.5 h] RN [2 Available] 7:00PM - 7:30AM Duration [12.5 h] RN [2 Available]	Primary [4] 7:00AM - 7:30PM Duration [12.5 h] RN [2 Available] 7:00PM - 7:30AM Duration [12.5 h] RN [2 Available]	Primary [4] 7:00AM - 7:30PM Duration [12.5 h] RN [2 Available] 7:00PM - 7:30AM Duration [12.5 h] RN [2 Available]	Primary [2] 7:00PM - 7:30AM Duration [12.5 h] RN [2 Available]
Transfer [12]	Transfer [12]	Transfer [12]	Transfer [12]	Transfer [12]	Transfer [12]	Transfer [12]

4. Depending on your job and where you are eligible to work, you may need to select a specific location or job. For example, to sign up for on call shifts select Job and the appropriate on call job for the shifts you want to work.

Time Label | Job | All

7/23 | Tue | ON CALL 2
Primary [4] | ON CALL 1
7:00AM - 7:30PM | RN

Submitting a self-schedule request (Continued)



Important Tip:

Please be sure to review and verify your shift selections prior to clicking **Submit** as you will *not* be able to make any changes once submitted.

Reviewing available shifts

The schedule grid contains several features that make it easier to select the shifts that you want to work:

- A** Move between weeks in a multi-week schedule period using the navigation arrows.
- B** View shifts by shift times or shift labels.
- C** Click the sort icon to sort shifts for a specific day in various ways, such as by start time or duration.
- D** Available shifts that are in your primary job and Scheduled location are grouped together under The Primary heading. Shifts for other jobs or Locations that you can work in appear under the Transfer heading such as the ON CALL job or RN job for a LPN.

The screenshot displays a schedule grid for the period 7/22/2018 - 7/28/2018. The grid shows shifts for Sunday 7/22, Monday 7/23, and Tuesday 7/24. The 'Adjusted Request period' is 7/01/2018 - 8/11/2018. The interface includes navigation arrows, a 'Time' button, a 'Label' button, and a 'Location' dropdown menu set to 'All'. A sort menu is open for Sunday 7/22, showing options for 'Start Time' and 'Duration'. The 'Primary' heading is highlighted for Monday 7/23, and the 'Transfer' heading is also highlighted. The 'Primary' heading is also highlighted for Tuesday 7/24.

Sun 7/22	Mon 7/23	Tue 7/24
Sort by... Start Time Start Time Duration Duration	Primary [4] 7:00AM - 7:30PM Duration [12.5 h] RN [2 Available] 7:00PM - 7:30AM Duration [12.5 h] RN [2 Available]	Primary [4] 7:00AM - 7:30PM Duration [12.5 h] RN [2 Available] 7:00PM - 7:30AM Duration [12.5 h] RN [2 Available]
Transfer [12]	Transfer [12]	Transfer [12]

Submitting a self-schedule request (Continued)



Reviewing the location schedule

Use the **Dept Schedule** supporting tab to see when your colleagues are working. This allows you to choose shifts when you would be working with the colleagues with whom you work best.

Location: ...HS/MED SURG/5 SOUTH Job: Time Label Whole Shift Segmented Shift Hide unscheduled employees

Employee	Job	Sun 7/15	Mon 7/16	Tue 7/17	Wed 7/18	Thu 7/19	Fri 7/20	Sat 7/21
BROWN, LE-VETA G	PCT US							
BURD, STEPHAINE A	LPN				7:00AM-7:30PM		7:00AM-7:30PM	
BURKHOLDER, MINDY L	RN		7:00AM-7:30PM	7:00AM-7:30PM		7:00AM-7:30PM		
CAMPBELL, STACY L	PCT US							
COOK, HEATHER N	PCT US							
DAVIS, MORGAN P	PCT US							

Reviewing coverage information for your location

Review the current coverage data for your location in the **Coverage** supporting tab to determine which shifts will best meet your location's coverage needs.

Job: .../MED SURG/5 SOUTH/RN Zone

Zone	Sun 7/15	Mon 7/16	Tue 7/17	Wed 7/18	Thu 7/19	Fri 7/20	Sat 7/21
7a	↓ 0/2	↑ 3/2	2/2	2/2	2/2	2/2	↓ 1/2
7p	↓ 0/2	2/2	↓ 1/2	2/2	↑ 3/2	2/2	2/2

My Accruals Dept Schedule Coverage

Submitting a self-schedule request (Continued)



Select shifts to work

Use the self-schedule request grid to select the shifts that you want to work.

7/22/2018 - 7/28/2018 | Time Label | Location All | Type Self Scheduling JTS | Draft Submit Cancel

Adjusted Request period: 7/01/2018 - 8/11/2018 | Deadline for submission: 7/06/2018 11:59PM

Sun 7/22	Mon 7/23	Tue 7/24	Wed 7/25	Thu 7/26	Fri 7/27	Sat 7/28
Primary [2] <input type="radio"/> 7:00AM - 7:30PM Duration [12.5 h] RN [2 Available]	Primary [4] <input type="radio"/> 7:00AM - 7:30PM Duration [12.5 h] RN [2 Available] <input type="radio"/> 7:00PM - 7:30AM Duration [12.5 h] RN [2 Available]	Primary [4] <input type="radio"/> 7:00AM - 7:30PM Duration [12.5 h] RN [2 Available] <input type="radio"/> 7:00PM - 7:30AM Duration [12.5 h] RN [2 Available]	Primary [4] <input type="radio"/> 7:00AM - 7:30PM Duration [12.5 h] RN [2 Available] <input type="radio"/> 7:00PM - 7:30AM Duration [12.5 h] RN [2 Available]	Primary [4] <input checked="" type="radio"/> 7:00AM - 7:30PM Duration [12.5 h] RN [2 Available] <input type="radio"/> 7:00PM - 7:30AM Duration [12.5 h] RN [2 Available]	Primary [4] <input checked="" type="radio"/> 7:00AM - 7:30PM Duration [12.5 h] RN [2 Available] <input type="radio"/> 7:00PM - 7:30AM Duration [12.5 h] RN [2 Available]	Primary [2] <input type="radio"/> 7:00PM - 7:30AM Duration [12.5 h] RN [2 Available]
Transfer [12] My Schedule	Transfer [12] My Schedule	Transfer [12] My Schedule	Transfer [12] My Schedule	Transfer [12] My Schedule 7:00AM - 7:30PM	Transfer [12] My Schedule 7:00AM - 7:30PM	Transfer [12] My Schedule

1. Select the shift(s) that you want to work.

- If you need to clear a shift selection, click the radio button a second time.
- You can only select a single shift for a particular day. If you want to work multiple shifts in a day (regular and on call), you need to submit multiple requests.

2. Click **Submit**.

- If you are not ready to submit the request, you can click Draft instead. You can edit your schedule request later if needed and then submit the request.
- You can also cancel the request if you do not want to save it.

Submitting a self-schedule request (Continued)



Tracking the request status

After you submit the self-schedule request, it is automatically approved; the shifts that you signed up for appear in your calendar and the request status is **Approved** but subject to change until the final schedule is posted.

Thu 7/19	Fri 7/20	Sat 7/21
Open (12)	Open (12)	Open (13)
<input checked="" type="checkbox"/> Self Scheduling JTS		
7a7 7:00AM-7:30PM [12.5 h] Regular Organization/LMHS/MED SURG/5 SOUTH/RN	Approved Number of requested shifts: 1 Request approved, but subject to change until the final schedule is posted.	

Changing shifts in an approved, posted schedule

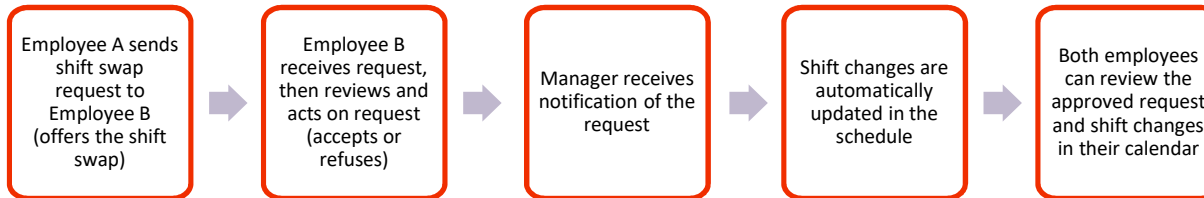
If you realize that you cannot work one or more of the shifts that you have signed up to work, you have several options:

- Shift swap with an open shift or another associate
- Request to cover (if you do not need to work the hours)

Requesting to swap shifts



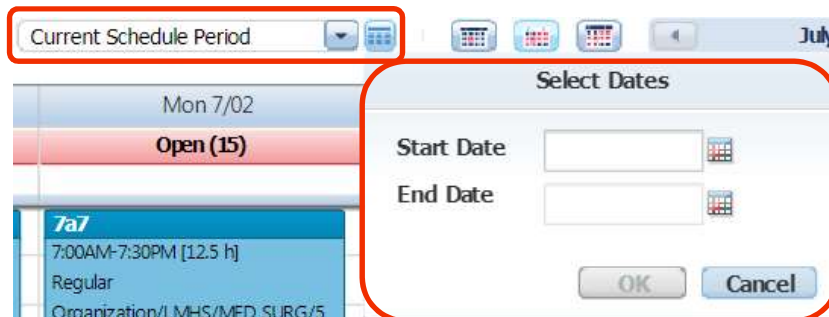
Understanding the shift swap process



Selecting a time period

Choose the time period that includes the date of the shift that you cannot work. You can either:

- Select a pre-configured time period from the drop-down list.
- Click the calendar icon, enter the applicable date range into the **Start Date** and **End Date** fields, and then click **OK**.



Requesting to swap shifts (Continued)



Review the Dept Schedule for possible swap candidates

You can review the schedule for the date and location where you are considering swapping your scheduled shift to determine:

- Potential colleagues to swap with
- Other colleagues who are scheduled to work in the potential swap location at the same time

Location: ...HS/MED SURG/5 SOUTH Job: Time: Label: Whole Shift Segmented Shift Hide unscheduled employees

Employee	Job	Sun 7/01	Mon 7/02	Tue 7/03	Wed 7/04	Thu 7/05	Fri 7/06	Sat 7/07
EVANS, BRENDA L	PCT US			7:00PM-7:30AM		7:00PM-7:30AM		
GUDORF, KYLIE M	RN					7:00PM-7:30AM	7:00PM-7:30AM	
HALL, CATRINA M	LPN							
HALL, MELINDA S	RN			7:00AM-7:30PM	7:00AM-7:30PM		7:00AM-7:30PM	
HUMES, KYLA J	RN			7:00AM-7:30PM			7:00AM-7:30PM	
HURLES, CASSANDRA E	PCT US				7:00PM-7:30AM	7:00PM-7:30AM		

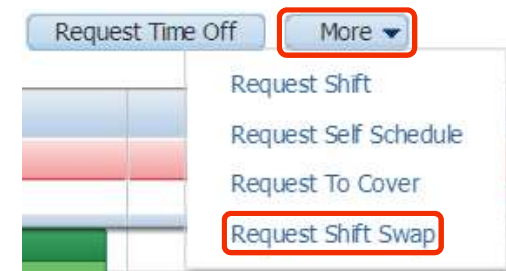
My Accruals Dept Schedule Coverage

Requesting to swap shifts (Continued)



Creating and submitting a request to swap shifts with another employee

1. Click the date in your calendar when you cannot work your scheduled shift, click **More**, and select **Request Shift Swap**.
2. In the Request Shift Swap dialog box, enter this:
 - a) In the **Date** field, ensure that the date on which you want to swap your shift appears.
 - Click the **calendar** icon to select the applicable date, if necessary
 - b) In the **Type** field, ensure that the applicable request type appears: **AUTO Shift swap**.
 - c) In the **Time** field, ensure that the start and end times appear for the shift that you cannot work. If you are scheduled for multiple shifts on that day, select the shift that you cannot work.
 - d) Confirm the shift information in the box under these fields.
 - e) In the **Date** field in the **Swap with** section, click the **calendar** icon, and select the date when you want to work.
 - f) Use the drop-down lists in the **Swap with** section to sort and filter on either **locations** or **jobs** for which you want to view potential employees for your shift swap.



A screenshot of the 'Request Shift Swap' dialog box. The 'Date' field is set to 7/02/2018 and the 'Type' is 'AUTO Shift swap'. The 'Time' field is set to 7:00AM - 7:30PM. Below this, a box shows 'Start Date' 7/02/2018, 'Start Time' 7:00AM, and 'Duration' 12.5 h. The 'Swap with' section has a date of 7/05/2018 and a location of 'All'. A table lists potential employees to swap with:

Employee	Date	Start time	End time	Job/Location
<input type="radio"/> TIDD, JAYME L	Thu 7/05	7:00PM	7:30AM	.../MED SURG/5 SOUTH/RN
<input type="radio"/> DIFFIN, NICHOLE L	Thu 7/05	7:00PM	7:30AM	.../MED SURG/5 SOUTH/RN
<input checked="" type="radio"/> BURKHOLDER, MINDY L	Thu 7/05	7:00AM	7:30PM	.../MED SURG/5 SOUTH/RN
<input type="radio"/> SCHULTZ, AMY L	Thu 7/05	7:00AM	7:30PM	.../MED SURG/5 SOUTH/RN
<input type="radio"/> SUDLOW, KRISTY L	Thu 7/05	7:00PM	7:30AM	.../MED SURG/5 SOUTH/RN

Buttons for 'Draft', 'Submit', and 'Cancel' are at the bottom.

Requesting to swap shifts (Continued)



- g) Review the list of available swap candidates, and select the employee to whom you want to offer the shift swap.
- h) Enter an explanation in the **Notes** field, if needed.

3. Click **Submit**.

After you submit the request, the employee to whom you offered the shift swap receives a notification message in his or her Kronos Inbox about the request. The message contains specific information about the shift swap and prompts the employee to accept or refuse the request from his or her employee calendar.

The 'Request Shift Swap' dialog box shows the following details:

- Date:** 7/02/2018
- Type:** AUTO Shift swap
- Time:** 7:00AM - 7:30PM
- Start Date:** 7/02/2018
- Start Time:** 7:00AM
- Duration:** 12.5 h
- Regular:** Regular
- Swap with:** 7/05/2018
- Location:** All

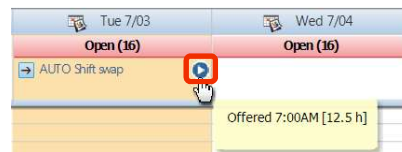
Employee	Date	Start time	End time	Job/Location
<input type="radio"/> TIDD, JAYME L	Thu 7/05	7:00PM	7:30AM	.../MED SURG/5 SOUTH/RN
<input type="radio"/> DIFFIN, NICHOLE L	Thu 7/05	7:00PM	7:30AM	.../MED SURG/5 SOUTH/RN
<input checked="" type="radio"/> BURKHOLDER, MINDY L	Thu 7/05	7:00AM	7:30PM	.../MED SURG/5 SOUTH/RN
<input type="radio"/> SCHULTZ, AMY L	Thu 7/05	7:00AM	7:30PM	.../MED SURG/5 SOUTH/RN
<input type="radio"/> SUDLOW, KRISTY L	Thu 7/05	7:00PM	7:30AM	.../MED SURG/5 SOUTH/RN

Buttons: Draft, Submit, Cancel

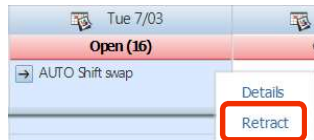
Retracting a shift swap

You can retract a shift swap request while it is in Offered status.

1. Hover on the request in your calendar and then click the circle with an arrow icon.



2. Select **Retract**.



3. Click **Retract** in Retract Request dialog box.

The 'Retract Request' dialog box shows the following details:

- Status:** Offered 7/03/2018-4:06:32PM
- Modified by:** Kawate
- Start Date:** 7/02/2018
- Start Time:** 7:00AM
- Duration:** 12.5 h
- Regular:** Regular
- Swap with:** PHILLIPS, JENNIFER R
- Start Date:** 7/03/2018
- Start Time:** 7:00AM
- Duration:** 12.5 h
- Regular:** Regular

Buttons: Retract, Cancel

Requesting Time Off

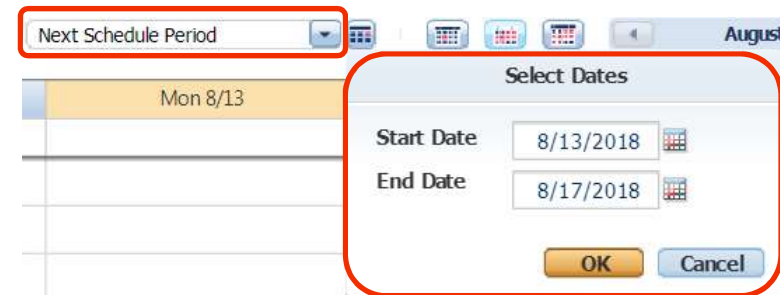


Selecting a time period

Choose the time period that includes the first and last date(s) of your time-off request. For a single day, these dates are the same.

You can either:

- Select a pre-configured time period from the drop-down list.
- Click the **calendar** icon and enter the applicable date range into the **Start Date** and **End Date** fields, and then click OK.



Reviewing coverage information for your location

Depending on the timing of your request, you might need to review the current coverage data for your location in the **Coverage** supporting tab to determine the impact of your taking time off during this period.

- For example, there is already undercoverage for RNs on Tuesday in the following image in the 7p zone so it might not be advisable to request time off.

Job	...	MED SURG/5 SOUTH/RN	Zone						
Span		Sun 7/15	Mon 7/16	Tue 7/17	Wed 7/18	Thu 7/19	Fri 7/20	Sat 7/21	
7a	↓	0/2	↑	2/2	2/2	2/2	2/2	↓	1/2
7p	↓	0/2	2/2	↓	2/2	↑	3/2	2/2	2/2

My Accruals Dept Schedule Coverage

Requesting Time Off *(Continued)*



Creating and submitting the time-off request

1. Click **Request Time Off**.
2. In the Request Time Off dialog box, enter the following information:
 - a) From the **Type** drop-down list, select the request type.
 - b) Use the **calendar icons** to select the applicable **Start** and **End dates** of the request.
 - a) In the **Start time**, enter the start time of the time-off request; for example 7a or 7p.
 - d) In the **Duration**, enter the number of hours you are taking off.
3. Use the **Accruals on** drop-down list to select the date of your time-off request, and review your accruals to ensure that you have accrued enough time to cover the time-off request.
4. Click **Submit**.

Request Time Off

Type: Time Off VAC

Start date: 7/20/2018

End date: 7/20/2018

Time Unit: Hours

Start time: 7:00AM

Duration: 12.0

Accruals on: 7/05/2018

Accrual	Balance
DR	0.0 Hour
PTM	54.1 Hour

Draft Submit Cancel

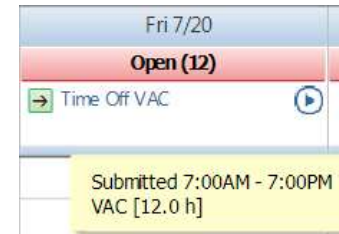
Note: If you are not ready to submit the request to your manager, you can click **Draft** instead. You can edit the request later if needed and then submit the request. You can also delete a draft request from your calendar if you no longer want to take the time off.

Requesting Time Off *(Continued)*

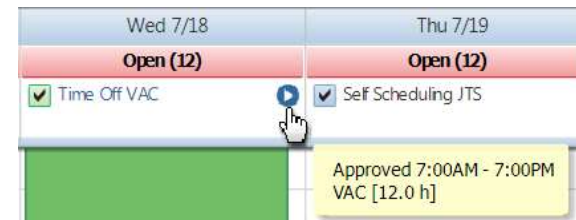


Tracking the request status

After you submit the time-off request, it will be reviewed by your manager for approval. The status of the request appears in your calendar as **Submitted** until it is reviewed.



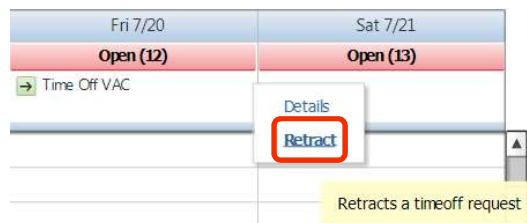
When the request is approved, the time off appears in your calendar and the request status is updated to **Approved**.



Retracting a time-off request

You can retract a time-off request while it is in Submitted status.

1. Hover on the request in your calendar and then click the circle with the arrow icon.
2. Select **Retract**.



3. Click **Submit**.

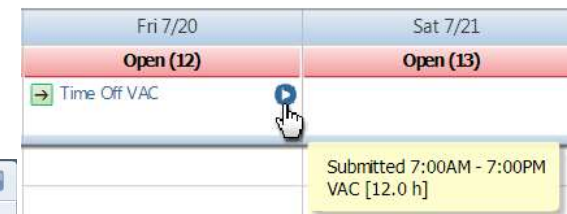
Retract Time-Off Request

Submitted 7/05/2018-10:57:08AM
Modified by Kawate

Requested

Type	Time Off VAC		
Start Date	7/20/2018	End Date	7/20/2018
Duration	Hours	Length	12.0 h
Start Time	7:00AM		

Submit Cancel



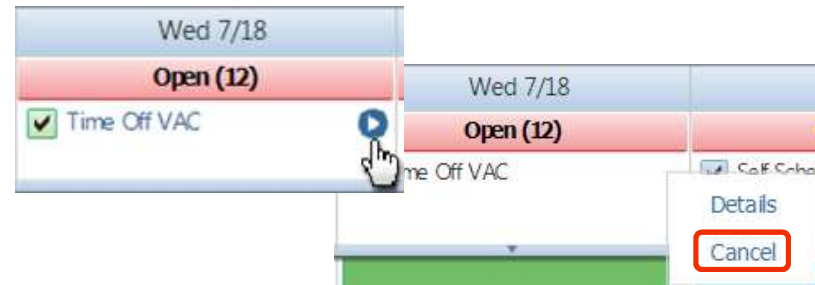
Requesting Time Off *(Continued)*



Canceling an approved time-off request

If your time-off request has been approved but you no longer need to take the time off, you can cancel it from your calendar.

1. Hover on the approved request in your calendar and then click the circle with an arrow icon.
2. Select **Cancel**.
3. In the Cancel Time-Off Request dialog box, click **Submit**.



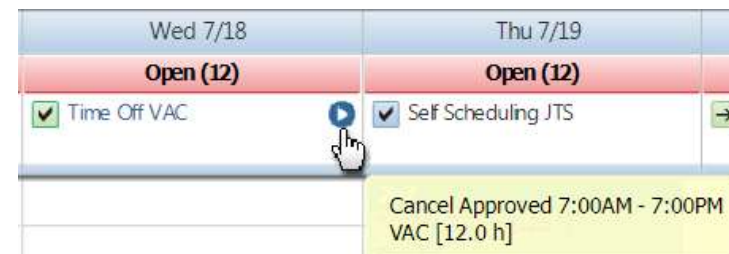
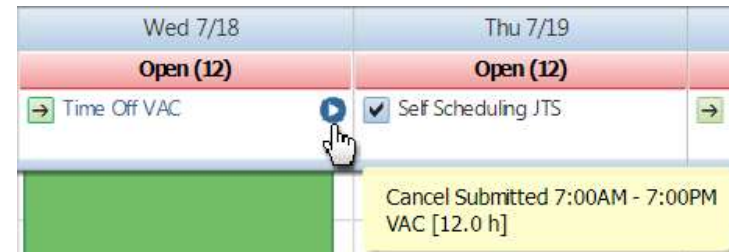
Cancel Time-Off Request

✓ Approved 6/29/2018-2:29:54PM
Modified by bszym

Requested Approved

Type	Time Off VAC		
Start Date	7/18/2018	End Date	7/18/2018
Duration	Hours		
Start Time	7:00AM	Length	12.0 h

Submit Cancel

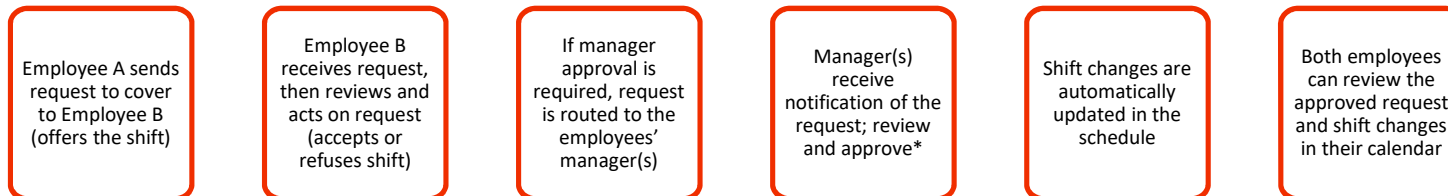


Note: When your cancellation request is approved, the time-off will be removed from your calendar.

Requesting another employee cover your shift



Understanding the request to cover process

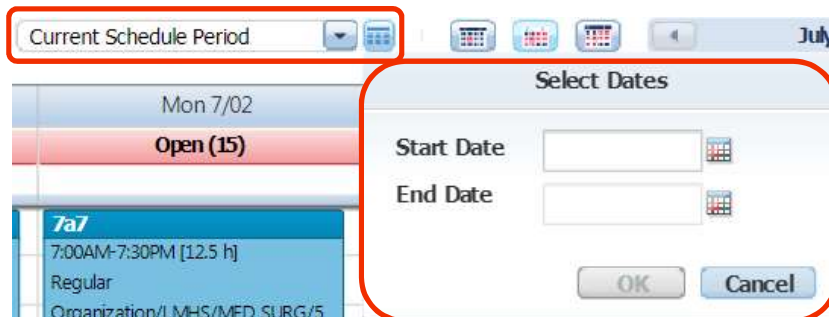


* In cases where the two employees have different managers, both managers are notified about the request, and either manager can approve it.

Selecting a time period

Choose the time period that includes the date of the shift that you cannot work. You can either:

- Select a pre-configured time period from the drop-down list.
- Click the **calendar** icon and enter the applicable date range into the **Start Date** and **End Date** fields, and then click **OK**.



Requesting another employee cover your shift (Continued)



Review the Dept Schedule for possible coverage candidates

You can review the schedule for the date and location of your scheduled shift to find:

- Unscheduled employees who might be able to cover your shift
- Other shifts that those employees are working during the week of your request, employees with fewer scheduled hours are more likely to be able to cover your shift.

Note: Ensure that the Hide unscheduled employees check box is cleared to include employees who are not currently scheduled during the selected time period. You might also want to filter the Job list so that only co-workers who can work in the job that you are scheduled for are included.

Location: ...HS/MED SURG/5 SOUTH Job: Time: Label: Whole Shift: Segmented Shift: Hide unscheduled employees

Employee	Job	Sun 7/08	Mon 7/09	Tue 7/10	Wed 7/11	Thu 7/12	Fri 7/13	Sat 7/14
KITCHEN, LESLIE L	RN			7:00AM-7:30PM	7:00AM-7:30PM			7:00AM-7:30PM
KNOCH, ROBERTA G	PCT US				7:00AM-7:30PM	7:00AM-7:30PM		7:00AM-7:30PM
KROUSKOP, BENJAMIN L	RN		7:00AM-7:30PM	7:00AM-7:30PM		7:00AM-11:00AM		7:00AM-7:30PM
KROUSKOP, BENJAMIN L	RN					11:00AM-3:00PM		
LEARY, JULIA A	LPN			7:00AM-7:30PM	7:00AM-11:00AM	7:00AM-7:30PM	7:00AM-7:30PM	
LEARY, JULIA A	LPN				11:00AM-3:00PM			
MARTIN, HANNAH J	PCT US				7:00PM-7:30AM	7:00PM-7:30AM		

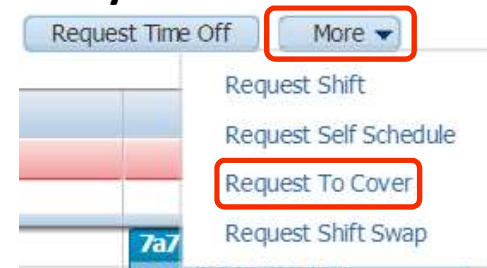
My Accruals Dept Schedule Coverage

Requesting another employee cover your shift (Continued)



Creating and submitting a request for another employee to cover your shift

1. Click the date in your calendar of the shift that you cannot work, and then click **More**, and select **Request to Cover**.
2. In the Request to Cover dialog box, enter this information:
 - a) In the **Date** field, ensure that the date appears when you have a scheduled shift that you cannot work.
 - Click the **calendar** icon to select the applicable date, if necessary.
 - b) In the **Type** field, ensure the request type is **Cover My Shift**.
 - c) In the **Time** field, ensure that the start and end times appear for the shift that you cannot work. If you are scheduled for multiple shifts on that day, select the shift that you cannot work.
 - d) Confirm the shift information in the box under these fields.
 - e) Review the list of available coverage candidates and select the employee or employees to whom you want to offer the shift.
 - f) In the **Notes** field, enter an explanation, if needed.
3. Click **Submit**.



Request To Cover

Date: 7/10/2018 Type: Cover My Shift

Time: 7:00AM - 7:30PM

Start Date: 7/10/2018 Start Time: 7:00AM

Duration: 12.5 h

Regular

Shift to cover by

Employee	Time	Availability
<input checked="" type="checkbox"/> DEMPSEY, NATASHA L		<input type="checkbox"/> Unknown
<input type="checkbox"/> HALL, CATRINA M		<input type="checkbox"/> Unknown
<input type="checkbox"/> GUDORF, KYLIE M		<input type="checkbox"/> Unknown
<input type="checkbox"/> SHIELDS, MELANIE A		<input type="checkbox"/> Unknown
<input type="checkbox"/> ROBERTS, TARA M		<input type="checkbox"/> Unknown

Notes (Optional)

Can you cover my shift on Tuesday? I need to take my daughter to an appointment.

Requesting another employee cover your shift (Continued)

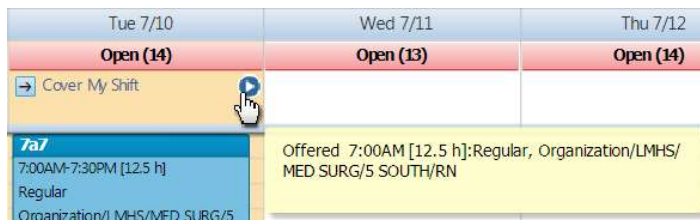


You can click **Draft** to save a draft of the Request to Cover in your employee calendar. You can see details of the request, offer the shift, or delete the draft request at a later time.

After you submit your request to cover, the employee to whom you have offered your shift receives a notification in his or her Kronos Inbox, prompting the employee to accept or refuse the request from the employee calendar.

Tracking the request status

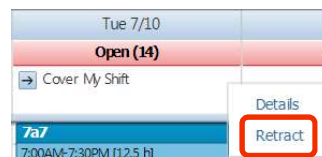
After you submit the request to cover, you can determine the status of your request by reviewing the status icon. You can also hover on the request to view a tool tip that shows the current status. When the request is approved, the schedule change appears in your calendar and the request status is updated to **Approved**.



Retracting a request to cover

You can retract your request while it is in Offered status.

1. Hover on the request in your calendar and then click the circle with an arrow icon.
2. Select **Retract**.
3. In the Retract Request dialog box, enter a note to your manager in the **Notes** field, if applicable, and then click **Submit**.



Retract Request

→ Offered 7/05/2018-12:51:44PM
Modified by Kawate

Start Date	7/10/2018	Start Time	7:00AM
Duration	12.5 h		

Regular

Covering Employee:

DEMPSEY, NATASHA L

Notes (Optional)

Retract Cancel

Requesting to cover an open shift



Selecting a time period

From the **time period** drop-down list, choose the time period that matches the open shift request period, typically the **Next Schedule Period**.



Reviewing available open shifts

Available open shifts in your location appear in a red bar under the dates when they occur.

- The number of open shifts available on that day appears in parentheses
- Hover on the red bar to view the shift start and end times in a tool tip

Sun 7/22	Mon 7/23	Tue 7/24
Open (2)	Open (2)	Open (4)

Regular
7:00PM-7:30AM (1)
Transfer
Organization/LMHS/MED SURG/NON CC ONCALL/ON
CALL 1 - 11:00PM-3:00AM (1)

Reviewing the Dept Schedule

You can review the current schedule for your location in the **Dept Schedule** supporting tab to see when your colleagues are working. This can help you to select a shift that is scheduled at the same time as colleagues with whom you work best.

Employee	Job	Sun 7/08	Mon 7/09	Tue 7/10	Wed 7/11	Thu 7/12	Fri 7/13	Sat 7/14
LEARY, JULIA A	LPN				11:00AM-3:00PM			
MARTIN, HANNAH J	PCT US				7:00PM-7:30AM	7:00PM-7:30AM		
MARTIN, MEGAN L	PCT US	7:00AM-7:30PM		7:00AM-7:30PM	7:00AM-7:30PM			
METZLER, ASHLEI L	RN	7:00PM-7:30AM		7:00PM-11:00PM	7:00PM-7:30AM			
MILLER, CONNIE L	RN		7:00PM-7:30AM		7:00PM-7:30AM	7:00PM-7:30AM		7:00PM-11:00PM
MUSTAINE, LOGAN M	PCT US				7:00PM-7:30AM	7:00PM-7:30AM		

Requesting to cover an open shift (Continued)



Reviewing coverage information for your location

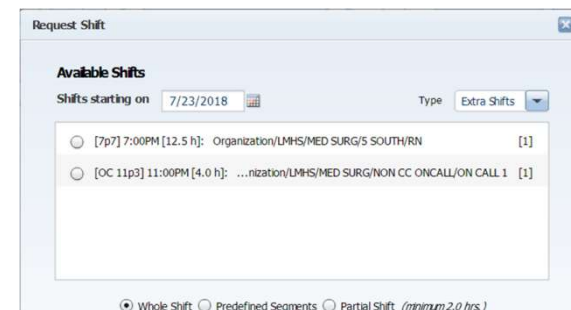
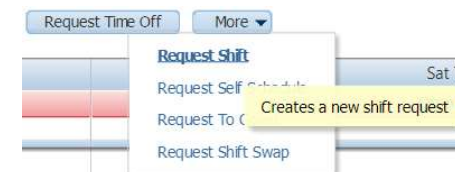
You can review the current coverage data for your location in the **Coverage** supporting tab to determine which shifts will best meet your location's coverage needs.

Job	...	MED SURG/5 SOUTH/RN	Zone									
Span	Sun 7/22	Mon 7/23	Tue 7/24	Wed 7/25	Thu 7/26	Fri 7/27	Sat 7/28					
7a	↓ 1/2	2/2	↓ 1/2	↓ 0/2	↓ 0/2	↓ 0/2	2/2					
7p	2/2	↓ 1/2	↓ 1/2	↓ 0/2	↓ 0/2	↓ 0/2	↓ 0/2					

My Accruals | Dept Schedule | Coverage

Creating and submitting an open shift request

1. In the calendar, click the **date** of the open shift that you want to work.
2. Hover on the open shift in the calendar, click the circle arrow icon, and then select **Request Shift**.
 - Alternatively, click the **More** button; select **Request Shift**.
3. In the Request Shift dialog box, enter the following information:
 - a) In the **Date** field, ensure that the date appears when you want to work.
 - Click the **calendar** icon to select the applicable date, if necessary
 - b) In the **Type** field, ensure the request type is **Extra Shifts**.
 - c) Select the **open shift** that you want to work.
 - d) Select one of the following options:



Requesting to cover an open shift (Continued)



To select a whole shift:

- i. Select **Whole Shift** if you want to cover the entire shift.

To select part of the shift:

- i. Select **Partial Shift**.
- ii. Indicate which part of the shift you want to work.
 - If you need to start working the shift after the designated start time, select the **first option** and enter the time when you want to begin the shift.

Whole Shift Predefined Segments Partial Shift (minimum 2.0 hrs.)

<input checked="" type="radio"/> Start time: 1p	<input type="radio"/> Start time: 7:00AM
End time: 7:30PM	End time: <input type="text"/>

- If you need to stop working earlier than The designated end time, select the **second option** and enter the time you want to end the shift.

Whole Shift Predefined Segments Partial Shift (minimum 2.0 hrs.)

<input type="radio"/> Start time: <input type="text"/>	<input checked="" type="radio"/> Start time: 7:00AM
End time: 7:30PM	End time: 1p <input type="text"/>

Request Shift

Available Shifts

Shifts starting on 7/23/2018 Type Extra Shifts

- [7p7] 7:00PM [12.5 h]: Organization/LMHS/MED SURG/5 SOUTH/RN [1]
- [OC 11p3] 11:00PM [4.0 h]: ...nization/LMHS/MED SURG/NON CC ONCALL/ON CALL 1 [1]

Whole Shift Predefined Segments Partial Shift (minimum 2.0 hrs.)

Notes (Optional)

Draft Submit Cancel

Requesting to cover an open shift (Continued)



- e) In the **Notes** field, enter a note to your manager, if needed.
- 4. Click **Submit**.

Tracking the request status

After you submit the open shift request, it will be reviewed by your manager for approval. The status of the request appears in your calendar as **Submitted** until it is reviewed.

Tue 7/24	Wed 7/25	Thu 7/26
Open (4)	Open (4)	Open (16)
Extra Shifts		
	Submitted 7:00AM [12.5 h] 7:00AM [12.5 h]:Regular, Organization/LMHS/MED SURG/5 SOUTH/RN	

The 'Request Shift' dialog box shows the following details:

- Available Shifts:** Shifts starting on 7/23/2018. Type: Extra Shifts.
- Selected Shifts:
 - [7p7] 7:00PM [12.5 h]: Organization/LMHS/MED SURG/5 SOUTH/RN [1]
 - [OC 11p3] 11:00PM [4.0 h]: ...nization/LMHS/MED SURG/NON CC ONCALL/ON CALL 1 [1]
- Shift Type: Whole Shift Predefined Segments Partial Shift (minimum 2.0 hrs.)
- Notes (Optional): [Empty text field]
- Buttons: Draft, Submit, Cancel

When the request is approved, the shift(s) that you requested appears in your calendar and the request status is updated to **Approved**.

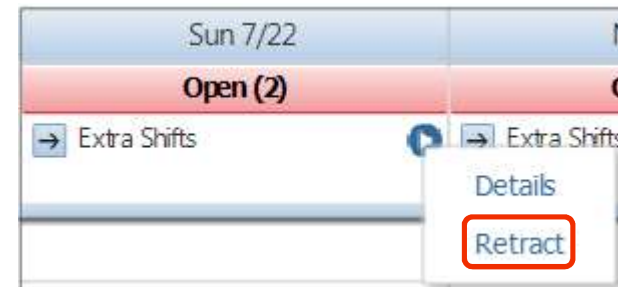
Tue 7/24	Wed 7/25	Thu 7/26
Open (3)	Open (4)	Open (16)
Extra Shifts		
7a7 7:00AM-7:30PM [12.5 h] Regular Organization/LMHS/MED SURG/5 SOUTH/RN	Approved 7:00AM [12.5 h] 7:00AM [12.5 h]:Regular, Organization/LMHS/MED SURG/5 SOUTH/RN	

Requesting to cover an open shift *(Continued)*



Retracting an open shift request

1. Hover on the request in your calendar and then click the circle with an arrow icon.
2. Select **Retract**.
3. In the Retract Request dialog box, enter a note to your manager in the **Notes** field, if needed, and then click **Retract**.



Changing shifts after they are approved

If you realize that you cannot work the shift or part of a shift that you requested after it was approved, you have several options:

- Shift swap with a different open shift or another employee
- Request to cover (if you do not need to work the hours)

Retract Request

Submitted 7/05/2018-4:44:38PM
Modified by Kawate

Start Date 7/22/2018	Type Extra Shifts
Base Open Shift 7:00AM [12.5 h]	Regular

Notes (Optional)

Changed my mind.

Retract **Cancel**