Area Assignment Sheet

HOW TO MAKE ASSIGNMENTS: - log into the Schedule Admin & select Assignments from the blue menu bar, and then select Area Assignment Sheet

1. The parameter page settings default to your team, today's date, and the current day part – change parameters as needed, and then select Continue

2. To make new assignments select the dropdown in the assignment field and a list of employees qualified for the assignment display

    •   Employees that do not have an assignment display red

    •   Employees that have an assignment display blue

    •   Select the employee's name or place a checkmark in the box next to the employees you want to assign

3. Select Done in the upper right corner or just click outside the box. The list closes and the number of employee(s) selected displays in blue for this assignment

Repeat these steps 2 & 3, selecting the employees to be assigned to each assignment

4. Once assignments are made, select any of the Set Times & Continue buttons (*located under the comment fields in each area*) - this populates the employees' scheduled shift times in the start/end time fields - you can manually change the start and/or end times if the employee will be in this assignment for part of their shift – and then select Set Times & Continue

    The employee names assigned now display with a yellow 'NEW' flag before each new assignment. ***Please note that the assignments are not saved until you select submit***

5. Select Submit from the top or bottom of page - the yellow flag no longer displays, and the assignments are now saved

You can wait until the end or anytime during the assignment process to complete step #4 above. You can also wait until the end or anytime during the assignment process to complete step #5 above, selecting Submit. However, if you select Submit, you cannot simply cancel the entries. You can delete entries once submitted if they need to be changed.

NOTES:

•   The pink status bar, at the top of the page, updates every time you submit, displaying the number of employees that have not been assigned – you can view the list of these employees by selecting the link
•   A comment box is available for each assignment and can only be saved if an assignment is present
•   A comment box is available per area - you can use this area to make comments regarding the associated OR/Area, i.e., cases or physicians or any specifics for this area – no assignment is required
•   The assignments will be shaded gold & you will see a Validation Error at the top of the page in the pink header, stating the Start/End times cannot be blank if you forget to select Set Times & Continue before selecting submit. To correct, select Set Times & Continue, and then select Submit

CHANGING AN EMPLOYEE'S ASSIGNMENT DURING A SHIFT (Multiple assignments):

1. An employee can have multiple assignments throughout the shift. For example, you have an employee that is assigned to OR 5, but now you need them to move to OR 10

2. Change the end time for the employee's assignment in OR 5 to the time they are moving to OR 10, and then select Set Times & Continue

3. Make their assignment for OR 10, selecting their name from the already assigned list (names in blue), and then manually add the start/end times and select Set Times & Continue and then Submit.

- You will see a warning in the pink header that this employee has multiple assignments, which is great!

Assignment Changes:

- If an employee's shift time is changed, when you load the assignment sheet, the assignment for the employee will be highlighted gold, f*or example: An employee is booked off for part of a shift or an entire shift; left sick or was cancelled*

- A Warning message in the pink status bar lets you know that there was a schedule change

- A Warning message in the pink status bar lets you know if an employee has more than one assignment, if more than one assignment is intended, ignore the message

- If the employee left early, the end time can be manually adjusted on the assignment - modify the end time and click Set Times & Continue and then Submit

Deleting and Changing Assignments & Schedule Changes:

- To delete an assignment, select the checkbox at the end of the assignment row, and select submit

- If you have submitted an assignment and now want to move an employee to a different Area for the entire shift, delete the current assignment and then make the new assignment

- Remember, any changes to the schedule for an employee with an assignment will display a warning in the pink header.

Other Features:

- Populate Yesterday's Assignments – Button at the bottom of the page if selected, will copy the previous days assignments.

- View the 14-day history for an assignment by hovering your mouse over an assignment

- View the 14-day history for an employee by hovering your mouse over the calendar button after an employee is assigned

- View Unassigned Employees from the pink header by selecting the 'here' link or from the View Unassigned Employees link at the bottom of the page