

## WFM Self Service Portal - SELF SCHEDULER

To access the self-scheduler, log into WFM, and then select Self Service Portal

Next, select the menu icon above the calendar (3 horizontal lines), and then select Self Scheduling



### How to self-schedule with a default shift using the quick select mode:

1. Your default shift will display in the right column, **select the toggle switch**, to the left of the default shift, to turn on the quick select mode - if you do not have a default shift\* you will see Available Shifts
2. **Select the dates you want to work**, and the shifts displays dark green as selected
3. **Select Submit** to save your selections, and they will display light green once saved
4. Acknowledge the message, and then **select okay**

YOU ARE DONE!

The submit button can be selected any time you want to save your selections, and as often as you choose.

**Note:** If you do not have a default shift set in the system you will schedule - however you will select a date and then select a shift, once all are dates/shifts are selected, then select submit to save your selections.

### How to self-schedule with no default shift - Available Shifts displays:

1. You will **select a date to be scheduled** – shifts display for jobs you are qualified to work; this could include shifts for various times and jobs dependent on your employee record
2. **To schedule a shift - Select a shift from the lists** - each available shift will display in a box with the details of the shift and a number listing how many of these shifts are available for scheduling - a dark green shift label will display on the calendar for shifts selected
3. **Repeat steps 1 and 2 until all shifts have been selected** for the 6-week schedule
4. **Select Submit**–saved shifts display with a light green shift label - *you can select submit as often as you choose*
5. Acknowledge the message by **selecting Okay** YOU ARE DONE!
  - To remove a selected or saved shift, select the date, select the shift to be removed and select the trashcan – the shift is now removed – *you will not need to submit after cancelling a shift*
  - If you select another date and shift to work, be sure and select Submit to save the selection

### Self Service Portal:

- Is mobile compatible!
- Home page displays your schedule calendar for the current month; this calendar has distinct color codes and the details of a shift display in the right column for a single date
- A menu icon is above the calendar – you will select menu to access the Self Scheduling
- Select Home from the menu to return to your home calendar and access to the Billboard

### Self-Scheduler – detailed information

#### Calendar:

- The scheduling calendar displays the last week of the previous schedule and the six-week calendar for the scheduling period
- A green flag displays in the bottom right-corner of all dates when a shift is available that matches the default shift selected (displayed in right-column)

- The bottom of the screen displays the legend. Shifts will display on the calendar in the corresponding colors.

### **Right Column:**

- Process name displays at the top, use dropdown to select a different process
- Default shift displays - if you do not have a default shift, 'Available Shifts' displays
- If you have more than one default shift, use the dropdown to select a different default shift
- If you have a default shift, the quick select mode is available for scheduling with one click. Turn quick select mode on, select the toggle, it will display blue when quick select mode is on
- Self Scheduling Rules are rules for your scheduling group – a yellow triangle (warning sign) will display next to the rules that apply to your schedule until the rule is satisfied
- A submit button is located at the bottom, and is active once a shift is selected
- A selected shift is not yours until you select submit and see the message they were successfully submitted
- Saved shifts will display light green indicating you have the shift!

**toggle**      **default shift**

⚡      N12 1845 (RN) ▼

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**Self Scheduling Rules**

Please select 4 weekend shifts (Sat and/or Sun)

▲ Please select one weekend on call (sat or sun)

▲ Please select 3 weekend work shifts (Sat and/or Sun)

▲ Please select 1 weekday on call (Mon-Fri)

### **Available Shifts** (see screenshot below):

- Displayed are available shifts for jobs you are qualified to work that do not overlap with a scheduled shift
- If you have a default shift, the shifts will display with a green star in the top left corner
- The number of shifts available displays with a green number in the top left corner of each shift
- A warning will display if the shift has you scheduled for >40 hours for the week Sun-Sat
- Again, quick select mode cannot be used when Available Shifts is selected.

**NOTE:** If you select Available Shifts from the dropdown next to your default shift, you can view shifts available for any date. The number of shifts available displays with a green number in the top corner of each shift!

**See screenshots on next page:**

Available Shifts 

1 AVAILABLE

19:00 - 07:00    NgtOCN  
RN                    ONCALL

## Compliance Warnings

2 AVAILABLE

18:45 - 07:15    N12 1845  
RN                    WRK

 *Matthew* exceeded  
40.0 hours for the week from  
[05/12/2024 - 05/18/2024]

1 AVAILABLE

18:45 - 07:15    N12 1845  
SL                    WRK

 *Matthew* exceeded  
40.0 hours for the week from  
[05/12/2024 - 05/18/2024]

**FREQUENTLY ASKED QUESTIONS****Can I select a few shifts and submit, and then continue more scheduling?**

- Yes, when scheduling with quick select or available shifts, if there is a day or week that you want to quickly submit, schedule those shifts and submit to save the selections
- Then, schedule the remaining shifts and submit again

**Why did I get the message that a shift I selected is no longer available? What do I need to do about it?**

- The shift was available at the time you selected it, however since that time other employees have selected the same shift and there are no longer any available. Select okay to acknowledge the message and select a new date during the week that the shift was not available

**What about outstanding rule warnings?**

- The rules in the system are rules for your scheduling group as defined by your team's leaders
- For example, a rule might be- you are required to select 4 weekend shifts per schedule, consisting of Saturdays and/or Sundays – if you select less than four weekend shifts, a warning will display in the message when you submit your selections
- If you submit your schedule with an outstanding warning **your shift selections are saved**, as indicated by the change to light green, however it is suggested to change your schedule to satisfy the rules
- If you do not satisfy the rules your name and the number of shifts selected will display on a report that is sent to leadership when the process closes

**What if you want to change the date of a shift selected?**

- If you change your mind about a selected shift before you click submit, in quick links simply select the shift again to de-select that shift (this can only be done prior to selecting submit)
- To remove a shift after submitting, you will select the toggle to turn off quick select –then select the shift and remove it by selecting the trash icon (you will do this if not using quick select)
- If you are cancelling a shift, there will be no submit – submit is used to save a selected shift
- If you select another shift, be sure and submit the selection

**What if I have multiple default shifts?**

- You will select the default shift to schedule using the dropdown menu-the calendar will display a flag on dates where this default shift is available
- Once scheduled, we suggest that you submit your selections to save them
- To schedule to another default shift, select a different shift, select the shifts to schedule and submit
- You can continue this until all default shifts are scheduled, as needed
- You can schedule them in any order of your choosing

#### **How can I see how many shifts are available for staff to schedule?**

- If you are using quick select, you can select the toggle switch to turn off quick select - when you select a date your default shift will display with how many are available
- To view all shifts that are available, select Available Shifts from the default shift dropdown and displayed top left of the shift details box is a green number indicating the number of shifts available

#### **How can I get to the billboard from this page?**

- Select Home in the right column or if you have closed that section, select the menu and then home
- The link for the billboard will display to the right of your schedule calendar