

How to Create a Self-Scheduling Process

PRE-SET UP - Things to do before setting up the process:

1. Pre-populate with holidays or other shifts, if needed (see Frequently Asked Questions, last page for steps)
2. Self-Scheduling Groups - Make sure all staff are in a self-scheduling group - Go to *Scheduling > Self-Scheduling > Group* to edit a group or create a new group
3. Make sure all staff have a default shift – Go to *Employees > Employee Basic Information – Override and then, to Employees>Employee and then Employee Default Shift*
4. Master Rotation changes need to be in place – new staff or staff no longer on your team, email vandyworks@vumc.org with change request – in subject type: Master Rotation Change, Schedule Start Date

GENERATING A SCHEDULE TEMPLATE:

Go to **Scheduling > Schedule Template > Generate Schedule**

1. Select your team
2. Select the schedule period for scheduling using the dropdown to select the schedule dates (DO NOT ENTER DATES) and then select Next
3. Select the checkbox next to Staff Req Template if one is listed
4. Select checkbox next to the Shift Template to be used, i.e., VUH 9S FY20 Schedule – If you have a day shift template and a night shift template you may select the shift for the process you are setting up and then, select Next
5. Under Generate Options – Select ALL 3 items*
 - Select the checkbox next to Generate Workload based Staffing Requirements, *if Staff Req was selected on previous page
 - Select the checkbox next to Generate unassigned shifts
 - Select the button next to Create as unpublished shifts and then, select Generate

You will see a message: Schedule Template Gen.... message, Workload Generated & Unpublished shifts create, select Close – you are done with this page, it is okay to move to the steps for creating a process.

CREATING THE PROCESS:

Go to **Scheduling>Self-Scheduling>Process**

1. Select the Blue **Create New Entry** button (toward the top of page)
2. Fill in the top section:
 - Select the Unit/Team name
 - Select the schedule period for scheduling (DO NOT ENTER DATES) only use the dropdown of schedule dates to make the selection
 - *In the Copy Window Definition field, select a previous process to copy
 - Select the blue Create New Process button

**Copying the Window Definitions copies the scheduling windows from the process you selected. This does NOT copy the shifts. Remember: You must generate a schedule template to offer shifts, see Generating Schedule Template above.*

There are three sections in the process: Self Scheduling Process Definition, Self-Scheduling Window Definition and Self Scheduling Shift Selection – start at the top and work your way down through each section

SELF SCHEDULE PROCESS DEFINITION:

1. Process Name – Replace the numbers displayed by typing the name of the new process -the name must be unique; adding the dates of the schedule makes it unique – do not include forward slashes in the dates, example of name VUH 8S Days June2-July13 2024 or VUH 8S Days 6.2-7.13.2024-If you have separate processes for days and nights or different times, include that in the name, ex Days
2. No description is needed
3. Verify the team and schedule start and end dates are correct

SELF SCHEDULING WINDOW DEFINITION:

Go to the **Self Scheduling Window Definition** section

1. Verify that the Window Start Date & Time is the date/time the first scheduling window will open & close – update if needed
2. The schedule windows will be in order, with first window that opened at the top and last window that opened at the bottom. If your team alternates who goes first, simply change the group name to match the dates for scheduling (window start and end date/time)
3. Select the Save button next to Process Status (Open/Close/Save), above the windows to save your entries

SELF SCHEDULING SHIFT SELECTION:

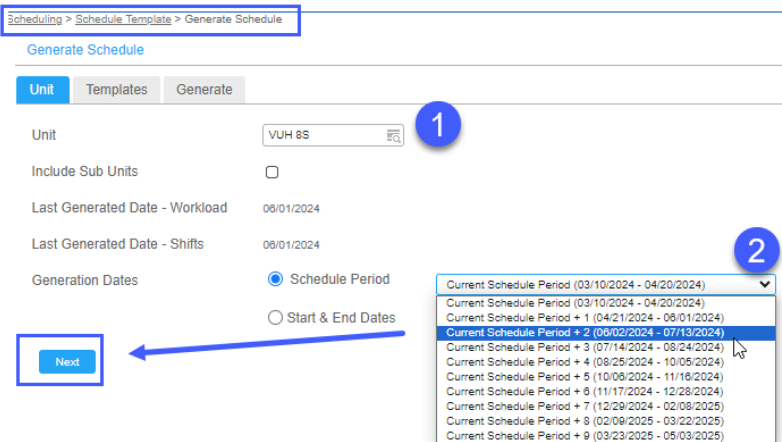
Go to the **Self Scheduling Shift Selection** section - the jobs offered in the schedule template are listed with Offer All next to them

1. Select the blue Offer All button next to each job that staff will be offered to employees for scheduling and then select the expand icon for the job
2. Verify the number of shifts offered for each job, each shift time, for each day - you may decrease the shifts offered for any dates - if you need to increase the number (see page 6 FAQs)
3. Select Save, located in the **Self Scheduling Window Definition** section

The windows will display in Pending status until the day/time they are set to open.

YOU ARE DONE!

Steps with screenshots first steps for *Generating a Schedule Template*



Generate Schedule

Unit **Templates** Generate

Unit VUH 8S
 Include Sub Units

Dates 03/10/2024 to 04/20/2024

Staffing Requirement Templates

<input checked="" type="checkbox"/>	Staff Req Template	Unit	Last Generated
<input checked="" type="checkbox"/>	HC VUH 8S	VUH 8S	05/31/2024

Shift Templates

<input type="checkbox"/>	Shift Template	Unit	Last Generated
<input checked="" type="checkbox"/>	VUH 8S FY19 Budget Template	VUH 8S	05/31/2024
<input type="checkbox"/>	VUH 8S HERO Shifts	VUH 8S	01/26/2024

Previous Cancel **Next**

Generate Schedule

Unit **Templates** **Generate**

Generation Parameters

Unit VUH 8S
 Include Sub Units
 Dates 03/10/2024 to 04/20/2024
 Staffing Requirement Templates HC VUH 8S
 Shift Templates VUH 8S FY19 Budget Template

Generate Options

- Generate Workload based on Staffing Requirements
- Generate unassigned shifts
- Create as unpublished shifts

Previous Cancel **Generate**

i Schedule Template Gen...x

Workload Generated
 Unpublished shifts created

Close

When the Schedule Template Gen... message is displayed, select Close and go to Scheduling>Self Scheduling>Process to create the self-scheduling process

Steps for Creating a Process & entering information in each section:

Creating the Process:

Scheduling / Self-Scheduling / Process

Create New Entry 1

Process Find

	Process Name
Edit	10T3 DAY SHIFT 12/17-1/27

Scheduling > Self-Scheduling > Process > Create New

Create New Process

Unit* 2

Schedule Period*

Start & End Dates* to

Copy Window Definition

Create New Process Cancel

Self Scheduling Process Definition:

Self Scheduling Process Definition

1 Process Name: Process Description: 2

Team: VUH 8S

Schedule Start Date: 06/02/2024 3 Schedule Length: 42 Schedule End Date: 07/13/2024

Self-Scheduling Window Definition – if you copied a previous process, the groups that were in that process are copied forward and display here with the dates and times based on the dates of new process:

Self Scheduling Window Definition

Window Start Date: 05/13/2024 16:00 1 Window End Date: 05/23/2024 22:00

Group Set: VUH 8S ALL GROUPS Process Status: open close Save 3

RTSSG ID	Window Start	Comment	Configuration Time (min)	Window End	Comment	Configuration Time (min)
VUH 8 S GROUP B DAYS	05/13/2024 16:00	Default Opening Comment	60 Day	05/23/2024 22:00	Default Closing Comment	60 Day
VUH 8 S CSL	05/13/2024 16:30	Default Opening Comment	60 Day	05/23/2024 22:00	Default Closing Comment	60 Day
VUH 8 S GROUP A DAYS	05/14/2024 16:00	Default Opening Comment	60 Day	05/23/2024 22:00	Default Closing Comment	60 Day
VUH 8 S GROUP C DAYS	05/15/2024 16:00	Default Opening Comment	60 Day	05/23/2024 22:00	Default Closing Comment	60 Day
VUH 8 S GROUP D	05/16/2024 16:00	Default Opening Comment	60 Day	05/23/2024 22:00	Default Closing Comment	60 Day

To place the groups in the right order for this process we simply select the letters from the Group names, B, A, & C and changed them to A, C & B for this process – also, we noticed B was set to open at 1600 the same time as the process. To send messages on time, the first window needs to open after the process opens. The open time was changed to 1630. **Below are the updated windows:**

Window Start Date: 05/13/2024 16:00 1 Window End Date: 05/23/2024 22:00

Group Set: VUH 8S ALL GROUPS Process Status: open close Save 3

**In the first screenshot the window order was Group B, CSL, Group A, Group C & then D
This team alternates Groups A,B,C CSL is always first and D is always last**

RTSSG ID	Window Start	Comment	Con
VUH 8 S CSL	05/13/2024 16:30	Default Opening Comment	60
VUH 8 S GROUP A DAYS	05/13/2024 16:30	Default Opening Comment	60
VUH 8 S GROUP C DAYS	05/14/2024 16:00	Default Opening Comment	60
VUH 8 S GROUP B DAYS	05/15/2024 16:00	Default Opening Comment	60
VUH 8 S GROUP D	05/16/2024 16:00	Default Opening Comment	60

Self-Scheduling Shift Selection – the shifts that are offered to the self-scheduler for employees to select:

If this section is blank, save and, go to Scheduling>Schedule Template>Generate Schedule

Self Scheduling Shift Selection

Display is only one week of the shifts - process displays 6-weeks, 42 days

Display label	Start Time	End Time	Skill	06/02	06/03	06/04	06/05	06/06	06/07	06/08
CP	Offer all			0/6	0/6	0/8	0/8	0/8	0/8	0/6
PFN	Offer all			0/0	0/1	0/1	0/1	0/1	0/1	0/0
RN	Offer all			0/14	0/15	0/16	0/16	0/16	0/15	0/14
SL	Offer all			0/2	0/2	0/2	0/2	0/2	0/2	0/2

We selected Offer All on the CP row and then expanded the row to see all shifts and the numbers offered, viewing the first 6-weeks below. Below the date you see 6/6, 6/6, 8/8, etc. listed across from Remove all indicating that you are offering 6 shifts out of 6 available and 8 out of 8 available – if you look at the expanded numbers D12 0645 3/3 and 4/4 and N12 1845 3/3 and 4/4, which are the number of shifts offered for each shift from the available for that shift - those numbers combined are where the 6/6 and 8/8 come from-the total offered over the total available

[Self Scheduling Shift Selection](#)

Display label	Start Time	End Time	Activity	06/02	06/03	06/04	06/05	06/06	06/07	06/08
CP				6/6	6/6	8/8	8/8	8/8	8/8	6/6
D12 0645	6:45 AM	7:15 PM	WRK	3 /3	3 /3	4 /4	4 /4	4 /4	4 /4	3 /3
N12 1845	6:45 PM	7:15 AM	WRK	3 /3	3 /3	4 /4	4 /4	4 /4	4 /4	3 /3
PFN				0/0	0/1	0/1	0/1	0/1	0/1	0/0

Below we removed the N12 1845 shifts because this process will open for day shift employees. If you do not have enough staff to fill all shifts offered, then you want to decrease the number as we did below, notice on day shift PC we decreased some dates by 1 and Fridays by two – the dates below are Sun-Sat

Display label	Start Time	End Time	Activity	06/02	06/03	06/04	06/05	06/06	06/07	06/08
CP				3/6	3/6	3/8	3/8	3/8	2/8	3/6
D12 0645	6:45 AM	7:15 PM	WRK	3 /3	3 /3	3 /4	3 /4	3 /4	2 /4	3 /3
N12 1845	6:45 PM	7:15 AM	WRK	0 /3	0 /3	0 /4	0 /4	0 /4	0 /4	0 /3

If there is an employee or employees on master rotations or pre-populated to the schedule with a published shift, those shifts are deducted from the number available.

Update the number of shifts offered based on the number of staff that will be scheduling. For example, you are budgeted for 9 care partners, all 0.9 FTEs, they will each schedule 3 shifts a week, 9CP x 3 Shifts = 27 shifts/week. You have two vacancies, so you only have 7 CPs to schedule, 7x3=21 you do not want to offer more the 21-24 shifts per week. If you have CPs on PTO, you can go down to 21 or less. Notice above we have lowered the numbers to get as close to the number that are going to be scheduled.

[Self Scheduling Window Definition](#)

Window Start Date: 05/13/2024 16:00
 Window End Date: 05/23/2024 22:00
 Group Set: VUH 8S ALL GROUPS
 Process Status: open close **Save**

You are done! The self-scheduling windows are pending until day & time to open

Process Status
PENDING
PENDING
PENDING
PENDING
PENDING

VUH 8S DAYS June2-July 13 2024	VUH 8S	PENDING	05/13/2024 16:00
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Frequently Asked Questions (FAQs):

✓ **What if I need to offer more shifts than what is available in the self-schedule process?**

1. Load the Advanced Schedule View (ASV) for the week of the scheduling period where you need shifts.
2. Change to Mass Edit – select the magic wand and then Mass Edit
3. *Select unpublished, unassigned shifts for the dates, shift time, and job that you need to offer. If you need more than the available shifts listed, then click on unassigned, unpublished shifts on other dates for that job and shift time until you have the number of additional shifts needed
4. Select the pencil icon, located with the function tools, and select Copy
5. Verify the dates, shift times and jobs are correct –modify dates if needed and click Save

If the unassigned shifts have locks – go to the self-scheduling process, go to the self-scheduling window definitions, expand the job shifts are needed, change the number offered for the first few days to zero and save. This will remove the locks from those dates. Load the schedule for the first week and use those unavailable shifts to copy to the dates needed. Now go back to the process and you should have the shifts added that are needed for offering. Do not forget to add the shifts for the first few days and save.

*Only unpublished shifts can be sent to the self-scheduler. Unpublished shifts display framed with dotted lines:

✓ **What if my shift numbers are not right? Do I have to change them every time I set up a process?**

No, email WFM@vumc.org and let us know what you would like to change. Be sure and include the jobs, shift times and the number of shifts needed.

✓ **How do I fix the process if it is not what we want?** Contact us by emailing WFM@vumc.org. If it is time or almost time for employees to schedule, please call the Vanderbilt Help Desk at 615-343-4957 and ask for Workforce Management (WFM) assistance.

✓ **What if I set up the process, but there are no shifts in the shift selection section?** You just forgot to generate the schedule – go to the first page of this document and follow the steps for Generating a Schedule. Then when you can go back to the process you created, you will see the jobs and shifts to offer.

✓ **How do I add employees to work a holiday?** Load the schedule for the **CURRENT** week

1. Change to Mass Edit by selecting the wand icon listed in the function tools at the top, right and then select Mass Edit
2. Select a shift for each time & job to be assigned (shifts turn green as selected)
3. Select the pencil icon, located with the function tools, and select Copy
4. Select the lookup button, then find and select all employees for each job & time to be scheduled
5. Change the date of the shifts to the date of the holiday to be scheduled and Save
6. You will see a message that states, "Your date is outside of the selected schedule rage," select OK

Repeat steps for additional holidays. If the same employees will be working more than one holiday select two shifts to copy, then after you have completed step 4 for one date, simply copy the list of user ID's that displays in the Employee field and paste them in the Employee field for the next date that they need to be scheduled.

You can load the schedule for the holiday and see that the shifts have been added and are published! When you generate the team's shift template the available shifts to offer for the holiday will be decreased based on the number of staff that you scheduled to work. Once you have prepopulated the schedule for holidays, then you are ready to **Generate a Schedule, go back to page 1.**