STEPS FOR UPDATING EMPLOYEE INFORMATION

Log into Infor Workforce Management (WFM) Schedule Admin, select <u>Employees</u> from the blue menu bar, and then select <u>Employee Basic Information – Override</u>

Setting the employee's Default Shift and confirming the Default Daily Minutes & Auto Break Minutes from the Employee Basic Information - Override

1. Enter the employee's last name, and then press tab. When the name is displayed in the employee field, select Go
2. The employee's record displays, verify the Default Daily Minutes, update if needed. *The minutes should be the employee's work hours x 60 minutes, ex: 8x60=480, 10x6=600, & 12x60=720*
3. Verify the Auto Break, update if needed. *The auto break minutes should be set based on the employee's meal break (i.e., 30-minute break, 60-minute break).*
4. Verify the Default Shift field, update as needed. Enter the start-time and end-time using 4 digits with a colon between the hours and minutes followed by a single dash (no spaces) then the end-time, (ex: 07:00-17:30, 08:00-16:30, 06:45-19:15) and then press tab to lock it in. You can use the lookup to find & select the shift time, if preferred.
5. At the bottom of the page select Save and Continue or Submit to save changes – Save and Continue takes you to the top of the current page & submit takes you back to the employee selection page.

Confirming Default Hours, add Scheduling Jobs, Skills/Competencies for the employee, and Employee Default Shift for Self-Scheduling Quick Select functionality: From the blue menu bar, select Employees, and then Employee (the second employee option)

1. Enter the last name of the employee in the Employee field and select Find or enter.
2. Select Edit on the row with their name
3. When the employee record displays, use your mouse to hover over three dots (ellipsis), at the top of the page, *next to Employee – View*, and click on Employee Data, to jump to that section.
4. Verify the data in the *Default Hours field is correct, update as needed. *The value should be set to the number of hours the employee works in a day, excluding the meal break. Typical hours 6, 8, 9, 10, 11, 12. The hours must be a whole number. If an employee works 11.5 hours, then round up to 12. If an employee works different shift times, enter the hours for the longest shift.*
5. Scroll down to select Save.

Adding scheduling job(s):

1. Scroll down until you see the section labeled, Employee Job
2. Below the list of jobs, select the plus sign (+) to add a new row
3. Type the *job name in the new row or select the lookup icon to find & select the job add – *the system will add the default start and end date of 01/01/1900 to 01/01/3000 once saved*
4. Select Save

Scheduling jobs and skills – jobs that require one specific license: RN, LPN, RT, etc., must have a corresponding skill listed in the Employee Skills section. After adding the additional job, be sure to also add a corresponding skill. Example: SL, CN, RN-SD, RN-CC (see next section for steps)

If a scheduling **job is used by employees with varying licenses**, example RN & LPN, RN & Paramedic, LPN & Med Asst, then a corresponding **skill is NOT needed**, i.e., Nurse MedSurg, Clinic Nurse, Clinic Asst, Nurse Emer

To add a compliance/skill/job:

Note: the end date for the job will be updated in WFM with the actual license expiration with a daily import from Workday. The Point of Care (POC) team may enter competencies for your employees.

The skills that must be added are for scheduling jobs that require one license, as noted above, and any unit specific competency:

1. Scroll down to the Employee Skills section, and the select the plus sign (+) to add a new row
2. Type the name of the Compliance/Skill (job) in the Skill box or select the lookup to find & select the competency/skill (job) to add – *add only skill and license information that is not in Workday*
3. If you are entering a unit-based compliance that requires renewal, enter the Expiration Date in the End Date field. If you are entering a skill (additional job), do not enter a start or end date – the system will populate the start and end date as 01/01/1900 and 01/01/3000, respectively, and then select Save

Note: all licenses and certifications should be entered into Workday as the source of truth. The information will come to WFM daily from Workday

Adding Employee Default Shift for Self-Scheduling

1. Scroll down to the Employee Default Shift section, and then select the plus sign (+) to add a new row
2. In the Team field, enter the employee's Home Team. In the Job field, enter the job the employee will schedule to. In the Shift field, enter the shift label for the employee's shift. *For example, Team VUH 11S, Job RN, Shift D12 0645*
3. Add new rows for any jobs and/or shifts the employee may self-schedule, example:
   Team VUH 9N, Job RN, Shift D12 0645 - Team VUH 9N, Job RN, Shift DayOCN - Team VUH 9N Job SL, Shift D12 0645
4. Click on the Save button to save your changes.

These Employee Default Shift settings will allow the employee to utilize one-click Quick Select during self-scheduling for each of the team/job/shifts listed. When a default fault shift is selected, the self-scheduling calendar displays a flag on the dates where the shift is available for scheduling.

Adding an employee to a Self-Scheduling Group

If your staff self-schedules, they must be added to a Self-Scheduling Group. Select Scheduling from the blue menu bar select, Self-Scheduling, and then Group.

1. Find the group and select Edit
2. Select the plus sign (+) at the bottom of the list of employees to add a new row
3. Type the employee's last name in the box and press tab key; the employee's full name will be displayed
4. Select Save

Assigning an employee a Set Schedule (Master Rotation)

1. There is an Excel template for master rotations available from HELP within WFM. Using this template ensures that we receive the information needed to create the employee's schedule – from the blue menu bar, select HELP
2. Select Schedule Admin Toolbox, and then select Master Rotations. Select the Master Rotation Request Template. When the spreadsheet opens, select Enable Editing at the top of the spreadsheet and enter the required information, including the schedule for the employee until it repeats. Save the document.
3. Email the saved spreadsheet to WFM@vumc.org with Master Rotation in the subject line
4. Master Rotation schedules are manually managed by the WFM team. Please notify us if an employee transfers to another team, leaves VUMC, or their schedule changes.

The template can be used for new employee schedules and to request modifications.