



**WFM Schedule Admin- Inpatient Unit Shift Leader (RSL)
Instructor-Led Training**

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Login to WFM Schedule Admin and your home page displays – the blue menu bar at the top of the page has links to navigate through the system:

Messages - your WFM Inbox - Types of mail:

Displays messages in your inbox – same as on the Employee Self Service – You will receive a notification if an employee has an expired license.

REPORTS: Links to frequently used reports

- Approved Leave
- First Off Report
- Verify Employee Information
- Draft Printed Home Team Schedule
- Draft Printed Coverage Schedule
- Team Contact List
- Assignment History for Staff Scheduled

LINKS: Links for easy access to other systems or pages

These links open in a new window for your convenience:

- Kronos
- Workday
- TN Board Licensure Verification
- KY Board Licensure Verification
- VUMC Policies
- HR Policies

ASSIGNMENT SHEET

How to load the Assignment Sheet

1. Select Assignments from the blue menu bar and then select *Assignment Sheet and the parameters display.
2. Date field defaults to the current date – select the calendar Icon to select another date.
3. Team field defaults to your home team - select the lookup to select another team.
4. Day Part field defaults to your shift – use dropdown to select another shift (day part)
5. Select Submit and the assignment sheet displays.

***There is an Area Assignment Sheet** used by some areas, if your team uses the area assignment sheet, then you will select Area Assignment Sheet in step #1. There are documents on the help site for how to make assignments on the area assignment sheet and an overview of the area assignment sheet for detail information.

Staffing Section – How to make staffing adjustments using recommended staffing:

- The black row at the top displays the unit census with the date and time of the last update. The census is updated at 15 minutes before each hour.
- Jobs column displays each job needed or scheduled.
- Scheduled displays the number of employees scheduled per job, per shift hours.
- Recommended displays the number of staff recommended based on the current census - select Recommended hyperlink to display window to adjust staffing numbers - includes a built-in calculator.
 - If the number of staff needed differs from the recommended, enter the number needed in the Adjusted column per job – may select Apply and Calculate button to view how your adjustment impacts the staffing budget.
 - Select a Reason code from the dropdown selection.
 - Add comment if needed and then select Save – *your VUNet ID, date & time stamp display for each entry*, select Close.
 - To view your adjustments, select the Submit button.

Note: The adjustments entered display on the staffing dashboard, viewable by the float pool.

Why do we use recommended staffing on the assignment sheet?

- Effective staffing is at the very core of quality patient care.
- Staffing decisions have an impact on the budget.
- Staffing that achieves a balance between quality, safety, labor costs, and staff satisfaction is incredibly complex.
- Census driven Recommended Staffing Levels and Hours Per Patient Day (HPPD) numbers display on the assignment sheet.
- Recommended Staffing provides Shift Leaders with the information needed to make daily staffing decisions based on the patient care needs on the unit, while staying as close as possible to the budgeted staffing targets.
- Shift Leaders can still adjust the recommended staffing based on their knowledge and judgement, but now they will be able to see how their decisions directly impact the budget.

Understanding the numbers and terminology:

- Staffing Requirements are the budgeted number of staff needed each day. This initially drives the number of shifts that are offered to staff for Self-Scheduling.
- Patient Days are the daily average of the number of patients on the unit. We use midnight census – Average Daily Census.
- Budgeted Hours Per Patient Day (HPPD) is the budgeted number of direct patient care hours, compared to the number of patients on the unit (ADC).

Hours Per Patient Day (HPPD)

- Tracking HPPD helps to ensure each of the units in the hospital are meeting financial targets.
- The American Nurses Association for the National Database Quality Indicators (NDNQI) state that, 'Nursing care hours are the number of hours worked by nursing staff that have direct care responsibilities for more than 50% of their shift.'
- Total nursing care hours include hours worked by RNs, LPNs, CPs, MAs, and other jobs that provide direct care to patients.

What if your assignment sheet does not have recommended staffing?

- Staffing Requirements are loaded into VandyWorks for each unit, per the staffing template, each fiscal year. Average Daily Census (ADC) is used for staffing values per day & shift.
- Shift Leaders can adjust the required number of staff and document via the Inpatient Assignment Sheet, which is then viewable on the VandyWorks Staffing Dashboard and Float Grid.

Justification and Critical Thinking

- Look at your staffing matrix or the recommended staffing tool as a guide to staffing.
- You are the expert! If you need more nurses than budgeted, due to skill mix or acuity, you have the autonomy to make that decision.
- Your decisions impact the bottom line!

Nursing Scheduling Dashboards – Available by selecting Star Dashboards from the blue menu:

- Adjustments made on the assignment sheet display on the Staffing Dashboard shaded yellow.
- The float pool reviews the staffing dashboard to view needs and adjustments made.
- Leadership can get a quick view of hospital-wide staffing by viewing the entity related dashboard.

Day Shift

	Required	Scheduled	FP	Trav	On Call
SL	1.00	1.00			
RN	10.00	10.04+OC	1	1	
CP	7.00	6.00			
MR	1.00	1.08			
PFN	1.00	0.00			
PT CARE ATTEND	1.00	0.00			

Night Shift

	Required	Scheduled	FP	Trav	On Call
SL	1.00	1.00			
RN	9.00	8.00		1	1.00
CP	7.00	7.00			
MR	0.00	0.33			
PT CARE ATTEND	1.00	0.00			

How to Make Assignments:

1. Go to the bottom of the assignment sheet and select Populate Yesterday's Assignments and then select Submit to view the assignments in the Current Assignment column. Assignments display for anyone who worked the shift on previous date.
2. Make new assignments or adjust the current assignments by selecting the lookup next to Make Assignments for each employee. Current assignments display with a checkbox selected - select each box to assign to employee.
3. Once you have selected assignments for the employee you can use the comment field at the end of the row to enter a comment about the assignment. *If the employee does not have an assignment the comments will not be saved when you select submit.*
4. Repeat the above steps for each employee on the Assignment Sheet. You can click Submit as often as you want to refresh the data. This makes it easy to view, with assignments listed in the assignment column.
5. Below the list of employees is a General Comments section. You can use this section to enter comments for the shift. These comments are NOT tied to the employee assignments and will display even after you submit the changes.
6. To save assignments select Submit. A window displays with a list of assignments that have not been filled. Review this list and verify that you have not missed any assignments, then select OK to acknowledge the message. *You may select Submit as often as you want to save what has been entered.*

Reports to review

- Cancellation Report – Review if needing to flex down and nobody will be in overtime for the week.
- Float Rotation Report – Review if needing to float an employee to another unit.

Book Off an Employee that has Called out or is being Placed On Call or shift Cancelled:

Select [BOTTOM OF PAGE] link to go to the bottom of the page.

1. Select the dropdown next to Book Off Employee, and then select the name of the employee to book off.
2. The book off code defaults to ABS - may select a differed code using the dropdown next to ABS.
3. Comments are optional and if entered will display on the ASV in details edit for the shift.
4. Select the gray Book Off button and the employee is booked off to the time code selected.

You will see a message at the top of the page, shaded blue, that the employee has been booked off successfully. Only full shifts can be booked off from the assignment sheet. For booking off a partial shift you will go to the Advanced Schedule View (ASV)

TRY-IT SCENARIOS #1

Use the current assignment sheet for #s 1 & 2

1. You have too many nurses. Book off a nurse to POC (Placed On Call) (page 5).
2. Book off another employee to ABS that has called out (page 5).
3. Access the Cancellation and Float Reports. Do you have any questions (page 5).

Go back to past date given to you by instructor for #s 3 & 4

3. You need to adjust staffing coverage on the assignment sheet. Practice with the 'Recommended link,' making sure you know how & why you adjust staffing and the rationale (page 3).
4. Make assignments. From the past assignment sheet use the "Populate Yesterday's Assignments" function at the bottom of the page to populate assignments and then make a couple of assignments or change a couple of assignments for the next shift (page 5).

THE ADVANCED SCHEDULE VIEW (ASV)

How to load the schedule

1. Select Scheduling from the blue menu bar, and then select Advanced Schedule View – the ASV selection page displays.
2. Select the team to view.
3. Select the blue Load button –the schedule calendar for the above selections displays.

The selection page is now closed. Above the schedule calendar are the team and the schedule dates loaded.

- There are navigation arrows to view the previous or next schedule, per dates displayed, respectively.
- If you choose another team or manually change the dates, then you will select Load.
- To the right of the page, a toggle can be selected to switch to the Compact View.
- There is also an expand icon to open the schedule selection page.

Viewing the Schedule Calendar

Directly above the calendar are view options on the left and function icons on the right. *See screenshot:*



- The default view (on left) has the Position view selected as the default. The schedule displays alphabetically by job (position).
- The function icons (on right) are additional functions that can be used. Hover over each to see the name of the function. The default edit mode is Details Edit, edit mode can be changed by select the wand icon.
- The pencil icon (Edit) only displays when Mass edit mode is selected. The warning sign icon, second icon listed, only displays if an employee is scheduled >40 hours in a week (Sun-Sat). The paper icon on the end, only displays if the schedule needs to be published. The nine icons in-between these always display.

Shift Display Labels

Shift Labels are created with a letter representing what shift start time: D (day), M (Mid), & N (night). The hours in the shift, and then the start time of the shift are next. All shift labels are presumed to have a 30-minute meal break unless the shift is less than 6-hours or has a number after the start time. A number displaying after the start time indicates a meal break time, different from the norm of 30 minutes.

You want to see employee information: Hover your computer mouse over an employee's name and see their telephone numbers from Workday, their jobs, and skills in WFM (VandyWorks).

How to use the quick filter function – Examples: filter to job (RN) and shift (Day or NGT):

Using the quick filter function – Examples: filter to job (RN) and shift (Day or NGT):

1. Select the filter from the function icons.
 2. Filter any one or a combination of items from these areas: Unit, Job, Activity, Day Part, Rotation, Employee or Schedule Status. For example, in the Job section, select a job – filter options close and schedules display for the selected job.
 3. Select filter icon again, and then in the Day Part section, select a day part, for example, for inpatient areas select 12 HR Day or 12 HR NGT – filter options close and the calendar displays schedules for the job you previous selected but only for the day part selected.
- Select multiple items in each section by holding down the control key (Ctrl) when selecting more than one item, for example you have selected a job, find another job to select, hold the control key down and select the second job.

NOTE: If the unassigned shift is currently posted to the billboard, you will see an additional message that lets you know the billboard posting will be cancelled, select OK

Booking-off a partial shift:

1. Select the shift to be booked off and the Details Edit Panel displays.
2. Select Book-Off, and the Book-Off Wizard displays.
3. Select or type the book-off code.
4. Modify the time to reflect the time of the book-off code chosen, if the employee is leaving early adjust the start time to when they are leaving, and then select Relief Not Needed in the Send to Relief Queue Column
5. Entering a comment is optional – select Submit and the shift displays shaded teal.

Note: Depending on the number of hours the employee will be working you may see a message –related to shortening the break, ignore and select OK to acknowledge-*Meal breaks are done through Kronos*

What if you booked off the wrong employee, time code (book off code) or time? Select the shift, select Cancel the Book-off, and then submit. Then book-off as needed!

Shift History - do you need to see information about a shift? Who edited the shift or when?

1. Select the shift that you want the view information.
2. Select Show History
3. The shift history displays – select the plus sign next to Shift History View to see all - you can expand the dates by changing the Start or End dates in the window and select Go and there is also a Print option.

OnCall – how to bring in the OnCall employee for work:

Go to Scheduling>Advanced Schedule View select the team or employee On Call and then select Load,

1. Select the OCN shift for the employee on call, and the Details Edit Panel displays.
1. Select Add Work, located below the green on call row (you will not change the green row)
2. In the new row, enter the start and end time the employee is expected to work*
3. Select or type CBK in the Activity field and then select Save.

The shift will display with the phone icon shaded black, indicating they are no longer on call.

If the employee is night shift and is reporting to work after midnight select Next in Details Day located before the start time.

***When is the employee expected to arrive for work?** A minimum of 1 hour from the time they were called. Enter 1 hour from the time you called them rounded based on quarter of the hour, for example: you called them at 1005 they should arrive by 1115, you called them at 2340 they should arrive by 0045.

Placed OnCall (POC)– how to bring in the POC employee for work:

1. Select the POC shift to change, and the details edit panel displays.
2. Select Cancel Book-Off, and then click Submit button - the working shift is back on the schedule.
3. Select the working shift and the details edit panel displays.
4. Select Book-Off and the book-off wizard displays
5. Select POC for the book-off code and change the end time to when the employee is expected to report to work, and then select Submit.

The employee's shift is shaded teal. Hover the computer mouse over the ellipsis and the POC & Work times display.

An ERROR Encountered messages is due to a schedule compliance rule, if you are adding a shift that would have the employee scheduled to more than four consecutive 12-hour shifts.

Change the activity code to APPROVED ON and Save for the shift you are adding or to one of the shifts in the series of dates listed in the error message to add the shift. The APPROVED-ON activity code overrides the compliance error.

TRY-IT SCENARIOS #2

1. Filter the schedule to what you want to view (page 7). Use the quick filter. You will have to click on the icon once for each item you filter.
2. One of your nurses just came to you reporting that she is sick and needs to leave early. Mark the nurse off the schedule for the portion of the shift that she will miss (page 7).
3. You are looking at staffing for the next shift & you need to bring in the on-call nurse for the entire shift. Where can you find their phone number on the ASV? Bring the on-call nurse into work for the next shift (page 8).
4. Use another on call shift. Bring in the on-call nurse coming into work after the shift has started (page 8).
5. The shift is getting busy, and you are filling all your beds, you placed a nurse on call earlier. Bring in the nurse that was placed on call (POC) for the remaining hours of the shift (pages 8).

HELP!

- From the Schedule Admin, select Help from the blue menu bar & from the Employee Self Service, select Quick Links, and then select HELP.
 - You must sign in with your VUNet ID & E-password.
- Email us at wfm@vumc.org for non-urgent issues.
- For urgent issues log a Help Desk Ticket by calling 343-6547 (3 HELP)
 - Select the Clinical Application Team
 - We are on call 24/7, even holidays.
 - We do our best to respond within 15 minutes of receiving the ticket.
- You can go directly to our Help site, even if WFM is in downtime, go to www.vumc.org/WFM

Return to the ASV – Select Scheduling from the blue menu bar and then select View Schedule

- The schedule will display the last schedule you had loaded. If you leave the schedule on the Current Week, it will always load to the current week, but without filters.

REASON CODES WITH DESCRIPTIONS FOR RECOMMENDED STAFFING ADJUSTMENTS:

REASON CODE	DESCRIPTION	REASON CODE	DESCRIPTION
Acuity-H	They acuity is higher (H) than predicted	Acuity-L	The acuity is lower (L) than predicted
Vol-H	Changes in volume higher (H) than expected. For use by ED & PACU	Vol-L	Changes in volume lower (L) than expected. For use by ED & PACU
BHOBS	Behavioral Health Observation needing sitter or patient care attend, 1:1 constant observation	Other	Used for reason not listed in dropdown. Will need comment added for description
Pend-DC	Pending Discharge (DC)	Pend-ADM	Pending Admission (ADM)
Model	Confirming the recommended value is accurate for census listed (Use Model or Census)	Census	Confirming the recommended value is accurate for census listed (Use Model or Census)

BOOK OFF TIMECODES WITH DESCRIPTIONS

*Time code is masked on printed schedules and assignment sheets

Book Off (Activity) Codes	Descriptions	Goes to Kronos for Non-Exempt Staff
ABS	Unscheduled Absence - PTO	Yes, as PNS, <i>may need to update PNU in Kronos</i>
ABS-GFS	Unscheduled Absence - Grandfathered Sick	Yes, as SICK
ABS-OCN	Unscheduled Absence for On Call Shift	No
ADJ	Adjustment to Schedule (Master Rotation)	No
APR	Approved Time Off	No
BRV	Bereavement	Yes, as paid time, not PTO
CXM	Canceled Mandatory	No
CXOC	Canceled On Call Shift	No
CXV	Canceled Voluntary	Yes, as PNS
EDEP	Early Departure	No
FLOAT	Float Code Used for Master Rotation	No
FML-ABS*	Employee Call Out – Unsch FMLA PTO	Yes, PNS
FML-NONFMLA*	NonFMLA MUST BE APPROVED by HR	No
FML-PL*	FMLA – Planned Absence	No
HOL-PTO	Holiday-PTO	Yes, PNS
ISV	In-service Hours – does not count toward FTE	No
ISV-EPIC	In-service for Epic Training Code from LMS	No
ISV-WK	In-service Hours – counts toward FTE	No
JRY	Jury Duty	Yes, paid time, not PTO
LTAR	Late Arrival	No
MIL	Military Leave – Unpaid	No
NO-SHW*	No Call No Show	Yes, as PNS, <i>may need to update PNU in Kronos</i>
NR-ISV	In-service – Nurse Residency training	No
PAL*	Paid Administrative Leave	Yes (paid time, not PTO)
PERS	Paid Time Off – Day off, Excused	Yes, PNS
POC	Placed on Call	No
POFF	Preferred Off Day	No
PPL*	Paid Parental Leave	No
PREC-ISV	In-service – Preceptor Training Code from LMS	No
SHG	Shared Governance Hours – does not count toward FTE	No
SHG-WK	Shared Governance Hours – counts toward FTE	No
UNPAL*	Unpaid Administrative Leave	No

ASV Legend

ADVANCED SCHEDULE VIEW (ASV) LEGEND	
Blue shading	Ad-hoc shift or swapped shifts
Bright Orange shading	Placed on Call (POC)
Clipboard icon	Only displays on unassigned shifts when posted to the billboard
Dark Orange shading	Booked off shift for the length of the shift
Gold shading	Unassigned shifts
Shift information is light gray	Viewing job/shift that is different from schedule, ex: scheduled to job of SL and view job of RN
Teal shading	Booked off shift for part of the shift
Below employee name has MSTR Row#	Name of Master Rotation and row number employee is assigned. Employee's schedule is pre-populated based on a set schedule.
Green checkmark	Compliance violation has been acknowledged and approved
Lock by employee name	The employee's home team is a team that you do not have schedule admin access
Triangle warning sign	Compliance violation, employee scheduled to >40 hours in week

WFM Terminology

Activity codes – These codes account for an employee’s hours. Typical activities are WRK (work), OCN (on call), ISV-WK (in-service time counts toward FTE), ABS (absence), PNS (paid time off, non-exempt staff), etc.

Ad Hoc shift – A manually created shift.

Advanced Schedule View (ASV) – The new, updated schedule view in VandyWorks.

Billboard Group Team field - A unit/team added to this section allows ALL employees on that team to view and select shifts posted to this group.

Billboard Shift Team field - Adding a team to this section allows management on that team to post shifts for this group to view and select.

Detail Edit – Default Edit Mode. The details of each shift display and may be modified per shift.

Float Code FLOAT – A code used when floating an employee to another unit.

Hours Per Patient Day (HPPD) – Is the budgeted number of direct patient care hours, compared to the number of patients on the unit.

Mass Edit – Select multiple shifts to modify this group of shifts at one time. When you select this mode, the pencil icon displays with the functions available.

Master Rotation – A way to assign a repeating schedule to an employee (replacing Shift Patterns).

Patient Days - The daily average of the number of patients on the unit. We use midnight census – Average Daily Census.

Preset - Allows you to create subsets of the schedule that you view frequently, which when selected, will load the schedule with predefined parameters.

Recommended Staffing – Provides Shift Leaders with the information needed to make daily staffing decisions based on the patient care needs on the unit, while staying as close as possible to the budgeted staffing targets.

Relief Not Needed – Updates selected shift to RNN status; an unassigned shift will not be created.

Schedule templates – Provide you with a tool for planning your staffing demands for specific periods. The templates are used to create unassigned shifts that can be sent to the real-time self-scheduler and/or to the shift billboard for employees to select and schedule themselves.

Shift billboard – Is a feature allowing employees to claim open shifts that have been posted to a shared area, called a “shift billboard.” The billboard displays open shifts that have been posted by managers.

Shift display label – Represents a shift. The display label is used in assigning shifts to a day. Display labels are created for teams, based on their need. The same display label can be used for other teams. Example: The D8 0800 label represents a shift that starts on the Day shift, is an 8-hour shift that starts at 0800. N12 1845 label represents a shift that starts on Night shift, is a 12-hour shift that starts at 1845. There are also shift labels created for Mid shifts, On Call shifts, Late Stay shifts and Orientation shifts.

Split Shift – An ASV feature that allows admin to split a shift into segments.

Swap Shifts – A feature that allows admin to swap shifts between two employees on the ASV.

Staffing Requirements Template (Workload requirements) – The workload requirements let you specify the number of shifts needed for a job (for example, the number of LPNs, PSS, etc.) for each shift. These requirements can help you determine if you are overstaffed or understaffed when you view the schedules. For inpatient units we receive workload requirements (budgeted templates) from nursing finance.