



OREGON
HEALTH & SCIENCE
UNIVERSITY

Kronos Scheduling™ v6.1

Reference Guide

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Module 1: Getting Started

Importance and Benefits of Kronos Scheduling

Purpose

Effective workforce scheduling is a challenge. Each Employee at Oregon Health & Science University provides a valuable service towards meeting OHSU's business needs. The Kronos Scheduling application helps you meet business needs by providing you with resources and real-time data to help you schedule the right amount of the most appropriate people at the right time.

The following Kronos Scheduling benefits enable Oregon Health & Science University to:

- Improve staff scheduling by allowing the ability to generate schedules based on coverage requirements, certifications, availability, and actual time worked, including double shifts, overtime, weekend and holiday rotation.
- Allow the eventual use of badge readers for clocking transactions that will result in streamlined processes for managing clocking transactions for charge, differentials, floating, etc.
- Identify employees with licenses and certifications approaching expiration
- Optimize staffing resources by scheduling Employees according to their availability, preferences, skills and certifications
- Schedules flow to the timecard, which eliminates dual entry between the scheduling and timekeeping systems
- Compare staffing to workload requirements
- Compare productive and non-productive scheduled hours
- Provide the ability for Employees to view their schedules online
- Access the scheduling application from home
- Provide audit capabilities to track how and when transactions are entered
- Allow Employees to request time off and request shift swaps through online schedule requests in the near future.

Logging On/Off

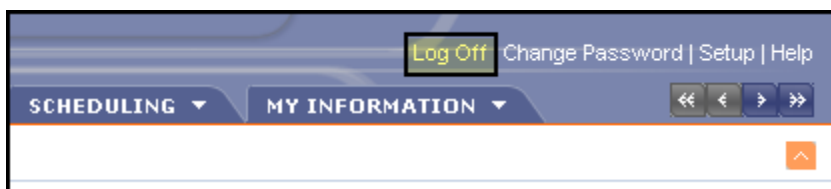
Steps	
1	Access the Kronos log on page by selecting Start > All Programs > OHSU Services > Administrative Services > Kronos .
2	Enter your OHSU Network user name and password in their designated fields.
3	Click the Log On button or press the Enter key.

Forget your password?
If you forget your Network username or password, please contact the ITG Helpdesk 4-2222.

INACTIVITY TIME OUT
Inactivity timeout screen appears after 20 minutes of no activity. If you do not log in after an inactivity timeout, you will lose all unsaved edits.

Logging off Kronos Scheduling

Clicking the Close (X) button without first logging off might leave your connection to the application open, which might allow unauthorized people to view and edit information.



Navigating the Schedule Planner

Purpose

The Schedule Planner is a timeline view of Employees' schedules during a specified time period. It is the primary work area where you create and maintain Employees' schedules.

The key components the Schedule Planner

The screenshot shows the 'SCHEDULE PLANNER - HC' interface. At the top, there are 'Top Tabs' (BY EMPLOYEE, BY GROUP, BY JOB), a 'Name' column, and 'Scheduled Hours' columns for dates from Sun 07 to Tue 16. A 'Show' dropdown is set to 'All Home Locations' and a 'Time Period' dropdown is set to 'Next Schedule Period'. Below the main grid, there are 'Bottom Tabs' for SCHEDULE ASSISTANT, COVERAGE, RULE VIOLATIONS, HOURS SUMMARY, COMMENTS, HOURS/VOLUME, and CALL LIST. A summary table at the bottom shows totals for Shift Hours and Grand Sum across various employee types.

Component	Description
Show	Where you select which Employees to display in the Schedule Planner. All Home Locations displays all Employees to which you have access. The All Home query will limit Kronos Scheduling functionality if selected. The All Home query will not allow you to evaluate coverage, rule violations, and view open shifts.
Time Period	Where you select a specific schedule period, range of dates, or individual date in which to view data
Top Tabs	Three tabs that each display schedule information differently: by Employee names, by schedule groups, or by job
Name	Column that lists the Employees' names in alphabetical order in By Employee tab
Date Columns	Columns that display shift start and end times for the date in the header. Pay codes also appear for scheduled non-worked hours.
Bottom Tabs	Tabs containing data and tools to assist with scheduling and analysis: Call List, Comments, Coverage, Metrics, and Rule Violations.

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Bottom Tabs	Tabs containing data and tools to assist with scheduling and analysis: Call List, Comments, Coverage, Metrics, and Rule Violations.

Using Workforce Genies

Purpose

Workforce Genies present customized views of Employee information in a summarized, easy-to-read format so that you can quickly analyze and respond to scheduling needs. Each Genie is unique, but there are several common ways to view and use Genies.

Example

You want to check for Employees with expiring licenses. Use the Certification Genie to perform this task.

Steps	
<p>1 Select a Genie from one of the navigation tabs.</p>	<p>The screenshot shows the Kronos Scheduling Planner interface. At the top, there are navigation tabs: GENERAL, MY GENIES, SCHEDULING (highlighted), and MY. Below the tabs, there are links for Timecard, Schedule, People, Reports, and More. The main heading is 'SCHEDULE PLANNER - HC' with a sub-heading 'Loaded: 2:27PM'. Below this, there are filter tabs: BY EMPLOYEE (highlighted), BY GROUP, and BY JOB. A 'Save' button and several dropdown menus (Actions, Shift, Pay Code, Accrual Amount) are visible. On the right side, a dropdown menu is open, listing various scheduling options: Schedule Planner - HC, Schedule Group Multi-Line, Schedule Group Roll-up, Sign Up Complete, Expired License, Employee Information, Unit Workload Planner, and Schedule Template Editor.</p>
<p>2 Select the specific set of Employees from the Show drop-down list.</p>	<p>The screenshot shows a 'Show' dropdown menu. The menu is open, displaying a list of options. The 'Expired License' option is highlighted in green. Other options include: Cost Center 402, Cost Center 403, Cost Center 404, Department 301 and 302, Employees Not Signed Off, HC, Irregular Timecards, Kronos All People, Managers Only, MFG, Missed Punches, Overtime, Any, and Overtime, Over 5 hours. At the bottom of the menu, there are buttons for 'New...' and 'Edit Ad Hoc...'.</p>

Steps

3 Select the specific time period from the **Time Period** drop-down list.

Time Period	Current Pay Period
Amount ▾ Accruals	Previous Pay Period
Unit	Current Pay Period
Maternity	Next Pay Period
Medical	Previous Schedule Period
Medical	Current Schedule Period
Maternity	Next Schedule Period
	Today
	Yesterday
	Week to Date
	Last Week
	5/20/2008, Specific Date
	5/20/2008 - 5/20/2008, Range of Dates

4 (Optional) Click column headers to sort the data.

Actions ▾ Punch ▾ Amount ▾ Accruals ▾ Schedule ▾ Approvals ▾						
Name	2 ▲	Unit	1 ▲	Employee's Supervisor	License Name	License Expiration Date
Andreyev, Isabella		Maternity		Maynard, Doris	LNA	5/30/2008
Zhang, Shirley		Maternity		Maynard, Doris	LPN	5/29/2008
Beaulieu, Susan		Medical		Maynard, Doris	LPN	5/21/2008
Gaetani, Peter		Medical		Maynard, Doris	RN	5/21/2008

5 Click an Employee's name to select and work with a single Employee.
To select more than one Employee, hold the **Ctrl** key while clicking each Employee's name. Selected Employee rows appear green.

Timecard Schedule People Reports More ▾
EXPIRED LICENSE
Last Refreshed: 3:19PM
Show <input type="text" value="Expired License"/>
Time Period <input type="text" value="Current Pay Period"/>
Actions ▾ Punch ▾ Amount ▾ Accruals ▾ Schedule ▾
Name 2 ▲ Unit 1 ▲ Employee's Supervisor
Andreyev, Isabella Maternity Maynard, Doris
Zhang, Shirley Maternity Maynard, Doris
Beaulieu, Susan Medical Maynard, Doris
Gaetani, Peter Medical Maynard, Doris

6 Click a link or select a menu option to perform a task with the selected Employees or Employees' schedules.

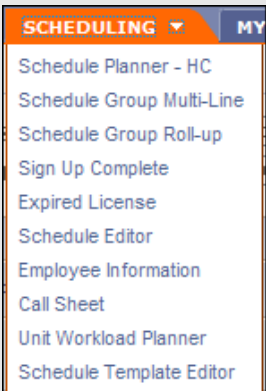
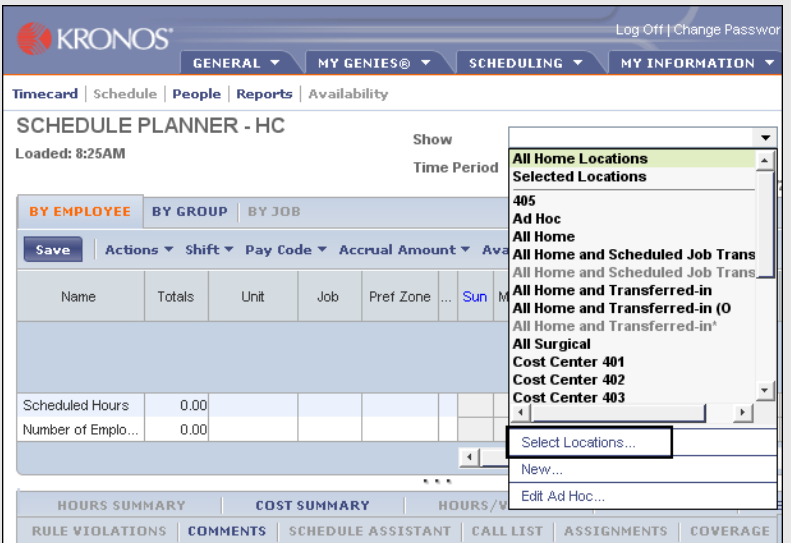
Selecting Employees and a Time Period in the Schedule Planner

Purpose

You can choose to display schedules for the current or future period, or for a specific date or range of dates in the Schedule Planner. You can also choose to see the schedules of all Employees to which you have access, or you can select Employees in a specific location or locations, or who work specific jobs within a location.

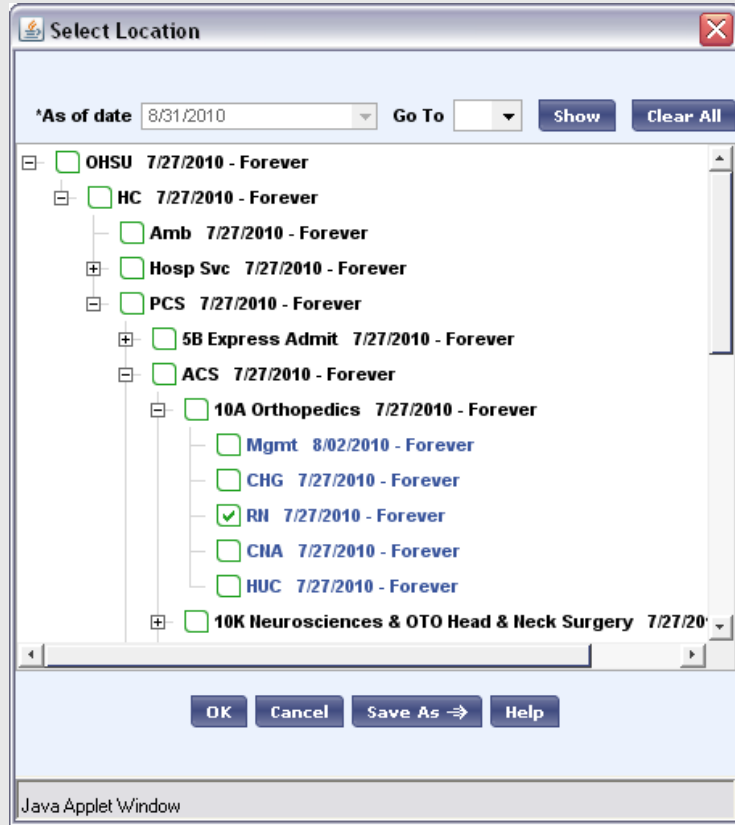
Example

You need to work on schedules for the RNs and CNAs in 10A for the next schedule period.

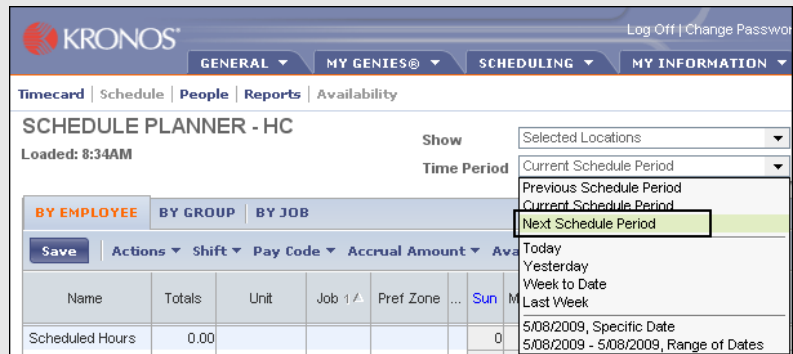
Steps	
<p>1 Select Scheduling > Schedule Planner.</p>	 <p>A screenshot of a web application's navigation menu. The 'SCHEDULING' dropdown is open, showing a list of options: Schedule Planner - HC, Schedule Group Multi-Line, Schedule Group Roll-up, Sign Up Complete, Expired License, Schedule Editor, Employee Information, Call Sheet, Unit Workload Planner, and Schedule Template Editor.</p>
<p>2 In the Show drop-down list, select Select Locations.</p>	 <p>A screenshot of the 'SCHEDULE PLANNER - HC' web interface. The 'Show' dropdown menu is open, displaying a list of location options including 'All Home Locations', 'Selected Locations', '405', 'Ad Hoc', 'All Home', 'All Home and Scheduled Job Trans', 'All Home and Scheduled Job Trans...', 'All Home and Transferred-in', 'All Home and Transferred-in (0', 'All Home and Transferred-in*', 'All Surgical', 'Cost Center 401', 'Cost Center 402', and 'Cost Center 403'. The 'Selected Locations' option is highlighted.</p>

Steps

- 3 All locations that you have access to are selected by default. Click the **Clear All** button.
- 4 Expand the organizational map by clicking the **plus (+) sign** until the appropriate department and jobs appear. Click the box preceding the job.
- 5 Click **OK**.



In the **Time Period** drop-down list, select the time period.



Note

The Schedule Planner Genie will default to the current schedule period and a Query of None.

Saving a Personal Location Search Query

Purpose

For Employees in locations and jobs that you view frequently, you can save a set of locations or jobs as a reusable query that appears in the Show drop-down list.

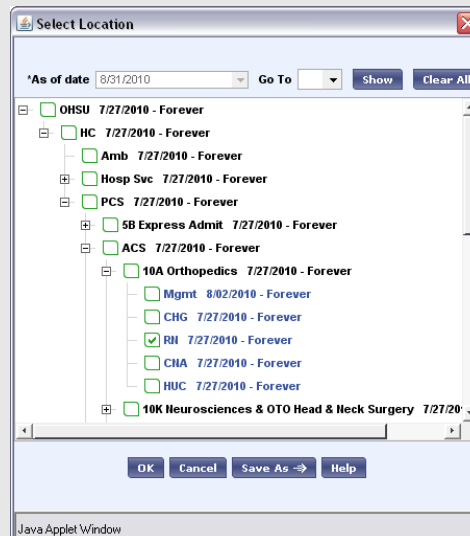
Example

You frequently use the schedules of RN's in 10A. You create a personal query to make this task easier.

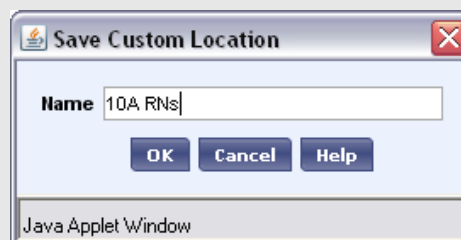
Steps

1 From the **Schedule Planner**, select **Show > Select Locations**.

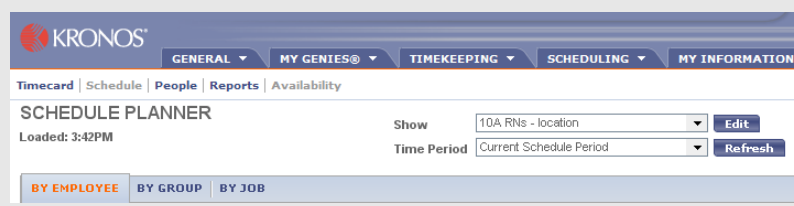
2 In the **Select Locations** dialog box, select the locations and jobs you want to include in your query, and then click **Save As**.



3 In the **Save Custom Location** dialog box, enter a name for your query in the **Name** field, and then click **OK**.



4 Your new location query appears in the **Show** menu list with "**- location**" appended to the name.



Tip

You can delete an existing location query. Select a location query in the Show drop-down list, click Edit, and then click Delete to permanently delete the query.

Refreshing and Saving Data in the Schedule Planner

Purpose

When you add or modify schedule data, the application displays your edits but does not save them automatically. You must tell the application to save the data. Prior to saving your data, you can cancel your edits if necessary.

Visual indicators

When you edit a schedule, the page name turns orange and an asterisk appears next to it to let you know that your data is not yet saved. After you save, the visual indicators no longer appear.

Canceling edits

The application does not save your edits until you tell it to do so. Until that time, you can remove or cancel your edits using the Refresh button. When you click Refresh, the application re-displays the most recently saved information, overwriting any unsaved edits.

Saving edits

When you are satisfied with your edits, you must save them. If you close the Schedule Planner before you save the edits, they are not saved.

Canceling edits

Steps	
1	Perform your edits to a schedule. Note the visual indicators that indicate unsaved data.
2	Click Refresh and review the schedule information.
3	Do you want to cancel your changes? <ul style="list-style-type: none"> To cancel your changes, click Yes. To keep your changes, click No.

***SCHEDULE PLANNER - HC**
Loaded: 5:43PM

Show: All Home Locations

Time Period: Current Schedule Period

Saving edits

Steps	
1	Perform your edits to a schedule. Note the visual indicators that identify unsaved data.
2	Click Save .
3	Review the schedule to ensure that the visual indicators no longer appear, validating that your information was saved.

***SCHEDULE PLANNER - HC**
Loaded: 5:43PM

BY EMPLOYEE | BY GROUP | BY JOB

Actions ▾ Shift ▾ Pay Code ▾

Adjusting the Schedule Planner View

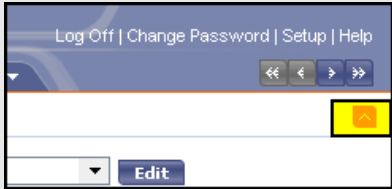
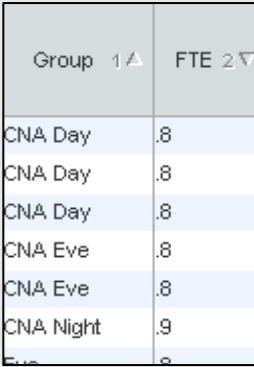
Purpose

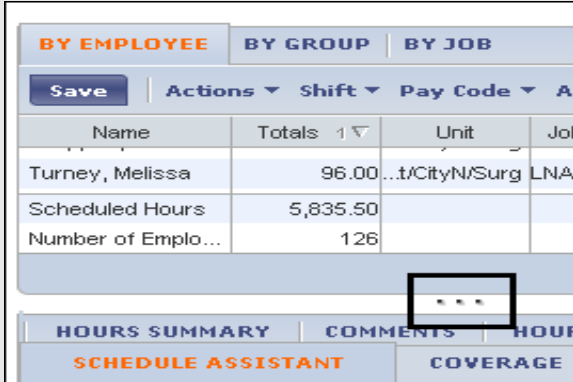
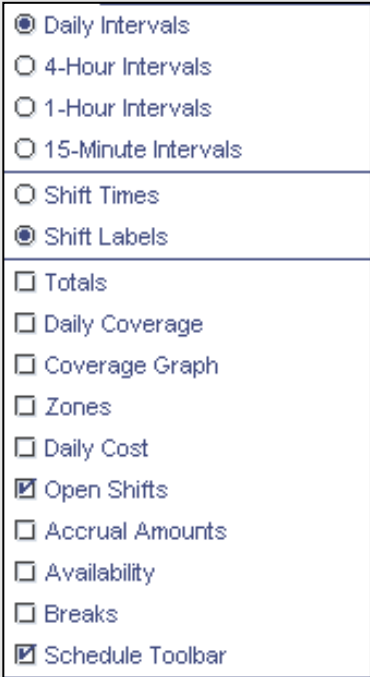

You have options for manipulating how the data appears in the Schedule Planner. You can:

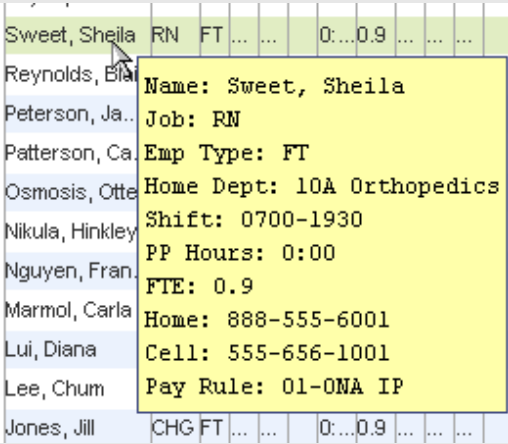
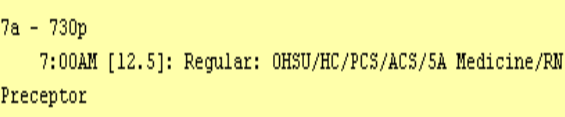
- Expand the workspace by hiding the banner
- Sort the data by some of the columns, for example by Pay Period Hours
- Resize areas of the workspace
- Use options in the View menu to change time intervals, show shift times or shift labels, and show and hide data from the display
- Use the Schedule Planner top tabs for different views of schedule data and Employees: By Employee, By Group, and By Job
- View additional data about Employees in tool tips
- Zoom in and out on date columns in the schedule grid area

Example

You want to review schedules for the next schedule period to locate Employees in 10A with the fewest scheduled hours. To easily see the data you want, sort Employees by pay period hours and job.

Feature	Description														
<p>Showing and hiding the banner</p> 	<p>Click the Show/Hide button to hide the banner and view more of the page. Click the Show/Hide button to display the banner again.</p>														
<p>Sorting columns</p>  <table border="1" data-bbox="207 1402 459 1766"> <thead> <tr> <th>Group</th> <th>FTE</th> </tr> </thead> <tbody> <tr> <td>CNA Day</td> <td>.8</td> </tr> <tr> <td>CNA Day</td> <td>.8</td> </tr> <tr> <td>CNA Day</td> <td>.8</td> </tr> <tr> <td>CNA Eve</td> <td>.8</td> </tr> <tr> <td>CNA Eve</td> <td>.8</td> </tr> <tr> <td>CNA Night</td> <td>.9</td> </tr> </tbody> </table>	Group	FTE	CNA Day	.8	CNA Day	.8	CNA Day	.8	CNA Eve	.8	CNA Eve	.8	CNA Night	.9	<p>You can sort most columns by clicking on their column headers.</p> <p>An arrow appears in the column header to indicate that the column is sorted.</p> <p>Click on the column header again to reverse the sort.</p> <p>You can sort up to two columns.</p>
Group	FTE														
CNA Day	.8														
CNA Day	.8														
CNA Day	.8														
CNA Eve	.8														
CNA Eve	.8														
CNA Night	.9														

Feature	Description
<p>Resizing workspaces</p> 	<p>You can resize individual workspaces in the Schedule Planner to see more or less of the information they contain. For example, you can move up or down the divider between the Employee rows and the Bottom Tabs to display more or fewer Employee rows.</p>
<p>Using View menu options</p> 	<p>Use the options in the View menu to adjust how data appears in the Schedule Planner, including:</p> <ul style="list-style-type: none"> • what time intervals are shown • whether shift labels or times are displayed • whether to display the Daily Coverage <p>This guide describes several of these View options. For information on all View options, refer to the online Help.</p>
<p>Using the By Employee, By Group, and By Job tabs</p> 	<p>Use these tabs to display schedule data by Employee, by group, or by job.</p>

Feature	Description
<p>Using tool tips</p>  	<p>By selecting an employee and resting the mouse pointer over the employee's name, you can display important information about the employee including Job, Dept, FTE, and Pay Rule.</p> <p>You can also rest over the shift to display information such as the shift length, the unit and job, and any comments or work rule transfers that have been entered.</p>

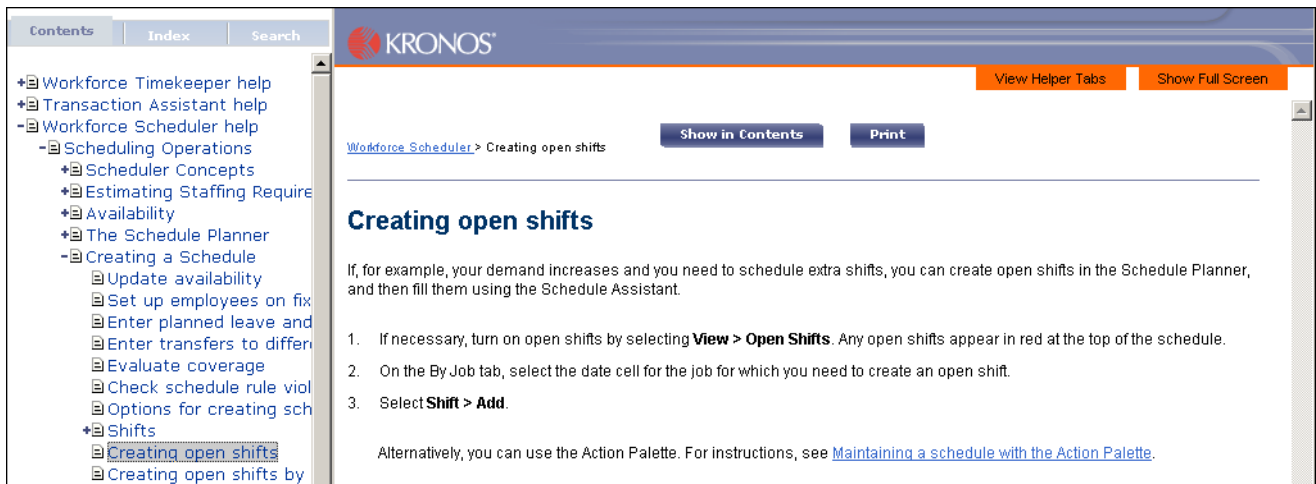
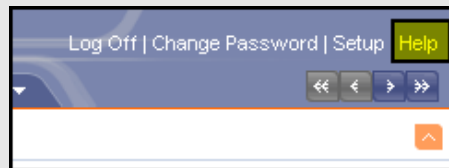
Using Online Help

Purpose

The application contains a context-sensitive online Help system to help you perform scheduling tasks.

Steps

- 1 Click the **Help** utility link in the upper right corner of the banner.
This link displays a Help topic specific to where you are in the application.



Component	Description
Contents tab	Collection of topics
Index tab	Alphabetical directory of all Help topics
Search tab	Tool for entering a specific word or phrase; topics appear with percent rankings that identify their relevance
View/Hide Helper Tabs	Displays or hides related topics and terms
Show Full Screen/Show Headers	Hides or displays the banner within the Help topic page

Module 2: Assigning Patterns and Groups

Assigning Schedule Groups

Purpose

A schedule group is a collection of Employees who work the same or similar shifts. You assign Employees to schedule groups to facilitate creating and editing their schedules. Employees can be assigned to more than one schedule group. Schedule groups are only for viewing in the schedule planner. Reports do not print by schedule groups.

Example

When evaluating and building your schedule, you can view Employees by their shifts and jobs. You group your Day RN Employees by assigning them to the RN Day Schedule Group. A new RN will be working days. You assign her to the RN Day schedule group.

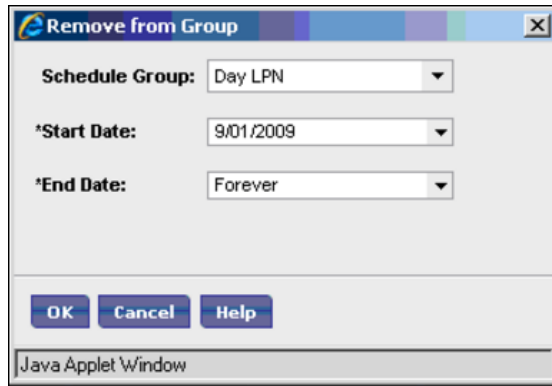
Steps

<p>1 Access a Schedule Planner and click the By Group tab.</p>	
<p>2 Select the Employee that you want to assign to a schedule group. To select multiple Employees, hold the Ctrl key and single-click each Employee's name.</p>	
<p>3 Select Group > Add to Group.</p>	
<p>4 From the Schedule Group drop-down list, select the name of the schedule group to which you want to assign the Employee(s).</p>	
<p>5 In the Start Date drop-down list, select the effective date for the schedule group assignment.</p>	
<p>6 In the End Date drop-down list, select the last date the schedule group assignment is effective. For the assignment to be in effect with no end date, select Forever.</p>	
<p>7 Click OK and then click Save and Refresh.</p>	



Tip

To remove an Employee from a schedule group, repeat steps 1 and 2 but select **Group > Remove from Group**. Select the schedule group you are removing the Employee from and the start and end dates for which the Employee will no longer be a member of the group. To remove the Employee from the schedule group indefinitely, select **Forever**.



Assigning an Individual Schedule Pattern

Purpose

When Employees have a unique fixed schedule pattern that is not defined in a template, you can create and assign to them an ad hoc schedule pattern.

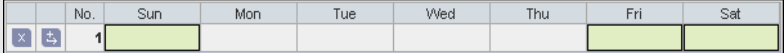

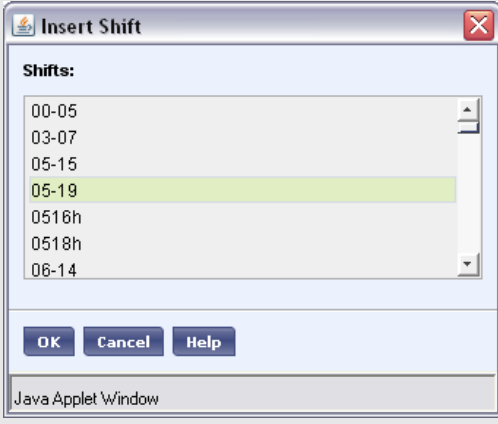
Example

Angela Zambrano will be working 7:00 A.M. to 3:30 P.M. Friday, Saturday and Sunday. You will create an individual schedule pattern for Angela.

Steps

<p>1 From the Schedule Planner, right click the Employee's name and select Add Pattern > Shift or Pay Code.</p> <p>Note: To apply the same pattern to more than one employee, highlight employees using Ctrl+click, then right click on one of the employee's name.</p>	
<p>2 In the Work Start Date field, specify the effective date that the Employee(s) starts working the pattern.</p> <p>Note: The Work Start Date must be within the Time Period currently displayed in the Schedule Planner.</p>	
<p>3 In the Pattern Start Date field, select the first day of the schedule period.</p>	
<p>4 In the End Date field, specify the last date when this pattern is in effect for this Employee. For the pattern to remain in effect for an indefinite time, select Forever.</p>	
<p>5 In the Recurring field, enter how many weeks or days the pattern recurs.</p>	

Steps

6	Select the cells of the days the Employee works. To select multiple days, hold the Ctrl key and select each day.	
7	Click Insert Shift .	
8	Select the shift from list.	
9	Click OK to Insert Shift	
10	Click OK to Pattern Editor	
11	Click Save and Refresh	

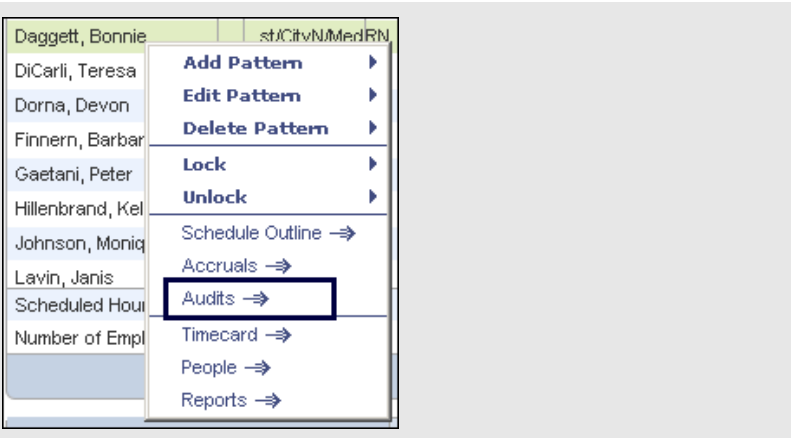
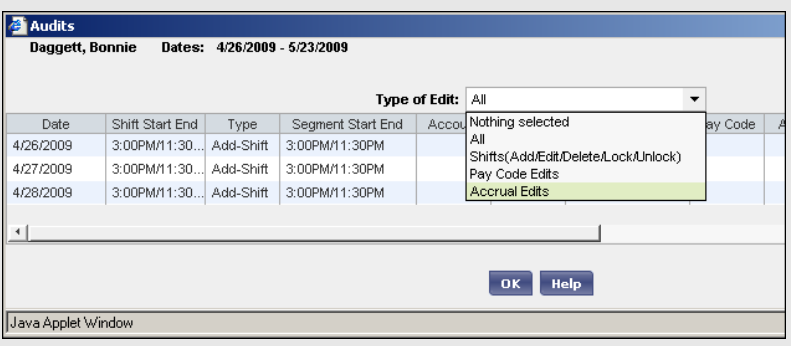
Reviewing an Employee's Audit Trail

Purpose

The audit trail lists all schedule and pay code edits performed in the Schedule Planner as well as schedules entered from group edits that affect the Employee's schedule. The audit trail also includes the user name of the person who made the edits and the date and time of the edits.

Example

You know that there were changes made to an employee's schedule. View the audit trail to see the edits that were made.

Steps	
<p>1 From the Schedule Planner, right click the Employee's name and select Audits.</p>	
<p>2 From the Type of Edit drop-down list, select the type of schedule edit you wish to review.</p>	
<p>3 Click OK when finished.</p>	

Module 3: Creating Schedules

Inserting a Shift Template

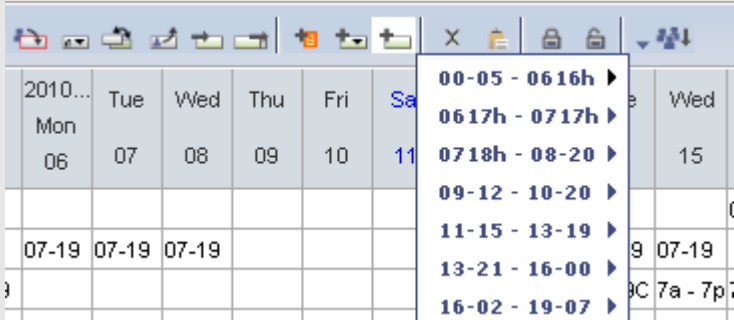
Purpose

Shift templates define the start and end times of standard shifts that employees work regularly. A shift template does not include specific days or dates. The shift templates are listed in alphabetical/numerical order. Use the Schedule Toolbar to insert a shift template.

Example

An employee has agreed to work an additional 8-hour shift on Tuesday at 07:00. This is a common shift, so a shift template exists. You can use a shift template to insert the shift into the employee's schedule.

Steps

1	From the Schedule Planner , in the Schedule Toolbar , click the Shift Template button.	 <p>The screenshot shows a calendar grid with columns for days of the week (Mon, Tue, Wed, Thu, Fri, Sat) and rows for dates (06, 07, 08, 09, 10, 11). A dropdown menu is open, displaying a list of shift templates with their start and end times, such as '00-05 - 06 16h', '06 17h - 07 17h', '07 18h - 08 -20', '09-12 - 10-20', '11-15 - 13-19', '13-21 - 16-00', and '16-02 - 19-07'. The interface also includes a toolbar with various icons for scheduling actions.</p>
2	Select the shift template from the drop-down list.	
3	Click the date cell for the Employee you will schedule using the shift template. (Optional) Add the shift template to multiple days by clicking each day's date cell.	
4	When you are finished, click the Shift Template button again to turn it off.	
5	Click Save .	

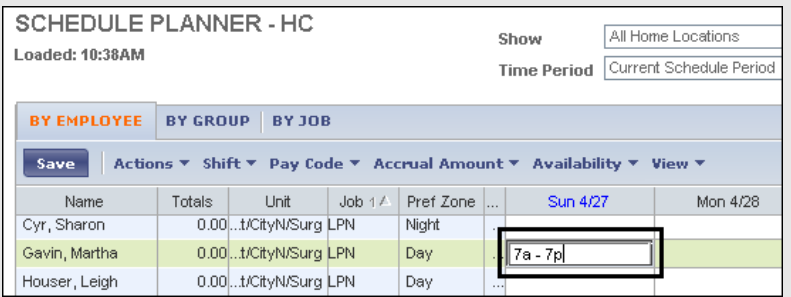
Adding a Shift Using In-Cell Editing

Purpose

When there is no shift template available for a shift, add the shift by entering the shift start and end times directly into the date cell.

Example

An employee can only work a 5-hour shift on Wednesday from 07:00 to 12:00. This is not a typical shift, so there is no shift template available for it. Add the shift to the employee's schedule using in-cell editing.

Steps		
1	From the Schedule Planner , click the date cell for the Employee who will work the shift.	
2	Enter the shift start and end times separated by a hyphen, for example 7a-12p.	
3	Click Save .	



Tip

Entering start and end times into the cell does not populate the shift label. If the shift label is left blank, reports will print actual start and end times.

Copying and Pasting Shifts

Purpose

You can copy and paste shifts and pay code amounts from one day to another, or from one employee to another, to speed up the scheduling process.

Example

An employee can only work a 5-hour shift on each Wednesday in the following two weeks from 07:00 to 12:00. You add the shift to the first Wednesday and then copy and paste it to the next Wednesday.

Steps	
1	From the Schedule Toolbar , click the Paste button.
2	Click the date cell of the shift or pay code you want to copy.
3	Click the date cell into which you want to paste the shift or pay code. (Optional) Continue to paste the shift or pay code to any other date cells where they should occur.
4	When you are finished, click the Paste button again to turn it off.
5	Click Save .



Editing a Shift

Purpose


You can change the start or end time of a scheduled shift.

Example

An employee discovers that he can now work until 13:00 on Wednesday. You will edit his shift to change the end time.

Steps

1	From the Schedule Planner , highlight the portion of the shift in the date cell that you need to change.	<div style="border: 1px solid #ccc; padding: 5px;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc;"> BY EMPLOYEE BY GROUP BY JOB </div> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc;"> Save Actions ▾ Shift ▾ Pay Code ▾ Accrual Amount ▾ Availability </div> <table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr style="background-color: #e6e6e6;"> <th>Name</th> <th>Totals</th> <th>Unit</th> <th>Job 1 ▲</th> <th>Pref Zone</th> <th>...</th> <th>Sun 4/27</th> </tr> </thead> <tbody> <tr> <td>Cyr, Sharon</td> <td>0.00</td> <td>...t/CityN/Surg</td> <td>LPN</td> <td>Night</td> <td>...</td> <td></td> </tr> <tr style="background-color: #e6f2e6;"> <td>Gavin, Martha</td> <td>11.50</td> <td>...t/CityN/Surg</td> <td>LPN</td> <td>Day</td> <td>...</td> <td>7a 7p</td> </tr> </tbody> </table> </div>	Name	Totals	Unit	Job 1 ▲	Pref Zone	...	Sun 4/27	Cyr, Sharon	0.00	...t/CityN/Surg	LPN	Night	...		Gavin, Martha	11.50	...t/CityN/Surg	LPN	Day	...	7a 7p
Name	Totals		Unit	Job 1 ▲	Pref Zone	...	Sun 4/27																
Cyr, Sharon	0.00		...t/CityN/Surg	LPN	Night	...																	
Gavin, Martha	11.50	...t/CityN/Surg	LPN	Day	...	7a 7p																	
2	Enter the new time.																						
3	Click Save .																						



Tip

Always look for a shift template to use in place of editing a shift. When you edit the shift's start or end time, make sure to edit the shift label also. Shift labels appear in many reports instead of actual start and end times. If the shift label is left blank, reports will print actual start and end times.

Deleting a Shift

Purpose

When an Employee is scheduled for a shift by mistake, you need to delete the shift so that it does not count towards coverage requirements.

Example

An employee is mistakenly scheduled to work the Night shift on Monday. Right now, you know that you do not need someone else to fill that shift.

Steps	
1	From the Schedule Planner , in the Schedule Toolbar , click the Delete button.
2	Select the shift you want to delete. (Optional) You can delete additional shifts by clicking on them in the Schedule Planner.
3	When you are finished, click the Delete button again to turn it off.
4	Click Save .



Swapping Shifts

Purpose

The Schedule Toolbar's Swap button helps you make schedule changes quickly, including shift swaps and shift reassignments.

Example

Two employees inform you that they would like to swap their Monday and Friday shifts. After you review their overtime and skill mix you use the Schedule Toolbar to make the swap.

Steps	
1	From the Schedule Planner , in the Schedule Toolbar , click the Swap button.
2	Select a shift to swap or reassign.
3	<p>If the shift is being swapped, select the other shift in the swap.</p> <p>If the shift is being reassigned, select the empty date cell for the Employee to which the shift is being reassigned (the shift will be 'swapped' with the empty day).</p>
4	When you are finished swapping or reassigning shifts, click the Swap button to turn it off.



Entering Pay Codes

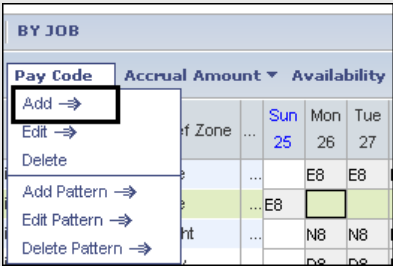
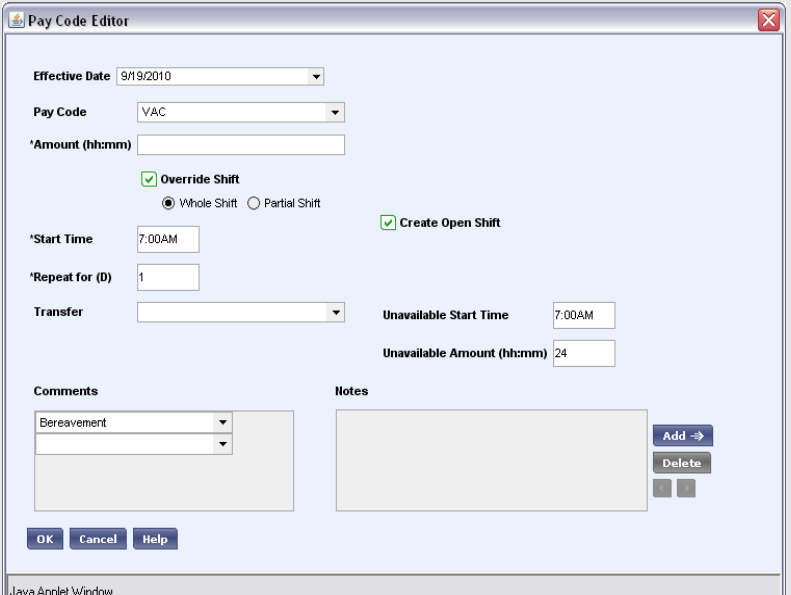
Purpose

Several items included on schedules are not regular shifts that count towards coverage for the unit. Most of these items are added to the schedule in the form of a *pay code edit* rather than a shift. You can add pay code edits using the Pay Code Editor dialog box when the pay code is applied to an unscheduled day or if the amount you wish to add is less than the shift length.

Example

An employee will be on vacation on Tuesday. This pay code needs to be added to the schedule so that the time is tracked and she is not asked to arrive early on that day.

Steps	
1	From the Schedule Planner , select the date cell in which you wish to add a pay code edit.
2	Select Pay Code > Add .
3	Select the pay code from the Pay Code drop-down list.
4	In the Amount (hh:mm) field, enter a specific number of hours.
5	In the Start Time field, enter the effective time for the non-worked hours.
6	If the pay code applies to multiple consecutive days, enter the number of days in the Repeat for (D) field.
7	The Unavailable Start Time is defaulted and not required.
8	The Unavailable Amount is defaulted and not required.

Steps

- | | |
|----|---|
| 10 | <p>Select Override Shift if the pay code amount should replace the shift.</p> <p>Select Whole Shift to replace the entire shift, or select Partial Shift to replace a segment of the shift.</p> <p>Note: If partial shift is selected, the override begins at the Start Time and ends once the Amount is reached.</p> |
| 11 | <p>Select Create Open shift to create an open shift.</p> |
| 12 | <p>Click the OK button.</p> |



Block Vacation Requests

Enter the Pay code BLK for approved time off in the future schedule period. The BLK is a non-paid placeholder which does not affect the accrual balance. BLK is used instead of VAC because employees have not yet earned the accruals they will use in the future. Employees will need to enter the accrual pay code and hours they want to be paid from.



Tip

To get a **list of Pay Codes and their descriptions**, go to the Forms & Policies section of the Payroll web site and select Section 11: Timekeeping & Scheduling.



Tip

To view your Employee's accrual amounts, right click the Employee's name and select **Accruals**.

Gold, Joyce	RN FT ...	0:
Jackson, Lakesha	RN ET	0:
Jones, Jill		
Lee, Chum		
Lui, Diana		
Marmol, Carla		
Nguyen, Fran		
Nikula, Hinkley		
Osmosis, Otte		
Patterson, Ca		
Peterson, Jac		
Reynolds, Bla		
Sweet, Sheila		

- Add Pattern ▶
- Edit Pattern ▶
- Delete Pattern ▶
- Lock ▶
- Unlock ▶
- Schedule Outline →
- Accruals →
- Audits →
- Timecard →
- People →
- Reports →

Accruals							
Jackson, Lakesha							
Date 9/25/2010 Accrual Profile Leave Accruals							
Accrual Code ▲	Balance on Selected Date	Units	Balance Projected Through	Projected Debits	Projected Credits	Projected Balance	Balance without Projected Credits
Comp	0:00	Hour	9/25/2010	0:00	0:00	0:00	0:00
ONA Comp	0:00	Hour	9/25/2010	0:00	0:00	0:00	0:00
ONA Holiday	24:00	Hour	9/25/2010	0:00	0:00	24:00	24:00
Sick	16:00	Hour	9/25/2010	0:00	0:00	16:00	16:00
Vacation	120:00	Hour	9/25/2010	0:00	0:00	120:00	120:00

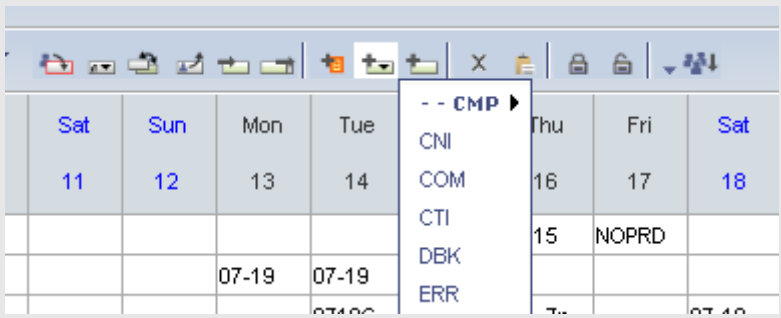
Replacing a Shift with a Pay Code Amount

Purpose

Frequently, a scheduled shift needs to be replaced with a pay code edit, such as when an employee scheduled to work calls in sick or requests out of block vacation. The Schedule Toolbar includes a button to perform pay code edits that replace shifts with minimum clicks.

Example

An employee is scheduled to work on Thursday but will be at the lake with her grandfather. You can schedule the VAC time as a pay code edit. You will need an open shift to find a replacement for her shift, so you will use the Schedule Toolbar's Pay Code button.

Steps		
1	From the Schedule Planner , in the Schedule Toolbar , click the Pay Code button.	
2	The available pay codes are categorized alphabetically into lists. Roll over a list and select the appropriate pay code to apply.	
3	Select each shift to be replaced by the pay code edit.	
4	When you are finished, click the Pay Code button again to turn it off.	



Tip

When you use the Schedule Toolbar's Pay Code button, an open shift is created automatically and availability is updated when certain pay codes are assigned. If you do not need to fill that open shift, you can delete it using the Delete button.

Locking Shifts and Days

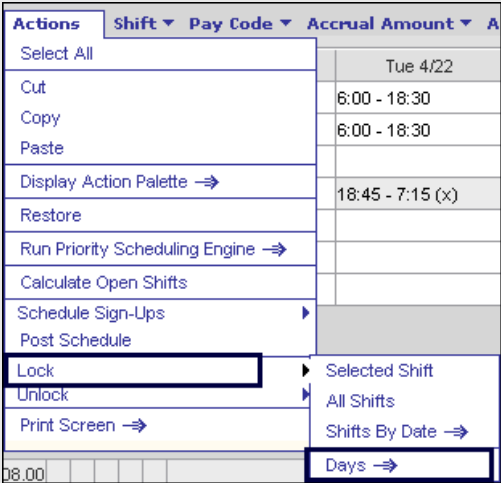
Purpose

Locking a scheduled shift prevents anyone from modifying, deleting, or overwriting that shift. Locking a day for an employee prevents anyone from modifying the scheduled contents of that day for the employee, including both the shifts and pay code edits.

Locking Days Example

An employee is using BLK in a future schedule period. You want to ensure that his BLK is not overridden by a pattern, so you lock the day.

Steps	
1	From the Schedule Planner , select the specific set of employees from the Show drop-down list. Select the specific time period from the Time Period drop-down list.
2	Select the employee's name.
3	<p>Select either Actions > Lock > Days</p> <p>OR</p> <p>Actions > Lock > Shifts by Date.</p>

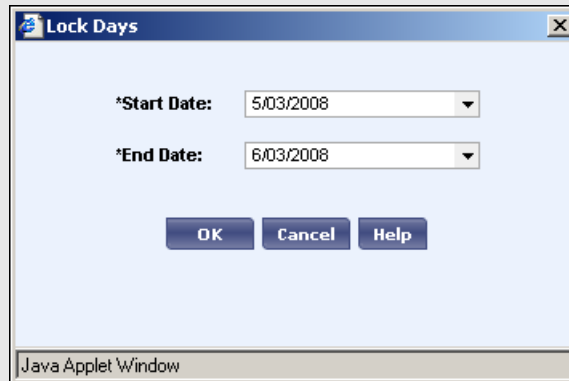


The screenshot shows a software interface with a table of shifts. The table has columns for 'Actions', 'Shift', 'Pay Code', 'Accrual Amount', and 'A'. The 'Actions' column contains a list of actions: 'Select All', 'Cut', 'Copy', 'Paste', 'Display Action Palette ->', 'Restore', 'Run Priority Scheduling Engine ->', 'Calculate Open Shifts', 'Schedule Sign-Ups', 'Post Schedule', 'Lock', 'Unlock', and 'Print Screen ->'. The 'Shift' column shows 'Tue 4/22'. The 'Pay Code' column shows '6:00 - 18:30'. The 'Accrual Amount' column shows '18:45 - 7:15 (x)'. The 'A' column is empty. The 'Lock' and 'Days' options in the 'Actions' column are highlighted with a blue box.

Steps

4 To lock a range of dates, from the **Start Date** drop-down list, select the first date to lock. From the **End Date** drop-down list, select the last date to lock.

5 Click **OK**.



Tip

If you only need to lock a single shift, you can select that shift and then select **Actions > Lock > Selected Shift**. Or, using Schedule Toolbar, select the lock button and then select the shift.

If you wish to lock all shifts in the schedule period for an employee, select the employee and then select **Actions > Lock > All Shifts**.



Tip

To unlock shifts or days, use **Actions > Unlock** instead. The Unlock sub-menu includes the same options as the Lock menu. Or, using the Schedule Toolbar, select the unlock button and then select the locked shift.

Adding Comments and Notes to a Shift or Pay code

Purpose

Comments provide additional useful information about a shift or a pay code. For example, comments such as CHL and MTG are used to show that an employee is working a Charge shift or in a Meeting. These display on the OHSU daily reports and monthly schedules.

Example

On Tuesday, an employee picked up an additional shift that brings her into Regular Other status.

Steps	
1	From the Scheduler Planner , right-click the employee's shift. Select Edit > Shift or Pay Code
2	In the Edit Shift window, select the Comments drop-down arrow and select the comment.
3	Click the Add button in the Notes section to type a free text note. Note: You can add notes only when there is a comment.
4	Click OK .
5	Click Save .



Tip

View comments on the Comments tab in the Schedule Planner. There is no limit to the number of comments that can be attached to a shift or pay code.

SCHEDULE ASSISTANT	COVERAGE	RULE VIOLATIONS	HOURS SUMMARY	COMMENTS	CALL LIST	HOURS
Date ▲	Shift/Pay Code	Name	Comments	Note		
4/01/2009	D8	Regan, Elinor	Approved	Shift Swap [dmaynard; 4/02/2009 4:16PM]		

To delete a comment or note, right click the shift and select **Edit**.



Tip

To get a **list of Comments and their descriptions**, go to the Forms & Policies section of the Payroll web site and select Section 11: Timekeeping & Scheduling.



Tip

To view your Employee's accrual amounts, right click the Employee's name and select **Accruals**.

Gold, Joyce	RN FT ...	0:
Jackson, Lakessha	RN ET	0:
Jones, Jill		
Lee, Chum		
Lui, Diana		
Marmol, Carla		
Nguyen, Fran		
Nikula, Hinkley		
Osmosis, Otte		
Patterson, Ca		
Peterson, Jac		
Reynolds, Bla		
Sweet, Sheila		

- Add Pattern ▶
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Accruals							
Jackson, Lakessha							
Date 9/25/2010 Accrual Profile Leave Accruals							
Accrual Code ▲	Balance on Selected Date	Units	Balance Projected Through	Projected Debits	Projected Credits	Projected Balance	Balance without Projected Credits
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ONA Comp	0:00	Hour	9/25/2010	0:00	0:00	0:00	0:00
ONA Holiday	24:00	Hour	9/25/2010	0:00	0:00	24:00	24:00
Sick	16:00	Hour	9/25/2010	0:00	0:00	16:00	16:00
Vacation	120:00	Hour	9/25/2010	0:00	0:00	120:00	120:00

Scheduling a Job Transfer for a Shift

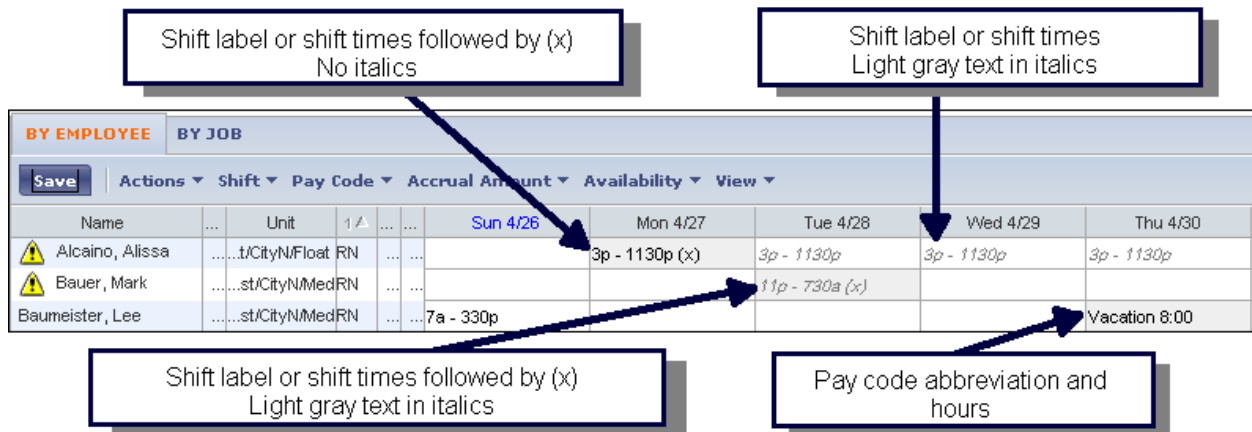
Purpose

Kronos Scheduling enables you to schedule an employee to work a shift in a different job than her primary assignment. The shift assignment could be in a different department, or it could be in the same department, but in a secondary position (for example, a CNA acts as a HUC for the shift). In Kronos Scheduling, you can schedule this shift as a *job transfer*. By scheduling the job transfer, you ensure that the shift's hours apply toward the correct coverage count.

Example

An RN will be schedule as a Unit Educator for a shift.

Steps	
1	From the Schedule Planner , in the Schedule Toolbar , click the Transfer button.
2	Select the appropriate transfer from the list.
3	Click the appropriate shift for which the transfer should apply.
	<p>Note: If the shift does not yet exist, you must add it first by using a Shift Template or in-cell editing.</p> <p>Note: You can continue to apply transfers to additional shifts by selecting the appropriate shifts.</p>



Shift text appearance in date cell	Event	Example
Shift label or shift times followed by (x) No italics	Transfer Employee to the same or different job code on a unit that is currently displayed in the Schedule Planner.	Alissa Alcaino, an RN from a non-displayed Float unit, is transferred to work as an RN in the Medical unit.
<i>Shift label or shift times followed by (x)</i> Light gray text in italics	Transfer Employee to the same or different job code on a unit that is not currently displayed in the Schedule Planner.	When looking at the schedule for Medical only, the shift for an RN, Mark Bauer, who was transferred (scheduled) to a job on the non-displayed unit ICU, will appear in light gray italics with an (x) to indicate he is scheduled but working elsewhere.
<i>Shift label or shift times</i> Light gray text in italics	Transfer Employee to the same or different job code on a unit that is currently displayed in the Schedule Planner from a unit that is not currently displayed in the Schedule Planner.	When looking at the schedule for Medical only, Alissa Alcaino, an RN transferred from the non-displayed Float unit will appear in a row in the schedule, but all her shifts scheduled in units other than Medical will appear in light gray italics.
Pay code abbreviation and hours	Time off edit.	Eric Kunze has scheduled time off for that time period.

Scheduling a Full Day Work Rule Transfer

Purpose

Employees may be scheduled for shifts that are either paid or tracked differently than regular hours.

Work Rule transfers must be entered for the following shifts:

Charge	Light Duty	Patient Care Attendant
Critical Floor Care	Meeting	Preceptor
Doubleback	Orientation	Union Steward
Education	Other Assignment	

- Determining which work rule to enter is based on each employee's Pay Rule, which gives us their classification and their meal break.


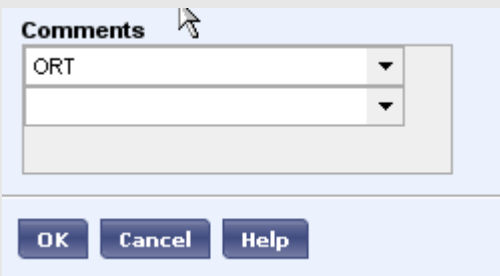
01– ONA IP M0



- The first two numbers of the Pay Rule refer to the employee's classification.
 - 01: Inpatient RNs AND Resource Step RNs (e.g. 01-ONA IP, 01-RS Step IP)
 - 03: Outpatient RNs AND Resource Step RNs (e.g. 03-ONA OP, 03-RS Step OP)
 - 05: Resource RNs (e.g. 05-RS IP)
 - 20: AFSCME 24hr unit (e.g. 20-AFSCME SH)
 - 30: AFSCME non-24hr unit (e.g. 30-AFSCME)
 - 25: FLEX (e.g. 25- Flex)
 - 70: Student (e.g. 70-Student)
- The last part of the Pay Rule indicates the employee's meal break. M0 = no meal break. M1=1 hr meal break. If no meal break is listed, the employee has a default ½ hr meal break.

Example

An employee is going to be attending orientation for her full shift on Monday. You will perform a work rule transfer to Orientation during her shift and add the corresponding comment.

Steps	
<p>1 First, determine which Work Rule to use based on the employee's Pay Rule. Hold the cursor over employee's name to find out their Pay Rule. This inpatient nurse has the default ½ hr lunch break.</p>	
<p>2 Double click on an existing shift or Right click on a blank day.</p>	
<p>3 Click on Insert Shift Template to and choose the shift to enter. Then, double click on the shift to edit.</p>	
<p>4 Select Search from the Transfer drop-down list. Note: Recent transfers appear in the drop-down list along with the Search option. If the work rule transfer appears in the list, you can select it and go to step 6.</p>	

<p>5 Use the Work Rule drop-down list to choose the correct work rule. Choose 01-Orientation (with no M0 or M1 after it) to match this nurse's pay rule.</p>	
<p>6 Click OK.</p>	
<p>7 Select the ORT comment from the Comment drop-down list so that employee is shown as being in orientation status on reports.</p> <p>Click OK.</p>	



Non-Productive Shift Label

Shift templates have a built-in Shift Label. If a shift is a non-productive shift and you do not want it to print on the Daily Staffing report, use the NOPRD shift template and enter the start and end times or just type NOPRD into the shift label, replacing the existing label.

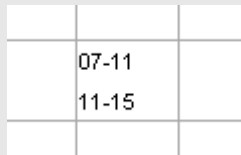
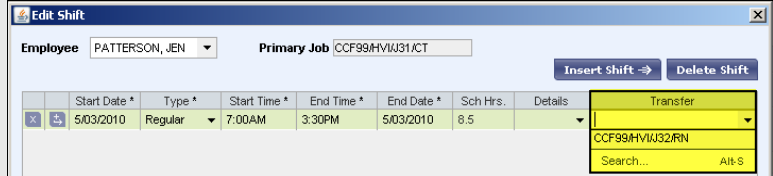
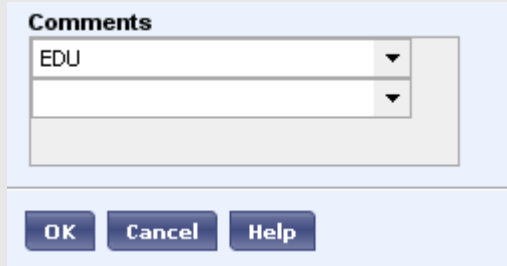
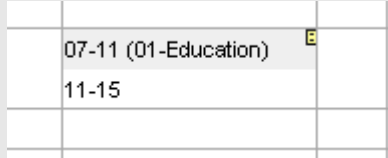
Scheduling a Partial Day Work Rule Transfer

Purpose

If an employee is working in a different status for part of the day, enter a partial day work rule transfer.

Example

An employee is going to attend a training class for the first 4 hours of her shift on Friday. This requires a work rule transfer for just that portion of her day.

Steps	
<p>1 From the Schedule Planner, click into a blank cell for the employee. Type the hours of the first portion of the shift. Press the Enter key to get a second blank line. Type in the hours of the second portion of the shift.</p>	
<p>2 Double click on the first shift which needs a work rule transfer. Select Search from the Transfer drop-down list.</p>	
<p>5 Use the Work Rule drop-down list to choose the correct work rule. Choose 01-Education (with no M0 or M1 after it) to match this nurse's pay rule.</p>	
<p>6 Click OK</p>	
<p>7 Enter the EDU comment from the Comment drop-down list so that employee is shown as being in Education status on reports. Click OK.</p>	
<p>8 The two adjacent shifts are listed in the same cell. The first portion has the work rule transfer to Education and the second is a regular shift.</p>	

Module 4: Evaluating and Finalizing Schedules


Evaluating Schedule Rule Violations

Purpose

Several OHSU scheduling policies and guidelines have been incorporated into the application as schedule rules. When your schedule violates one of these rules, the application calls attention to the violation on the Rule Violations tab in the Schedule Planner.

Example

As you create your schedule, you notice an employee is violating a schedule rule. You make adjustments to the schedule and recheck the rules.

Steps																																						
1	From the Schedule Planner , you see the Warning symbol next to an employee's name.																																					
2	Click on the employee's name and view the Rule Violations tab.	<table border="1"> <thead> <tr> <th>SCHEDULE ASSISTANT</th> <th>COVERAGE</th> <th>RULE VIOLATIONS</th> <th>HOURS SUMMARY</th> <th>COMMENTS</th> <th>CALL LIST</th> </tr> </thead> <tbody> <tr> <td colspan="6">Filter row by Type: All <input type="button" value="Check Violations"/></td> </tr> <tr> <th>Date</th> <th>Name</th> <th>Severity</th> <th colspan="3">Description</th> </tr> <tr> <td>5/23/2008</td> <td>Lohn, Joseph</td> <td>Warning</td> <td colspan="3">Shift starting at 5/23/2008 12:00PM starts 4:30 hours after previous shift, which</td> </tr> <tr> <td>5/18/2008</td> <td>Kunze, Eric</td> <td>Informational</td> <td colspan="3">Scheduled for 48:00 hours, which is more than the weekly maximum of 42:30 h</td> </tr> <tr> <td>5/18/2008</td> <td>...CityN/Surg/LPN</td> <td>Informational</td> <td colspan="3">LPN has 56:00 hours for Vacation, which is more than the weekly maximum of</td> </tr> </tbody> </table>	SCHEDULE ASSISTANT	COVERAGE	RULE VIOLATIONS	HOURS SUMMARY	COMMENTS	CALL LIST	Filter row by Type: All <input type="button" value="Check Violations"/>						Date	Name	Severity	Description			5/23/2008	Lohn, Joseph	Warning	Shift starting at 5/23/2008 12:00PM starts 4:30 hours after previous shift, which			5/18/2008	Kunze, Eric	Informational	Scheduled for 48:00 hours, which is more than the weekly maximum of 42:30 h			5/18/2008	...CityN/Surg/LPN	Informational	LPN has 56:00 hours for Vacation, which is more than the weekly maximum of		
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3	Read the Warning message for the employee you selected.																																					



Tip

An icon appears next to name of the Employee with the rule violation. Select the Employee's name in the Schedule Planner to highlight his or her name in the **Rule Violations** tab. Click the **Name** column header to sort the data by the Employees' names. If an Employee has more than one rule violation, sorting by the Name column will list the violations together.



Rule Violations

Some common Employee schedule rule violations are:

- Employee has an expired certification
- Employee is scheduled beyond his or her maximum hours in a week
- Employee is scheduled beyond his or her maximum hours in a shift

Evaluating Coverage

Purpose

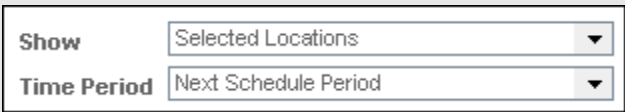
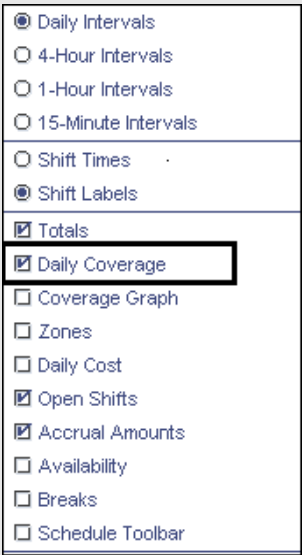
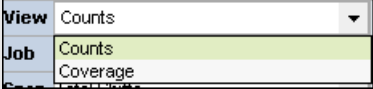
Schedulers need to evaluate coverage often to determine whether the schedule satisfies the core coverage requirements. The Schedule Planner provides a Daily Coverage view to help review coverage.

You can also evaluate and address coverage in the Schedule Planner with the following tabs:

- Coverage
- Metrics

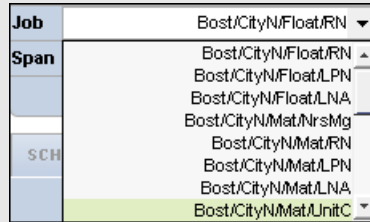
Example

You want to validate that you scheduled enough RNs. If you discover that there are too many or too few RNs scheduled, you can modify the schedule by adding or deleting shifts to meet the workload plan.

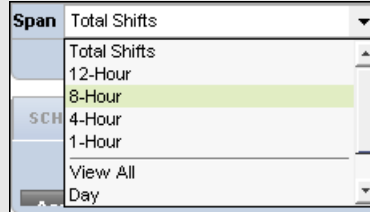
Steps	
<p>1 From the Schedule Planner, select the specific set of employees from the Show drop-down list. Select the specific time period from the Time Period drop-down list.</p>	 <p>The screenshot shows two dropdown menus. The first is labeled 'Show' and has 'Selected Locations' selected. The second is labeled 'Time Period' and has 'Next Schedule Period' selected.</p>
<p>2 Select View > Daily Coverage.</p>	 <p>The screenshot shows a menu with several options. 'Daily Coverage' is selected and highlighted with a black box. Other options include 'Daily Intervals', '4-Hour Intervals', '1-Hour Intervals', '15-Minute Intervals', 'Shift Times', 'Shift Labels', 'Totals', 'Coverage Graph', 'Zones', 'Daily Cost', 'Open Shifts', 'Accrual Amounts', 'Availability', 'Breaks', and 'Schedule Toolbar'.</p>
<p>3 Select Counts or Coverage from the View drop-down list.</p>	 <p>The screenshot shows two dropdown menus. The first is labeled 'View' and has 'Counts' selected. The second is labeled 'Job' and has 'Coverage' selected.</p>

Steps

4 Select a job from the **Job** drop-down list.



5 Select a time span from the **Span** drop-down list.

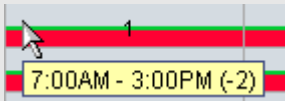
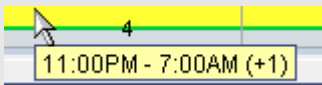
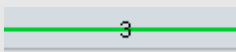


Daily Coverage View Option	Description
Counts	Displays planned and scheduled coverage data numerically, in the form of X/Y where X is the number of people scheduled and Y is the number of people planned. If you select Total Jobs from the Job drop-down list, a plus (+) indicates over-scheduling and (-) indicates under-scheduling.
Coverage	Displays planned and scheduled coverage data graphically using a shaded bar graph. Tool tips display variances between scheduled and planned workloads.

View	Counts	Day - 8h	3 / 3	1 / 3	1 / 3
Job	10A Orthopedics/RN	Eve1 - 4h	1 / 3	2 / 3	2 / 3
Span	View All	Eve2 - 4h	1 / 3	2 / 3	2 / 3
		Night - 8h	2 / 3	4 / 3	4 / 3

Counts View Examples	Description
	This example shows one person scheduled for the RN job and three people planned. You are understaffed by two RNs. The color RED indicates that you are understaffed.
	This example shows four people scheduled for the RN job and three people planned. You are overstaffed by one RN. The color YELLOW indicates that you are overstaffed.
	This example shows three people scheduled for the RN job and three people planned. You are scheduled to the planned amount. The color GREEN indicates that you are staffed to plan.

View	Coverage	Day - 8h	3	1	1
Job	10A Orthopedics/RN	Eve1 - 4h	1	2	2
Span	View All	Eve2 - 4h	1	2	2
		Night - 8h	2	4	4

Coverage View Examples	Description
	<p>The number 1 indicates how many people are scheduled. The RED bar below the green line indicates that the job is understaffed. The information in the tool tip indicates that you are short by two people between 7:00AM – 3:00PM.</p>
	<p>The number 4 indicates how many people are scheduled. The YELLOW bar above the green line indicates that the job is overstaffed. The information in the tool tip indicates that you are overstaffed by one person between 11:00PM-7:00AM.</p>
	<p>The number 3 indicates how many people are scheduled. The GREEN line with no colored bars indicates that you are scheduled to plan.</p>

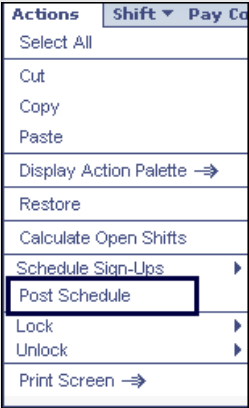

Posting a Schedule

Purpose

In Kronos Scheduling, posting a schedule makes it visible to employees. After changes are made to the schedule, it must be reposted.

Example

You have just completed your schedule for the next schedule period. You post the schedule in Kronos Scheduling before making a hard copy to post on the wall.

Steps	
1	From the Schedule Planner , select the specific set of Employees from the Show drop-down list. Select the specific time period from the Time Period drop-down list.
2	Select Actions > Post Schedule . 
3	Click Yes to confirm the posting.
4	When the system displays a message confirming that the schedule has been successfully posted, click OK . 



Posting the Schedule

Employee can only see schedule information that has been posted when they log into Kronos. If changes are made in the schedule after the final posting and you want employees to see the new changes, the schedule must be posted after each new change.

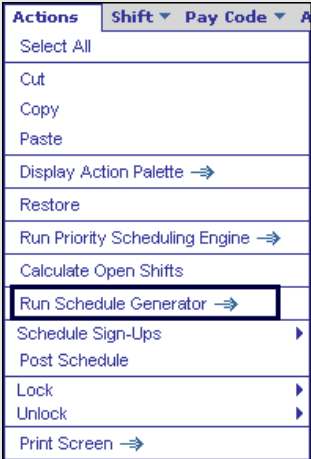
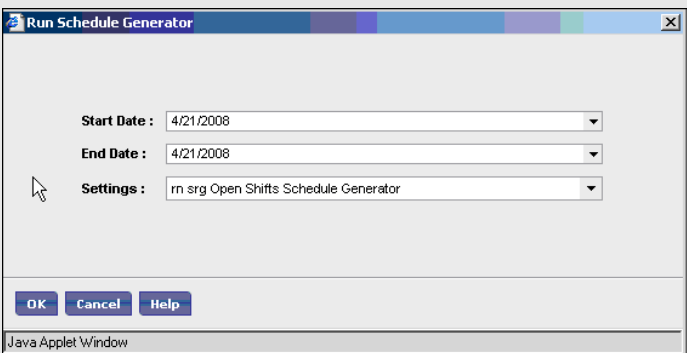
Creating Open Shifts for Zone Locations

Purpose

Schedule Generator automatically creates open shifts needed for coverage. The Schedule Generator deletes any open shifts in the Schedule Planner, and then calculates how many open shifts are needed by comparing current scheduled shifts to workload requirements in the Workload Planner. This option is only available for locations using zone sets for coverage.

Example

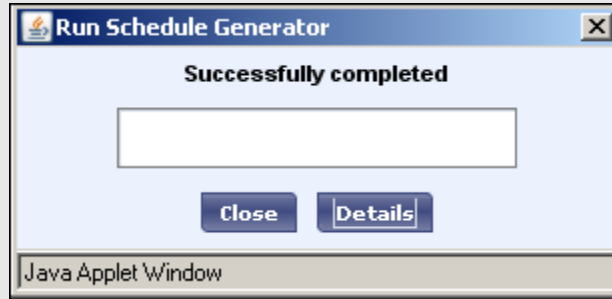
After an update to the workload, you wish to generate a list of open shifts.

Steps		
1	<p>From the Schedule Planner, select the specific set of employees from the Show drop-down list.</p> <p>Select the specific time period from the Time Period drop-down list.</p>	
2	<p>Select Actions > Run Schedule Generator.</p>	
3	<p>In the Run Schedule Generator window, select the start date from the Start Date drop-down list.</p> <p>Select the last date for which to generate open shifts from the End Date drop-down list.</p> <p>Select the appropriate setting from the Settings drop-down list.</p> <p>Click OK.</p>	

Steps

4 After the Schedule Generator has completed successfully, click **Close**.

Note: Click **Details** to review in a separate window the details of what actions the Schedule Generator performed when it generated a schedule, then click **Close** to close the details window.



5 Click **Save**.



Caution

The Schedule Generator is only used for locations that have been assigned zone sets.



Tip

The recommended practice is to run Schedule Generator on one job at a time. To do this, use the Show menu to select a single job. Open shifts will print blank lines on Daily Staffing report.

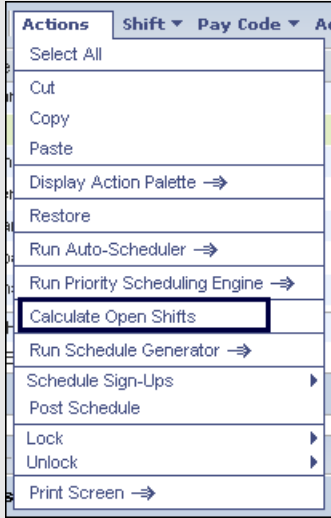
Creating Open Shifts for Shift Set Locations

Purpose

The Calculate Open Shifts feature automatically creates open shifts needed for coverage for units that use shift sets for coverage. Kronos Scheduling calculates how many open shifts are needed for coverage by comparing current scheduled shifts to workload requirements in the Workload Planner.

Example

After an update to the workload, you wish to generate a list of open shifts.

Steps	
1	<p>From the Schedule Planner, select the specific set of Employees from the Show drop-down list.</p> <p>Select the specific time period from the Time Period drop-down list.</p>
2	<p>Select Actions > Calculate Open Shifts.</p> 



Caution

Calculate Open Shifts is only used for locations assigned to shift sets.


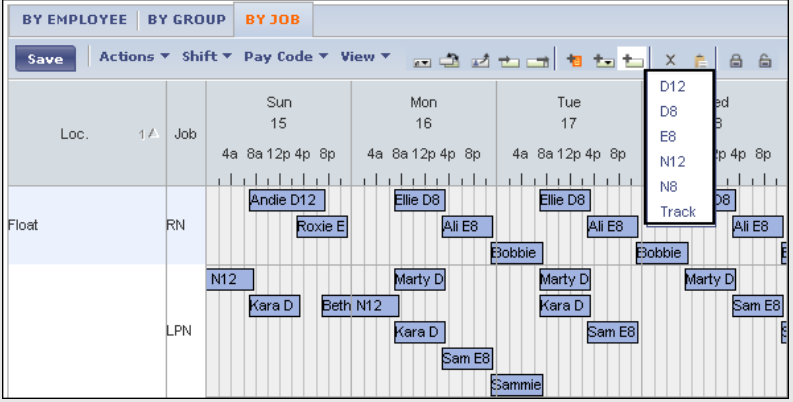
Creating Open Shifts Manually

Purpose

You can manually create open shifts in the Schedule Planner to better meet your workload needs. Manually created open shifts will remain in the Schedule Planner even after running the Schedule Generator or calculating open shifts.

Example

You wish to create open shifts manually. You can insert a shift template into a job in the Schedule Planner's By Job tab to create an open shift.

Steps	
<p>1 From the Schedule Planner, click the By Job tab.</p> <p>Select the specific set of employees from the Show drop-down list.</p> <p>Select the specific time period from the Time Period drop-down list.</p>	
<p>2 In the Schedule Toolbar, click the Shift Template button.</p>	
<p>3 Select the shift template from the drop-down list.</p>	
<p>4 Click the date cell for the job of the open shift to be created</p> <p>(Optional) Add the shift template to multiple days by clicking each day's date cell.</p>	
<p>5 When you are finished, click the Shift Template button again to turn it off.</p>	
<p>6 Click Save.</p>	

Module 5: Reporting

Generating a Printable Report or Schedule

Purpose

Kronos Scheduling reports include several schedule formats that can be printed, scheduled, and/or emailed. Reports that are useful for staffing and scheduling include:

Daily Staffing Reports	Description
OHSU Daily Staffing by Zone	Daily assignment sheet for departments using zones.
OHSU Staffing Sheet - Daily	Daily assignment sheet for departments using shift sets.

Weekly Schedule Report	Description
Location Schedule – Weekly	Can be used to show a week of daily assignments at a glance. Prints all employees for a location

Monthly Schedule Reports	Description
OHSU Employee Schedule – 4 Week	Prints all employees for a location by job in a 28 day view. Can be used to print a blank or final schedule.
OHSU Employee Schedule – 6 Week	Prints all employees for a location by job in a 42 day view. Can be used to print a blank or final schedule.
OHSU Location Schedule with Coverage	Shows all employees who are scheduled for a location by zone. Prints by zone and job and includes coverage counting.

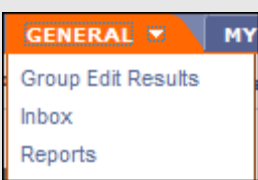

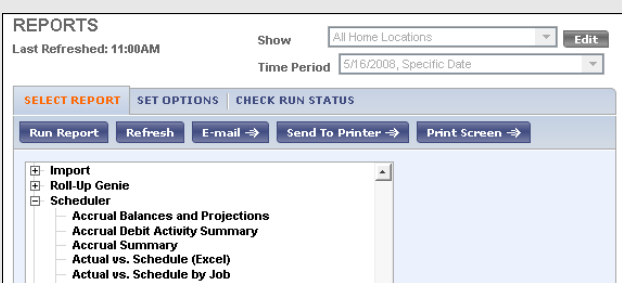
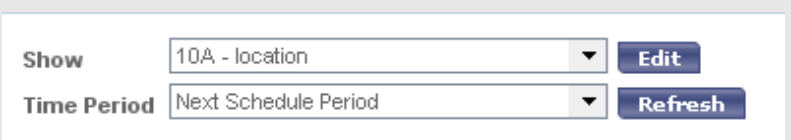

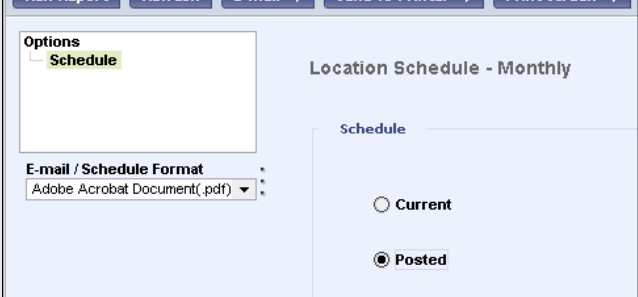
Calendars	Description
Absence Summary	Displays absence pay codes per employee in calendar form
Tardy	Displays Early in, Late in, Early out, and Late out per employee in calendar form

Timekeeping Reports	Description
Exceptions	Displays exceptions and comments attached to the start and end of a shift. Can choose exceptions in Options such as Early in, Late in, Early out, and Late out
OHSU Daily Worked Hours Summary	Worked hours by day by location to be run for one day.
OHSU Daily HPPD Summary	Daily hours per patient day Summary

Timekeeping Reports	Description
OHSU Comments Audit Report	Displays comments entered in schedule or timecard. Excel version can be used to sort comments and total up hours.
OHSU Employee Hours By Pay Code	Displays hours for pay codes per day. Can choose pay codes in Options. Excel version can be used to total up hours.
OHSU Employee Absenteeism Report	Displays hours for pay code SIK, VAC, CMP, COM, HCB, UNP, TRK, REQ, ECP
OHSU Unscheduled Absence Report	Displays hours for pay codes SIK, ECP, UNP, REQ and any pay code with an EC or FMLA/OFLA comment.

Example

After posting the schedule electronically, you wish to print out a copy that you can post on the wall.

Steps	
<p>1 To run a schedule report for all of your employees, open the General tab menu and select Reports.</p> <p>OR</p> <p>To select which employees will appear on the OHSU Employee Schedule report, select the employees in the Schedule Planner and click the Reports link.</p>	 <p>OR</p> 
<p>2 On the Select Report tab, click the + next to Scheduler to display a list of reports. Select the report name.</p>	
<p>3 Select the appropriate information in the Show and Time Period drop-down lists.</p> <p>OR</p> <p>Verify that the Previously Selected Employees and correct Time Period is displayed.</p>	
<p>4 Click the Set Options tab and choose options, if available.</p>	
<p>6 Click Run Report.</p>	

Steps

7. On the **Check Run Status** tab, click the **Refresh Status** button until *Complete* appears in the **Status** column.

8. Click **View Report**.

9. Check the 'Choose Page Source by PDF page size' to change the paper size and verify in Preview

REPORTS
Last Refreshed: 4:37PM

Show: All Home
Time Period: Next Schedu

SELECT REPORT | **SET OPTIONS** | **CHECK RUN STATUS**

View Report | **Refresh Status** | **Delete** | **Print Screen** →

Report Name	Date Done	Status	Output	User
Employee Schedule - Monthly	Fri 3/05/2010 04:36:55PM	Complete	Screen	psuper

Print

Printer Name: \\printers2\msba196p
Status: Ready
Type: HP Universal Printing PCL 6



Print Range:
 All
 Current view
 Current page
 Pages from: 1 to: 63
 Subset: All pages in range | Reverse pages

Page Handling:
 Copies: 1 | Collate
 Page Scaling: Fit to Printer Margins
 Auto-Rotate and Center
 Choose Paper Source by PDF page size
 Print to file

Preview: 8.5 x 14 inches
 Units: Inches | Zoom: 96%
 1/63 (1)

Buttons: Printing Tips, Advanced, OK, Cancel

Running Excel Reports

Steps	
<p>1. Choose a report that shows an Excel option such as the OHSU Daily Staffing by Zone (Excel) Under Set Options use the drop down menu to change the format to Excel. Click Email</p>	
<p>2. Enter the email address(es) in the Recipients box. Note: Excel reports must be emailed.</p>	
<p>3. Click OK</p>	

Scheduling Reports

Steps	
<p>1. Choose a report to schedule. Click Schedule from menu bar.</p>	

Steps

- Enter the email address(es) and parameters of the report to be scheduled including Schedule Type and Start/End Dates. Reports may be scheduled to print to a printer or emailed.

Reviewing Calendars

Purpose

Calendars displays trending information about individual employees. There are several under the Timekeeping tab. Tardy, Absence Summary, Work and Absence Summary are helpful calendars.

Example

You want to view absence trends for an employee. You review Absence Summary calendar for Vacation and absenteeism.

Steps

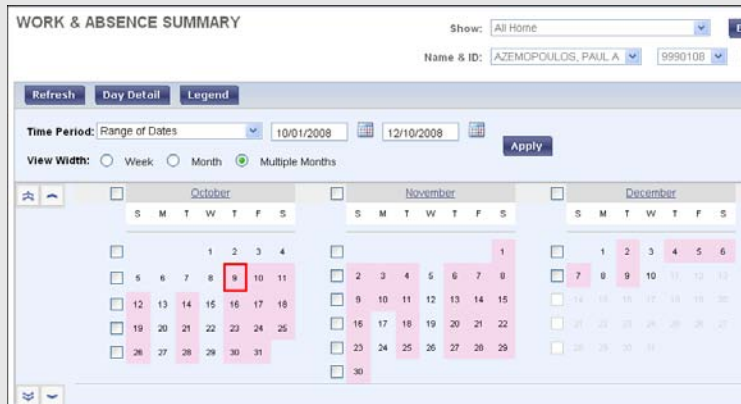
- From the **My Timekeeping** tab, select **Work & Absence Summary**.



- From the **Show** drop-down list, select a group of Employees. From the **Name & ID** drop-down list, select an Employee.

- From the **Time Period** drop-down list, select a timeframe. Click one of the **View Width** options, and then click **Apply**.

- Review information in the calendar workspace.



Action	Step
Select a specific date	Click the date cell in the calendar; its fill color changes to show that you selected the date.
Deselect a selected date	Click the date cell a second time; its fill color reverts to normal to show that the date is no longer selected.
View non-abbreviated details of a particular day	Click the date cell and select Day Detail from the menu options.
View a legend showing descriptions of abbreviations and colors	Select Legend from the menu options.
View different calendar formats	Select Week to view one week across the screen. This view displays the most detail. Select Month to view each month across the screen. This view displays trends. Select Multiple Months to view several months across the screen. This view displays several months at a time.