

# When I Work



**USER MANUAL- ADMINISTRATION**

# Login



- Login at [www.wheniwork.com](http://www.wheniwork.com)

The screenshot shows the Wheniwork login interface. At the top center is a large, light gray oval containing three horizontal bars of increasing length. Below this is a form with two input fields. The first field contains a user icon and the email address `admin@distinctivehomecare.`. The second field contains a magnifying glass icon and a password field with several dots. Below the form is a large green button with the word "LOGIN" in white. At the bottom of the page are two smaller buttons: "FORGOT PASSWORD" on the left and "REGISTER NOW" on the right. At the very bottom center is a link labeled "THIRD PARTY CONNECT →".

	<code>admin@distinctivehomecare.</code>
	.....

**LOGIN**

[FORGOT PASSWORD](#)   [REGISTER NOW](#)

[THIRD PARTY CONNECT →](#)

# Menu Bar



DASHBOARD SCHEDULER ATTENDANCE **20** DAYS LEFT ON TRIAL Jasmine

REQUESTS Start typing... ie. 'pending'

# Notifications



- Notifications about new shifts, swap and drop requests can be viewed here.

When clicked, the notifications pane will open. Click to close.

The screenshot shows a software interface with a dark header bar. On the left, there's a navigation menu with icons for Dashboard, My Schedule, Coworkers, and a user profile for Jane. A red arrow points from the text above to the 'Dashboard' icon. Below the header is a search bar labeled 'Search Recent Activity'. The main content area is titled 'NOTIFICATION / ACTIVITY'. It lists several items:

- THINGS NEEDING YOUR ACTION**
  - Drop Shift** Shift on Wed, November 12 from 1:00p to 7:00p **WAITING**
  - Swap Shifts** Shift on Tue, November 11 from 9:00a to 5:00p **WAITING**
- NOTIFICATIONS**
  - John D. initiated a shift drop request from 1:00p to 7:00p on **November 12** **WAITING**
  - John D. initiated a shift swap request from 9:00a to 5:00p on **November 11** **WAITING**

At the bottom of the notifications list is a 'SEE MORE' button. The right side of the interface shows a larger view of the 'NOTIFICATION / ACTIVITY' section, displaying specific messages like 'John Doe wants to make this shift. It is open for grabs.' and 'This shift request has been approved.' by Jasmine Matthews. There are also input fields for 'REPLY...' and a green 'POST' button.

At the very bottom of the page, there are links for Privacy Policy, Developers | Found a Bug?, and NEED HELP?.

# User Dashboard

- The manager can view the basic summary of what is in store for the day, add employees, re-configure features and go through a guided setup.

Hi Jasmine! Let's get your schedule started.

[WATCH TUTORIAL >](#)

DON'T SHOW AGAIN

[SHOW ME LATER](#)

 ADD LOGO

Customize the look and feel of your schedule's login page. Add your company's logo to the login page of your account.

ADD LOGO

## INVITE EMPLOYEES

Quickly invite your staff here. If you know their email or mobile number, we'll invite them to access their schedule online.

[INVITE EMPLOYEES](#)

## 8. CONFIGURE FEATURES

Adjust how When I Work is used by your employees. Set the start of your week, 12/24 hours clock, etc. Turn on or off features.

## CONFIGURE FEATURES

## → GUIDED SETUP

Click "Guided Setup" below to quickly get your schedule configured by adding locations, positions, employees & shifts.

## GUIDED SETUP

Hi Jasmine! Today's Schedule for Distinctive Home & Health Care

MESSAGE STAFF

## CALENDAR SYNC

ALL LOCATIONS ▾

# App Settings



- The manager can make changes to the settings on how When I work should work.

The screenshot shows the When I Work mobile application interface. At the top, there is a navigation bar with icons for Dashboard, Scheduler, Attendance, and a user profile for "Jasmine". A green badge indicates "18 DAYS LEFT ON TRIAL". Below the navigation bar, a message says "Hi Jasmine! Let's get your schedule started." with options to "WATCH TUTORIAL" or "DON'T SHOW AGAIN".

The main content area has three sections: "ADD LOGO", "INVITE EMPLOYEES", and "CONFIGURE FEATURES". Each section has a descriptive text and a button to "ADD LOGO", "INVITE EMPLOYEES", or "CONFIGURE FEATURES".

To the right, a vertical sidebar menu is open, showing the following options:

- MY PROFILE
- MY SCHEDULE
- MY AVAILABILITY
- APP SETTINGS** (this option is highlighted with a red arrow)
- ACCOUNT & BILLING
- SWITCH ACCOUNTS
- LOGOUT

At the bottom of the screen, there are buttons for "MESSAGE STAFF" and "CALENDAR SYNC".

# App Settings- General Settings



- General settings regarding the logo, requests are made here.

GENERAL SETTINGS SAVE

SCHEDULING

App Settings

Save edited information

ACCOUNT ID: distinctivehomehealthcar CHANGE... COMPANY: Distinctive Home & Health Care

TIME ZONE: (GMT-5) Eastern Time (US & Canada) START OF THE WEEK: Sunday

TIME FORMAT: 12 Hour CURRENCY SYMBOL: Dollar (\$)

**TIME OFF REQUESTS**

REQUIRE MANAGER APPROVAL  AUTO APPROVE SUPERVISORS' PERSONAL REQUESTS  SHOW APPROVED TIME OFF REQUESTS TO ALL USERS

DAYS NOTICE REQUIRED FOR TIME OFF? 0 days MAX PAID HOURS PER DAY? 8 hours

**AVAILABILITY**

SHOW AVAILABILITY TO ALL USERS

**SOCIAL**



# App Settings- Scheduling



- General settings regarding Scheduling can be made here.

GENERAL SETTINGS

SCHEDULING

## Scheduling

MY SCHEDULE

ALLOW EMPLOYEES TO SET PREFERRED HOURS

SPLIT SHIFT MINIMUM TIME

Splitting Disabled

SCHEDULER

EMPLOYEES CAN VIEW THEIR COWORKERS SCHEDULE  EMPLOYEES CAN ONLY SEE THE SCHEDULE FOR THEIR POSITIONS

SORT EMPLOYEES BY

First Name

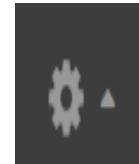
SHIFTS SWAPS & DROPS

REQUIRE MANAGER REVIEW

SAVE

Save edited information

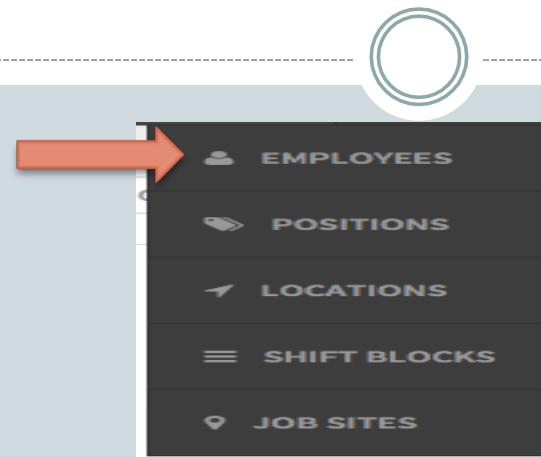
# Employee Gear



- EMPLOYEES**
- POSITIONS**
- LOCATIONS**
- SHIFT BLOCKS**
- JOB SITES**



# Employee Page



EMPLOYEES

POSITIONS

LOCATIONS

SHIFT BLOCKS

JOB SITES

DASHBOARD SCHEDULER ATTENDANCE 20 DAYS LEFT ON TRIAL ADD EMPLOYEE

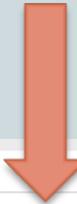
Locations

- ALL LOCATIONS
- OFFICE
- LAUREL- MD
- LANHAM- MD
- UPPER MALBORO- MD
- BRYAN'S ROAD- MD

Employees

Employees	Positions	Locations	Last Login	Actions
Athew McCalla	CNA	Office, Upper Malboro- MD	Never	
Crissie Frederick	CNA, Own Vehicle, Driver License	Office, Upper Malboro- MD	Never	
Erica Colbert	CNA, Own Vehicle, Driver License	Office, Bryan's Road- MD	Never	
Jasmine Matthews	None	Office	Oct, 26	
Margaret Mushi	CNA, Driver License, CPR	Office, Lanham- MD	Never	
Sama Fun	CNA, Own Vehicle, Driver License	Office, Laurel- MD	Never	

# Add Employee



## Employees

Start typing...

**ADD EMPLOYEE**



<input type="checkbox"/>	Employees	Positions	Locations	Last Login	Actions
<input type="checkbox"/>	Athew McCalla	CNA	Office, Upper Malboro- MD	Never	
<input type="checkbox"/>	Crissie Frederick	CNA, Own Vehicle, Driver License	Office, Upper Malboro- MD	Never	
<input type="checkbox"/>	Erica Colbert	CNA, Own Vehicle, Driver License	Office, Bryan's Road- MD	Never	
<input type="checkbox"/>	Jasmine Matthews (301) 225-2900	None	Office	Oct, 26	
<input type="checkbox"/>	Margaret Mushi	CNA, Driver License, CPR	Office, Lanham- MD	Never	
<input type="checkbox"/>	Sama Fun	CNA, Own Vehicle, Driver License	Office, Laurel- MD	Never	

# Add Employee



## EMPLOYEE DETAILS

## LOCATIONS / POSITIONS

## PAYROLL / WAGE

## LOG / NOTES

### Add Employee

Find Previous Employee X

FIRST NAME

John

LAST NAME

Doe

PROFILE PICTURE



Maximum size 500kb, png, jpg.

CHANGE

EMAIL ADDRESS

johndoe@abc.com

MOBILE NUMBER

1234567890

USE CUSTOM TIME ZONE

(GMT -5) Eastern Time (US & Canada) ▼

EMPLOYEE ID

ACCESS PRIVILEGES [Learn More](#)

Manager

Supervisor

Employee

HIDE IN THE SCHEDULER

\* Employees will receive an email and/or text message inviting them to register.

ADD & INVITE\* EMPLOYEE



Will allow the manager to add and invite the employee via text message and email.

# Add Employee- Position



- Multiple positions can be added!

EMPLOYEE DETAILS

LOCATIONS / POSITIONS

PAYROLL / WAGE

LOG / NOTES

## Add Employee

Find Previous Employee  X

POSITIONS

Select Position to Add

- CNA
- Own Vehicle
- Driver License
- CPR

LOCATIONS

Select Location to Add

ALL CLEAR

**ADD & INVITE\* EMPLOYEE**

# Add Employee- Location



- Multiple location can be added! It is best to add the office as a location as well.

The screenshot shows a user interface for adding an employee. On the left, there is a vertical sidebar with four tabs: 'EMPLOYEE DETAILS' (selected), 'LOCATIONS / POSITIONS' (highlighted in blue), 'PAYROLL / WAGE', and 'LOG / NOTES'. The main area has a title 'Add Employee' and a search bar with a magnifying glass icon and a clear button. Below the search bar are two dropdown menus: 'POSITIONS' (labeled 'Select Position to Add') and 'LOCATIONS' (labeled 'Select Location to Add'). The 'LOCATIONS' menu lists several locations: 'Office' (which is highlighted in grey), 'Laurel- MD', 'Lanham- MD', 'Upper Malboro- MD', and 'Bryan's Road- MD'. A note at the bottom states: '\* Employees will receive an email and/or text message inviting them to register.'

EMPLOYEE DETAILS

LOCATIONS / POSITIONS

PAYROLL / WAGE

LOG / NOTES

Add Employee

Find Previous Employee

POSITIONS

Select Position to Add

ALL CLEAR

LOCATIONS

Select Location to Add

- Office
- Laurel- MD
- Lanham- MD
- Upper Malboro- MD
- Bryan's Road- MD

\* Employees will receive an email and/or text message inviting them to register.

# Add Notes



EMPLOYEE DETAILS

LOCATIONS / POSITIONS

PAYROLL / WAGE

LOG / NOTES

## Add Employee

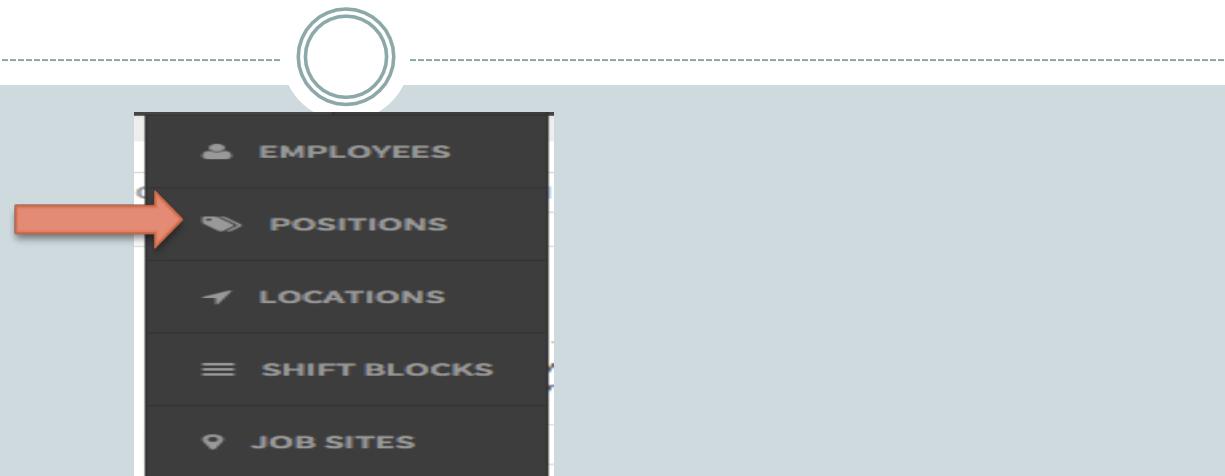
Find Previous Employee X

**LOG / NOTES** - Visible to only Managers and Supervisors.

\* Employees will receive an email and/or text message inviting them to register.

**ADD & INVITE\* EMPLOYEE**

# Add Positions



## Positions

[ADD POSITION](#)

### POSITIONS

### ACTIONS

	CNA		
	Own Vehicle		
	Driver License		
	CPR		

# Add Positions



- Positions can be color coded.

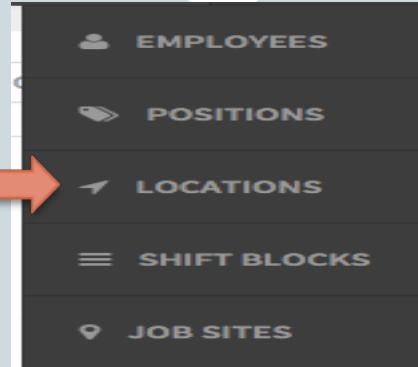
### Add Position

**NAME**

ie. Managers, Team Leads, Coordinators, etc.



# Add Location



## Locations

[ADD LOCATION](#)

### LOCATIONS

### ACTIONS

Office



Laurel- MD



Lanham- MD



Upper Malboro- MD



Bryan's Road- MD



# Add Location



### Add Location

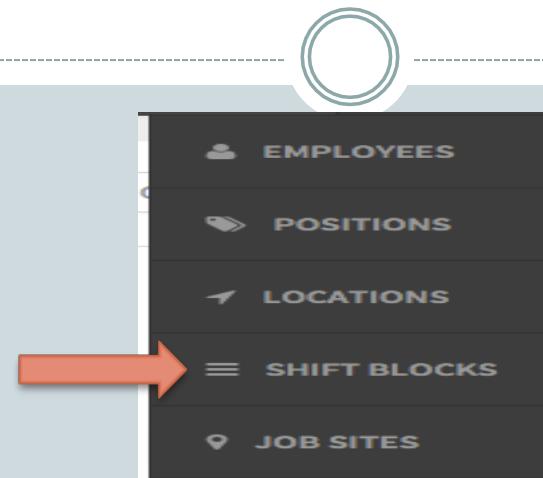
X

<b>NAME</b>	<b>MAX HOURS / WEEK</b>
<input type="text" value="Office"/>	<input type="text"/>

**ADDRESS**

Map data ©2014 Google

# Add Shift Block



## Shift Blocks

[ADD SHIFT BLOCK](#)

*There are no shift blocks setup. [Create a Shift Block](#)*

# Add Shift Block



- Shift Blocks can be color coded.

### Add Shift Block

**TIME** **UNPAID BREAK**

i.e. 2:30p - 7p hours 

**POSITION** **LOCATION**

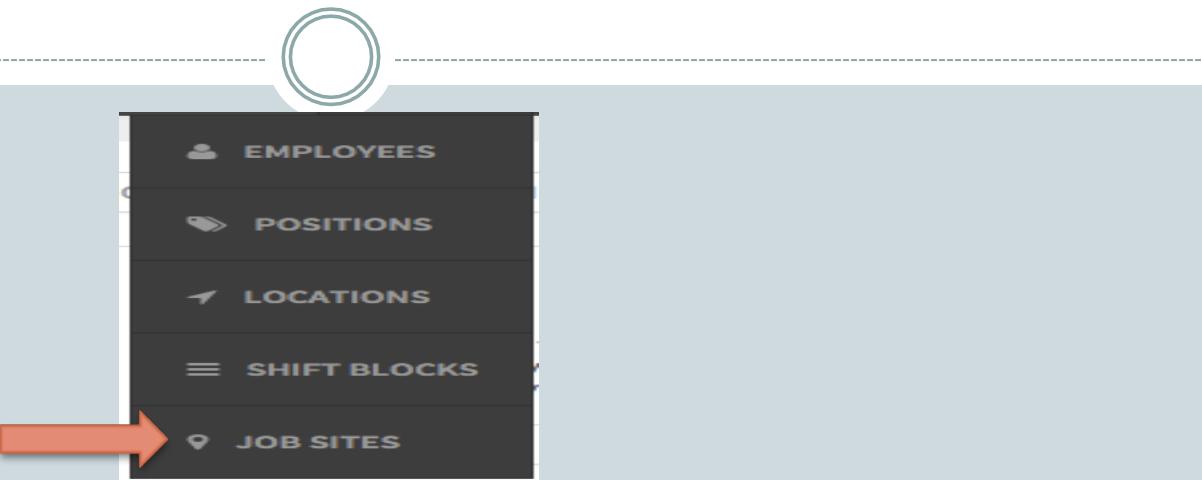
No Position All Locations

**NOTES**



**ADD SHIFT BLOCK**

# Add Job Site



## Job Sites

Start typing...

EXPORT

IMPORT

ADD SITE

JOB SITES	ADDRESS	LOCATION	ACTIONS
 rp	4400 University Dr. Fairfax VA 22030	All Locations	 

# Add Job Site



- Can be color coded.

### Add Job Site

**NAME**  
George Mason

**LOCATION**  
All Locations 

**ADDRESS**  
4400 University Dr, Fairfax, VA 22030

**DESCRIPTION**



Map data ©2014 Google

**ADD JOB SITE**

# Employee Actions

- On the employee page, under the Actions, the management can perform actions on the information of the employees.

Employees					<input type="text"/> Start typing...	<a href="#">ADD EMPLOYEE</a>	<a href="#">⋮</a>
	Employees	Positions	Locations	Last Login	Actions		
<input type="checkbox"/>	Athew McCalla	CNA	Office, Upper Malboro- MD	Never	<a href="#"></a> <a href="#"></a> <a href="#"></a>		
<input type="checkbox"/>							

# Edit Employee Information

To edit the employee information, find the edit button under the Actions.

Employees					
	Employees	Positions	Locations	Last Login	
				Actions	
<input type="checkbox"/>	Athew McCalla	CNA	Office, Upper Malboro- MD	Never	

# Edit Employee Information



## EMPLOYEE DETAILS

## LOCATIONS / POSITIONS

## PAYROLL / WAGE

## LOG / NOTES

### Add Employee

Find Previous Employee X

#### FIRST NAME

#### LAST NAME



#### PROFILE PICTURE

Maximum size 500kb, png, jpg.

**CHANGE**

#### EMAIL ADDRESS

#### MOBILE NUMBER

#### USE CUSTOM TIME ZONE

(GMT -5) Eastern Time (US & Canada) ▼

#### EMPLOYEE ID

#### ACCESS PRIVILEGES [Learn More](#)

Manager

Supervisor

Employee

#### HIDE IN THE SCHEDULER

\* Employees will receive an email and/or text message inviting them to register.

**ADD & INVITE\* EMPLOYEE**

# Delete Employee

- How to Delete an Employee.

Employees

Start typing... ADD EMPLOYEE

<input type="checkbox"/>	Employees	Positions	Locations	Last Login	Actions
<input type="checkbox"/>	Athew McCalla	CNA	Office, Upper Malboro- MD	Never	

The page at <https://app.wheniwork.com> says:

Are you sure you want to delete this employee?

# Edit Availability

- The manager and the employee (once they set up an employee account) can set and edit the employee's availability.

Employees					
	Employees	Positions	Locations	Last Login	Actions
<input type="checkbox"/>	Athew McCalla	CNA	Office, Upper Malboro- MD	Never	 

# Set/Edit Availability



- Availability can either be set by the employee or management.
- **Green** represents the employee's **Preferred Schedule** and **Red** represents when the employee is **unavailable**.

EDITING AVAILABILITY PREFERENCE FOR CRISSIE FREDERICK																									
DAY		12A	1A	2A	3A	4A	5A	6A	7A	8A	9A	10A	11A	12P	1P	2P	3P	4P	5P	6P	7P	8P	9P	10P	11P
Sunday	All Day	All Day																							
Monday	All Day	∅ 12a - 9a									10a - 12a														
Tuesday	All Day	All Day																							
Wednesday	All Day	All Day																							
Thursday	All Day	All Day																							
Friday	All Day	All Day																							
Saturday	All Day	All Day																							

**DELETE** **Preferred** **Unavailable** **SAVE**

# Set Availability- Advanced Mode



- The user can name that availability for a certain period of time or set it on a loop of their choice.

<b>TITLE</b> Default Availability	<b>DESCRIPTION</b> ie. I am not available on Mondays during the summer	<b>EFFECTIVE DATES</b> Oct 28, 2014  to <input type="text" value="On Going"/>	<b>ROTATION</b> <input checked="" type="checkbox"/> Every Week <input type="checkbox"/> Every Other Week <input type="checkbox"/> Every 3 Weeks <input type="checkbox"/> Every 4 Weeks
<b>DAY</b>			

Add Title

Can give it a Description

Can pick a start and end date

Can add a loop

# View Schedule



- The employee's schedule can be viewed.

## Employees

Start typing...

ADD EMPLOYEE⋮

<input type="checkbox"/>	Employees	Positions	Locations	Last Login	Actions
<input type="checkbox"/>	Athew McCalla	CNA	Office, Upper Malboro- MD	Never	

# View Schedule

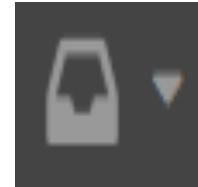


John's Schedule For Oct 19th - Nov 1st

[<<](#) [TODAY](#) [>>](#) [AVAILABILITY](#)

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
19	20	21	22	23	24	25
26	27	28	29	30	31	01

# Request Time-Off



+ REQUEST TIME-OFF

VIEW REQUESTS

# Request Time-Off



**Request Time-Off** X

---

ARE YOU TAKING OFF A PORTION OF THE DAY OR A WHOLE DAY(S)?

All Day  Partial Day

TIME-OFF TYPE

Unpaid ▼

---

START DATE END DATE

▼  ▼

---

EMPLOYEE

Jasmine Matth... X ▼

---

MESSAGE

---

SEND REQUEST

# Request Time-Off- Time Off Type



## TIME-OFF TYPE

- Unpaid
- Paid (PTO)
- Sick
- Holiday

# View Time off Requests



- Shows the list of employees who requested for time off.

Export requests to Excel Spreadsheet

The screenshot shows a user interface for managing time-off requests. At the top, there's a search bar with placeholder text "Start typing... ie. 'pending'" and a magnifying glass icon. To its right are three buttons: "Export" (highlighted with a red arrow), "Request Time-Off", and a plus sign icon. Below the search bar, the word "REQUESTS" is displayed in bold capital letters. Underneath, there's a list item showing a profile icon, the status "PENDING", and the text "Time Off requested from Sat, November 1, 2014 thru Sun, November 2, 2014". To the right of this list item are the names "John Doe" and the date "Tue, Oct 28, 2014 7:04p", followed by a close parenthesis icon. At the bottom right of the list area, there are two small icons: a left arrow and a right arrow.

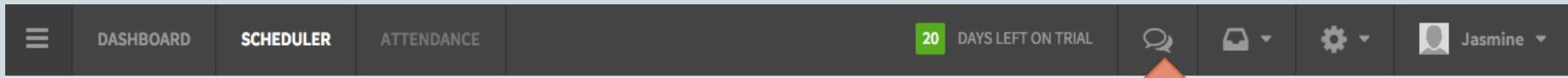
# Accept/Deny Time off Requests



The manager can either accept or deny the time-off request.

TIME-OFF REQUEST	
PENDING	<a href="#">Back</a>
	<b>John Doe</b> requested time-off at Tue, 28 Oct 2014 7:04p
ALL-DAY   TIME-OFF <b>Sat, Nov 1 thru Sun, Nov 2, 2014</b>	
<a href="#">DENY</a> <a href="#">ACCEPT</a>	

# Send Message



Send a Message either via email or text.

LOGS **Send Message** CLOSE

**EMAIL** TEAMTXT™ BOTH

**TO**  
All/Everyone

**SUBJECT**

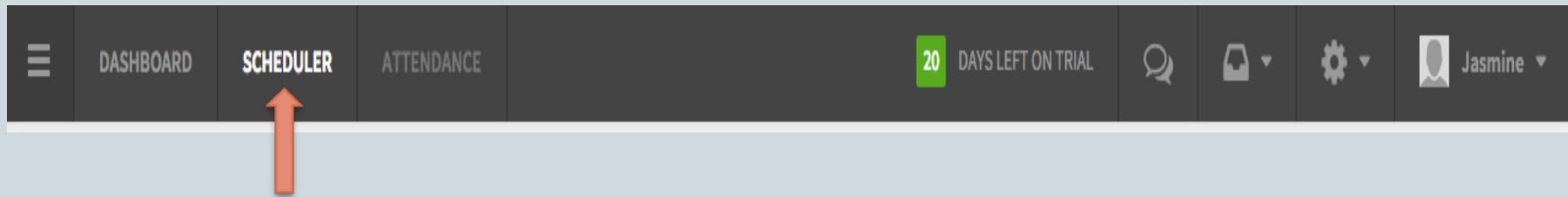
**MESSAGE**

**SEND MESSAGE**

# Scheduler



- To schedule shifts and publish them, the manager has to click here:



# Scheduler



- Scheduler page.

NO SHIFTS  
ADD SHIFTS TO PUBLISH

SHIFT POSITION

Office

Positions ALL +

- No Position
- CNA
- Own Vehicle
- Driver License
- CPR

Oct 26, 2014 - Nov 1, 2014

TODAY < TODAY > DAY WEEK

STAFF	SUN 26	MON 27	TUE 28	WED 29	THU 30	FRI 31	SAT 1
OpenShifts™							
Athew McCalla 0 / 0 / 40							
Crissie Frederick 0 / 0 / 40				UNAVAILAB	UNAVAILAB	UNAVAILAB	UNAVAILAB
Erica Colbert 0 / 0 / 40				UNAVAILAB	UNAVAILAB	UNAVAILAB	UNAVAILAB
Jasmine Matthews 0 / 0 / 40							
Margaret Mushi 0 / 0 / 40	UNAVAILAB						UNAVAILAB
Sama Fun 0 / 0 / 40							

# Scheduler Actions



- There are multiple actions that can be performed on the scheduler page.

« Oct 26, 2014 - Nov 1, 2014

TODAY

<       >

DAY

WEEK

# Calendar



- The manager can select the week to view/set the schedule.

Calendar

Previous week      Next week

Oct 26, 2014 - Nov 1, 2014

TODAY < TODAY > DAY WEEK

DAY

October 2014

S	M	T	W	T	F	S
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1

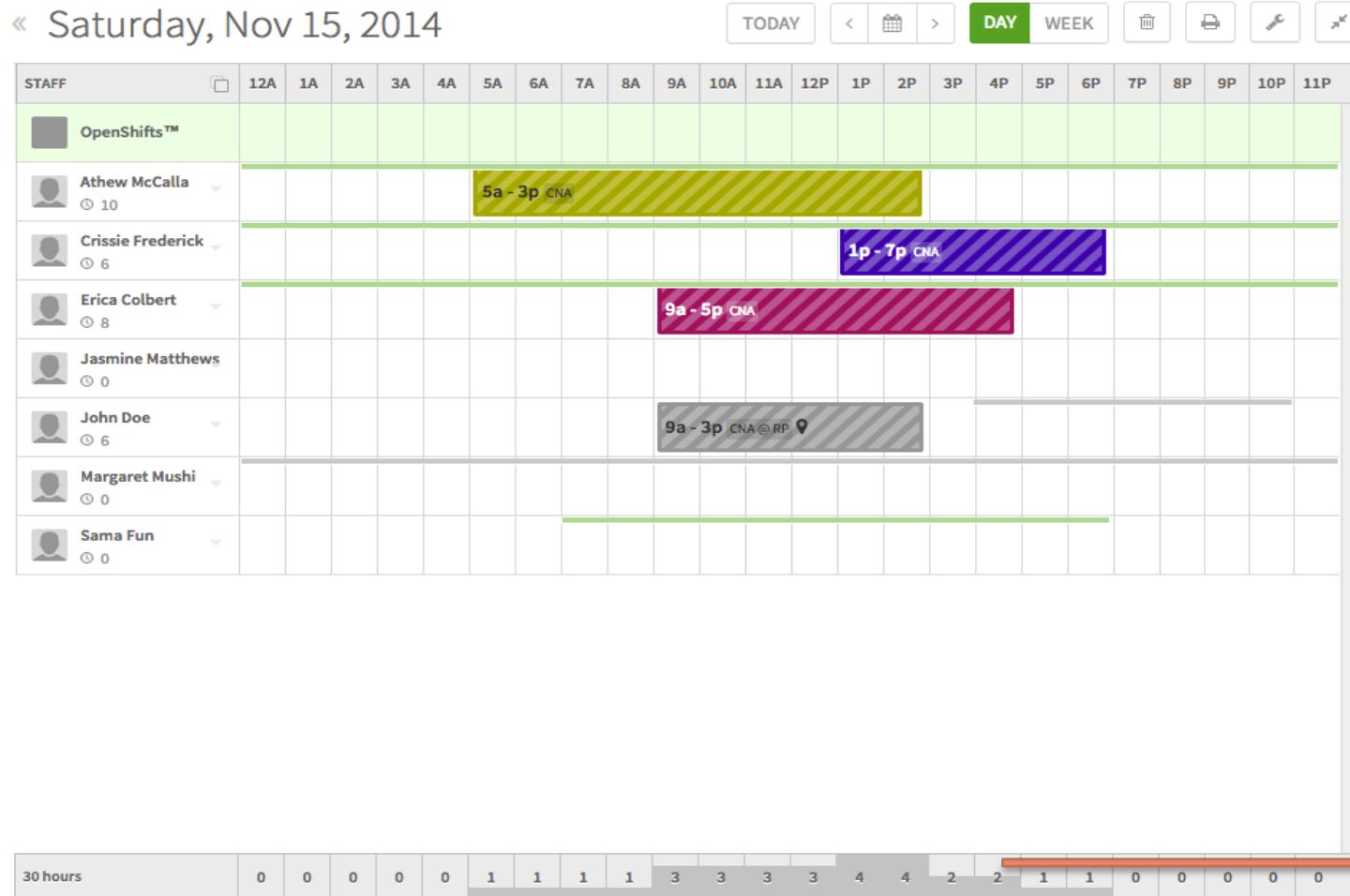
# Scheduler- Day View

- Can be viewed by Day.

# Show how hours are Distributed



- In the day view, at the bottom of the schedule, the manager can view the distribution of the hours. The manager can also view what hours are the



# Scheduler- Week View

- Can be viewed by the Week.

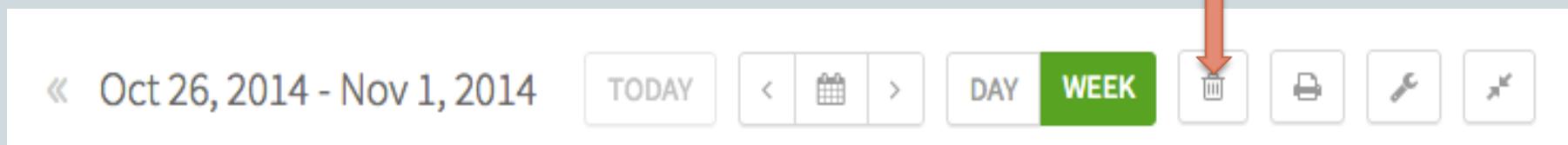
The image shows a screenshot of a scheduler application interface. At the top, there is a navigation bar with a date range "Nov 9, 2014 - Nov 15, 2014", a "TODAY" button, and a "WEEK" button, which is highlighted with a green background and a red arrow pointing down to it. To the right of the week view are icons for trash, print, edit, and refresh. Below the navigation bar is a grid titled "STAFF" on the left. The grid columns represent the days of the week: SUN 9, MON 10, TUE 11, WED 12, THU 13, FRI 14, and SAT 15. The rows represent staff members. Row 1 is labeled "OpenShifts™". Rows 2 through 7 are staff profiles: Athew McCalla, Crissie Frederick, Erica Colbert, Jasmine Matthews, Margaret Mushi, and Sama Fun. Each staff row has a profile icon, name, and availability status. The grid cells for staff members show green triangle icons indicating availability. The grid cells for "OpenShifts™" and the last two staff members (Margaret Mushi and Sama Fun) show "UNAVAILA" in grey, indicating unavailability. The grid cells for the first three staff members (Athew McCalla, Crissie Frederick, and Erica Colbert) show green triangle icons indicating availability.

STAFF	SUN 9	MON 10	TUE 11	WED 12	THU 13	FRI 14	SAT 15
OpenShifts™							
Athew McCalla ⌚ 0 / 0 / 40		⚡	⚡	⚡	⚡	⚡	⚡
Crissie Frederick ⌚ 0 / 0 / 40		⚡	⚡	UNAVAILA	UNAVAILA	UNAVAILA	UNAVAILA
Erica Colbert ⌚ 0 / 0 / 40		⚡	⚡	UNAVAILA	UNAVAILA	UNAVAILA	UNAVAILA
Jasmine Matthews ⌚ 0 / 0 / 40							
Margaret Mushi ⌚ 0 / 0 / 40	UNAVAILA		⚡	⚡	⚡	⚡	UNAVAILA
Sama Fun ⌚ 0 / 0 / 40		⚡	⚡	⚡	⚡	⚡	

# Clear Schedule



- This button will clear the schedule that was created.



# Print Schedule



- The schedule can be printed.

« Oct 26, 2014 - Nov 1, 2014

TODAY

< >

DAY

WEEK

↓

# Other Settings



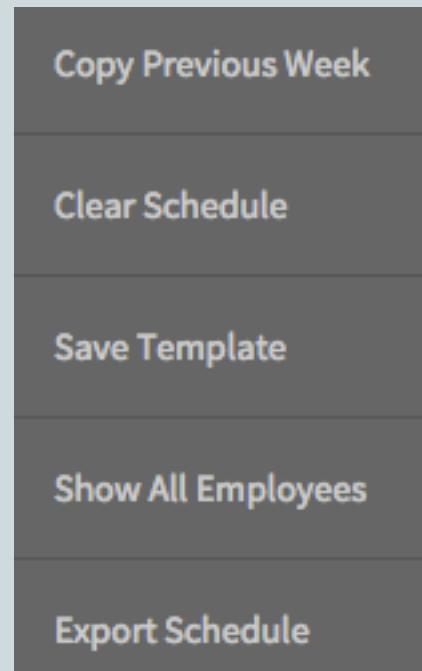
- When I work provides many other features.

« Oct 26, 2014 - Nov 1, 2014

TODAY < CALENDAR > DAY WEEK

DELETE PRINT EXPORT

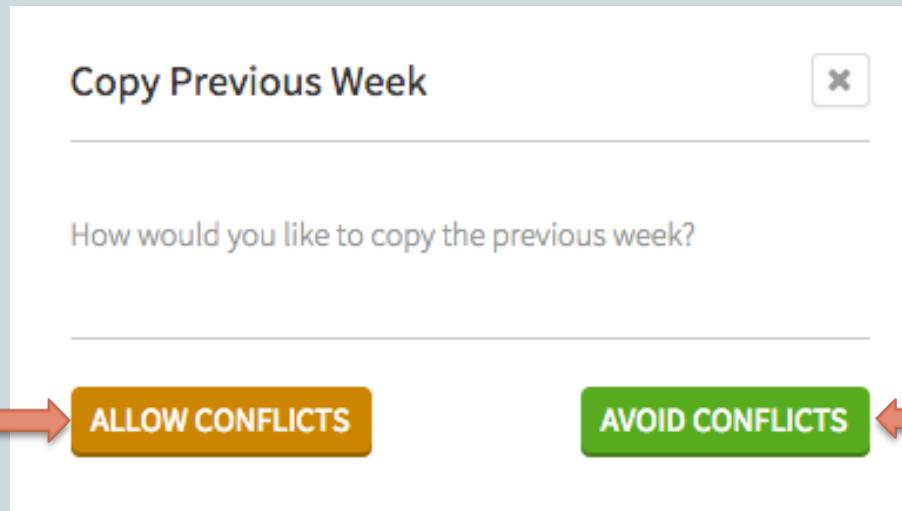
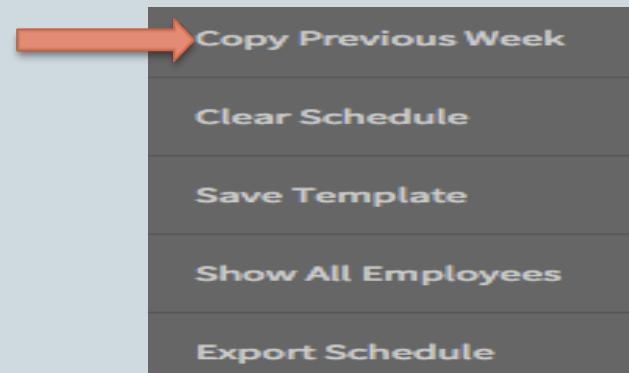
A red arrow points to the EXPORT button in the top right corner of the modal menu.



# Copy Previous Work



- When I Work allows the manager to copy the schedule from the previous work.



Allows overriding  
any conflicts.



ALLOW CONFLICTS

Avoid copying  
conflicts that  
may arise.

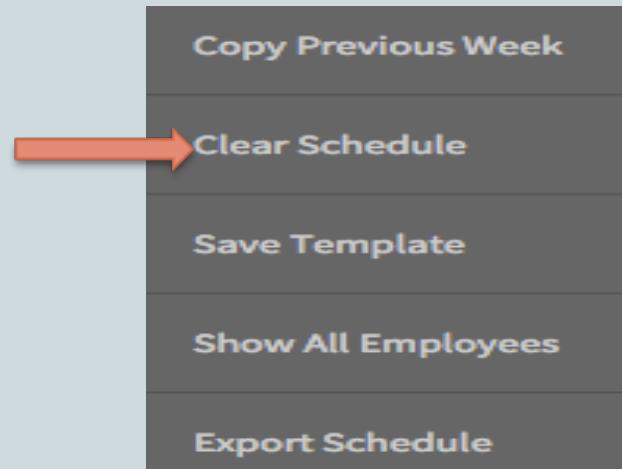


AVOID CONFLICTS

# Clear Schedule



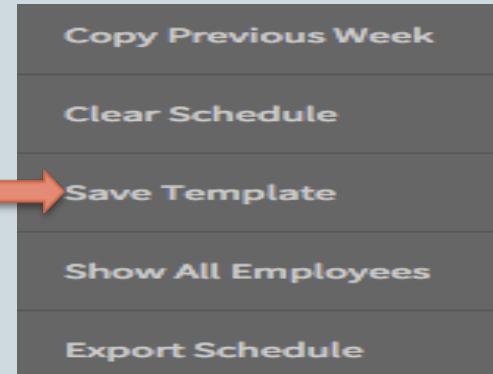
- This will clear the schedule and allow the manager to create a whole new schedule.



# Save Template



- This allows the manager to just load an old saved schedule and not redo the same schedule if needed.



Name the template as there might be multiple.

Description can be added about the template being saved.

Create New Template X

NAME

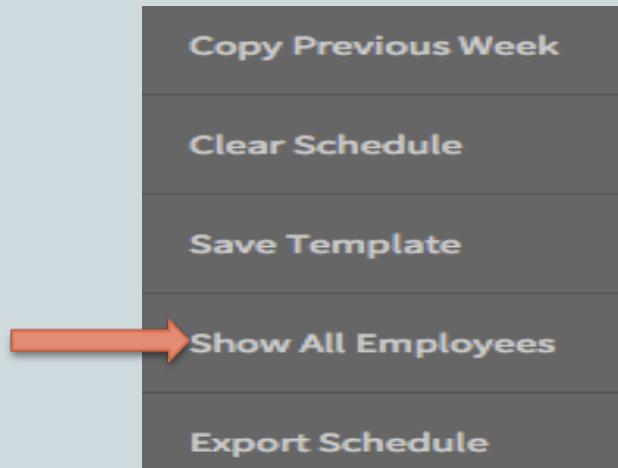
DESCRIPTION

**CREATE TEMPLATE** Save Template

# Show All Employees



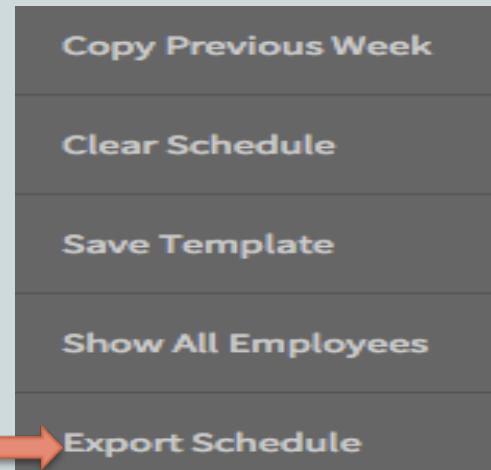
- By clicking on this, all the employees at that location can be viewed.



# Export Schedule



- The set schedule can be exported to an Ms. Excel spreadsheet.



# Export Schedule



- Locations, Job Sites, Positions, Employees can be filtered as per the manager's needs.

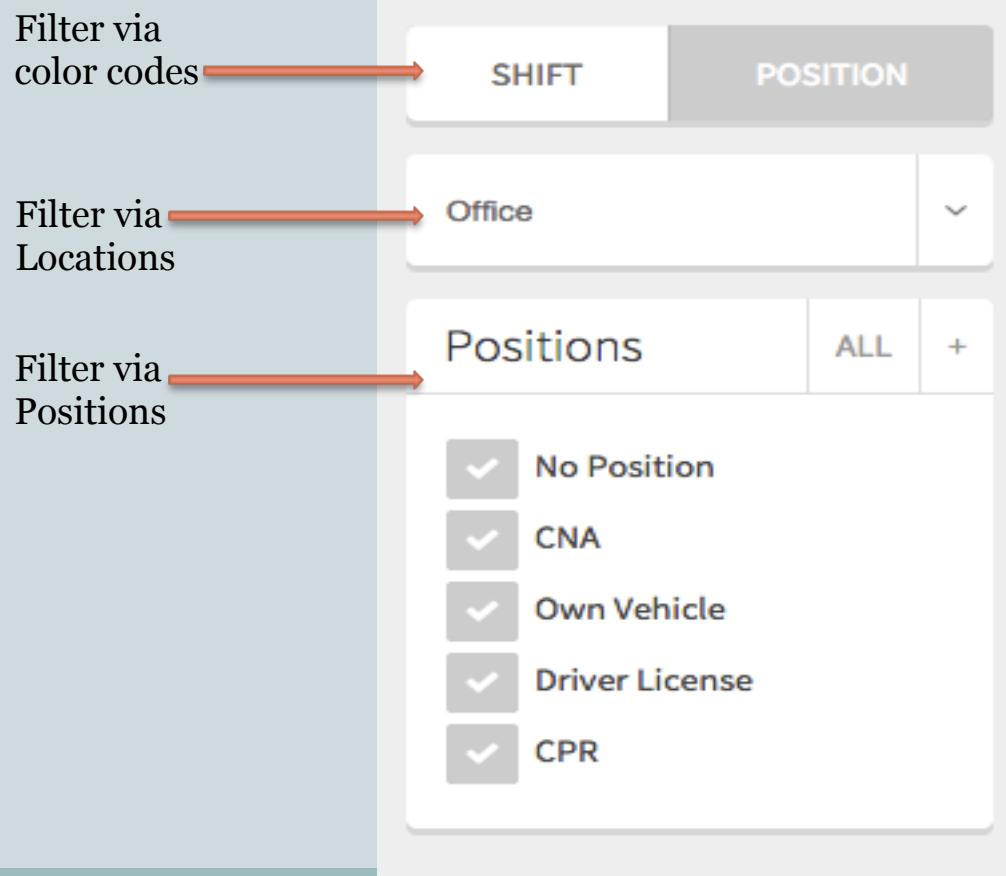
**Export Schedule** CANCEL

<b>START DATE</b> 11/09/2014 <span style="float: right;">CALENDAR</span>	<b>END DATE</b> 11/15/2014 <span style="float: right;">CALENDAR</span>
<b>LOCATIONS</b> <span style="background-color: #4CAF50; color: white; padding: 5px 10px; border-radius: 5px;">All</span> <span style="border: 1px solid #ccc; padding: 5px 10px; border-radius: 5px; margin-left: 10px;">+</span>	<b>JOB SITES</b> <span style="background-color: #4CAF50; color: white; padding: 5px 10px; border-radius: 5px;">All</span> <span style="border: 1px solid #ccc; padding: 5px 10px; border-radius: 5px; margin-left: 10px;">+</span>
<b>POSITIONS</b> <span style="background-color: #4CAF50; color: white; padding: 5px 10px; border-radius: 5px;">All</span> <span style="border: 1px solid #ccc; padding: 5px 10px; border-radius: 5px; margin-left: 10px;">+</span>	<b>EMPLOYEES</b> <span style="background-color: #4CAF50; color: white; padding: 5px 10px; border-radius: 5px;">All</span> <span style="border: 1px solid #ccc; padding: 5px 10px; border-radius: 5px; margin-left: 10px;">+</span>
<input checked="" type="checkbox"/> Split into separate locations <span style="color: red; font-size: 2em; float: left; margin-right: 10px;">↑</span>	
<span style="background-color: #4CAF50; color: white; padding: 5px 10px; border-radius: 5px; border: none; cursor: pointer;">EXPORT</span>	

The locations can be split to different columns.

# Filter on Scheduler Page

- The employee information can be filtered on the left side section of the Scheduler page.



# Filter on Scheduler Page via Color Codes

- Information can be viewed by color codes set while creating Shifts, Positions and Job Sites.

Choose how to view Schedule

The scheduler interface allows users to choose how to view the schedule. On the left, there are three tabs: SHIFT (selected), POSITION, and JOB SITE. Below the tabs, a dropdown menu shows 'Office' selected. Under 'Positions', there are four filter options: 'No Position' (checked), 'CNA' (checked), 'Own Vehicle' (checked), and 'Driver License' (checked). To the right is a grid-based calendar for the week from Sunday 9 to Saturday 15. Each row represents a staff member, and each column represents a day. Green checkmarks indicate availability, while grey boxes indicate unavailability. Some shifts are color-coded into blocks: Athew McCalla has a green block labeled '5a - 3p CNA'; Crissie Frederick has a purple/blue block labeled '1p - 7p CNA'; Erica Colbert has a pink/magenta block labeled '9a - 5p CNA'; and John Doe has a grey block labeled '9a - 3p CNA'. A red arrow points from the 'SHIFT' tab to the 'SHIFT' tab header. Another red arrow points from the '9a - 3p CNA' block to the text 'Color Coded by Shift Blocks'.

STAFF	SUN 9	MON 10	TUE 11	WED 12	THU 13	FRI 14	SAT 15
OpenShifts™							
Athew McCalla ① 0/10/40							5a - 3p CNA
Crissie Frederick ① 0/6/40			UNAVAIL	UNAVAIL	UNAVAIL	UNAVAIL	1p - 7p CNA
Erica Colbert ① 0/8/40			UNAVAIL	UNAVAIL	UNAVAIL	UNAVAIL	9a - 5p CNA
Jasmine Matthews ① 0/0/40							
John Doe ① 0/6/0							9a - 3p CNA
Maryannat Muchi							

Color Coded by Shift Blocks

# Filter on Scheduler Page via Locations



- When particular location is clicked from the dropdown list, the employees set to that location are filtered.

The screenshot illustrates the process of filtering employees based on their assigned locations. On the left, there's a sidebar with a 'SHIFT' tab and a 'POSITION' tab. Below these are two dropdown menus: one for 'Location' set to 'Upper Malboro- MD' and another for 'Positions' with options 'ALL' and '+'. A red arrow points from the text 'Location filtered to Upper Malboro' to the 'Location' dropdown. To the right is a main scheduler grid. The grid has a header row for 'STAFF' and days from 'SUN 9' to 'SAT 15'. It includes columns for 'OpenShifts™', employee names ('Athew McCalla', 'Crissie Frederick'), availability status (green checkmarks or grey 'UNAVAIL'), and shift details ('(5a - 3p) at' or '(1p - 7p) at'). A red dashed box highlights the 'Athew McCalla' row, with a red arrow pointing from the text 'Employee filtered by their assigned locations' to it. The 'Crissie Frederick' row is also visible below.

STAFF	SUN 9	MON 10	TUE 11	WED 12	THU 13	FRI 14	SAT 15
OpenShifts™							
Athew McCalla ① 0/10/40	✓	✓	✓	✓	✓	✓	(5a - 3p) at
Crissie Frederick ① 0/6/40	✓	✓	UNAVAIL	UNAVAIL	UNAVAIL	UNAVAIL	(1p - 7p) at

# Filter on Scheduler Page via Positions



- The Schedule Page can also be filtered by checking and unchecking the Positions.

The image shows a scheduler interface. On the left is a sidebar with tabs for SHIFT, POSITION (which is selected), and JOB SITE. Under POSITION, there is a dropdown menu set to 'Office'. Below it is a 'Positions' section with 'ALL' and a '+' button, and a list of three items: 'Own Vehicle', 'Driver License', and 'CPR', where 'CPR' has a checked checkbox. The main area is a grid titled 'STAFF' with columns for 'SUN 9', 'MON 10', 'TUE 11', 'WED 12', 'THU 13', 'FRI 14', and 'SAT 15'. It lists three staff members: 'OpenShifts™' (green background), 'John Doe' (light blue background, with a red dashed box around the grid cell and a red arrow pointing to it), and 'Margaret Mushi' (light blue background). John Doe has availability from 9a-3p CNA. Margaret Mushi is marked as UNAVAILABLE for all days except Saturday, which is also marked as UNAVAILABLE.

Filtered to show CPR certified employees

Employee filtered by their assigned positions

# Create Shift



- The manager can view the availability of the employee by clicking on either the green flag or the grey flag. The green flag is for preferred availability and grey for the shift block that is not preferred.

STAFF	SUN 9	MON 10	TUE 11	WED 12	THU 13	FRI 14	SAT 15
OpenShifts™							
Athew McCalla ① 0 / 0 / 40	↙	↙	↙	↙	↙	↙	↙
Crissie Frederick ① 0 / 0 / 40	↙	↙	UNAVAILAI	UNAVAILAI	UNAVAILAI	UNAVAILAI	↙
Erica Colbert ① 0 / 0 / 40	↙	↙	UNAVAILAI	UNAVAILAI	UNAVAILAI	UNAVAILAI	↙
Jasmine Matthews ① 0 / 0 / 40							
John Doe ① 0 / 0 / 0					↖		↖
Margaret Mushi ① 0 / 0 / 40	UNAVAILAI		↙	↙	↙	↙	UNAVAILAI
Sama Fun ① 0 / 0 / 40	↙	↙	↙	↙	↙	↙	↙

Green Flag (highlighted on Athew McCalla's Saturday slot)

Grey Flag (highlighted on John Doe's Friday slot and Margaret Mushi's Saturday slot)

# Create Shift

- When I work will match them to the custom shift blocks that are created or the manager can create a custom shift.

Pre-created shift blocks

Assign Shift to Crissie on Mon, Nov 10

TIME-OFF X

QUALIFIED (12A - 9A)

5a--3p CNA

9a--5p CNA

Unavailable 10a - 12a

1p--7p CNA

ADVANCED

TIME POSITION JOB SITE UNPAID BREAK

i.e. 2:30p - 7p

SAVE AS SHIFT BLOCK

Will be added to schedule and a message will be sent to employee.

CREATE & PUBLISH

CREATE

Can make the Custom Shift a new Shift Block

Add to schedule.

# Create Shift



- If it does not fit the employee's time preference, the shift block can be edited to fit the employee's choice.

Assign Shift for Crissie on Mon, Nov 10 X

---

Preferred (12A - 9A)      Unavailable: 10A - 12A

TIME	POSITION	UNPAID BREAK
5a - 3p <span style="float: right;">edit</span>	CNA <span style="float: right;">▼</span>	0 <span style="float: right;">edit</span>
3:00p		

Edit the time →

NOTES  

---

Can be saved as a shift block →  Save as "Shift Block" also, so I can use it later.

Will be added to schedule and a message will be sent to employee. ↑

CREATE & PUBLISH CREATE ↓ Added to schedule.

# Custom Shift



- Custom Shifts can also be created when clicked on one of the flags or box.

Assign Shift to John on Sat, Nov 15

TIME-OFF X

QUALIFIED Unavailable 4p - 11p

5a - 3p CNA Edit

9a - 5p CNA Edit

1p - 7p CNA Edit

Or Create A Custom Shift

ADVANCED Edit

TIME POSITION JOB SITE UNPAID BREAK

9:00a - 3:00p CNA rp i.e. 1 hr Edit

Can be saved as a shift block SAVE AS SHIFT BLOCK

Will be added to schedule and a message will be sent to employee. CREATE & PUBLISH CREATE

Add to schedule.

Advanced Setting for Custom Shift

# Advanced Settings for Custom Shift



- Advanced Settings

Assign Shift for John on Sat, Nov 15 X

Unavailable: 4P - 11P

TIME	POSITION	UNPAID BREAK
9:00a - 3:00p	CNA	i.e. 1 hr

JOB SITE

rp

NOTES

Save as "Shift Block" also, so I can use it later.

CREATE & PUBLISH CREATE

# Loop Schedule



- The Schedule can be repeated as per the manager's needs.

Edit Crissie's Shift on Sat, Nov 15 NOTIFY HISTORY X

Preferred (ALL DAY)

TIME POSITION UNPAID BREAK

1p - 7p CNA 0 EDIT

REPEAT EVERY ENDING

Every Week CALENDAR

JOB SITE

No Site

NOTES

DELETE SAVE & PUBLISH SAVE

Choose from dropdown list to choose how often the shift has to be repeated. ←

Choose an End Date to end repeating the schedule. →

NOTIFY HISTORY X

EDIT

CALENDAR

SAVE & PUBLISH SAVE

# Set Position for Custom Shift



- The positions the employee can work are highlighted in green.

Assign Shift for John on Sat, Nov 15 X

Unavailable: 4P - 11P

TIME	POSITION	UNPAID BREAK
i.e. 2:30p - 7p <input type="button" value="edit"/>	<input type="button" value="CNA"/> <input type="button" value="Own Vehicle"/> <input type="button" value="Driver License"/> <input type="button" value="CPR"/> <input type="button" value="No Position"/>	<input type="button" value="i.e. 1 hr"/> 
JOB SITE		
NOTES		

Positions are highlighted in green

Save as "Shift Block" also, so I can use it later. CREATE & PUBLISH CREATE

# Copy Shift



- The manager can copy shifts by easily clicking on:

For Mac: command + click and drag to new block

For Windows: cntrl + click and drag to new block

STAFF	SUN 9	MON 10	TUE 11	WED 12	THU 13	FRI 14	SAT 15
OpenShifts™							
Athew McCalla ⌚ 0 / 10 / 40	▼	▼	▼	▼	▼	▼	5a - 3p CNA
Crissie Frederick ⌚ 0 / 10 / 40	▼	▼	UNAVAILAI	UNAVAILAI	UNAVAILAI	UNAVAILAI	▼
Erica Colbert ⌚ 0 / 10 / 40	▼	▼	UNAVAILAI	UNAVAILAI	UNAVAILAI	UNAVAILAI	5a - 3p CNA
Jasmine Matthews ⌚ 0 / 0 / 40							
John Doe ⌚ 0 / 6 / 0					▼	9a - 3p CNA	
Margaret Mushi ⌚ 0 / 0 / 40	UNAVAILAI		▼	▼	▼	▼	UNAVAILAI
Sama Fun ⌚ 0 / 0 / 40	▼	▼	▼	▼	▼	▼	▼

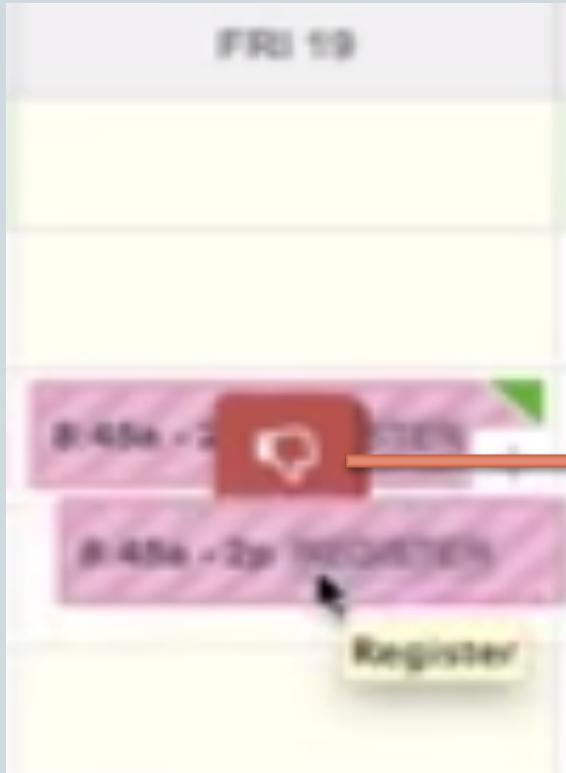
Original Shift

Copied Shift

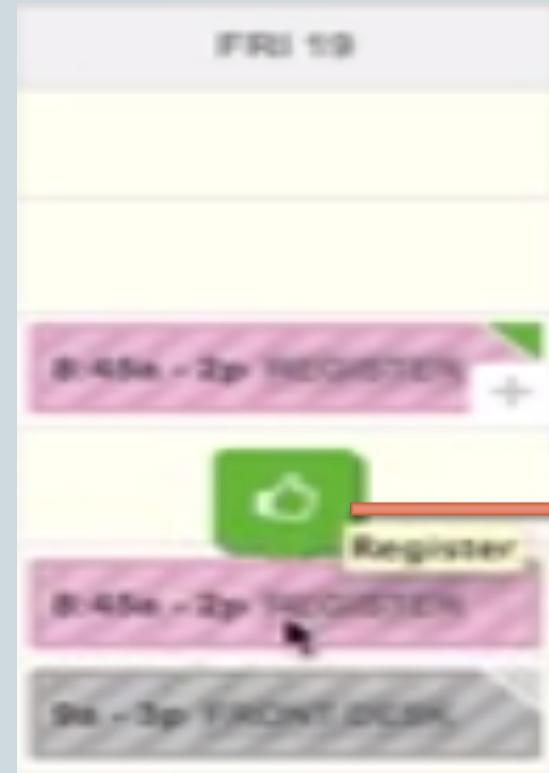
# Copy Shift



- Red Thumbs down means that it does not fit the employee's schedule.
- Green Thumbs up means that it fits the employee's schedule.



Does not fit that employee's schedule.



Fits that employee's schedule.

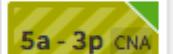
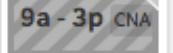
# Open Shift



- Open shifts can be created for employees to take. The first employee who grabs the shift gets it.

Create block  
to create an  
Open Shift



STAFF	SUN 9	MON 10	TUE 11	WED 12	THU 13	FRI 14	SAT 15
 OpenShifts™							
 Athew McCalla ① 0 / 10 / 40							
 Crissie Frederick ① 0 / 6 / 40							
 Erica Colbert ① 0 / 8 / 40							
 Jasmine Matthews ① 0 / 0 / 40							
 John Doe ① 0 / 6 / 0							
 Margaret Mushi ① 0 / 0 / 40							
 Sama Fun ① 0 / 0 / 40							

# Create an Open Shift



- To create an Open Shift, the manager has to click on one of the required date block.
- The manager can either use a Shift Block or create a Custom Shift.

**Assign Shift on Tue, Nov 11**

**TIME-OFF** **X**

**QUALIFIED**

5a - 3p NO POSITION 9a - 5p NO POSITION

1p - 7p NO POSITION

---

**Or Create A Custom Shift**

**ADVANCED**

TIME	POSITION	JOB SITE	UNPAID BREAK
i.e. 2:30p - 7p			i.e. 1 hr

**SAVE AS SHIFT BLOCK** **CREATE & PUBLISH** **CREATE**

# Offer/Assign to Shift



- The manager can also offer or assign that shift to employees of their choice.

Click on Shift to edit, offer/assign the shift.

STAFF	SUN 9	MON 10	TUE 11	WED 12	THU 13	FRI 14	SAT 15
OpenShifts™							
Athew McCalla ⌚ 0 / 10 / 40							
Crissie Frederick ⌚ 0 / 6 / 40				UNAVAILAI	UNAVAILAI	UNAVAILAI	
Erica Colbert ⌚ 0 / 8 / 40				UNAVAILAI	UNAVAILAI	UNAVAILAI	
Jasmine Matthews ⌚ 0 / 0 / 40						+	
John Doe ⌚ 0 / 6 / 0							
Margaret Mushi ⌚ 0 / 0 / 40	UNAVAILAI						UNAVAILAI
Sama Fun ⌚ 0 / 0 / 40							

# Offer/Assign to Shift



Edit Open Shift(s) on Tue, Nov 11

NOTIFY

HISTORY



TIME

9a - 5p

POSITION

No Position

UNPAID BREAK

0



JOB SITE

rp

NOTES

HOW MANY

1

DELETE

OFFER / ASSIGN...

SAVE & PUBLISH

SAVE



Click to view employees  
eligible to take this shift.

# Employees Eligible to pick up Open Shift



The manager can pick and choose from the employees that are eligible to pick up the shift and then notify them via email, text or/and push notifications.

Edit Open Shift(s) on Tue, Nov 11

NOTIFY HISTORY X

Please select to whom you would like to offer this OpenShift™.

<input checked="" type="checkbox"/> Athew McCalla	<input checked="" type="checkbox"/> Crissie Frederick
<input type="checkbox"/> Erica Colbert	<input checked="" type="checkbox"/> Jasmine Matthews
<input type="checkbox"/> John Doe	<input checked="" type="checkbox"/> Margaret Mushi
<input checked="" type="checkbox"/> Sama Fun	

BACK OFFER TO USERS

Send message to selected employees about the open shift.

Offer Open Shift to employees

# Notify Employees Regarding Shift



- A notifications via email, text or/and push notifications.

Edit Open Shift(s) on Tue, Nov 11

NOTIFY HISTORY X

Notify assigned and/or eligible employees about this OpenShift.

Is anyone able to pick up this shift?

Your message above will only be sent via email. Sending out a notification will automatically publish this shift.

BACK PUBLISH & SEND NOTIFICATION

# Edit Shift



- The manager can edit the shift by clicking on the shift.

Edit John's Shift on Sat, Nov 15 NOTIFY HISTORY X

Unavailable: **4P - 11P**

TIME	POSITION	UNPAID BREAK
9a - 3p <span>edit</span>	CNA <span>edit</span>	<span>coffee cup icon</span> 0 <span>edit</span>

JOB SITE edit

rp edit

NOTES edit

DELETE SAVE & PUBLISH SAVE

# Delete Shift



- The manager can edit the shift by clicking on the shift and then clicking the delete button at the bottom left.

Edit John's Shift on Sat, Nov 15 NOTIFY HISTORY X

Unavailable: **4P - 11P**

TIME	POSITION	UNPAID BREAK
9a - 3p	CNA	0

JOB SITE rp

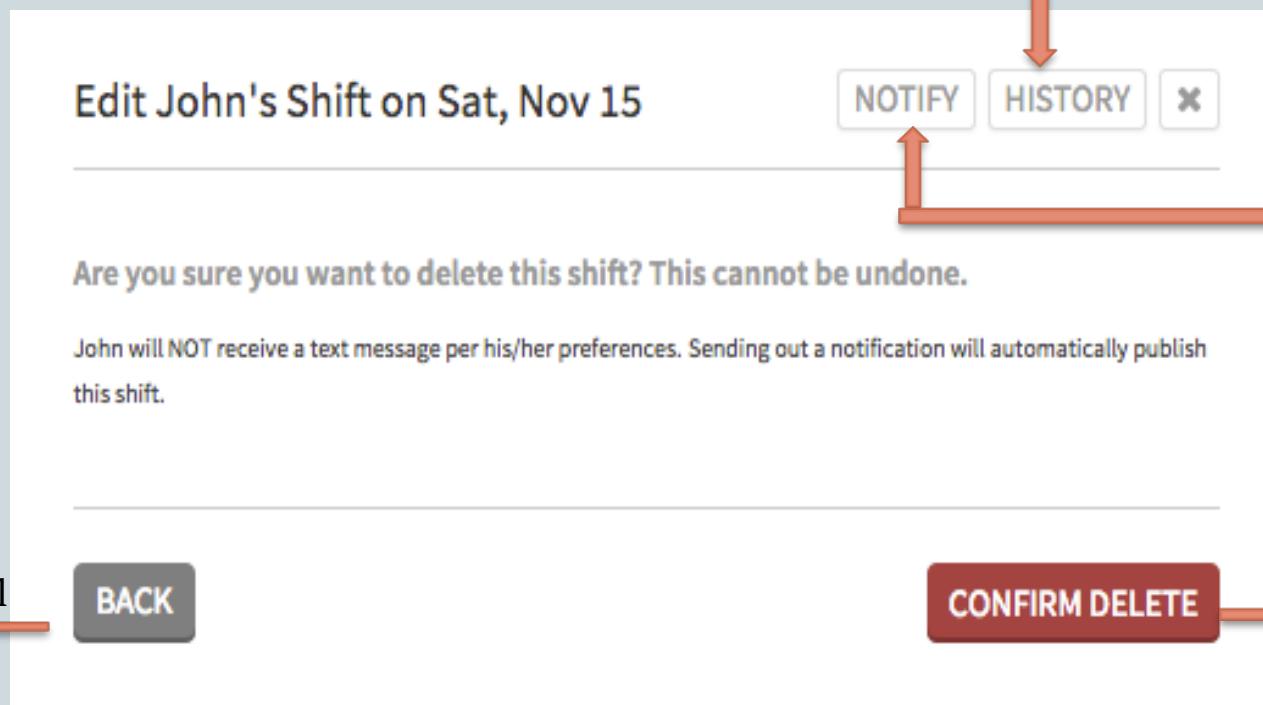
NOTES

**DELETE**  SAVE & PUBLISH SAVE

Click on button to delete shift

# Delete Shift

- Confirm Delete to delete the shift from the schedule.



View History of the Shift

Notify Employee about the deletion of the shift

Go back to cancel delete

CONFIRM DELETE

Press button to confirm deleting the shift

# Notify Employee about Deleted Shift



- The manager can notify the employee with a message by either email or/and text message.

Edit John's Shift on Sat, Nov 15 NOTIFY HISTORY X

Notify John about this shift.

Your message above will only be sent via email. John will NOT receive a mobile alert per his/her preferences.  
Sending out a notification will automatically publish this shift.

Go back to cancel delete BACK Will be deleted from schedule and a message will be sent to employee. PUBLISH & SEND NOTIFICATION

# History of Shift



- Information of the shift can be viewed here.

Edit John's Shift on Sat, Nov 15 BACK

---

OCTOBER 28, 2014

SHIFT CREATED AT 4:32P  
9a - 3p | John D on November 15, 2014

!

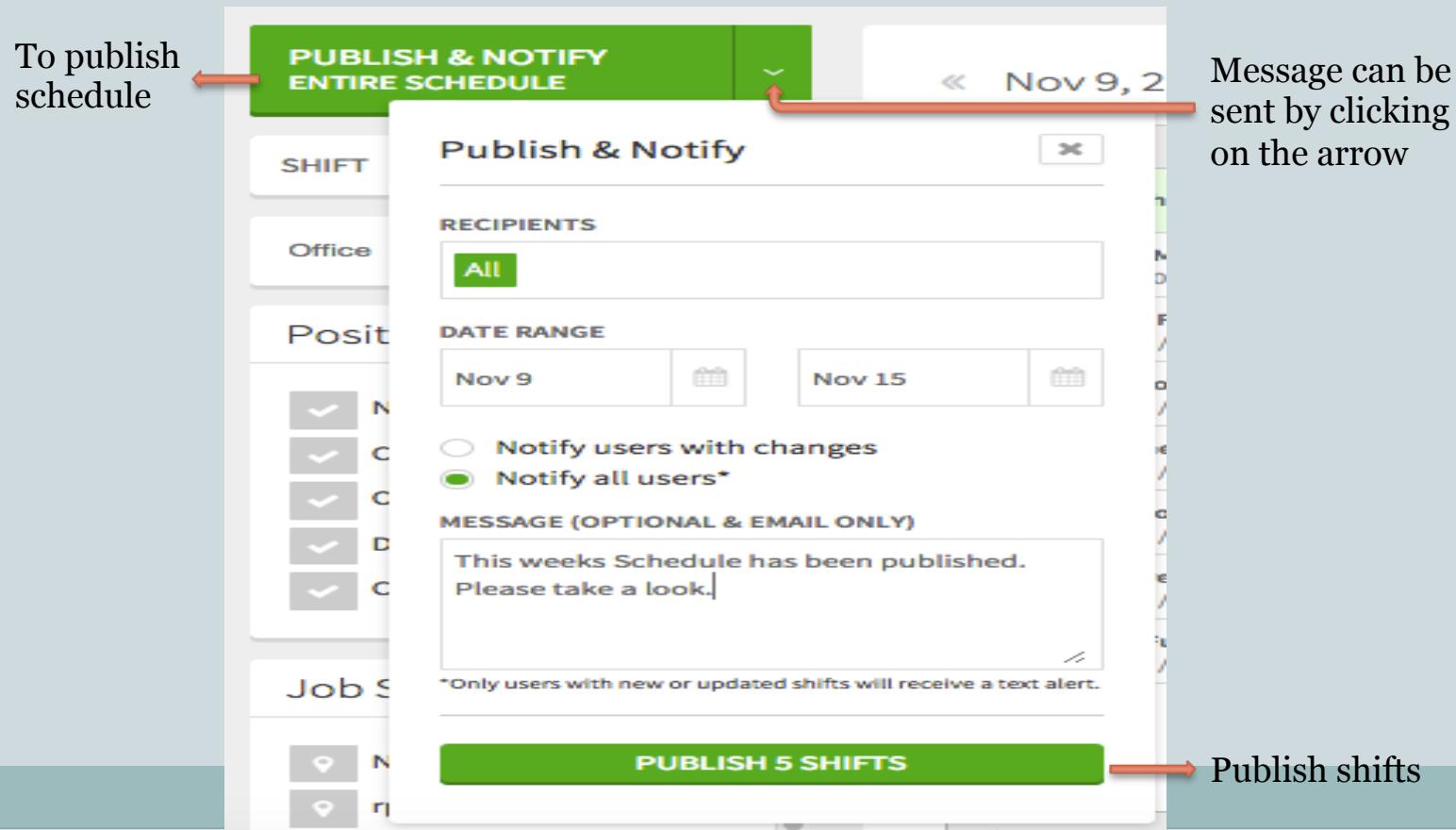
REASSIGNED Jasmine Matthews 4:32p  
to Jasmine Matthews

REASSIGNED Jasmine Matthews 4:32p  
to John Doe

CURRENT SHIFT  
9a - 3p | John D on November 15, 2014

# Publish & Notify Schedule

- The manager must publish schedule to finalize the schedule and so that it can be viewed by the employees. The manager can also send a message to all/selected employees.



# Publish Changes to Schedule

- If any changes are made to the Schedule, the publish button is changed to orange and will be published for the employees to view.

Click orange button to save and publish changes made in the schedule.

The screenshot shows the OpenShifts software interface. On the left, a sidebar titled "PUBLISH CHANGES" displays "1 CHANGE | ALL POSITIONS". It includes tabs for "SHIFT", "POSITION", and "JOB SITE", with "POSITION" selected. A dropdown menu for "Office" is open. Below it, a list of positions is shown with checkboxes: "No Position" (checked), "CNA" (checked), "Own Vehicle" (checked), "Driver License" (checked), and "CPR" (checked). At the bottom of the sidebar are buttons for "Job Sites", "ALL", and a plus sign. On the right, a weekly schedule grid for the week of Nov 9, 2014 - Nov 15, 2014 is displayed. The grid has columns for "STAFF" (listing employees: OpenShifts™, Athew McCalla, Crissie Frederick, Erica Colbert, Jasmine Matthews, John Doe, Margaret Mushi, Sama Fun) and days from "SUN 9" to "SAT 15". Shifts are color-coded: purple for Athew McCalla (9a-5p @ RP), green for Crissie Frederick (5a-3p CNA), blue for Erica Colbert (1p-7p CNA), and red for Sama Fun (9a-5p CNA). Some cells are grayed out or have diagonal lines, indicating unavailability. Navigation buttons at the top include "TODAY", "WEEK" (highlighted in green), and other controls like "DELETE", "PRINT", and "EXPORT".

# Logout



- This will log the manager out of the account. Enter email address and password at [www.wheniwork.com](http://www.wheniwork.com) to login again.

The screenshot shows the Wheniwork dashboard interface. At the top, there is a dark navigation bar with the following items: a menu icon (three horizontal lines), the word "DASHBOARD", a "MY SCHEDULE" dropdown, the word "COWORKERS", a user profile icon with the name "Jane", and a "LOGOUT" button. To the right of the dashboard area, a sidebar is visible with the following options: "MY PROFILE", "MY SCHEDULE", "MY AVAILABILITY" (which has a checked checkbox), and "SWITCH ACCOUNTS". The main dashboard area displays a message to "Jane" about her schedule for "Distinctive Home & Health Care". Below this message is a table showing staff availability from 11P to 10A. The table has columns for "STAFF" and time slots from "11P" to "10A". The first row shows "John Doe" with an availability entry of "8p - 1". A red arrow points upwards from the bottom of the "LOGOUT" button towards the "LOGOUT" text in the sidebar.

STAFF	11P	12A	1A	2A	3A	4A	5A	6A	7A	8A	9A	10A
John Doe	8p - 1											

Hi Jane! Today's Schedule for Distinctive Home & Health Care

MESSAGE STAFF CALENDAR SYNC

STAFF 11P 12A 1A 2A 3A 4A 5A 6A 7A 8A 9A 10A

John Doe 8p - 1

MY PROFILE

MY SCHEDULE

✓ MY AVAILABILITY

SWITCH ACCOUNTS

LOGOUT

# When I Work



**USER MANUAL- EMPLOYEE**

# Login



- A request is sent from management via text and email. When the employee clicks the link. They are asked to register by setting a password. For the future, login to [www.wheniwork.com](http://www.wheniwork.com)

The screenshot shows a login page with the following elements:

- Logo:** A large, faint logo consisting of three horizontal bars inside an oval shape.
- Email Input:** A text input field containing "admin@distinctivehomecare." with a small user icon to its left.
- Password Input:** A text input field containing a series of dots (".....") with a small magnifying glass icon to its left.
- LOGIN Button:** A large green button with the word "LOGIN" in white capital letters.
- Forgot Password Link:** A link labeled "FORGOT PASSWORD" in a grey box.
- Register Now Link:** A link labeled "REGISTER NOW" in a grey box.
- Third Party Connect:** A link labeled "THIRD PARTY CONNECT →" at the bottom center.

# Notifications



- Notifications about new shifts, swap and drop requests can be viewed here.

When clicked, the notifications pane will open. Click to close.

The screenshot shows a software interface with a dark header bar. On the far left of the header is a red circular badge with the number '2'. To its right are menu items: DASHBOARD, MY SCHEDULE (with a dropdown arrow), COWORKERS, and user profile icons for 'Jane' and a dropdown menu. A red arrow points upwards from the bottom of the Notifications pane towards the badge.

**Search Recent Activity**

**THINGS NEEDING YOUR ACTION**

- Drop Shift** Shift on Wed, November 12 from 1:00p to 7:00p  
WAITING
- Swap Shifts** Shift on Tue, November 11 from 9:00a to 5:00p  
WAITING

**NOTIFICATIONS** SEE MORE

- John D. initiated a shift drop request from 1:00p to 7:00p on November 12  
WAITING
- John D. initiated a shift swap request from 9:00a to 5:00p on November 11  
WAITING

**ACTION / ACTIVITY**

- John Doe  
Want make this shift. It is open for grabs.  
Tue, 28 Oct 2014 21:14:56 -0400
- Jasmine Matthews  
This shift request has been approved.  
by Jasmine Matthews on Tue, 28 Oct 2014 23:08:05 -0400

**POST**

Privacy Policy | Developers | Found a Bug? **NEED HELP?**

# User Dashboard



- The user can view their shifts for the day.

A screenshot of the dashboard's top navigation bar. It includes a menu icon (three horizontal lines), a "DASHBOARD" button with a red arrow pointing to it, a "MY SCHEDULE" dropdown, a "COWORKERS" link, and two user profile icons labeled "John".

A screenshot of the staff schedule grid. The grid has "STAFF" in the first column and time slots from 7P to 8A across the rows. A specific shift for "John Doe" at 8P-12a is highlighted in gray and labeled "8p - 12a at Office CNA".

STAFF	7P	8P	9P	10P	11P	12A	1A	2A	3A	4A	5A	6A	7A	8A
John Doe		8p - 12a at Office CNA												

Click to  
drop/  
swap  
shift

Click to  
view  
address  
and map  
of job

# User Schedule



- The user here can view their schedule exclusively. They can also swap or drop their shifts on this page.

Schedule For Nov 9th - 22nd

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
09	10	11 9a - 5p at Office	12 1p - 7p at Office	13	14	15
16	17	18	19	20	21	22

DASHBOARD    MY SCHEDULE    COWORKERS    Change Date    Sync When I work Calendar to the Calendar on mobile or laptop    Set Availability

< TODAY >    CALENDAR SYNC    AVAILABILITY

John

# View Full Schedule



- The user can view everyone's schedule but cannot make any changes to anyone's schedule but their own.

Click on arrow

The screenshot shows the 'FULL SCHEDULE' tab selected in the top navigation bar. A red arrow points to the dropdown menu next to 'MY SCHEDULE' in the top header. The main area displays a grid of staff availability from November 9 to November 15, 2014. Staff listed include Athew McCalla, Crissie Frederick, Erica Colbert, Jasmine Matthews, John Doe, Margaret Mushi, and Sama Fun. Shifts are color-coded: grey for 'OpenShifts™', green for shifts, purple for '9a - 5p CNA', blue for '1p - 7p CNA', and yellow for '5a - 3p CNA'. Some cells are labeled 'UNAVAILABLE'.

STAFF	SUN 9	MON 10	TUE 11	WED 12	THU 13	FRI 14	SAT 15
OpenShifts™				9a - 3p CNA			
Athew McCalla 0/0/0							5a - 3p CNA
Crissie Frederick 0/0/0			UNAVAILABLE	UNAVAILABLE	UNAVAILABLE	UNAVAILABLE	1p - 7p CNA
Erica Colbert 0/0/0			UNAVAILABLE	UNAVAILABLE	UNAVAILABLE	UNAVAILABLE	9a - 5p CNA
Jasmine Matthews 0/0/0							
John Doe 0/14/0			9a - 5p CNA	1p - 7p CNA			
Margaret Mushi 0/0/0	UNAVAILABLE						UNAVAILABLE
Sama Fun 0/0/0							

# View Coworkers

- The user can view his coworkers

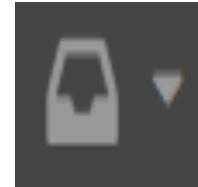
DASHBOARD    MY SCHEDULE    COWORKERS    John

COWORKERS    My Privacy Settings

Jasmine Matthews  
admin@distinctivehomecare.com

Email Coworker

# Request Time-Off



COWORKERS

Jasmine Matthews  
✉  
[admin@distinctivehomecare.com](mailto:admin@distinctivehomecare.com)

+ REQUEST TIME-OFF

VIEW REQUESTS

Privacy Settings

# Request Time-Off



**Request Time-Off** X

---

ARE YOU TAKING OFF A PORTION OF THE DAY OR A WHOLE DAY(S)?

All Day  Partial Day

TIME-OFF TYPE

Unpaid ▼

---

START DATE END DATE

▼  ▼

---

EMPLOYEE

Jasmine Matth... X ▼

---

MESSAGE

---

SEND REQUEST

# Request Time-Off- Time Off Type



## TIME-OFF TYPE

- Unpaid
- Paid (PTO)
- Sick
- Holiday

# View Time off Requests



- Shows the list of employees' requests.

REQUESTS		Start typing... ie. 'pending'	Request Time-Off +
	PENDING	Drop Shift Shift on Wed, November 12, 2014 from 1p to 7p	John Doe Tue, Oct 28, 2014 9:14p
	PENDING	Swap Shifts Shift on Tue, November 11, 2014 from 9a to 5p	John Doe Tue, Oct 28, 2014 9:02p
	ACCEPTED	Time Off requested from Sat, November 1, 2014 thru Sun, November 2, 2014	John Doe Tue, Oct 28, 2014 7:04p

# User Profile

- The user can make changes to their profile here.

A screenshot of a user interface for managing a schedule. At the top, there's a navigation bar with 'DASHBOARD', 'MY SCHEDULE', and 'COWORKERS' buttons. On the right, a user profile section shows a placeholder profile picture and the name 'John'. Below the navigation bar, a message says 'Hi John! Today's Schedule for Distinctive Home & Health Care'. A staff grid shows 'John Doe' assigned to shifts from 8P to 7A, with a note '8p - 12a at Office CNA'. To the right is a sidebar menu with the following items:

- MY PROFILE (highlighted with a red arrow)
- MY SCHEDULE
- ✓ MY AVAILABILITY
- ↔ SWITCH ACCOUNTS
- Logout

Make  
changes to  
profile

# My Profile



Hi John! Let's get started.

ALL DONE!



## VERIFY YOUR INFORMATION

Verify your information below. Make sure your email and mobile number are correct. This is how your manager will contact you with schedule updates.



## INPUT YOUR AVAILABILITY

Your availability lets the manager know when you are unavailable and when you prefer to be scheduled.

SETUP AVAILABILITY



## REVIEW ALERT PREFERENCES

Review your alert preferences below. These preferences determine how you are notified about schedule updates, shift trades/drops and other activity about your work schedule.

# Verify your Information

- The employee can view/edit their information.

My Profile



Upload picture from file on computer. →

UPLOAD PICTURE

<b>FIRST NAME</b> John	<b>LAST NAME</b> Doe
<b>EMAIL ADDRESS</b> john.doe@gmail.com	<b>MOBILE NUMBER</b> (xxx) xxx-xxxx
<b>SLEEP PREFERENCES</b> - Do not disturb me during this time 11:00p and 5:00a	
<b>TIMEZONE</b> (GMT-5) Eastern Time (US & Ca)	
<b>PREFERRED HOURS</b> - # of hours preferred per week 0	

Change current password ↑

**CHANGE PASSWORD** **SAVE** → Save edited information

**PRIVACY**  
When on, your coworkers will not be able to see your contact information. → To keep your profile private from other employees

# Change Password



- The user should retype their current password, followed by their new password and then confirm their new password.

Change Password X

---

CURRENT PASSWORD	NEW PASSWORD	CONFIRM PASSWORD
<input type="password" value="*****"/>	<input type="password" value="*****"/>	<input type="password" value="*****"/>

---

**CHANGE PASSWORD**



Click to save  
new password

# Input your availability



- The user can add/edit their availability for the manager to view and schedule shifts accordingly.

Hi John! Let's get started.

ALL DONE!



## VERIFY YOUR INFORMATION

Verify your information below. Make sure your email and mobile number are correct. This is how your manager will contact you with schedule updates.



## INPUT YOUR AVAILABILITY

Your availability lets the manager know when you are unavailable and when you prefer to be scheduled.

SETUP AVAILABILITY



## REVIEW ALERT PREFERENCES

Review your alert preferences below. These preferences determine how you are notified about schedule updates, shift trades/drops and other activity about your work schedule.



# Set/Edit Availability



- Availability can either be set by the employee or management.
- **Green** represents the employee's **Preferred Schedule** and **Red** represents when the employee is **unavailable**.

Advanced Mode

EDITING AVAILABILITY PREFERENCE FOR CRISSIE FREDERICK

Advanced Mode Watch a Tutorial ►

DAY	12A	1A	2A	3A	4A	5A	6A	7A	8A	9A	10A	11A	12P	1P	2P	3P	4P	5P	6P	7P	8P	9P	10P	11P
Sunday	All Day	All Day																						
Monday	All Day	Ø 12a - 9a				10a - 12a																		
Tuesday	All Day	All Day																						
Wednesday	All Day	All Day																						
Thursday	All Day	All Day																						
Friday	All Day	All Day																						
Saturday	All Day	All Day																						

**DELETE** Preferred Unavailable **SAVE**

# Set Availability- Advanced Mode



- The user can name that availability for a certain period of time or set it on a loop of their choice.

<b>TITLE</b> Default Availability	<b>DESCRIPTION</b> ie. I am not available on Mondays during the summer	<b>EFFECTIVE DATES</b> Oct 28, 2014  to <input type="text" value="On Going"/>	<b>ROTATION</b> <input checked="" type="checkbox"/> Every Week <input type="checkbox"/> Every Other Week <input type="checkbox"/> Every 3 Weeks <input type="checkbox"/> Every 4 Weeks
<b>DAY</b>			

# Alert Preferences



- The user can choose their alert preferences, they have a choice of email or text.

**Alert Preferences**

**TIME-OFF REQUESTS**  EMAIL  MOBILE

**SWAP / DROP REQUESTS**  EMAIL  MOBILE

**SCHEDULE UPDATES**  EMAIL  MOBILE

**SHIFT REMINDERS**  hours before my shift  
Mobile reminders are not guaranteed. Delay in carrier delivery is possible.

**SAVE** 







Edit how long before shift reminders are wanted

# Alert Preferences Via Social Networking



- The employee can connect their When I Work account to their Facebook to view and share their schedule and connect to Twitter to get shift reminders.

## Social

 FACEBOOK

Connect to Facebook so you can view your schedule on Facebook without logging in to When I Work. You can even setup "Schedule Sharing" so your Facebook friends can see when you get off work.



 TWITTER

Connect to Twitter and get shift reminders tweeted to you from [@wheniworkapp](#). Shift reminders are tweeted as @ replies.



Login and authorize when I work

```
graph LR; A[Login and authorize when I work] --> B[CONNECT]; A --> C[CONNECT]
```

# View Shift- Employee Version



- The employee cannot make any change their schedule. They can only view their shift. They can send drop and swap requests to the manager to review. Click on shift to view options.

Schedule For Nov 9th - 22nd

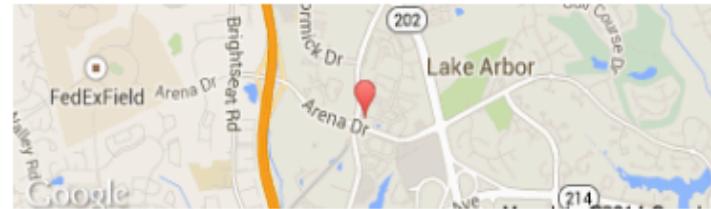
SUNDAY	MONDAY	TUESDAY
09	10	11 9a - 5p at Office
16	17	18

A red vertical arrow points from the "TUESDAY" column header down to the shift entry for November 11th.

**TUE  
11**

**9a - 5p**  
at Office as CNA X

**LOCATION**  
9500 Arena Drive, Ste 105, Largo, MD 20774



**Office**

**SWAP SHIFT** **DROP SHIFT**

# Swap Shift



WED  
**12**

**1p - 7p**

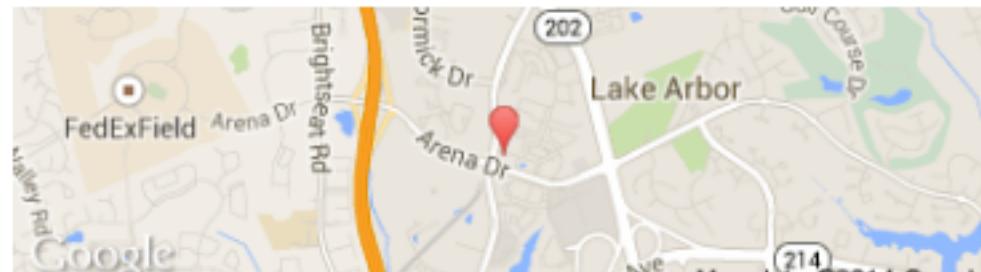
at Office as CNA



---

## LOCATION

9500 Arena Drive, Ste 105, Largo, MD 20774



## Office

---

**SWAP SHIFT**

**DROP SHIFT**



# Swap Shift



- The employee can swap shift with other eligible employees. Employee can either choose employee they want to swap with or send request (email/text/push) to all or multiple eligible employees. The employee is still responsible for their shift until the swap is approved by the manager and then accepted.

**Shift Swap** X

**TRADE THIS SHIFT**  
**Tuesday, November 11, 2014 at 9a - 5p at Office**

**FOR ONE OF THESE SHIFTS** **ALL** **NONE** **LOAD MORE SHIFTS**

<b>TUE, NOV 11</b>	<b>9A - 5P, @ Office</b> Athew M. as CNA	<input type="checkbox"/>
<b>TUE, NOV 11</b>	<b>9A - 5P, @ Office</b> Jane D. as CNA	<input checked="" type="checkbox"/>

**MESSAGE**

Can we please swap for this week?

**INITIATE SWAP**

Click to send initiate request

# Accept/Decline Swap



- The shift has to be either accepted or denied after the manager's approval.

**SWAP/DROP REQUEST**      WAITING      Back

John Doe  
requested shift swap at Tue, 28 Oct 2014 9:02p

John wants to trade this shift...

Tue, Nov 11, 2014 | 9a - 5p  
OFFICE | AS CNA

...with one of these shifts.

Tue, Nov 11, 2014 | 9a - 5p  
JANE DOE | AS CNA

**DECLINE**      **ACCEPT**

**CONVERSATION / ACTIVITY**

John Doe      Tue, 28 Oct 2014 21:02:51 -0400  
Can we please swap for this week?

This shift request has been approved.      by Jasmine Matthews on Tue, 28 Oct 2014 22:50:03 -0400

Yes we can!      POST

Deny Request, no change will be made

Accept Request to make change to schedule

A message will be sent to the employee who requested the swap

# Drop Shift



WED  
**12**

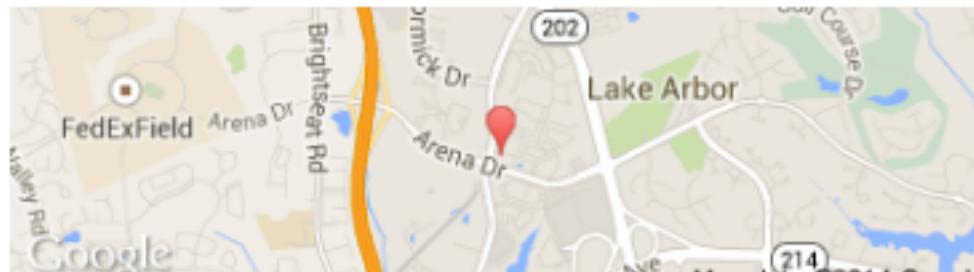
**1p - 7p**

at Office as CNA



## LOCATION

9500 Arena Drive, Ste 105, Largo, MD 20774



## Office

SWAP SHIFT

DROP SHIFT



# Shift Giveaway/Drop



- The employee can offer this shift to all/multiple/one user along with a message.

### Shift Giveaway / Drop

X

SELECT WHICH USERS YOU WOULD LIKE TO OFFER THE SHIFT:  
Wednesday, November 12, 2014 at 1p - 7p at Office

FOR ONE OF THESE SHIFTS

Athew McCalla  Crissie Frederick  Erica Colbert  Jane Doe

Jasmine Matthews  Margaret Mushi  Sama Fun

ALL  NONE  LOAD MORE SHIFTS

MESSAGE

I cant make this shift. It is open for grabs.

INITIATE DROP

Confirm Drop

# Drop Shift



- The shift that has been dropped has to be first approved by the manager and then out of the requested, the first to pick it up will get the shift.

**SWAP/DROP REQUEST**    PENDING    Back

John Doe  
requested shift drop at Tue, 28 Oct 2014 9:14p

John wants to giveaway this shift...

**Wed, Nov 12, 2014 | 1p - 7p**  
OFFICE | AS CNA

...to one of these people. Do you approve?

**Crissie Frederick**

**Erica Colbert**

**Jane Doe**

**DENY** **APPROVE**

**CONVERSATION / ACTIVITY**

John Doe    Tue, 28 Oct 2014 21:14:56 -0400  
I cant make this shift. It is open for grabs.

Post a reply... **POST REPLY**

Manager can choose not to giveaway the shift to certain employees



# Accept/Decline Giveaway



- The shift has to be either accepted or denied after the manager's approval. The first person to accept the shift will get it.

**SWAP/DROP REQUEST**      WAITING      Back

John Doe  
requested shift drop at Tue, 28 Oct 2014 9:14p

John wants to giveaway this shift...

**Wed, Nov 12, 2014 | 1p - 7p**  
OFFICE | AS CNA

...to one of these people.

**Erica Colbert**

**Jane Doe**

**DECLINE**      **ACCEPT**

Deny Request, no change will be made

Accept Request to make change to schedule

**CONVERSATION / ACTIVITY**

John Doe      Tue, 28 Oct 2014 21:14:56 -0400  
I cant make this shift. It is open for grabs.

This shift request has been approved.      by Jasmine Matthews on Tue, 28 Oct 2014 23:08:05 -0400

Post a reply...      POST

A message will be sent to the employee who requested the swap

# Logout



- This will log the employee out of the account. Enter email address and password at [www.wheniwork.com](http://www.wheniwork.com) to login again.

A screenshot of the Wheniwork dashboard interface. At the top, there's a dark header bar with navigation links: DASHBOARD, MY SCHEDULE (with a dropdown arrow), COWORKERS, and user profile icons for Jane Doe. To the right of Jane's name is a dropdown arrow. Below the header is a large white area containing a greeting message: "Hi Jane! Today's Schedule for Distinctive Home & Health Care". Underneath this message are two buttons: "MESSAGE STAFF" and "CALENDAR SYNC". Below the message is a staff schedule grid. The grid has columns for time slots from 11P to 10A and rows for staff members. The first row is labeled "STAFF". The second row shows "John Doe" in the first column and a scheduled shift in the 11P column: "8p - 1". The rest of the grid is empty. In the bottom right corner of the main content area, there's a "LOGOUT" button with a power symbol. A red vertical arrow points upwards from the bottom right towards the "LOGOUT" button, indicating the direction of the click.

STAFF	11P	12A	1A	2A	3A	4A	5A	6A	7A	8A	9A	10A
John Doe	8p - 1											

MESSAGE STAFF CALENDAR SYNC

LOGOUT