Stewart, Anne

From:	Whitney, Randy
Sent:	Tuesday, May 31, 2016 11:43 AM
To:	Stewart, Anne; Apigo, Steve; Marion, Charlotta; Lively, Pamela Lynn; Little, Kimberly; Rogers, Alexis; Lynch, Julie; Wolka, Susan; Stahl, Daniel; Reinman, Marie; Adams, Kelly; Ackley, Patricia; Brieden, Molly; Heitz, Patricia; Davis, Janice; Lorenzo, Roderick; Hamlin, Janet; Sejnost-Good, Martha; Dunn, Collette; Whitney, Randy
Subject:	Leader Web Scheduler Training

Hi,

As you are aware web Scheduler training will begin next week. As a leader you will need four hours of training and they are scheduled for the following days and times. There is a limit of 8 people per time because you will be working on the computer, so please let me know what day and time you would like to attend. Once the classes are filled you will have to pick another day and time.

Tuesday June 7, 2016 from 8am-12 noon
Tuesday June 7, 2016 from 1pm – 4pm
Wednesday June 8, 2016 form 8am – 12 noon

Agenda
- Employee Role Functions
- Administrator Role Functions
- Manager Functions

You will be getting a separate email regarding super user and staff training.
Call with any questions.
Randy

1

Nurse Leader Scheduled Attendry

5/26

6/7
8A-12
1. SUE WALKA
2. Kelley Adams
3. Pat Ackley
4. Janice Davis
5. Jackie Blessman
6. _____
7. _____
8. _____

6/7
1-4₀
1. Molly Baieder
2. Pam Lively
3. Kim Litten
4. Marie R
5. Charlotta Marion
6. Julie Lynch
7. _____
8. _____

6/8
8-12
1. Alexis Rogers
2. Dennis Lorenzo
3. Collette Dunn
4. Pat Hertz
5. STEVE Apigo
6. SUE WALKA
7. _____
8. _____

Beaumont

**ANSOS One-Staff
Web Scheduler Training
Visit Agenda**

Meeting Title:	WSM Training Visit
Meeting Date / Time:	June 7 – 10, 2016 8:30 – 4:30
Meeting Location:	TBD

Scheduling Visit Objectives
- Training of Staffing Office Personnel
- Scheduler Administrator Training Sessions
- Super User training sessions for Employee Role

Customer Preparation:
- Provide LCD projector, white board or flip chart
- Computer for each participant with access to the Web Scheduler Test environment
- Nurse Managers/Designates should be aware of which units employees will need access too.

Day 1 Tuesday, June 7, 2016 8:00 – 4:30

Hospital Attendees:	Managers/Staffers/Designates who will approve time off and extra shifts
McKesson Attendees:	Carol D. Brown, McKesson Implementation Consultant
Class Session:	Schedule Administrator
Class Time:	8:00 – 12:00/1:00 – 4:30
Location:	TBD

8:00 AM: Welcome
Agenda Review

8:15 AM: Employee Role Functions
- Calendar View
- Requests
  - Time off
- Available Shifts
  - Determining which unit
- My Schedule
  - Weekly View
  - My Schedule
    - o Self Scheduling
      - Key
  - Code Coverage
  -

9:00 AM: Schedule Administrator Role Functions
- Inbox
  - o Setting up filter to include Swaps
  - o Inbox processing

Beaumont

- Schedule View
- Planner
  - o Publishing Schedules
    - Balancing Mode
    - Publish Mode

10:00 AM: Manager Functions in ANSOS Web Scheduler Mode
- Resetting employee passwords
- Employee Unit access review

12:00 PM: Session Ends

Day 2 June 8, 2016 8:00 AM – 4:30 PM

Beaumont Attendees: Managers/Staffers/Designates who will approve time off and extra shifts
McKesson Attendees: Carol D. Brown, McKesson Implementation Consultant
Class Session: Schedule Administrator
Class Time: 8:00 – 12:00/1:00 – 4:30
Location: TBD

8:00 AM: Welcome
Agenda Review

8:15 AM: Employee Role Functions
- Calendar View
- Requests
  - Time off
- Available Shifts
  - Determining which unit
- My Schedule
  - Weekly View
  - My Schedule
    - o Self Scheduling
      - Key
  - Code Coverage
  -

9:00 AM: Schedule Administrator Role Functions
- Inbox
  - o Setting up filter to include Swaps
  - o Inbox processing
- Schedule View
- Planner

Beaumont

**ANSOS One-Staff
Web Scheduler Training
Visit Agenda**

       o   Publishing Schedules
          ▪   Balancing Mode
          ▪   Publish Mode

10:00 AM: Manager Functions in ANSOS Web Scheduler Mode
        -   Resetting employee passwords
        -   Employee Unit access review

11:00 AM: Session Ends

Day 3 June 9, 2016 8:00 AM – 4:30 PM

Beaumont Attendees:	Employees who will be Super Users- Max of 12 per session
McKesson Attendees:	Carol D. Brown, McKesson Implementation Consultant
Class Session:	Super Users for Employee Role
Class Time(s):	8:00 -9:30AM/10:00-11:30AM/1:00PM-2:30PM/3:00PM-4:30PM (4 Sessions)
Location:	TBD

Welcome
Agenda Review

Employee Role Functions
- Calendar View
- Requests
  - Time off
- Available Shifts
  - Determining which unit
- My Schedule
  - Weekly View
  - My Schedule
    - o Self Scheduling
      - ▪ Key
      - ▪ Code Coverage

Session Ends

4:30 PM: Class Ends for Day 2

Beaumont

ANSOS One-Staff
Web Scheduler Training
Visit Agenda

Day 4 4:00AM – 11:30AM

Beaumont Attendees: Employees who will be Super Users- Max of 12 per session
McKesson Attendees: Carol D. Brown, McKesson Implementation Consultant
Class Session: Super Users for Employee Role
Class Time(s): 4:00AM-5:30AM/6:00AM-7:30AM/8:00AM-9:30AM/10:00AM-11:30AM(4)Sessions
Location: TBD

Welcome
Agenda Review

Employee Role Functions
- Calendar View
- Requests
  - Time off
- Available Shifts
  - Determining which unit
- My Schedule
  - Weekly View
  - My Schedule
    - Self Scheduling
      - Key
      - Code Coverage

Session Ends

Web Scheduler
McKesson Workforce Management Solution Suite

MCKESSON

To self-schedule, go to "Schedule" and click on "My Schedule"

| Calendar | Requests | Swap | Schedule | | Monday, August 24, 2015 |

Weekly View
My Schedule

Go to Current Month

Printable View

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1

Web Scheduler
McKesson Workforce Management Solution Suite

Welcome, T   RN   CE131

My Profile   Sign Out

MCKESSON

| Calendar | Requests | Swap | Schedule | | Monday, August 24, 2015 |

Click on the open period from the drop down menu.

My Schedule
Closed for Self-Scheduling

Period: 08/09/2015-09/05/2015

08/09/2015-09/05/2015
09/06/2015-10/03/2015
10/04/2015-10/31/2015

S	M	T	W	T	F	S		S	M	T	W	T	F	S	S	M	T	W	T	F	S
9	10	11	12	13	14	15		22	23	24	25	26	27	28	29	30	31	1	2	3	4	5

+ My Home Area: CE WBH-GP:ED Skill R

+ Key

My Schedule
Open For Self-Scheduling

Period: 10/04/2015-10/31/2015   Area to Schedule: CE WBH-GP:ED

Work Rules

+ ✓ Max 3 Workshifts in 1 Week.
+ ✓ Max 12 Hours in 1 Day.
+ ✓ Direct Overtime Workshifts
+ ⊘ Min 3 Workshifts in 1 Week.
+ ⊘ Min 12 Workshifts i

S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
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
						X	X						X	X													X

+ My Home Area: CE

+ Time-Off Availability

− Over/Under Counts

In the Over/Under field, you are able to see your assigned shift, as well as the number of shifts available for that day. "-1" means there is one opening for that day.

| | T | W | T | F | S | S | M | T | W | T | F | S | S | M | T | W | T | F | S |

☐ All Workshifts

| | 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 |

☐ y:1100-2330 ED FT RN

| -1 | -1 | -1 | -1 | -2 | -1 | -1 | -1 | 0 | -1 | -1 | -1 | -1 | -1 | 0 | -2 | -1 | -1 | -1 | 0 | 0 | -1 | 0 | -1 | -1 | -1 | -1 |

Self Scheduling is on a first come first serve basis. If there is a "0" listed, this means there are no opens spots for you to work for your shift and you must choose another day. You can only self– schedule yourself for the shift you are assigned to.

Web Scheduler
McKesson Workforce Management Solution Suite

Welcome,
My Profile   Sign Out

CO108

MCKESSON

| Calendar | Available Shifts | Requests | Swap | Schedule | | | ay, August 26, 2015 |

To choose this day to work, insert your shift code into the field.

My Schedule
Open For Self-Scheduling

Period: 10/04/2015-10/31/2015

Work Rules

+ ✅ Max 16 Hours in 1 Day.
+ ✅ Max 40 Hours in 1 Week.
+ ✅ Direct Overtime Workshifts
+ 🚫 3 P per Week.

	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	M	T	F	S
	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				
					X		P	P						P				P	P		X		P	P		P	P					

+ My Home Area: CO WBH-GP:3SE Skill R

+ Time-Off Availability Counts: CO WBH-GP:3SE Skill R
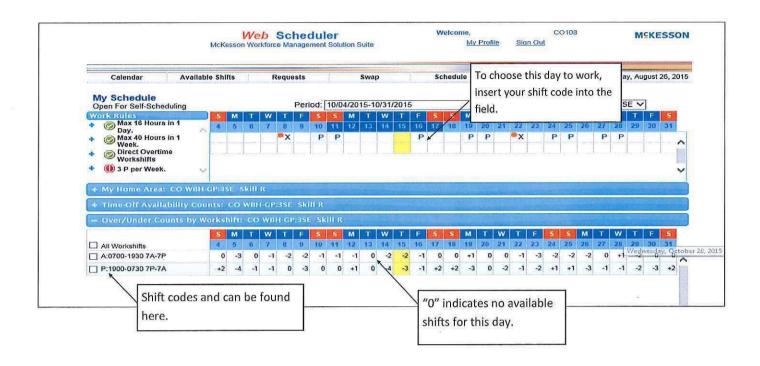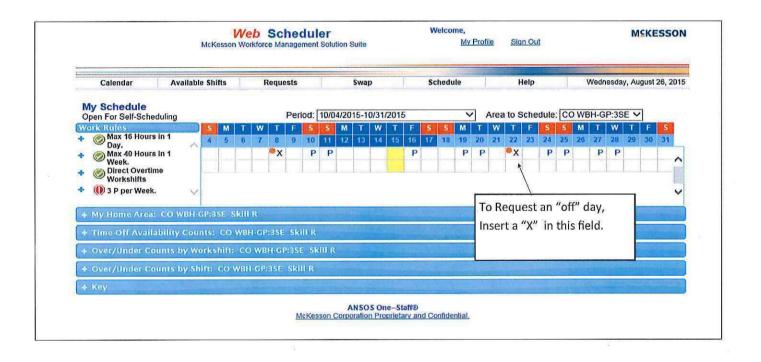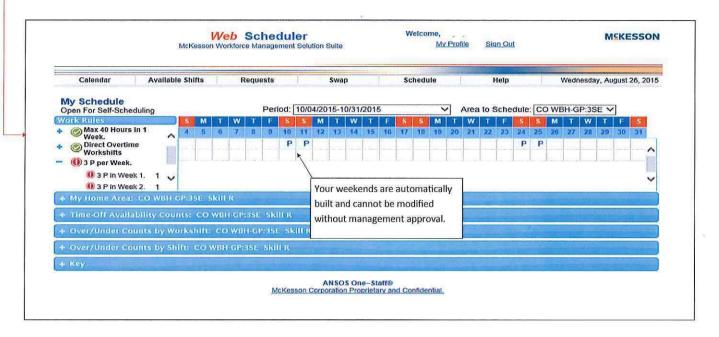
– Over/Under Counts by Workshift: CO WBH-GP:3SE Skill R

	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
	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
☐ All Workshifts																												
☐ A:0700-1930 7A-7P	0	-3	0	-1	-2	-2	-1	-1	-1	0	-2	-2	-1	0	0	+1	0	0	-1	-3	-2	-2	-2	0	+1			
☐ P:1900-0730 7P-7A	+2	-4	-1	-1	0	-3	0	0	+1	0	-4	-3	-1	+2	+2	-3	0	-2	-1	-2	+1	+1	-3	-1	-1	-2	-3	+2

Wednesday, October 28, 2015

Shift codes and can be found here.

"0" indicates no available shifts for this day.

Web Scheduler
McKesson Workforce Management Solution Suite

Welcome,
My Profile   Sign Out

MCKESSON

| Calendar | Available Shifts | Requests | Swap | Schedule | Help | Wednesday, August 26, 2015 |

My Schedule
Open For Self-Scheduling

Period: 10/04/2015-10/31/2015   Area to Schedule: CO WBH-GP:3SE

Work Rules

+ ✅ Max 16 Hours in 1 Day.
+ ✅ Max 40 Hours in 1 Week.
+ ✅ Direct Overtime Workshifts
+ 🚫 3 P per Week.

	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
	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
					X		P	P						P			P	P		X		P	P		P	P		

+ My Home Area: CO WBH-GP:3SE Skill R

+ Time-Off Availability Counts: CO WBH-GP:3SE Skill R

+ Over/Under Counts by Workshift: CO WBH-GP:3SE Skill R

+ Over/Under Counts by Shift: CO WBH-GP:3SE Skill R

+ Key

To Request an "off" day, Insert a "X" in this field.

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Work Rules are listed here. Please follow these rules for self-scheduling. For example, this user must Schedule themselves "3 P shifts" per week. When all work rules are completed, the user will see green check marks listed. Also, please remember to schedule yourself for (1) Monday and (1) Friday.

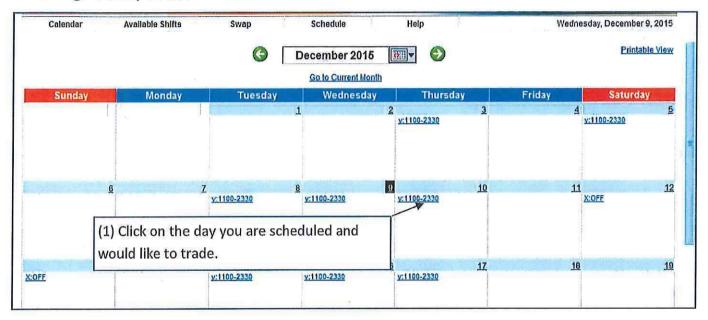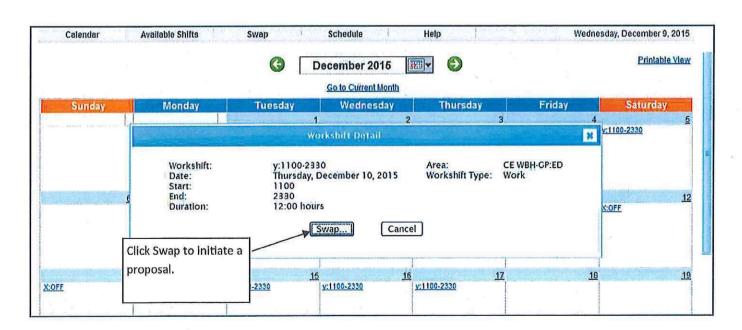Below is an example of a completed self-schedule.

This self-scheduling tool is only used as a template and days working are Subject to change in order to balance the needs of the department. Schedules are not final until posted. Please check your schedule under the "Calendar" view or "My Schedule" view once the schedule is posted.

Swapping Shifts

This Function would be used for requesting an **even trade** of shifts. You cannot trade time off or give away a shift

(1) Click on the day you are scheduled and would like to trade.

Workshift Detail

Workshift:	y:1100-2330	Area:	CE WBH-GP:ED
Date:	Thursday, December 10, 2015	Workshift Type:	Work
Start:	1100		
End:	2330		
Duration:	12:00 hours		

Swap...   Cancel

Click Swap to initiate a proposal.

Swaps must be an even trade of hours and **may not** generate over time.

| Calendar | Available Shifts | Swap | Schedule | Help | Wednesday, December 9, 2015 |

Propose a Swap

Your current workshift (to be swapped):

| Worshift: | y:1100-2330 | Area: | CE WBH-GP:ED |
| Date: | Thursday, December 10, 2015 | Duration: | 12:00 hours |

Find workshifts you could work instead:

Work Area: CE CE WBH-GP:ED

Work Date: 12/10/2015

December 2015

Su	Mo	Tu	We	Th	Fr	Sa
		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		

Your schedule for 12/10/2015:

Workshift	Area	Type	Status
y:1100-2330	CE	Work	

> Click on the day you would rather work instead within that same week.

Find workshifts you could work instead:

Work Area: CE CE WBH-GP:ED

Work Date: 12/11/2015

December 2015

Su	Mo	Tu	We	Th	Fr	Sa
		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		

Your schedule for 12/11/2015:

N/A

> All available employees who are eligible to trade are listed below along with their shift times.

Select workshift(s) to propose to swap with:

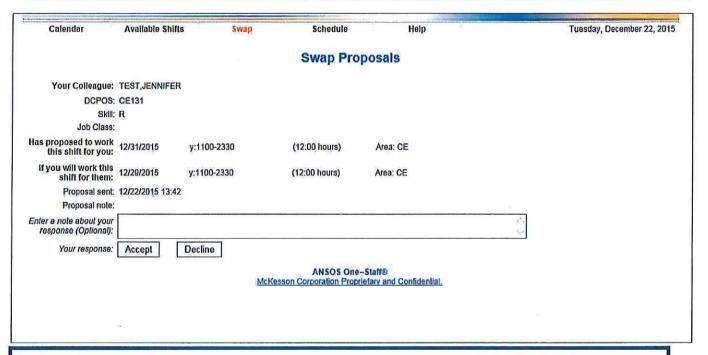| Select	DCPOS	Name	Skill	J Workshift	Duration
☐	CE133	Welch, Anna	R	k:1800-0630 ED N-GHG	12:00 hours
☐	CE143	Brown, Janet L	R	P:1900-0730 7P-7A	12:00 hours
☐	CE139	Lang, Diana	R	P:1900-0730 7P-7A	12:00 hours
☐	CE251	Gandolfi, Beverly A	R	K:0600-1830 ED D-CHG	12:00 hours
☐	CE216	Haberkorn, Elizabeth	R	A:0700-1930	12:00 hours
☐	CE239	Skoney, Kristen	R	A:0700-1930	12:00 hours
☐	CE253	Crosde, Chelsea L	R	A:0700-1930	12:00 hours

Don't FORGET! Midnight employees shifts **come in** the night **before** what is listed. When trading shifts, you assume that person shift times.

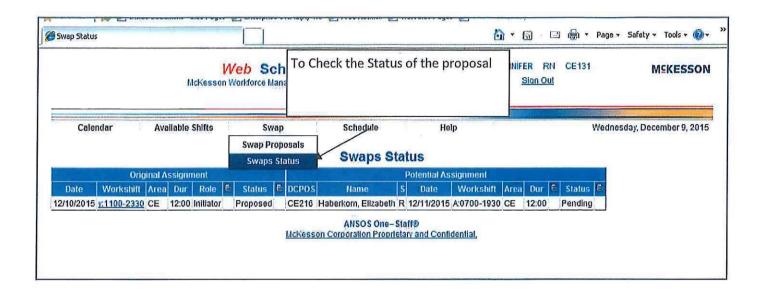Propose a Swap   🏠 ▾ 🔳 ▭ 🖨 ▾ Page ▾ Safety ▾ Tools ▾ ❓▾ »

Select workshift(s) to propose to swap with:

☐	CE133	Welch, Anna	R	R:1900-0630 ED N-CHG	12:00 hours	
☑	CE143	Brown, Janet L	R	P:1900-0730 7P-7A	12:00 hours	
☑	CE139	Lang, Diana	R	P:1900-0730 7P-7A	12:00 hours	
☐	CE251	G		1830 ED D-CHG	12:00 hours	
☑	CE216	H		1930	12:00 hours	
☐	CE239	S		1930	12:00 hours	
☑	CE253	S		1930	12:00 hours	
☑	CE277	S		2130	12:00 hours	

You may propose a swap to multiple people at once.

Submit your Proposal:

Review workshift(s) you are proposing to work:

DCPOS	Name	Skill	J Date	Workshift	Area	Duration	
CE143	Brown, Janet L	R	12/11/2015	P:1900-0730 7P-7A	CE	12:00 hours	remove
CE139	Lang, Diana	R	12/11/2015	P:1900-0730 7P-7A	CE	12:00 hours	remove
CE216	Haberkorn, Elizabeth	R	12/11/2015	A:0700-1930	CE	12:00 hours	remove
CE277	Sheardy, Caitlin	R	12/11/2015	?:0900-2130	CE	12:00 hours	remove
CE253	Sroufe, Chelsea J	R				12:00 hours	remove

You can also free text a note about the proposal.

Enter a note about the proposal (Optional):

[   ]

[Submit] [Cancel]

Click Submit.

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Web Scheduler
McKesson Workforce Management Solution Suite

Welcome, TEST,JENNIFER RN CE131   My Profile   Sign Out   **McKESSON**

Calendar   Available Shifts   Swap   Schedule   Help   Wednesday, December 9, 2015

Your swap proposal has been initiated.

[OK]

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You Proposal has now been sent to all recipients.

◆   Your swap request will be sent to the recipient. They can choose to accept it or not.

◆   If accepted, the request will be sent to the managers for final approval. Your swap will be completed **ONLY** if approved.

Calendar	Available Shifts	Swap	Schedule	Help	Tuesday, December 22, 2015

Swap Proposals

Your Colleague: TEST,JENNIFER

DCPOS: CE131

Skill: R

Job Class:

Has proposed to work this shift for you: 12/31/2015   y:1100-2330   (12:00 hours)   Area: CE

If you will work this shift for them: 12/29/2015   y:1100-2330   (12:00 hours)   Area: CE

Proposal sent: 12/22/2015 13:42

Proposal note:

Enter a note about your response (Optional):

Your response: [Accept]   [Decline]

ANSOS One–Staff®
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◆ **Responding to a swap request**

    ◆   Notice of a swap is found on your menu bar. The word "Swap" on your menu bar will appear orange when a swap has been proposed. Click "Swap" and you will see the "Swap Proposals" . Click to view.

◆   When the swap request is displayed, you can chose to accept or decline the shift

    ◆   Accepting the swap sends the request on for approval.

    ◆   If you decline the swap, the originator can check the status to verify the request and no further action is required.

- Once the swap has been initiated and accepted by the recipient, both parties can check the status by selecting "Swaps" the "Swap Status".

- The initiator could see the following status
  - Proposed
  - Retracted
  - Accepted
  - Not Accepted
  - Expired

- The recipient could see the following Status

  - "Pending" indicated swap is being reviewed

  - "Accepted" indicates the swap was approved

  - "Denied" indicated the swap **WAS NOT** approved.

  - If a swap is denied, the recipient will see "Not Approved" in the status box. If accepted, both parties will see "Pending in the status box.

Stewart, Anne

From:	Whitney, Randy
Sent:	Thursday, June 02, 2016 12:50 PM
To:	Lorenzo, Roderick; Stewart, Anne; Sejnost-Good, Martha; Hamlin, Janet; Dunn, Collette; Blessman, Jacqueline; Brown, Chrystal; Csernyik, Patricia; Lively, Pamela Lynn; Little, Kimberly; Stahl, Daniel; Wolka, Susan; Ackley, Patricia; Brieden, Molly; Heitz, Patricia; Davis, Janice; Lorenzo, Roderick; Apigo, Steve; Marion, Charlotta; Caplat, Leslie; Czerny, Gina; Flaherty, Christine; Hoffman, Christina; Jennings, Shelley; Kanas, Sandra; King, Brenda; Lopez, Theresa; LoPiccolo, Laureen; Owens, Ashlee; Rishel, April R; Thueme, Judith; Urben, Michelle; Haezebrouck, Melissa; Quenneville, Eric; Yaldoo, Luanne; Ohara, Linda; Mccarthy, Rhonda; Andras, Phyllis; Matway, Patricia; McCart, Carol
Subject:	Web Scheduler Super User Training.

Hi all,

This email is the times and dates for super user training for Web Scheduler. The super user should be staff people who would assist other staff members as needed. Each class will be limited to 8 people so they can use the computer in the IT training room. Each area/unit should sign up at least 2-4 people if possible. The super could be Charge nurses, people working on their ladder, NCA, a good mix of staff. Please send me the name of staff and time they will attending, or if you are receiving this message let me know which one you will be attending. Please make every effort to get as many staff trained.

Dates:
Wednesday June 8, 2016 1:00-2:30pm IT Training Room
Wednesday June 8, 2016 3:00-4:30pm IT Training Room
Thursday June 9, 2016 8:00-9:30am IT Training Room
Thursday June 9, 2016 10:00-11:30 am IT Training Room
Thursday June 9, 2016 1:00-2:30 pm IT Training Room
Thursday June 9, 2016 3:00-4:30pm IT Training Room
Friday June 10, 2016 4:00AM – 5:30AM IT Training Room.

You will be getting a separate email regarding staff training.
Call with any questions.
randy