

**Stewart, Anne**

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**From:** Whitney, Randy  
**Sent:** Thursday, January 14, 2016 7:04 AM  
**To:** Heitz, Patricia; Davis, Janice; Ackley, Patricia; Brieden, Molly; Rogers, Alexis; Little, Kimberly; Lively, Pamela Lynn; Adams, Kelly; Wolka, Susan; Sejnosc-Good, Martha; Hamlin, Janet; Stewart, Anne  
**Subject:** Web Scheduler Inservice

Please hold open Monday Feb 8<sup>th</sup> from 1-5 open for a in-service on Web scheduler from the ansos staff. I realized this is not the idea time, but since they are doing this as a favor to us, we had to take what they gave us.  
Once I confirm with Ansos, I will send out an appointment.  
thanks

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## Web Scheduler and eShift...

### A Winning Combination Comparison and Overview



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## Common Features of both offerings

### Web Scheduler and eShift

- Dynamic shift requests for Work or Time Off
- Available/Open Shift filling
- Multi-staged Tiered approach
- Overtime Rules
- Scheduling Rules
- Credentialing
- PTO Management
- Retractions
- Shift Swapping
- eMail Notifications

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## eShift - Key differentiators

- ✓ SaaS offering
- ✓ Light solution for implementation – (8) weeks
- ✓ Interfaced with ANSOS One-Staff
- ✓ Open Shift Management across facilities
- ✓ Use of Posting templates
- ✓ Filling of Open Shifts primary focus
- ✓ Partial Shift filling
- ✓ Monitoring of Filled versus Available Shifts via Dashboard
- ✓ Awards Points Program available
- ✓ Global and Individual Internal Messaging component
- ✓ Incentives when using bidding component
- ✓ Reporting on Fill and Available Rates

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## Web Scheduler – Key differentiators

- ✓ Offered as on-premis or hosted solution
- ✓ (3) month implementation timeframe
- ✓ Dynamic with ANSOS – (1) Single database – no interfaces
- ✓ Comprehensive Self-Scheduling capabilities
  - Rules-based
  - Staging (tiered release)
  - PTO Management
- ✓ Core "Code" Coverage drives scheduling needs
- ✓ Full View of Unit Schedule
- ✓ Automatic "Guidance-to-Shift" coverage feature
- ✓ Compatibility with using ANSOS2Go Mobile App
- ✓ All Reporting done directly in ANSOS One-Staff

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## Sites can use both solutions effectively!

- *Web Scheduler* focuses on **Self-Scheduling**
- *eShift* focuses on **Open Shift management**

### Sites use *eShift* for:

- Central Staffing Resource
- Float Pool Shift filling across campuses
- Setting postings for Training rollout (non-Nursing events)
- Areas that are specific to Partial, staggered shifts (ED, OR)

### Sites use *WSM* in tandem for:

- All inpatient areas
- Comprehensive self-scheduling
- Employee Mobile app access
- Calendar management for overall unit schedules

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# WebScheduler

**Staff Version**

USERNAME: 140722

PASSWORD: SPRING

USER MANUAL

**Prepared By:** Pat Avery, RO Nursing Resource Office  
October 2014

## **Introduction**

WebScheduler is an on-line schedule request system that offers employees the opportunity to:

- View or print their work schedule
- Submit schedule requests for time off or to work
- To swap shifts with another employee from any PC with internet access.

## **New Features**

- **Retracting Requests:** you will be able to retract any request that has not processed (approved or denied).
- **Swaps:** you will now be able to swap shifts with a co-worker using only one request in WebScheduler. If accepted by your co-worker and then approved, both employee schedules will be updated.
- **My Schedule** – if approved for self-scheduling, you will be able enter your schedule following your unit guidelines. You will also be able to see the needs on your unit and what your peers have entered as well.
- **Weekly Schedule view** – you will be able to view the schedules of your peers (same job category).

## **Security Features**

- Your account will be disabled after 3 failed attempts. Call the person responsible for resetting WebScheduler passwords in your area to have your account re-activated (if you do not know ask your department secretary). **DO NOT Call the I.T. Help desk; they cannot assist you with this password.**
- The system will shut down after 10 minutes of inactivity. You will need to log back in to WebScheduler.
- Once a request is submitted and approved it cannot be changed or deleted by anyone. Your requests are safe from interference.

# USER MANUAL

## Accessing WebScheduler from within the Facility

**inside Beaumont Online**

Documents Education Human Resources Departments Online Tools References

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**Building relationships helps us better**  
By Ken Matzick, President & CEO

For the past year, we have been building Beaumont's relationships with our community partners. Our mission, as a not-for-profit organization, is to provide services that benefit our community.

All Departments  
Corporate Compliance  
Community Relations  
Diversity  
Emergency Center  
Human Resources  
Information Services  
Joint Commission  
Medical Library  
Nursing

Click Nursing

**inside Beaumont Online**

Documents Education Human Resources Departments Online Tools References Quality Service

► ►

**Nursing**

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nd

Welcome to the Beaumont Hospitals Nursing Web site  
It's designed to put resources at the fingertips of Beaumont nurses and to recognize their contributions to our hospitals and to the care of our patients and their families.

Corporate Nursing Resources

- [Career Opportunities](#)
- [Recognition & Awards](#)

Campus Specific

- Royal Oak
  - [Nursing Resource Team](#)
- Troy
- Grosse Pointe

Click link to WebScheduler

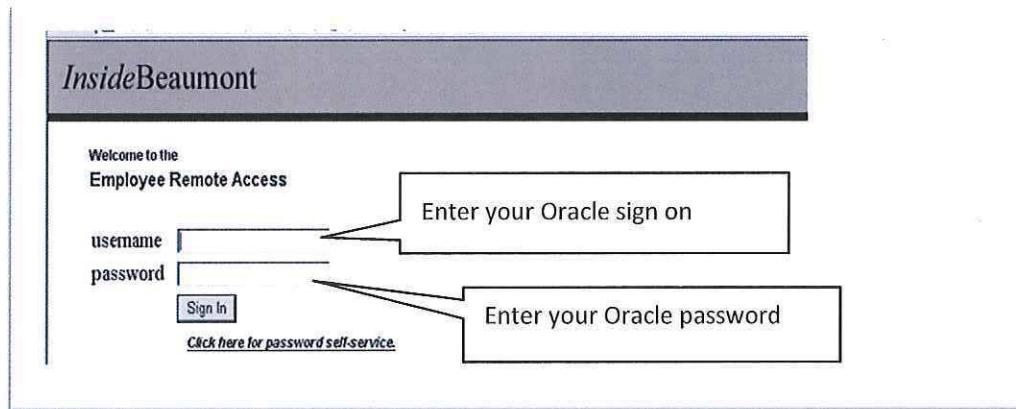
Web Scheduler  
<http://ansosweb/signin.do>

# USER MANUAL

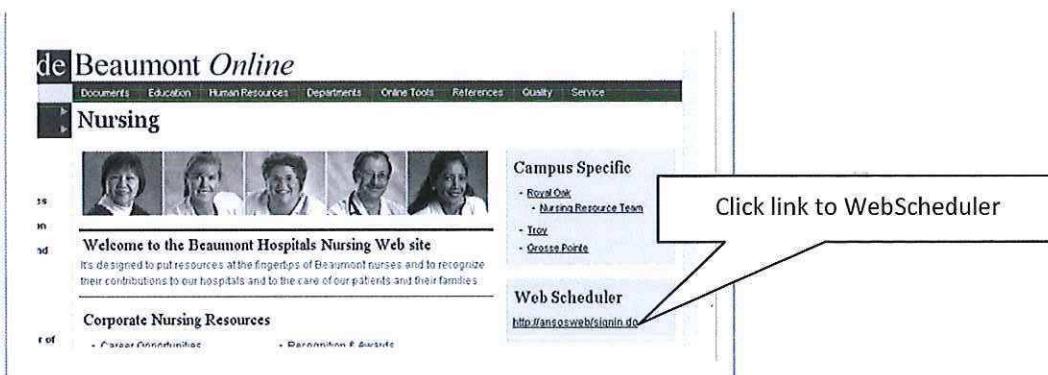
## Accessing WebScheduler from Home

Type the following web address in your browser:

**<https://employee.beaumont.edu>** (if WebScheduler is not working on your browser try Google Chrome)



**Of the listed sites, chose InsideBeaumont.**



## Signing in to WebScheduler

User Name

Password

**Sign In**

**Help**

NOTE: Web Scheduler has been optimized for use with Microsoft Internet Explorer versions 9 and 10.

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- Key in your user name
- Key in your password
- Click "Sign In"

*NOTE: The first time you sign in you will be asked to acknowledge our terms of use. Please select "I agree" and then continue.*

User Name:BPOTTER

Old Password:

New Password:

Verify New Password:

**Submit** **Cancel**

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The first time you sign in you also be required to change your password.

- Type your old password
- Enter a new password in the "New Password" box
- Verify Password
- Click on "Submit".

## My Profile

This link allows you to:

- Change your password
- View your phone and email address

*Note: If incorrect go to Employee Self-service and change your information in Oracle.*



## WebScheduler Menu Bar



### Calendar:

- This link take you to your personal calendar and is the "home screen" when you sign into WebScheduler.
- This screen displays the dates/times you are scheduled to work. If you float, it will show the unit code as well.
- Other types of activities are displayed as well, such as CTO, Conference, Requested day off, etc.
- You may see some symbols on this screen. Hovering on top of them with your mouse will provide additional information
  - - This indicates the start of a new schedule
  - - This symbol indicates a holiday

## Available Shifts (check to see if your department uses Available Shifts):

1. Click Available Shifts

**Web Scheduler**  
McKesson Workforce Management Solution Suite

Welcome, Posey, Tia C SEC AE294  
[My Profile](#) [Sign Out](#)

**MCKESSON**

Calendar Available Shifts Requests Swap Schedule Help Tuesday, October 7, 2014

Click ★ to request an available shift

Monday	Wednesday	Thursday	Friday	Saturday
1	2	3	4	11

For Area: AE BH-RO NADM

3. Click ★ on the date you want to work. This symbol only shows up on dates where there is a need.

5 ★ M:0400-1230 6 ★ M:0400-1230

2. Select the shift you like to work.

- Partial shifts are not available in Web Scheduler
- You can type comments in the box.
- Select submit and you will receive a confirmation message.
- The workshift will appear on your calendar in a pending status (Question mark symbol and the shift information has a blue background)

**Web Scheduler**  
McKesson Workforce Management Solution Suite

Calendar Available Shifts Requests

Friday

★ 3 D:0700-1530 Day 8 ?

Tuesday A scheduled

Select a workshift to submit:

Select	Workshift	Duration	Cater	Emp Skill
<input type="radio"/>	n:2230-0700	8:00		
<input type="radio"/>	N:2300-0730 8HN	8:00		
<input type="radio"/>	y:0630-1500 6:30A-3P	8:00		
<input type="radio"/>	D:0700-1530 8HD	8:00		
<input type="radio"/>	E:1500-2330 8HE	8:00		

Enter a note about the request (optional):

My assignments:  
 Workshift: M:0400-1230 Area: BH-RO:NADM

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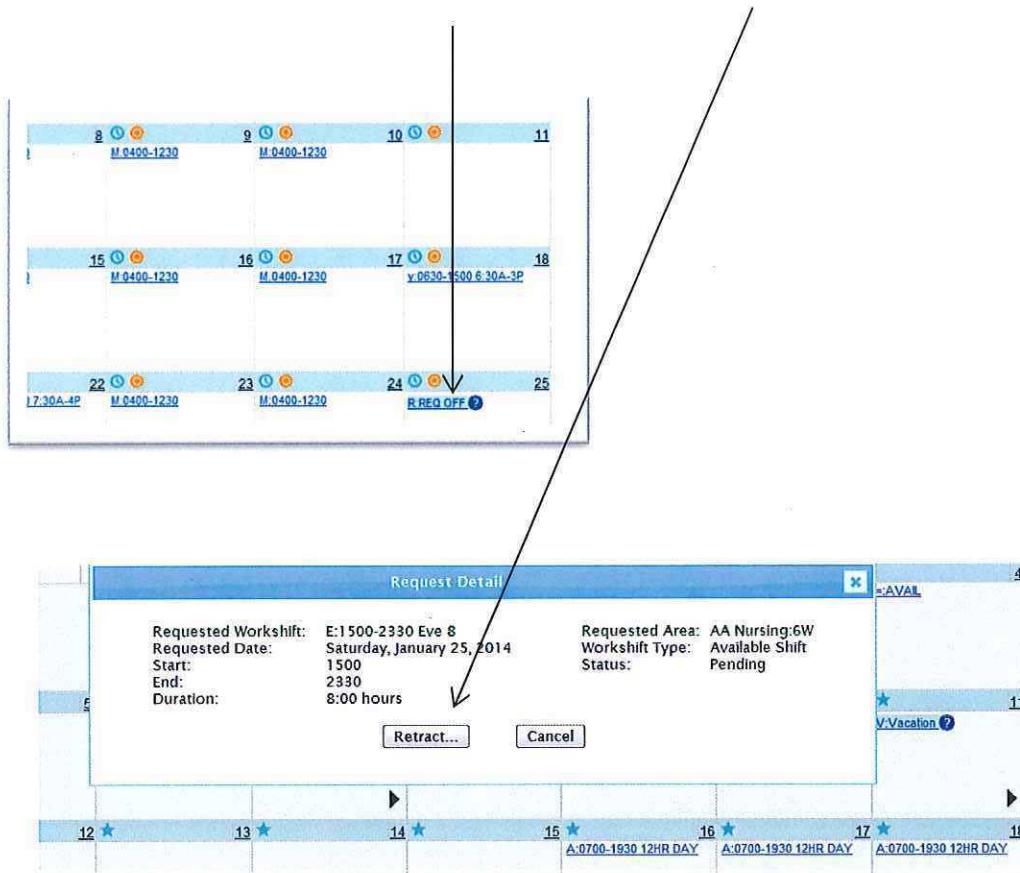
## Available Shifts (continued)

- If approved, the question mark and blue background disappear and the shift is indicated on your schedule
- If denied, the information about the shift is removed from your calendar and a black ½ diamond symbol appears on your calendar.
  - You can click on the symbol and it will provide you with details about the shift.
    - If you see a blue paper symbol, use your mouse to hover on it and you can read comments from the person who denied the request.

Type	Workshift	Area	Status	Submitted
Avail Shifts	D:0700-1530 Day 8		Denied	12/31/2013 09:06

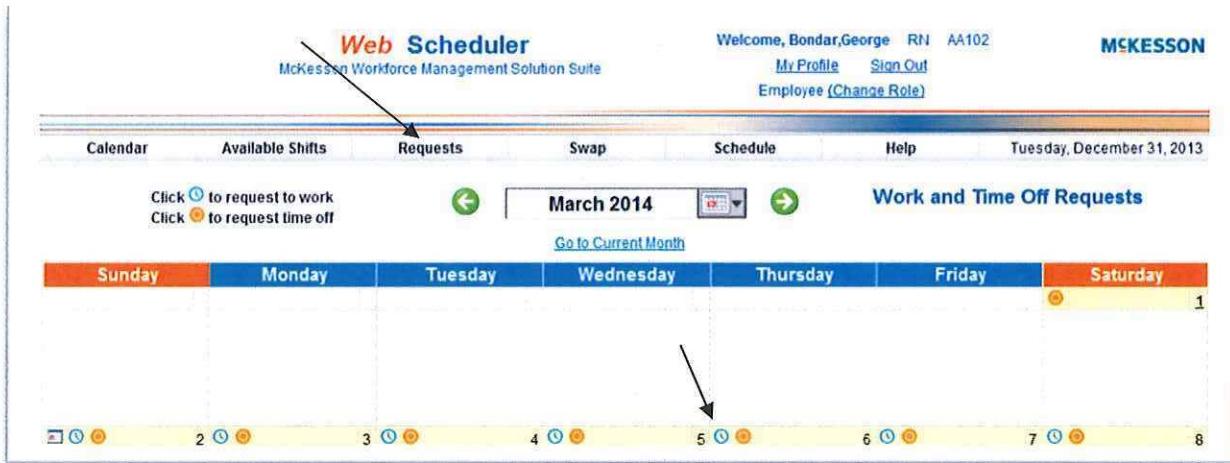
Denied by Bondar,George  
Note: Due to census, this shift is no longer needed.

- **Retract Request:** Requests can be retracted while still in the pending status. Once approved, you will NOT be able to retract.
  - To retract, click on the pending shift, select the retraction button and then submit.



## Requests – If your area uses this feature

- There are two different types of requests. To access this feature select "Requests" from the menu bar



- Basic rules:**

- Requests are made according to unit guidelines.
- Requests can be retracted while still in the pending status. Once approved, you will NOT be able to remove it from your schedule
- To retract (see page 8) click on the pending shift, select the retraction button and then submit. This works for requests to work or requests for time off

- Request to work:**

- (i) - Click to request to work.
- Select desired shift from the appropriate list and click submit.
- The request will be placed on your calendar in a pending status.



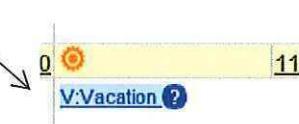
- If approved, the shift will appear on your Calendar
- If denied, the shift detail is removed and a black ½ diamond symbol appears on your calendar ►.
- Click on the symbol to see the details about the shift.
- If this icon hover on it to read comments.

Type	Workshift	Area	Status	Submitted
Avail Shifts	D:0700-1530 Day 8		Denied	12/31/2013 09:06

Denied by Bondar,George  
Note: Due to census, this shift is no longer needed.

- **Request time off (some units may not use this feature)**

-  - Click symbol to request time off
- Select desired shift from the appropriate list and click submit.
- The request will appear your calendar in a pending status. (Question mark symbol, and the shift information has a blue background)



- If approved, the request appears on your calendar without highlight or "?".
- If denied, the request is and a black ½ diamond symbol appears on your calendar.
- Click on the symbol to view details about the request.
- Click  to read comments.

Requests					
Type	Workshift	Area	Status	Submitted	
Time Off	<a href="#">V.Vacation</a>		Denied	 12/31/2013 09:20	
Denied by Bondar,George Note: Already have 3 nurses on vacation this day					

## Swaps

- This feature can be used to "trade" shifts. You cannot trade time off or give a shift away.

A screenshot of the Web Scheduler interface. The 'Swap' tab is selected. A swap request is shown for a shift on January 2nd, 2014, from 0700-1530. An arrow points from the text below to this specific shift entry.

- Click on the shift you wish to swap
- The Workshift detail box will open, and select the "Swap" button to begin your swap request.

**Workshift Detail**

Workshift:	M:0400-1230	Area:	AE BH-RO:NADM
Date:	Wednesday, October 29, 2014	Workshift Type:	Work
Start:	0400		
End:	1230		
Duration:	8:00 hours		

→ **Swap...**      **Cancel**

- The Swap Proposal Screen will appear
- Select the date you would rather work instead
- A list of staff and their work shifts eligible for trade will appear.

### Propose a Swap

#### **'our current workshift (to be swapped):**

Workshift: D:0700-1530 Day 8      Area: AA Nursing:6W  
 Date: Friday, January 03, 2014      Duration: 8:00 hours

#### **'ind workshifts you could work instead:**

Work Area: AA AA Nursing:6W

Work Date: 01/03/2014

Your schedule for 01/03/2014:

January 2014						
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	

Workshift	Area	Type	Status
D:0700-1530 Day 8	AA	Work	

Select workshift(s) to propose to swap with:

Select	DCPOS	Name	Skill	J Workshift	Duration
<input type="checkbox"/>	AA103	Gibbs,MaryAnn	R	2 D:0700-1530 Day 8 *	8:00 hours

- If you find a shift you would like to trade for, select it. You can also include comments if desired. Then click submit

**Submit your Proposal:**

Review workshift(s) you are proposing to work:

DCPOS	Name	Skill	J Date	Workshift	Area	Duration	
AA103	Gibbs,MaryAnn	R	2 01/03/2014	D:0700-1530 Day 8 *	AA	8:00 hours	<a href="#">remove</a>

\* You will be in overtime if you propose to this workshift assignment.

Enter a note about the proposal (Optional):

Can you trade

→ [Submit](#) [Cancel](#)

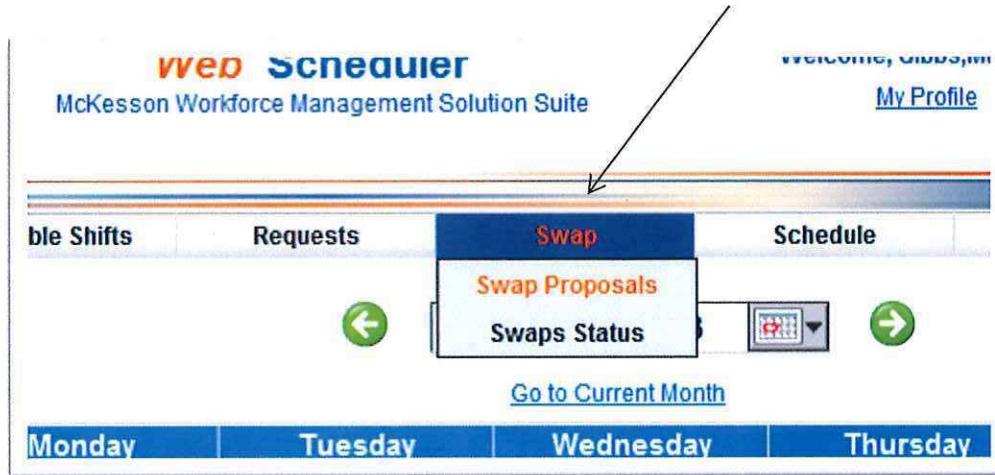
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- Your swap request will be sent to the recipient. They can choose to accept it or not.
- If accepted, the request will be sent on for approval. Your swap will be completed ONLY if approved.
- **IMPORTANT REMINDER:** You are responsible for the shift until you are notified that your swap has been approved.

**NOTE:** Only ONE of the two people involved in a swap should initiate a swap request.

- **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 of the recipient.

# USER MANUAL

**Web Scheduler**  
McKesson Workforce Management Solution Suite

Welcome, Gibbs,MaryAnn RN AA102  
[My Profile](#) [Sign Out](#)

Calendar Available Shifts Requests Swap Schedule Help

### Swap Proposals

Your Colleague: Bondar,George  
DCPOS: AA102  
Skill: R  
Job Class: 1

Has proposed to work this shift for you: 01/03/2014 D:0700-1530 Day 8 (8:00 hours) Area: AA

If you will work this shift for them: 01/03/2014 D:0700-1530 Day 8 (8:00 hours) Area: AA

Proposal sent: 12/31/2013 11:01  
Proposal note: Can you do this trade?

Enter a note about your response (Optional):

Your response:

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- Once the swap has been initiated and accepted by the recipient, both parties can check the status by selecting "Swaps" then "Swap Status".
- The Initiator could see the following Status
  - Proposed
  - Retracted
  - Accepted
  - Not Accepted
  - Expired
- The Recipient could see the following Status
  - "Pending" indicates swap is being reviewed
  - "Accepted" indicates the swap was approved
  - "Denied" indicates the swap WAS NOT approved.
  - If a swap is denied, the recipient will see "Not Accepted" in the status box. If accepted, both parties will see "Pending" in the status box.

Calendar Available Shifts Requests Swap Schedule Help Tuesday

Swap Proposals Swaps Status

Original Assignment							Potential Assignment						
Date	Workshift	Area	Dur	Status	Role	DCPOS	Name	S	Date	Workshift	Area	Dur	Status
01/03/2014	D:0700-1530 Day 8	AA	8:00	Pending	Recipient	AA102	Bondar, George	R	01/03/2014	D:0700-1530 Day 8	AA	8:00	Pending

# USER MANUAL

## Schedule

- There are two selections from this menu

The screenshot shows the top navigation bar with tabs: Available Shifts, Requests, Swap, Schedule, Help, and a date field showing Tuesday, Dec. Below the tabs is a month selector for December 2013 with a green back arrow. Underneath is a link 'Go to Current Month'. The 'Schedule' tab is highlighted in blue.

- "Weekly View" will display your schedule and the schedules of other in your skill group.

Skill R:RN									
DCPOS	Name	Sunday 12/29/2013	Monday 12/30/2013	Tuesday 12/31/2013	Wednesday 01/01/2014	Thursday 01/02/2014	Friday 01/03/2014	Saturday 01/04/2014	
AA102	Bondar,George	1 A:0700-1930	A:0700-1930	A:0700-1930		D:0700-1530	D:0700-1530	D:0700-1530	
AA103	Gibbs,MaryAnn	2		D:0700-1530					
AA105	Clark,Ann Marie	1 D:0700-1530		A:0700-1930	A:0700-1930	A:0700-1930		X:Off	
AA106	LAWSON,LISA L			D:0700-1530	D:0700-1530	D:0700-1530	D:0700-1530	D:0700-1530	
AA111	Eatman Prudence	1 X:Off	D:0700-1530	D:0700-1530					

- "My Schedule" is used for Self Scheduling

NOTE: This feature allows you to enter your PREFERRED schedule. Please be aware that management always retains the right to alter your schedule to balance the needs on the unit

- Select My Schedule to begin self-scheduling.

**Work Rules**

- +  Overtime 12 hours daily.
- +  Overtime 40 hours weekly.

**Time-Off Availability Counts:** AA Nursing:6W Skill R

**Over/Under Counts by Workshift:** AA Nursing:6W Skill R

**Over/Under Counts by Shift:** AA Nursing:6W Skill R

**Key**

- ▲ Scheduled to work where the start time or duration is non-standard
- ▲ Scheduled to work where the start time or duration is non-standard; float
- C Gray background indicates a workshift code may not be edited

**Area:** AA Nursing:6W  
A:0700-1930 12HR DAY  
C:COMMITTE  
D:0700-1530 Day 8  
E:1500-2330 Eve 8  
G:0700-1100 7a-11a  
H:Inservice

- Work Rules:
  - ✓ indicates that you are following your rules
  - ✓ Indicates you are not meeting your scheduling requirements.
- You can expand each rule by clicking the + symbol to see the detail of that rule.

**My Schedule**  
Open For Self-Scheduling  
**Work Rules**

- + Overtime 12 hours daily.
- + Overtime 40 hours weekly.

Period: 01/05/2014-02/01/2014 Area 1

S	M	T	W	T	F	S	S	S	M	T	W	T	F	S	S
5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
X			R	V											

Type your schedule codes into the grid. Expand the Key that helps you identify which codes may be used.

- "Letter" codes are case sensitive.
- If you type an unacceptable code, you will receive an error message. Simply acknowledge the message and then retype the appropriate code.
- Check Over/Under Counts by Workshift to see where your unit needs are. See the example [on next page](#).

**My Schedule**  
Open For Self-Scheduling  
**Work Rules**

- + Max 12 Hours in 1 Day.
- + Max 40 Hours in 1 Week.
- + Max 5 Workshifts in 1 Week.
- + Overtime 40 hours weekly.

Period: 11/30/2014-12/27/2014 Area to Schedule: AE BH-RO:NADM

+ My Home Area: AE BH-RO:NADM Skill S

Time-Off Availability Counts: AE BH-RO:NADM Skill S

- Over/Under Counts by Workshift: AE BH-RO:NADM Skill S

S	M	T	W	T	F	S	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S						
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
y	y	y	y			D	D	D	D	y	y		y	y	y	y	y	y	y	y	y	y	y	y	y	V	

- Negative numbers indicate a NEED
  - Positive numbers indicate that there are too many people already scheduled
  - A zero indicates that there are already enough people scheduled for the day.
- NOTE:** If all shifts are filled, you can still select the shift, HOWEVER, it will require a manager to approve the need.

# USER MANUAL

## Help

Help is a click away on how to use Web Scheduler. It is built into the Web Site. If you need assistance on any topic, select the "Help" button and it will explain how to use any feature.

