Acknowledgments

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Introduction

This section gives you a brief introduction to Centricity™ ShiftSelect®.

Overview

The GE Healthcare team partners with our clients to facilitate achievement of identified organizational goals and outcomes through creation of an effective staffing strategy infrastructure. We offer participatory workforce management solutions that are delivered quickly and generate sustainable ROI. We have always been committed to continued improvement of our software to assist clients in achieving optimal outcomes.

Centricity™ ShiftSelect® is a web-based solution that matches qualified healthcare workers with available shifts. Centricity ShiftSelect provides centralized, facility-wide access to both scheduled and open shifts throughout the organization.

Features include:

- Intuitive, easy-to-use user Interface for all staffing and scheduling functions
- World class open shift management, including:
  - Skill-based matching of shifts to staff
  - Multiple phase open shift posting
    Shifts posted in this way can be initially restricted to specific staff members by criteria such as home unit, status, and seniority
  - Customized alerts for shift awards, edits, and cancels, as well as staff ability to set notifications for preferred shifts
- Robust incentive management, including points-based ShiftRewards® program
- Credentials management and tracking
- Basic productivity management

About this Guide

This document is intended for solution administrators responsible for configuring, managing, and maintaining Centricity ShiftSelect. It contains instructions for all of the major functions an administrator might perform within the solution. It begins with an overview of the software and provides step-by-step instructions on how to use and configure the solution. If you come across
a question that is not answered in this guide, contact your GE Healthcare Services Representative.

Tip: A separate Centricity ShiftSelect Employee Guide is available for those using Centricity ShiftSelect to view and request shifts.

The best way to use the guide is to read all introductory material first, which will familiarize you with important concepts and terms in Centricity ShiftSelect. The rest of the guide serves as a training manual on how to use and configure the solution. If your security configuration differs from the standard solution, the guide will contain instructions for functions that do not appear in your solution. Access to certain parts of Centricity ShiftSelect can vary depending on how it has been set up and the type of administrative permissions you have. For example, a functional solutions administrator (FSA) may be able to create positions and skills, but not post shifts. A shift administrator may be able to create and copy shifts, but not create positions or change user passwords. If you are unclear about your access levels, contact the person in charge of Centricity ShiftSelect in your organization.

Tip: This guide is also available to you in the software under the program’s Help menu header.
Getting Started

This section contains information about Centricity ShiftSelect that is helpful to understand, such as definitions and navigation basics, before you begin using any of its functionality.

Understanding Roles

An administrator role is assigned to each administrator and determines what each has permission to do within Centricity ShiftSelect. General shift administrator functions include:

- Reviewing and approving profiles of enrolled staff for one or more Unit/Locations
- Scheduling staff
- Posting open shifts not filled by existing staff or pre-assigned float pool resources
- Reviewing information about staff that have requested the shifts you posted
- Awarding shifts to staff that have requested open shifts
- Changing passwords
- Managing employee credentials
- Generating reports

General functional solutions administrator activities include:

- Building new Unit/Locations
- Adding or editing positions and shift templates
- Configuring credentialing and other skills-based position requirements
- Configuring self-scheduling departmental permissions
- Adding new administrator roles, assigning permissions and creating administrator profiles

Functions available to each defined role are described in Permission Descriptions (on page 87). Roles can be built or edited only by a Centricity ShiftSelect functional system administrators (FSA) assigned to the Application Administrator permission role, which is granted to one or two client resources responsible for ongoing solution configuration and maintenance. Users who find they need permissions other than those currently defined for them must request assistance from their FSA to have this resolved.
Centricity ShiftSelect comes with the following administrator types already defined.

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Administrator</td>
<td>A Functional System Administrator role is responsible for Centricity ShiftSelect and is generally given to one or two people in an organization. A user with the Application Administrator role can perform any function in Centricity ShiftSelect. The name of this value should not be changed.</td>
</tr>
<tr>
<td>Shift Administrator</td>
<td>Generally, the Shift Administrator role is given to a manager for a specific department or group of departments. A user with the Shift Administrator role can schedule, create and post open shifts, award shifts, and make daily staffing decisions. The name of this value should not be changed.</td>
</tr>
</tbody>
</table>

Additional roles are defined by each organization as determined during implementation.

Some examples of additional roles are:

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shift Administrator without Pay</td>
<td>Includes any permissions associated to the Shift Administrator role as desired by the client, with the exception of the ability to view pay</td>
</tr>
<tr>
<td>Scheduler</td>
<td>Includes all of the permissions associated to creating schedules and posting open shifts, without the ability to approve profiles or award requested shifts</td>
</tr>
<tr>
<td>Supervisor</td>
<td>Includes all of the permissions associated to managing housewide daily staffing, without the ability to approve profiles or receive emails</td>
</tr>
</tbody>
</table>

**Definitions**

This section defines many of the terms and basic concepts used in Centricity ShiftSelect. Most will be familiar but are included because they might be used in a different way in Centricity ShiftSelect than you are used to.

Data, values, and other text associated with these terms are defined during the implementation process and appear on various screens in Centricity ShiftSelect. In this document, examples are noted as such, and it is understood that the values defined by your organization may be different than what is shown here.
The GE Healthcare Client Services team works with each client organization to ensure proper design and configuration of their Centricity ShiftSelect solution. Contact your GE Healthcare Client Services representative before changing or removing any high-level solution components (such as Position Types, Levels of Care, and Units/Locations).

Calendar

Calendars combine employees, shifts, and dates into several different views. You can view by employee or by single or multiple organization units. Display options on the calendars allow you tailor the information you see and how it gets displayed.

Current Experience

Users indicate their Current Experience levels when completing profiles and managers validate the accuracy of these selections when approving profiles. Current Experience is defined as the ability to perform the skill at this moment. It does not mean that the employee was able to perform this skill in the past.

Current Experience levels include:

- No experience
- Less than 1 year
- 1 year or greater

When a position is built requiring one or more skills, an employee must have experience for each required skill. Positions are generally built with the minimum skill level of less than 1 year of Current Experience, but this will vary based on the skill and the position being created.

Employee Profile

Employees must have an active Profile to view and request shifts. Profiles contain basic employee demographics and information about the employee’s home unit, level of care, FTE status, skills, and current experience.

A Profile completed by an employee during enrollment is in pending status until it is activated by a Shift Administrator (generally, the manager of the employee submitting the Profile). Employees with active Profiles can view and request open shifts in any department for which they are qualified (such as having the Skills in their profile that match those for the position used to post the shift).

For more information, see Managing Profiles (on page 23).

Profile statuses include:

- Pending
- Active
• Home Unit(s) Only  
  The profile is active. Shift visibility is limited to the employee's home unit, as listed in the profile.

• View Only  
  The profile is active. Employees can view all shifts for which they are qualified. Shifts cannot be requested.

• Inactive  
  The profile is no longer active and the employee cannot sign in to view or request shifts.

• Permanently Delete

Hospital/Facility

A hospital (or facility) is the highest-level physical location in the organization. A hospital in Centricity ShiftSelect can be an actual hospital or facility, a clinic, an outpatient center, a hospice, a section of a hospital, or even a group of buildings. A hospital will have many units (or departments) within it. Each shift is defined for a specific hospital and unit.

Job Title

A Job Title is a type of resource used to provide patient care and is used when creating and staffing shifts.

Examples of Job Titles include:

- RN, LPN, CNA, US
- Patient Care Tech, Surg Tech, Lab Tech, Pharm Tech
- CRNA, PA, Nurse Practitioner
- Paramedic
- Pharmacist

Level of Care

A Level of Care is a collection of similar departments. It is used, for example, during position setup and for reporting. Level of Care is one of the ways staff may view shifts they are qualified to request.

Examples of Levels of Care include:

- Maternal Child Health
- Surgical Services
- Med Surg
- Emergency Services
- Pharmacy Services
Position Type

A Position Type is the highest-level description of the kinds of resources configured to use Centricity ShiftSelect. Resources with many different job titles can fall within a single Position Type and these resources can see all the shifts for which they qualify that are opened to those job titles. Job titles within a Position Type, however, cannot see shifts for job titles in a different Position Type.

Note: It is recommended that, wherever possible, there be only one Position Type configured in Centricity ShiftSelect.

Examples of Position Types and associated job titles include:

- Nursing: RN, LPN
- Nursing support: Patient Care Tech, CNA, US
- Therapy: Occupational Therapist, Occupational Therapy Tech
- Pharmacy: Pharmacist, Pharmacy Tech
- Services: Housekeeper, Transporter

In the previous examples, an LPN would not see a shift for a Patient Care Tech and a CNA would not see a Transporter shift.

In situations where shifts are often offered to multiple job titles, configuration might necessitate creating a smaller number of Position Types, as in the following examples.

- Patient Care: RN, LPN, Patient Care Tech, CNA, US, Occupational Therapist, Occupational Therapy Tech
- Pharmacy: Pharmacist, Pharmacy Tech
- Services: Housekeeper, Transporter

Position

Positions are used to schedule and post shifts. The concept of Positions is central to much of Centricity ShiftSelect's functionality.

Positions consist of the following components:

- Job title
  The primary job title associated with the shift being posted, such as an RN shift. The Position may also be offered to other job titles, such as an RN shift being offered to LPNs.
- Level of care
  The level of care associated with the shift being posted, such as a Med Surg RN.
- Differentiator descriptor
  A particular type of shift within a level of care requiring more specialized skills (example, a Med Surg – Chemo RN)
- Minimum skills and/or credentials required for staff to see the shift
  The minimum experiential skills a staff member must have in order to view and request, or be scheduled for, the shift (example, Med Surg).
- Non-required skills and/or credentials
  Skills and/or credentials that would help the resource awarding a shift to make a decision between two people both meeting the minimum requirements (differentiators for selection).

Once a Position has been defined, it can be used repeatedly to schedule and fill different shifts in various departments. No shifts can be posted or worked unless Positions have been correctly configured.

A Position can allow one or many job titles to work shifts created for that Position. For example, to allow shifts to be viewed only by qualified unit clerks or nursing assistants, but not aides, then only the unit clerk and nursing assistant job titles should be used when creating the position. Skills defined as being required for an employee to view, request, or be scheduled into a shift must match the skills in the employee profile. For example, a Med Surg RN position that requires Med Surg experience is only visible to RNs who have the Med Surg skill in their active profile.

For information on building and managing positions, see the Configuration (on page 79) section related to positions.

Shift templates contain all of the components that make up an open shift and are used to quickly and easily post open shifts, including:
- Position
- Units/Locations that should have access to the shift template for use in posting the position
- Wage rate (how the shift is to be offered, such as with or without incentive)
- Restrictions (if any)
- Phases (if multiple phasing is being used)

For information on building and managing shift templates, see the Configuration (on page 79) section.

**Shift Award**

Shifts that have been requested by one or more individuals can be awarded to the employee deemed most appropriate by the Shift Administrator performing the award. Shifts can remain open to requests up to one hour before they begin (this setting is determined by the organization during implementation). Shifts can be awarded at any time after they open, but it is best to
award all shifts prior to the time they close to new requests so that requestors are clear about what is expected of them and not confused or dissatisfied by shifts that remain unawarded.

Different actions take place when a shift is awarded, including:

- The person awarded is automatically removed from any other shifts with signup periods that overlap the time period of the awarded shift.
- An optional e-mail is sent to one or more of the following people: the employee who was awarded the shift, the manager of the employee awarded the shift, and/or the manager of the unit for which the shift was posted.

For more information on awarding shifts, see Award Shifts (on page 59).

**Shift**

A Shift is a period of time to be worked on a specific unit/location and date and can be scheduled to, or requested by, staff with the required skills. Shifts are created using either default scheduling positions or open shift management templates. An example of a Shift is Med Surg RN, Unit 4E, General Hospital, from 07:00-19:00 on August 3, 2011, with $10.00 bonus.

Each Shift has a posted wage rate as defined by the organization. Shifts can be posted at fixed rates, such as regular rate of pay, premium multiplier (for example, 1.5x regular rate), or lump sum bonus. Wage rates can also be set as variable rate, which includes automatic decrements from a set maximum using either percentage or dollars.

The minimum time period for a Shift is one hour. The maximum time period for a Shift is configurable. Typical Shift lengths are 8 or 12 hours. On call Shifts cannot be set for more than 24 hours at a time.

Many people can request a Shift, but only one person can be awarded the Shift. If more than one person is needed for a single unit/location at the same time, identical Shifts can be created when posting the open needs. For more information on creating open Shifts, see the sections on Ultra PowerPost and PowerPost.

Shifts can also be posted to span two or more signup phases. The first phase can be limited to certain staff members from a specific home unit or facility, or who have a specific job title, level of care, seniority, or employee status. If no one bids on the phase, Shifts can automatically open subsequent phases to a broader group of staff members. Single and multiphase Shifts are created using shift templates containing all of the information needed to post these Shifts. For more information on creating multiphase shift templates, see the section on Scheduling Setup.

**Signup Period**

The Signup Period is the time interval during which employees can request a posted shift. At the end of the Signup Period, the shift is:

- Awarded to a single employee,
- Automatically moved to a subsequent phase, or
- Closed.

**Note:** A multiphase shift may have several Signup Periods before it is closed.

![Image](image.png)

**Note:** An administrator with the appropriate permissions can post shifts and set a future signup start date and time. Shifts posted with a future signup start date will automatically open to requests on that date and time. Shifts posted without a future signup start date and time will automatically open immediately upon posting.

**Tip:** A Signup Period cannot start before the current date and time and can last for up to 90 days. The Signup Period must end at least one hour before the actual shift start time.

A Signup Period (or phase) has one of three following statuses.

- **Pending**
  - The shift and Signup Period have been defined but the Signup Period has not yet started.
- **Active**
  - The Signup Period is in progress and employees are able to view and request the shift.
- **Closed**
  - The Signup Period has ended and staff can no longer view or request the shift.

Employees submitting requests for a shift can retract their requests until the Signup Period closes.

**Skills**

Skills are experiential levels of ability, as defined by your organization. Skills are a combination of the minimum requirements needed to view and request shifts and those that might differentiate one employee from another at the time of shift award. Skills can range from broad to specific, depending on the level of detail defined within the organization.

Examples of Skills include:

- Med Surg
- Critical Care
- Telemetry
- ACLS
- Eligible for OR call
- Scrub
- Circulate

Employees can only view and request a shift when they have the minimum Skills defined for the position used to post the shift. For this reason, it is important that Skills be defined carefully during initial setup.

The following image shows how the relationship between the Skills defined for a position and those saved in the employee staff profile determines the ability for employees to see qualified shifts.

**Target**

A target denotes a predetermined level of staffing need. For example, a schedule may show a target, or need, of 2 RNs for a particular shift.

**Unit/Location**

A Unit/Location is a unit or department within a facility and is used during position setup, for filtering shift lists based on an individual’s home department or Unit/Location of the shift, and for reporting. Each facility can contain one or many Unit/Locations and these are generally associated with a specific cost center. Staff member profiles use Unit/Locations to indicate their
home unit, but this information does not automatically exclude the individual from requesting shifts.

Examples of Unit/Locations include:

- Labor and Delivery
- Operating Room
- 4 North Medical
- Emergency Department
- Pharmacy

**Signing In**

Before you can sign in to Centricity ShiftSelect, request the Centricity ShiftSelect URL and an administrative user name and password from the appropriate person.

To sign in, complete the following steps.

1. Launch Internet Explorer from the Start menu.
2. In the browser’s address bar, enter the URL.
   
   The sign-in window appears.
3. Enter your user name and password and then click **Sign In**.

   **Tip:** The **User Name** and **Password** fields are case sensitive. If you have trouble signing in, make sure Caps Lock is turned off on your keyboard.

**Navigating the Home Page**

After signing in, the Home page appears. The Home page consists of two main areas: the top menu bar and the main contents.
Depending on your administrative privileges, you may have some or all of the menu options mentioned in this section. The following image of the Home page is a sample and may look different from the way your application is configured.

- **Home** - takes you to the Home page from wherever you are in the solution
- **Role** - your current role

**Tip:** If you have additional roles or types of access, you can change them from this menu.

- **Calendars** - gives you options for scheduling and staffing calendars, and some options for managing individual or groups of shifts
- **ShiftRewards (optional ShiftSelect module)** - set up the reward solution (such as assigning points to various transactions or assigning point values for various rewards). Reports can be run about the rewards solution (such as a summary of points accumulated for each staff member).
- **Reports** - shows you available reports (such as usage, shift activity, and payroll)

**Tip:** Reports can be reviewed online or saved as comma separated value (CSV) files to open in Microsoft Excel or as Portable Document Format (PDF) files.

- **Interfaces** - shows you a list of interfaces configured for your organization
- **Configuration** - shows you a list of build options available to you

**Example:** The Configuration menu includes the option to create or edit announcements that appear in the Announcements section of the Home page.
Search - takes you to a screen where you can search for employees, groups of employees, and shifts
Quick Links - shows you a list of shortcuts to common locations
Help - takes you to a list of available documents and ways to get help
Logout - signs you out of Centricity ShiftSelect

Note: It is important to use the buttons and links provided in Centricity ShiftSelect for navigation. Because Centricity ShiftSelect is not housed on the internet, but rather on secure servers, it only uses the internet as a "transmission portal" for information. Because of this, the browser's navigation buttons, such as back arrow, can result in unexpected results or behavior.

b. Informational sections allow you to collapse and expand information to quickly access points of interest. To expand or collapse a section, click on the little arrow next to the section name. The following sections are available.

Quick Links - provides a way to quickly view information about positions, shifts, and employees, and enables you to assign multiple employees to their primary shifts or scheduling groups.

Tip: There is also a Quick Links menu option at the top of the Home page for easy access to this functionality.

My To Dos - enables admins to see what actions need to be taken on specific items, such as shifts with requests to be awarded or non-duty requests for review
My Shift Summary - enables a quick view of the status of shifts in departments for which the admin has responsibility
Shift Rewards Summary - if Shift Rewards points are being used, it provides a quick view of the status of earned points in departments for which the admin has responsibility

c. The Announcement section displays announcements created by functional solution administrators, shift administrators, and other managers. When employees sign in, they are able to see general announcements meant for everyone and department-specific announcements that have been posted by the department manager/admin.

For information on how to create and edit announcements, see Creating and Editing Announcements (on page 29).

Navigating Lists

Specific details about how functionality works are included in the sections that cover those features, but there are general principles that govern all lists. Click the appropriate button or menu item to open the list you are interested in using.
Example: Click the **All Posted Shifts** button

![All Posted Shifts:](image)

Shift lists can be sorted by clicking the column header. Clicking the column header again sorts the list in reverse order.

A list with more than a predefined number of items in it (usually 50 per page) appears with page navigation buttons at the top of the screen.

### Navigating Calendars

Display options are available for calendars. It is suggested that display options be set prior to adding or changing information to save time.

**Employee Calendar**

![Employee Calendar](image)
Matrix Calendar

Display Options

Unit/Location:
ONC-ML-CRS Administr

Number of Weeks:
6 Weeks

Submit

View Shifts As:
- Start/End Times
- Shortcuts

- Show floats' non-unit shifts
- Show employee requested shifts

Job Titles
Select All / None
- Care Attendant

Employee Columns
- Weekly Totals
- FTE Status
- Hire Date
- Employee Status
- Primary Shift

View Totals
- Actual
- Target
- Difference
- Working
- On-Call
- Non-Duty

View Productivity
- Volume

12 Hours
- Day
- Evening
- Night
### Unit Calendar

#### Display Options

**Display Mode**
- Calendar
- List

**Shift Status**
- Filled
- Requested
- Not Requested

**Shift Types**
- Work Shifts
- On-Call
- Non-Duty

**Shift Period**
- Day
- Evening
- Night

**Job Titles**
- Select
  - All
  - None
  - Clinician
  - RN
  - RN 12MO
  - RN-Casual 30

**Display Shifts As**
- Start/End Time
- Shortcuts

#### Coverage Display Options
- Employee List
- Last Minute Availability
- Legend
- Shift Subtypes Legend
Managing Profiles

When employees enroll in Centricity ShiftSelect, their information is contained in their profiles. A profile remains in pending status until the status is changed by an administrator. This section describes the process for approving profiles and options available for ongoing profile management.

Approve Profiles

To approve profiles, complete the following steps.

1. Click **Staff profiles awaiting approval**.

2. On the profile list page, click the employee whose profile you want to approve.

3. Review and, if needed, make changes to the profile, including from the Profile Options section.

   **Tip:** See the following subsection for information about the Profile Options.

4. When finished, click **Save**.
Profile Options

Note: Make sure to click Save if you make any changes.

a. Personal Demographics

This is the initial profile page you see. Confirm that the Position information is correct.

Tip: Employees can update their contact information and Last Minute Availability options after approval.

b. Skill Competencies

This option displays the skills list. Confirm that the selections are accurate and update any skills as needed.

Tip: Skill information cannot be edited by employees after approval.

c. Employee Credentials

If credentialing is being used by the organization, this option displays the credentials the employee selected.
**Tip:** Only certain fields can be edited by the employee after profile approval. If any credentials are missing:
1. Select the credential from the **Select a Credential** drop-down menu.
2. Click **Add**.
3. Enter the credential's information.

![Credential Table]

- **d. Submit New Photo**
  This option allows you to upload a photo for the employee profile. Browse to photo’s location and click **Upload**.

- **e. Change Password**
  This option allows the admin user to change the employee’s password.

- **f. Change Status**
  This option enables the admin user to update the profile status for this employee. Select **Active** with no effective date to make profile active immediately. The employee will receive an email notifying them of the profile approval and that they can now sign in to Centricity ShiftSelect.

![Change Status]

- **g. Change Professional Details**
  This option allows you to enter future changes to an employee’s profile (such as a transfer to another unit).
  Select the Effective Date and make the relevant changes to the details.
Tip: Fields being updated change to blue text.

h. Adjust/Redeem ShiftRewards
   This option is only available if ShiftRewards are being used and allows you to manually adjust ShiftRewards points for this employee.

i. View User's Calendar
   This option allows you to view the employee’s calendar.

j. View User's Shifts
   This option allows you to view the employee’s requested and awarded shifts.

k. Action buttons

   Note: Make sure to click Save if you make any changes.
Change Profile Status

Click the **Change Status** option to change the current status.

The following statuses are available:

- **Pending** - profile is submitted and is waiting for admin approval
  - **Tip:** The employee with this status will not be able to sign in.

- **Active** - profile that has full rights to view and request shifts
  - **Tip:** The employee with this status will not be able to sign in.

- **Home Unit(s) Only** - profile that has rights to view and request shifts in the employee’s home unit only
  - **Tip:** This right is generally reserved for functional solutions administrators.

- **View Only** - profile that can view, but not request, shifts

- **Inactive** - profile that has no rights to view or request shifts
  - **Tip:** The employee with this status will not be able to sign in.
  - **Note:** Changing a profile status from Active to Home Unit Only releases any user shift requests and awards on shifts outside the home unit.

- **Permanently Delete** - this action removes a profile completely from Centricity ShiftSelect

  - **Tip:** Changing a profile status from Active to either Inactive or View Only releases all user shift requests and awards.

  - **Tip:** Changing a profile from Active to Pending has no impact on requested or awarded shifts.
Change Password

Click the Change Password option to change an employee's password.

![Reset Password Form]

Enter the new password in the two fields and click Save.

**Tip:** Be sure to notify the employee of the new password.

Edit Profiles

Administrators can change an employee's profile at any time (regardless of profile status). Access a profile via the Search link on the Home page or by clicking the View Staff Profiles link from the Quick Links menu on the Home page).

Once a profile has been approved, employees can only change their demographic information and reset their passwords. Any changes to professional information, such as department, employee status, job title, skills and credentials must be made by an administrator.
Creating and Editing Announcements

You can create global and department-specific announcements. This section explains how you can easily create announcements using the Edit Announcements feature.

Create an Announcement

To create an announcement, complete the following steps.

1. Navigate to Configuration > Edit Announcements.
   The Announcements page appears.
2. At the bottom of the page, click the Add button.
3. Enter the desired information.
   - User Type - the type of user who will see the announcement
   - Unit Location - if the User Type is set to Staff, select All or the required units

Tip: To select multiple units, press Ctrl while clicking.
   - Announcement Start Date - the date the announcement will appear
   - Announcement Text - enter the text and use the editor features to customize the display

4. Click Save.
Edit an Announcement

To edit an announcement, complete the following steps.

1. Navigate to Configuration > Edit Announcements.
   The Announcements page appears.
2. Click the announcement you would like to edit.
3. Make your changes and click Save.

Tip: Adding an announcement to an already existing announcement will result in the original announcement being moved to the inactive list.

To view and reactivate an inactive announcement, complete the following steps.

1. Navigate to Configuration > Edit Announcements.
   The Announcements page appears.
2. Click View Inactive/Past Announcements.
3. Click announcement you want to reactivate.
4. Make your changes, as needed, and click Save.
   This action will reactivate the announcement and move the original one to the inactive list.

Preview an Announcement

After completing an announcement, it is a good idea to preview it to see what it will look like when viewed on the Announcements page.

1. Navigate to Configuration > Edit Announcements.
   The Announcements page appears.
2. Find the announcement you want to preview and click its **preview** link.

A new preview box appears.

**Tip:** Any global announcements will display above department-specific announcements.
Printing

Reports, schedules, and employee information are often printed. This section gives you information about printing in Centricity ShiftSelect.

Print a Unit or Multi-Unit Calendar

To print a Unit or Multi-Unit calendar, complete the following steps.

1. Navigate to Calendars > Unit Calendar or Calendars > Multi-Unit Calendar.
2. Use the Display Options and the calendar and organization unit pickers to view the calendar to print.

Tip: The schedule will print exactly what is displayed, so be sure to remove any options (such as hire date, employee status, etc) you do not want printed.

3. Click Print.
4. In the print options dialog, make any desired changes and click Generate PDF.
5. Open or save the PDF file.

Tip: On a daily view of a Unit calendar, shift times are shown horizontally across the page.

Tip: On a daily view of a Multi-Unit calendar, shift times are shown vertically. Additionally, note the greater than and less than symbols that indicate the shift extends past or begins before the display option setting.

<table>
<thead>
<tr>
<th>Day</th>
<th>0700-1500</th>
</tr>
</thead>
<tbody>
<tr>
<td>Census:</td>
<td>32</td>
</tr>
<tr>
<td>RN: 1 of 2</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Federer, Roger 07:00-19:00 &gt;</td>
</tr>
<tr>
<td></td>
<td>Open 07:00-15:00</td>
</tr>
<tr>
<td></td>
<td>Open 07:00-15:00</td>
</tr>
<tr>
<td>Eve</td>
<td>1500-2300</td>
</tr>
<tr>
<td>Census:</td>
<td>32</td>
</tr>
<tr>
<td>RN: 1.50 of 1.50</td>
<td></td>
</tr>
<tr>
<td></td>
<td>&lt; Federer, Roger 07:00-19:00</td>
</tr>
<tr>
<td></td>
<td>Williams, Venus 15:00-23:00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Night</th>
<th>2300-0700</th>
</tr>
</thead>
<tbody>
<tr>
<td>Census:</td>
<td>0</td>
</tr>
<tr>
<td>RN: 0 of 1</td>
<td></td>
</tr>
</tbody>
</table>
Print a Matrix Calendar

To print a Matrix calendar, complete the following steps.

1. Navigate to **Calendars > Matrix Calendar**.
2. Use the Display Options and calendar picker to view the pending or approved calendar to print.

**Tip:** The schedule will print exactly what is displayed, so be sure to remove any options (such as hire date, employee status, etc) you do not want printed.

3. In the Select a Function drop-down menu, select **PDF View**.
4. In the print options dialog, make any desired changes and click **Print**.

**Note:** If you receive an Internet Explorer warning, you will be required to download the file before you can print to PDF. Contact your IT department to make Centricity ShiftSelect a trusted site, which will prevent this warning from occurring in the future.

5. Open or save the PDF file.

Print a Daily Staffing Sheet

To print a daily staffing sheet, complete the following steps.

1. Navigate to **Calendars > Matrix Calendar**.
2. Use the Display Options and calendar picker to view the pending or approved calendar to print.
3. In the Select a Function drop-down menu, select **Daily Staffing Sheet**.
4. In the print options dialog, make any desired changes and click **Print**.
5. Open or save the PDF file.

**Note:** In some cases when the **Job title then start time** sort is used, shifts may display for times that are not consistent with headers.

Print Reports

Access to available reports is governed by solution permission. A separate document is available that reviews each report in detail. To print reports, complete the following steps.

1. Navigate to **Reports > select a report**.
2. Set the report display options as desired and click **Generate Report**.
Note: Each report has different display options.

*Example: Employee Commitment Report display options*

<table>
<thead>
<tr>
<th>Report Type:</th>
<th>Employee Commitment Report ▼</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unit/Location or Hospital:</td>
<td>All Unit/Locations ▼ change</td>
</tr>
<tr>
<td>Job Title:</td>
<td>All Job Titles ▼</td>
</tr>
<tr>
<td>Employee Status:</td>
<td>All Employees ▼</td>
</tr>
<tr>
<td>Group By:</td>
<td>None ▼</td>
</tr>
<tr>
<td>Sub-Group By:</td>
<td>None ▼</td>
</tr>
</tbody>
</table>

- Include title and criteria as a header row in CSV file?

Generate Report

3. After the report data appears, click **CSV** or **PDF View**.
4. Open or save the CSV or PDF file.
Managing Shifts - Basic Scheduling

Shifts may be scheduled by using manager core scheduling or self-scheduling functionality. This section outlines the process for manager core scheduling.

**Note:** To begin using scheduling, a default scheduling position must be set up. For more information, see [Scheduling Setup](on page 95).

**About the Matrix Calendar**

The Matrix calendar is used to create shifts for employees and to approve schedules, which publishes the shifts to employee and manager calendars.

Open the Matrix calendar by navigating to **Calendars > Matrix Calendar**.

**Dates**

Click (calendar image) to choose a date within the desired pending scheduling period.
Pending Schedule

A schedule in pending status allows the manager to work on the schedule without staff being able to see it.

Select a Function Menu

The following options are available in the drop-down menu.

- **Daily Staffing Sheet** - print or display all staff for the specified days, including job title, employee, shift types, and hours.
  
  **Tip:** The schedule’s status must be Approved to print this report.

- **PDF View** - print or display the schedule
  
  What displays on the screen (and is printed) is controlled by how the Display Options are set.

  **Tip:** The schedule’s status can be either Pending or Approved to print this report.

- **Save Default Baseline** - saves a master version of a schedule of shifts that are used from scheduling period to scheduling period

  **Tip:** The schedule’s status can be either Pending or Approved to save as a default baseline.

- **Load Default Baseline** - loads a master version of a schedule of shifts previously saved then retrieved to populate a new blank schedule.

  **Tip:** The schedule’s status can be either Pending or Approved to load a default baseline.

  **Note:** Shifts on a previously-saved Default Baseline schedule will not overwrite any shifts already existing on a pending schedule, such as non-duty requests or active shifts that have been awarded via open shift management or actively scheduled via the unit or multi-unit calendar. A previously-saved Default Baseline cannot be loaded onto a schedule that has been set to Approved status.
• Approve Self Schedule Shifts - enables the manager to approve all requested self-schedule shifts with a single click

**Display Options**

Set desired display options. If you make changes, click **Submit** to see the changes reflected on the calendar.
The following display options are available.

- Unit/Location - one or more, depending upon user solution permissions
- Number of Weeks - the number of weeks to display

**Tip:** The default is the maximum number of weeks in the scheduling period.
• View Shifts As - display shifts as start/end times (such as 0700-1500) or as shortcut codes (for example, 0700-1500 might be displayed as D.

Tip: For information about shift shortcut codes, see Scheduling Setup (on page 95).

• Show floats' non-unit shifts - show either the entire schedule for staff from other units who are working in this unit or only those shifts being worked here

• Show employee requested shifts - show shifts that employees have requested

• Job Titles - show one or more of the available job titles (first one displays as default)

• Employee Columns - whether to show total number of hours scheduled for each week, employee FTE status, hire date, employee status, and primary shift

Tip: For information about primary shifts, see Scheduling Setup (on page 95).

• View Totals - select what to show on the calendar

  • Number of staff scheduled (Actual)
  • Number of staff needed (Target)
  • Difference between the two
  • The type of shift (Working, On-Call, Non-Duty)

Tip: This can be helpful when trying to create an on-call schedule separate from the working shifts or when trying to assess the impact of giving more than one staff member days off.

  • Display scheduled totals in 4, 8 or 12 hour increments
  • Display Days, Evenings, or Nights (alone or in combination).

• View Productivity - show volume (census) information when scheduling (permission-based)

Quick Shifts

Click to expand the Quick Shifts section to show the shifts used for scheduling.

For information about adding quick shifts and adding shifts to employees, see the next two sections: Add Quick Shifts (on page 41) and Add Shifts to Employees (on page 41).
About the Ultra PowerPost Screen

The following information appears on the Ultra PowerPost screen.

a. The job titles (selected from the Display Options) and the status of shifts for those job titles (Posted or Not Posted)
b. The totals to be displayed on the screen
c. The number of shifts to post and the difference (the difference between what has actually been scheduled and set targets)
d. The number of shifts to post for each start and end time (based on set targets and what has already been scheduled)
e. The shift template for each shift to post
Add Quick Shifts

To add new quick shifts, complete the following steps.

1. In the Quick Shifts section (click if needed), scroll down to the bottom.
   
   ![Quick Shift Example]

   2. Update the fields with the appropriate information.

   3. Click **Add Quick Shift**.
      
      The new quick shift appears in the list of shifts.

   **Tip:** To delete a quick shift, click the X next to it.

Add Shifts to Employees

To add shifts to employees, complete the following steps.

1. Click the shift you would like to use to begin scheduling.
   
   The shift turns dark green.

2. Click in a cell that corresponds with the employee and schedule date.
   
   The shift is scheduled for that employee.

   **Tip:** The Actual hours and the Difference value (and the cells' colors) update accordingly.

3. To remove a shift you scheduled, repeat steps 1 and 2.
**Note:** The shift selected in the Quick Shifts section must be the same as the shift you are removing from the employee.

4. To add another shift to the same employee, double-click the employee’s name to insert a new row and then repeat steps 1 and 2.

5. Continue to create the schedule.

6. Click **Save**.

**Tip:** Click **Save** often.

### Create a Default Baseline

A default baseline enables the manager to indicate which employees work specific shifts on specific days of the week (such as every other weekend or every Wednesday) and to save the baseline to be used every scheduling period. This saves time for the manager who otherwise would have to start from a blank schedule each time.

To create a default baseline, complete the following steps.

1. For each employee, add the shifts they normally work.

**Tip:** For information about adding shifts, see **Add Shifts to Employees** (on page 41).

2. From the **Select a function** menu, select **Save Default Baseline**.

   A warning appears indicating that any previously saved default baseline schedule will be overwritten by saving this new baseline.

3. Click **OK** to continue.

4. When finished, click **Back to Schedule**.
Load a Default Baseline

To load a default baseline onto a blank schedule, select Load Default Baseline from the Select a function menu. Your baseline populates the previously blank schedule, allowing changes to be made for that upcoming scheduling period.

Approve a Schedule

To approve a schedule, complete the following steps.

1. When the schedule is complete, click Approve.
   The schedule’s status changes from Pending to Approved.

Note: Approving the schedule publishes the shifts to the Employee and Unit Calendars.

2. In the warning message dialog, click OK.

Note: If a unit does not have the schedule completed for employees in every job title on that unit, clicking OK to this message will publish either a partially completed schedule or, in the case of no data having been entered, a blank schedule. Clicking Cancel stops the approval process and returns you to the Pending schedule.

Tip: In the event you inadvertently approve a blank schedule for one or more employees, you can go to the Unit Calendar for the appropriate date range, display the Employee List, set display options for the appropriate number of shift hours, and drag the employee on top of the job title for each date you want to schedule.

If the email notification functionality is enabled for your organization, employees with email addresses in their profiles will receive emails indicating they can see their schedules via the employee’s My Calendar.

Once the schedule has been approved, open shifts can be posted according to defined targets using the Ultra PowerPost functionality (see Posting Open Shifts with Ultra PowerPost (on page 43)).

Post Open Shifts with Ultra PowerPost

Ultra PowerPost is a quick way to post open shifts after approving a schedule. It is also used to post self-scheduling shifts prior to schedule approval for those areas using self-scheduling.

1. Access the approved schedule for which you would like to post open shifts.
2. Click Ultra PowerPost.
3. Set the desired Display Options.
Tip: The shift times will populate according to the number of shift hours set via display options (such as 4, 8, or 12).

4. In each job title’s Template column, select an open shift template from the drop-down menu.

5. Enter the Start and End time for the shifts you want to post with that template.

6. Enter the number of shifts to post for each day.

   If the Difference column visible, the values will decrement. Reaching your target results in display of a white field with a dash.

7. If needed, click Add to add more rows.

8. When finished, save your templates as a group for future use. From the Select a function drop-down menu, select Save template as.

Note: If you receive an Internet Explorer warning, you will need to download the file before you can save your template. Contact your IT Department to make Centricity ShiftSelect a trusted site, which will prevent this warning from occurring in the future.

9. Enter the name for the template and click OK.

10. In the confirmation dialog, click OK.

11. If you would like these shifts to open up on a later date or different time, or would like to add contact information, update the appropriate fields before posting the shifts.
12. Click **Post Shifts**.
   A list appears with the shifts about to be posted.

**Tip:** Shifts can be posted at any time using Ultra PowerPost once a schedule has been approved.

**Note:** Open shifts cannot be posted for dates in the past and the sign-up date/time cannot be prior to the current date/time.

13. Click **Post**.

14. In the confirmation dialog, click **OK**.

   The open shifts status for the job titles are changed to Posted.

15. Click **Back to Schedule** to leave Ultra PowerPost and return to the schedule.

### Check for Conflicts

Centricity ShiftSelect does not allow employees to be scheduled into two working shifts at one time. This is not an issue when attempting to schedule employees for non-duty shifts that overlap one they are already working, but it can be an issue if the employees have working shifts on a pending schedule and working shifts that are already active. A conflict check runs against shifts on a pending schedule and those that might have been previously posted as open shifts and awarded, or scheduled via the unit or multi-unit calendar. A conflict check automatically runs when the schedule is approved. In addition, a manager can initiate a conflict check at any time. Any conflicts must be resolved prior to a schedule being successfully approved.

1. To run a conflict check on a pending schedule, click **Validate**.
   A confirmation message displays the results of the conflict check.

2. Click **Done** to return to the Matrix calendar.

### Approve or Deny Non-Duty Requests

If the organization allows employees to place requests for time off using the Employee Calendar, these requests will display on the Matrix calendar as non-duty requests (NDRs).
NDRs appear on the Matrix calendar as a red box.

Rest the mouse pointer over the shift to see the request details if desired.

1. Double-click the NDR.
   Detailed information appears about the request, along with a history of other non-duty requests the employee has made.
2. Enter a comment (if desired).
3. Click **Approve** or **Deny**.

Approved NDRs change to active non-duty shifts and display as such. Denied NDRs are removed from the display.

**Note:** Both approved and denied NDRs display to the user when they access their Employee Calendar.
Managing Shifts - Self-Scheduling

Shifts may be scheduled by using manager core scheduling or self-scheduling functionality. This section outlines the process for self-scheduling using the Matrix calendar.

**Note:** To begin using self-scheduling, it must first be configured. For more information, see [Self-Scheduling Setup](on page 101).

**Post Self-Schedule Shifts with Ultra PowerPost**

Ultra PowerPost is used to post self-scheduling shifts prior to schedule approval for those areas using self-scheduling.

1. On the Matrix calendar, click ![calendar image] to choose a date within the desired pending scheduling period.
2. Set the desired Display Options.
3. Click **Ultra PowerPost**.
4. Select the appropriate self-scheduling template for each shift to post.

   ![Shift template selection]

   **Tip:** To remove a shift template for shifts you do not want to post, click the **Remove** link that corresponds to the shift you want to remove.

5. If needed, edit the **Start** and **End** times to make them correspond to the desired shift times.
6. Enter the number of shifts to post in the cells.
7. Continue to create the shifts to be posted.

**Tip:** As you create self-scheduling shifts, the Difference column changes to indicate whether set targets have been exceeded (too many staff = yellow), have been met (the right number of staff = white), or have not yet been met (not enough staff = red).

## Create a Default Self-Scheduling Template

A default self-scheduling template enables the manager to create a group of self-scheduling shifts and to use them every schedule period. This saves time for the manager who otherwise would have to start from a blank self-scheduling posting calendar each time.

To create a default self-scheduling template group, complete the following steps.

1. From the **Select a function** drop down menu, select **Save template as**.

   **Note:** If you receive a pop-up blocker warning, click the warning to allow the content. Contact your IT Department to make Centricity ShiftSelect a trusted site, which will prevent this warning from occurring in the future.

2. Enter a name for your template and click **OK**.
3. If you make additional changes to shifts used in this scheduling template, select **Save template** to save your changes to the existing template.
4. When finished, click **Back to Schedule**.

## Post Self-Schedule Shifts

When you are ready to post self-scheduling shifts from the Ultra PowerPost page, complete the following steps.

**Tip:** Before you can post self-scheduling shifts, you must first choose templates for all job titles displayed.

**Tip:** When display options are set for 8 hours, the first template displayed is for Day shifts, the second is for Evening, and the third is for Night. If shifts are displayed as 12 hours, the first template displayed is for Day shifts and the second is for Night.

**Tip:** You cannot post self-scheduling shifts in the middle of a scheduling period. The shift post date must be before the first schedule date.

1. If needed, load a different self-scheduling template.
   - From the **Select a function** menu, select the correct template.
The System Calculated option calculates the shifts to be posted based on what has already been added to the schedule.

2. Click **Post Shifts**.

The Post Self Scheduling Shifts dialog appears indicating the number of shifts to be posted for each template in the group.

![Post Self Scheduling Shifts dialog](image)

3. When ready, click **Post**.

**Note:** Only click the Post button once. Clicking more than once or double-clicking could result in double the number of shifts being posted.

4. In the confirmation dialog, click **OK**.

The Ultra PowerPost page now displays a message alerting you that shifts have been posted.
Search for Self-Scheduled Shifts

To search for self-scheduled shifts that have been posted, complete the following steps.

1. Navigate to the Search page and find the Search Self Schedule Shift section.

2. Enter the desired search criteria in the fields and click Search.

   A list of shifts appears. The number of needs/awards/requests can also be viewed from this list.

   **Tip:** Shifts can be inactivated individually by double clicking the shift.

Approve or Deny Self-Scheduled Shifts

Requested shifts display on the Matrix calendar as dark green and underlined. Self-scheduled shifts can be approved individually or as a group. Approved self-scheduled shifts are active upon approval, even if the schedule is still in pending status. Self-scheduled shifts can also be approved after the schedule has been approved.

To approve or deny a self-scheduled shift, complete the following steps.

**Individual Approval**

1. Find the requested self-scheduled shifts that you want to approve.
2. Double-click the shift you want to approve or deny and then click **Approve** or **Deny**.

**Multiple Approvals**

1. To approve all requested self-scheduling shifts, select **Approve Self Schedule Shifts** from the **Select a function** drop-down menu.
2. In the confirmation dialog, click **OK**.

**Note:** Approved self-scheduled shifts appear as white and underlined.

**Edit Self-Scheduled Shifts**

To change the details of a shift, complete the following steps.

1. Double-click the shift you need to change.

   The shift dialog appears.

2. Click the **Edit this Shift** button found near the bottom of the dialog.

**Tip:** You may need to scroll down to find the button.

3. Make the required changes and then click **Save**.
Daily Staffing

Approving schedules in the Matrix calendar publishes shifts to employee and manager calendars. Many managers find it most efficient to manage shifts from the Unit and Multi-Unit Calendars once a schedule has been approved. This chapter covers navigation and basic display options of the Unit and Multi-Unit calendars and explains shift management using these calendars.

About the Multi-Unit Calendar

Navigate to Calendar > Unit Calendars or Calendar > Multi-Unit Calendar.

Unit Calendar

The Unit Calendar provides a view of a single department and can be displayed as 1 day, 3 days, 1 week, or 2 weeks.
Multi-Unit Calendar

The Multi-Unit Calendar provides a single day view of multiple departments (or just a single department). Users with Multi-Unit Calendar Configuration permission can create one or more views of their departments.

For information about setting up a multi-unit view, see Set Up a Multi-Unit Calendar (on page 55).

Explanations for both Calendars

- choose a different date for the calendar

Display Options:

Tip: Click Submit after making updates to see the changes take effect.

- Display Mode - toggles between a calendar and list display
- Shift Status:
  - Filled - scheduled and/or awarded
  - Requested - shifts with requests
  - Not Requested - open shifts
- Shift Types - the kinds of shifts to display
• Shift Period - the time periods to display

**Tip:** If 12 Hours is selected as a Coverage Display Options, Evening will not be selectable.

• Job Titles - the types of job titles to display
• Display Shifts As - how the shift times appear

**Tip:** If shortcuts are not defined, shift appear with start and end times.

Coverage Display Options:

• Coverage Totals - total the coverage by Working, On-Call, or Non-Duty shifts
• Hours drop-down menu - display totals in 4-, 8-, or 12-hour increments
• Other details to display, such as volume (census), targets, and summaries

**Note:** The previous screen shots appear with all Coverage Display Options selected.

Employee Totals - view the employees in the departments who you have access to

**Tip:** Click ▶ to expand the departments and job titles to view the list of employees.

Last Minute Availability - for information, see Last Minute Availability (on page 73)

Legend and Shift Subtypes Legend - shows a visual cue with how items on the calendars appear

**Set Up a Multi-Unit Calendar View**

The Multi-Unit Calendar provides a daily view of one or more departments. Departments that can be displayed in the Multi-Unit Calendar are limited to those that a manager has permission to access. Views of the calendar are customized for each user.

To create a view of the Multi-Unit Calendar, complete the following steps.

1. Navigate to **Configuration > Hospital/Unit(s) Configuration > Multi Unit/Locations Group**.

2. In the empty field under Multi Unit Group Configuration, enter a name for your calendar or select a previously-created calendar from the drop-down menu.

3. From the drop-down menus in the row 1, select the departments to include in the calendar.
**Tip:** The order you use to select the departments when you create the view is the order they will appear in on the Multi-Unit Calendar page.

4. After adding all the departments to display, click **Save**.
5. In the confirmation message, click **Done**.

To display the new Multi-Unit Calendar view, complete the following steps.

1. Navigate to **Calendars > Multi-Unit Calendar**.
2. From the calendar view drop-down menu, select the new calendar.

The screen refreshes to show the new calendar.

### Manage Shifts from the Unit Calendars

This section explains the actions you can take on shifts from the Unit or Multi-Unit Calendars.

**User-Requested Shifts**

To view detailed information about shifts on the calendar, hover over the shift to see a ToolTip with shift details.

To manage a user-requested shift, double-click the requested shift.
View comprehensive information about each requester, then Award, Inactivate, or Edit the shift as appropriate.

Open Shifts

To change information about an open shift, double-click an open shift.

From here, you can edit or inactivate the shift, or close the window without making any changes. You can also use the Last Minute Availability functionality. For information, see Last Minute Availability or Last Minute Availability Using StaffReach.

Scheduled Shifts

Double-click a scheduled shift to take an action on this type of shift.
From here, you can view a history of shifts for this employee, edit or inactivate the shift, or close the window without making any changes.

**Create an Open Shift**

To create an open shift, double-click the job title and time of the needed shift.

**Tip:** Be sure to have your Coverage Display Option set for the appropriate number of shift hours (4, 8, or 12).

**Note:** Shifts greater than 24 hours in the past cannot be opened in this way.
Award Shifts

To award a user-requested shift for a calendar, complete the following steps.

**Tip:** The Award Shifts screen can also be accessed from the Home Page > Shifts with requests to be Awarded.

1. Double-click the requested shift.

The Award Shift screen appears and shows the following information.

![Award Shift Screen](image)

- **a.** Information about the shift, including shift date/time, location, time remaining for sign up, wage rate/incentive information, shift restrictions (if any)
- **b.** Information about the requesters, including whether or not they have requested all or part (P) of the shift (and if partial, what part of the shift); wage amount (base rate if regular rate shift, total amount with incentive added if bonus shift or asterisks if you do not have permission; whether or not requester will be in OT if shift is granted, is from home unit location or level of care of the posted shift; whether or not requester belongs to a registered agency; if award of the shift will exceed recommending scheduling safety limits; date and time of shift request
- **c.** Profile information for the selected user (if multiple requesters, must click a requester to see the information)
- **d.** Area to record award information, inactivate or edit the shift, or cancel your actions without saving
2. If needed, click different requesters to view their profile information.

3. Click the Shift List tab to see a list of shifts for this user.

4. Click the Employee Calendar tab for a visual display of this user’s shifts.

5. When you are ready to award the shift, choose the reason from the Award Reason drop-down menu.

6. If the shift would put the employee into overtime, select the $ This is an overtime shift option to have the shift display as overtime with the designated OT signifier (typically $).

7. Click Award Shift button to complete the transaction.

   The shift appears as awarded in the unit calendar.

8. To unassign an awarded shift, double-click the appropriate shift.

9. Click Unassign.

   The shift is removed from the calendar.

## Edit Open Shifts

To edit an open shift from the Unit or Multi-Unit Calendar, complete the following steps.

1. Double-click the open shift and then in the Open Shift dialog, click Edit Shift.

   **Note:** Any of the open shift details can be changed without removing any requesters on the shift.

2. Make the desired changes and then click Save.

3. Optional. To make additional shift changes, click Edit Additional Criteria.

   **Note:** Clicking Edit Additional Criteria and then answering Yes to the confirmation message will remove requesters from the shift.

   The Edit a Multi Phase Shift Wizard page appears.
4. Make any desired changes and then click **Save**.

5. Optional. To make additional changes, click **Continue**.

![Phase Setting Example]

6. Make any desired changes and then click **Save**.

7. Optional. Click **Add Another Phase** if you need to build a multi-phase shift.
Edit Scheduled Shifts

To edit a scheduled shift from the Unit or Multi-Unit Calendar, complete the following steps.

1. Double-click the scheduled shift.

The Edit Scheduled Shift screen appears and shows the following information.

- **Shift ID:** 1633213
- **Type:** Scheduled
- **Winner:** Berry, Tiffany M. (Scheduled)
- **Unit/Location:** MAGEE-CC-NICU / 22015
- **Shift Type:** Scheduled Work Shift
- **Sub-type:** None
- **Shift Date:** 01/19/2017
- **Start Time:** 09:00 (hh:mm)
- **End Time:** 17:00 (hh:mm)
- **Shift Contact:**
- **Additional Info:**
  - Created as a result of assigning shift #1633212
- **Manager Comment:**

### Wage Type (Specify Wage Type for this phase only):
- **Rate Type:**
  - **Regular**
- **Wage:** $ ___________
- **Bonus:** $ ___________ per hour
- **Bid Type:** Normal

### ShiftRewards Points:
- **Bid:** ___________
- **Award:** ___________
- **This is an overtime shift**

2. Make the desired changes and then click **Save**.
**Example 1**

Change a scheduled work shift to non-duty sick.

**Example 2**

Send an employee home sick halfway through the shift.

**Tip:** Follow these same steps to send a resource home on-call, except change the Shift Type to On Call and enter an appropriate subtype, if any.

1. Double-click the working shift, change the **End Time** to reflect the time the employee was sent home, and click **Save**.
2. A prompt asks what to do with the employee's remaining hours. Make changes and then click **Create New Shift**.

3. Click **Refresh** to display both shifts (the shift with the hours worked and the new shift reflecting the hours specified).

**Example 3**

Send someone home after part of the shift and do nothing with remaining hours.

1. Double-click the working shift, change the end time to reflect the time the employee was sent home, and click **Save**.

2. A prompt asks what to do with the remaining hours. Make changes and then click **Discard Remaining Hours**.

   The shift hours change to reflect the actual time worked.

**Example 4**

Float an employee to a different department for all or part of a shift.

All of a shift:

- Double-click the working shift, change the department to the float department, and click **Create New Shift**.

   The resource no longer appears on the current calendar, but will appear on the calendar of the department to which the resource was floated.
Part of a shift (employee works in home unit and then is floated):

1. Double-click the working shift, change the end time to reflect the time the resource was floated, and click **Save**.
2. A prompt asks what to do with the remaining hours. Change the department to the float department and then click **Create New Shift**.

Part of a shift (employee was floated at the beginning of the shift and then returned to the home department):

1. Double-click the working shift, change the department to the float department and the end time to indicate the time the resource returned to the home department, and click **Save**.
2. A prompt asks what to do with the remaining hours. Change the department to the home department and then click **Create New Shift**.

**Tip:** Remember to select a float subtype, if needed.

**Example 5**

Place Shift Rewards points on an upcoming shift.

- Enter points in the Award field and click **Save**.

  The points appear as pending until the date of the shift. They will be credited to the account after the shift date.

**Example 6**

Place a fixed rate incentive on shift.

1. In the Rate Type menu, select the desired option.
2. In the Bonus field, enter the bonus dollar amount.
3. Click **Save**.

**Example 7**

Place a variable rate incentive on shift. and then click the < Save> button.

1. In the Rate Type menu, select the desired option.
2. In the Percentage field, enter the percentage in addition to base pay (such as 15 for base pay plus 15%).
3. Click **Save**.
Edit Awarded Shifts

To edit an awarded shift from the Unit or Multi-Unit Calendar, complete the following steps.

1. Double-click the awarded shift.

**Note:** Any of the awarded shift details can be changed without removing any requesters on the shift.

2. Make the desired changes and then click **Save**.

3. Optional. To make additional shift changes, click **Edit Additional Criteria**.

**Note:** Clicking **Edit Additional Criteria** and then answering **Yes** to the confirmation message will remove requesters from the shift.

4. Make any desired changes and then click **Save**.

**Note:** Editing an awarded shift to a partial shift results in a prompt that asks you to either create a new shift or discard remaining hours. For information about partial shifts, see **Edit Scheduled Shifts** (on page 62).

5. To unassign an awarded shift, click **Unassign**.

   The shift is removed from the calendar.

6. To view a shift history, click **History**.

   The Bid History dialog appears.
Add Shift Notes

Unit and Multi-Unit Calendar shift notes are governed by the following permissions. The appropriate permissions must be set before you are able to interact with shift notes.

- Create/Edit Shift Note - enables you to add or change shift notes
- View Shift Note - enables you to view, but not add or revise, shift notes

To add shift notes, complete the following steps.

1. Click (shift note icon).

2. In the Notes dialog, enter the note in the New Note field.

3. Click Save.

   The shift note icon has changed to red to indicate that a note has been placed.

4. To add another shift note to the same shift, click the shift note icon again.

5. Enter the new note and click Save.
Create Shifts Using PowerPost

Multiple shifts can be posted quickly by using the PowerPost feature.

1. Navigate to **Calendars > PowerPost**.

    The PowerPost screen appears.

    ![PowerPost Screen](image)

    **Tip:** Follow the steps as indicated on the screen.

    2. Select the unit/location from the drop-down menu.

    3. Select the job title for which the shift will be posted.
4. Choose the appropriate shift template.

**Tip:** The list will be limited to the shift templates created for your positions and departments. Shift templates with incentives and phases will have been built as needed by the organization.

5. The start date of the upcoming scheduling period is defaulted into the Select Period field. If needed, change the period for which you want to post shifts.

6. Enter the start and end times for the shifts you are preparing to post.

7. If needed, enter a signup start date and time.

**Tip:** Leave the signup start date and time blank to make shifts immediately visible to qualified staff upon posting. The time of "Now" will reflect the time as indicated by the system at the moment shifts are posted.

**Tip:** A leading practice suggests that the schedule for full- and part-time staff be complete by the date the shifts are due to be open for requests, and that per diem/PRN staff pick up all shifts using Centricity ShiftSelect (instead of being scheduled on the core schedule). If the signup period should not start until a future date, change the signup date and set the time to midnight (00:00).

8. Enter the number of open shifts for each date.

**Tip:** You can press the TAB key to move from date to date.

9. If needed, add or change the contact information.

10. Click **Post These Shifts**.

11. Verify that the information on the confirmation screen is correct.

   - If it is not correct, click **Go Back** and make changes.
• If it is correct, click **Confirm** (if you have no more shifts to post and want to return to the Home page) or **Confirm & Post More** (if you want to return to the PowerPost page to post more shifts).

### You are about to post 8 shifts as follows:

<table>
<thead>
<tr>
<th>Period</th>
<th>09/26/2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shift Time</td>
<td>07:00 - 19:00</td>
</tr>
<tr>
<td>Position</td>
<td>Med Surg RN - Oncology</td>
</tr>
<tr>
<td>Shift Type</td>
<td>Regular Work Shift</td>
</tr>
<tr>
<td>Shift Contact</td>
<td>Mary Smith</td>
</tr>
<tr>
<td>Additional Info</td>
<td>x 5543</td>
</tr>
<tr>
<td>Phase 1</td>
<td>ends 42 days from posting, Regular + $0.00</td>
</tr>
</tbody>
</table>

**Please confirm if you want to proceed.**

[Go Back] [Cancel] [Confirm] [Confirm & Post More]

---

### Manage Employees from the Unit Calendars

Employees can be moved to different days and shifts on the same unit simply by dragging them in the Unit Calendar. Employees can be moved to different departments on the same day by dragging them in the Multi-Unit Calendar. The ability to use the drag-and-drop functionality is governed by a security permission.

To move an employee from one shift to another in the same department, complete the following steps.

1. Access the correct Unit Calendar and set the desired date and display options.
2. Drag the employee to the job title of the desired shift.

**Note:** Do not drag the employee onto an open shift. If you do, there will no longer be an open shift for others to request.

3. Depending on how your site is configured, you may receive a warning when attempting to drag an employee whose currently scheduled shift times do not match the number of hours set in your display options. If you get the messages, select the appropriate button for the shift times to use.

**Note:** If your site is not configured to display the warning, dragging an employee who is scheduled for a different number of hours than the display options are set to will either change them to the number of hours for which the options are set or maintain the scheduled length (depending on the configuration setting).

4. Click **Refresh** to clean up the calendar’s appearance.

**Tip:** An arrow to the right of the employee name indicates the shift extends past the hours displayed on the screen. An arrow to the left indicates the shift begins before the hours displayed on the screen.
To add an employee from the Employee List, complete the following steps.

**Note:** Using the Employee List is helpful when an employee who is currently working volunteers to stay and fill an open shift. Or, in cases when the census goes up and there is no posted open shift, you may want to add an employee to your staffing.

1. Click the **Employee List** bar and expand the folders until you find the employee.
2. Drag the employee into the appropriate shift (either into the open shift or on the job title).

The employee is now scheduled into that shift.

**Tip:** The employee will be scheduled for the same number of hours as display options are set to.

**Tip:** If you inadvertently approve a schedule in the Matrix calendar before all job titles have been scheduled, it will be easiest to set your Unit Calendar view to two weeks and drag the employees from the Employee List onto the job titles of the shifts you for which want to schedule them.

To move an employee from one department to another, complete the following steps.

1. Access the correct Multi-Unit Calendar and set the desired date and display options.
2. Drag the employee from one department to another (either into an open shift or on the job title).

**Note:** Centricity ShiftSelect checks the qualifications on the employee as they are moved.

3. When you attempt to drag an employee who does not meet the qualifications for the position, a message appears stating that the employee is not qualified to work the shift. Click **OK** to clear the message.

**Note:** The warning message appears when an employee is not qualified due to a mismatch in the minimum skills required for the position, either the default position (in the event the employee is being dragged onto the job title) or the position used to post the open shift.

### Manage Employees from the Employee Centric Calendar

There are three ways to access an Employee Centric Calendar.

- Navigate to **Calendars > Employee Centric Calendar** and then search for and double-click the employee.
- In the Unit or Multi-Unit Calendar, right-click the employee’s name and select **Employee Calendar** from the drop-down menu.
- In the Unit or Multi-Unit Calendar, double-click the employee’s name in the **Employee List**.
Add a scheduled shift

1. In the Quick Shift area, enter the start and end time, shift location, type, and subtype.

<table>
<thead>
<tr>
<th>Quick Shift Template:</th>
<th>Start Time:</th>
<th>Unit/Location:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>09:00 (hh:mm)</td>
<td>Med ICU / 20</td>
</tr>
<tr>
<td></td>
<td>21:00 (hh:mm)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduled Work Shift</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Subtype</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
</tr>
</tbody>
</table>

2. Click the date of the shift.

   The scheduled shift is added to the employee.

   ![Shift Schedule]

Edit a scheduled shift

1. Double-click the shift.

2. Make the needed changes and then click **Save**.
Last Minute Availability

Last Minute Availability enables managers and supervisors to find and display staff members who can work a shift on short notice. This functionality can be launched from the Home page or a Unit Calendar, and displays an ordered list of qualified staff. When this functionality is used, Centricity ShiftSelect automatically posts and awards/schedules shifts to any employees who have accepted proposed shifts. Queries can also be saved and returned to at a later time, making it easy for a single user to work one or more lists over a span of time, or for multiple users to work lists concurrently.

Use Last Minute Availability - Home Page

To use Last Minute Availability from the Home page, complete the following steps.

1. From the Quick Links menu on the left or drop-down menu, click Last Minute Availability (or Last Minute Scheduling).

2. On the Last Minute Availability search page, enter information about the shift you are trying to fill.

3. Click View Available Employees.

   A list appears with employees who are qualified to work (and not already working) organized into three groups.
   
   - Requested - employees who requested a shift on this date and start time (not selected and not awarded another shift)
   - Qualified, Willing - qualified employees who selected at least one Last Minute Availability option in their profiles
• Qualified, Not Willing - qualified employees who did not select any Last Minute Availability options in their profiles

The list is ordered using an algorithm that indicates which employees will be more inclined to accept an offer to work the shift.

4. Click to expand a group.

5. Click an employee's name to see a list of shifts they are working that might be in such close proximity to the needed shift that you would decide not to call them.

6. For each employee contacted, select the appropriate response from the Contacted for this Shift drop-down menu.

   Note: The System Contact option relates to StaffReach (automated calling solution) only.

   Note: If you select DNC for rest of day, that employee will not show on any Last Minute Availability list for the remainder of the day.

7. Click Save to save your progress.

   Tip: You can resume where you left off at a later time.

   • To continue a previous session, on the Last Minute Availability search page, click View Previous Queries.

8. When an employee accepts a shift, select Contacted, accepted and then click Save.

   The shift is filled by the employee and displays as Accepted.

   Also, the shift appears on the Unit and Matrix Calendars as a filled shift.
Use Last Minute Availability - Unit Calendar

Employee List from an Open Shift
1. Double-click the open shift for which you want to view Last Minute Availability.

Tip: If there is a need but no open shift, double-click the Job Title to create one.
2. In the Open Shift dialog, click Last Minute Availability.
3. Select the appropriate restrictions and then click View Available Employees.

A list appears with employees who are qualified to work (and not already working) organized into four groups.
- Scheduled Availability - if your organization allows employees to schedule availability, this list shows employees who indicated their interest in working on this particular date and time
- Requested - employees who requested a shift on this date and start time (not selected and not awarded another shift)
- Qualified, Willing - qualified employees who selected at least one Last Minute Availability option in their profiles
- Qualified, Not Willing - qualified employees who did not select any Last Minute Availability options in their profiles

The list is ordered using an algorithm that indicates which employees will be more inclined to accept an offer to work the shift.

4. For each employee contacted, select the appropriate response from the Contacted for this Shift drop-down menu.

<table>
<thead>
<tr>
<th>Employee</th>
<th>Job Title</th>
<th>Primary Unit</th>
<th>Phone</th>
<th>Email</th>
<th>Contact for this shift</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jo, Ro</td>
<td>RN</td>
<td>CC-NICU</td>
<td>P: 5</td>
<td><a href="mailto:e.b@ge.com">e.b@ge.com</a></td>
<td>Select contact action</td>
</tr>
</tbody>
</table>

Note: If you select DNC for rest of day, that employee will not show on any Last Minute Availability list for the remainder of the day.

5. Click Save to save your progress.
6. When an employee accepts a shift, select Contacted, accepted and then click Save.

The shift is filled by the employee.
Employee List from Last Minute Availability Display Option

1. Click the open shift for which you want to view Last Minute Availability.

Tip: If there is a need but no open shift, double-click the Job Title to create one.

2. Under Display Options, click on the Last Minute Availability header.

A list appears with employees who are qualified to work (and not already working) organized into four groups.

- Scheduled Availability - if your organization allows employees to schedule availability, this list shows employees who indicated their interest in working on this particular date and time
- Requested - employees who requested a shift on this date and start time (not selected and not awarded another shift)
- Qualified, Willing - qualified employees who selected at least one Last Minute Availability option in their profiles
- Qualified, Not Willing - qualified employees who did not select any Last Minute Availability options in their profiles

The list is ordered using an algorithm that indicates which employees will be more inclined to accept an offer to work the shift.

3. Drag the employee who has consented to fill the shift to the open shift.

The shift is filled by the employee.
Use Last Minute Availability - StaffReach

StaffReach is an automated calling component of Last Minute Availability.

**Note:** Contact your Client Services Representative about setup information. Note that the phone number displayed to the caller can be configured to reflect a phone number specific to your organization.

1. From the Unit Calendar, double-click the open shift for which you want to view Last Minute Availability.

**Tip:** If there is a need but no open shift, double-click the Job Title to create one.

2. In the Open Shift dialog, click **Last Minute Availability**.

3. Select the appropriate restrictions and then click **View Available Employees**.

   A list appears with employees who are qualified to work (and not already working) organized into four groups.
   - Scheduled Availability - if your organization allows employees to schedule availability, this list shows employees who indicated their interest in working on this particular date and time
   - Requested - employees who requested a shift on this date and start time (not selected and not awarded another shift)
   - Qualified, Willing - qualified employees who selected at least one Last Minute Availability option in their profiles
   - Qualified, Not Willing - qualified employees who did not select any Last Minute Availability options in their profiles

   The list is ordered using an algorithm that indicates which employees will be more inclined to accept an offer to work the shift.

4. Decide whether to use StaffReach for select employees or for all employees in the group.
   - For select employees, click **Contact via StaffReach** from the **Contacted for this Shift** drop-down menu.
   - For all employees in the group, click **Contact Everyone**.

5. Click **Save**.
6. Click **Contact Selected Employees** to invoke the calling process.

**Note:** Once the calling process is started, Centricity ShiftSelect will call each employee in the list until either the shift is accepted or the list has been completed.

7. To view the status of the search while the calling is active, double-click the open shift.

   In Progress appears in red in the top right corner of the dialog.

   When an employee accepts the shift, the open shift is updated with the name of the employee.

**Tip:** This should happen within ten minutes of the shift being accepted. The page may need to be refreshed to view the updated information.

**Note:** The Awarded Shifts report shows the award reason as Staff Reach.
Configuration

This section is intended for Functional System Administrators (FSA) responsible for initially configuring Centricity ShiftSelect and then maintaining and adjusting the configuration over time. Although most of the tasks in this section are done during initial configuration, you might need to refer to this section if you want to change or modify your configuration in the future.

Configuring Centricity ShiftSelect is a logical process, proceeding from global changes to specific data tables.

**Tip:** Notes within each step indicate information to consider when adding new facilities, departments, or groups of people to an already existing configuration.

**Note:** It is assumed that back end configuration settings have been set prior to beginning the core configuration.

**Configuration Hierarchy**

The following components are contained in the initial core configuration and are listed from largest (global) to smallest (specific) changes. Because some components must be built before others, it is strongly recommended to proceed in the following order.

**Tip:** The names in the list correspond to the names found in the Configuration drop-down menu.

1. Position Types
2. Job Titles
3. Hospitals
4. Levels of Care
5. Unit/Locations
6. Employee Statuses
7. Wage Rates
8. Skill Groups
9. Skills/Credentials
10. Employee Commitment Configuration
11. Edit Weekend Configuration
12. Primary Shift Configuration
13. Safe Scheduling Options
14. Overtime Warning Configuration
15. Role Configuration
16. Manage Admins
17. Create a Position*
18. Shift Template Configuration*

*Although positions and shift templates are built after the core configuration, it is expected that position templates have been built on paper prior to beginning core configuration.

The following components are primarily related to scheduling and self-scheduling configuration but do not have a recommended configuration order.

- Shift Subtype
- Shift Shortcuts Configuration
- Scheduling Group Configuration
- Self-Scheduling Configuration

It may be desirable to reorder the items in a configuration list. To reorder, click the dots to the left of the field and drag the item. The move must be saved by clicking Save.

<table>
<thead>
<tr>
<th>Name</th>
<th>Skill Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>CRITICAL CARE</td>
<td>Patient Care</td>
</tr>
<tr>
<td>BURN UNIT COMPETENCIES</td>
<td>Patient Care</td>
</tr>
<tr>
<td>OPEN HEART</td>
<td>Patient Care</td>
</tr>
<tr>
<td>RHYTHM INTERPRETATION</td>
<td>Patient Care</td>
</tr>
</tbody>
</table>

**Position Types**

1. Navigate to **Configuration > Position Configuration > Position Types**.
   A list of existing position types appears.

**Note:** Position types are mutually exclusive, meaning that job titles associated to one position type will never be associated to a different position type, thus effectively blocking them from being able to see each other's shifts. For example, if an RN and LPN job title are associated to a nursing position type, and a CNA is associated to a non-nursing position type, then an RN could see LPN shifts and vice versa (if desired), but an LPN could not see CNA shifts.
A question to consider: Will the job titles associated to this position type need to view shifts of employees with job titles in a different position type? If yes, then a new position type should not be created. The existing position type should be used instead.

2. In the empty field, enter the new position type and then click **Add**.

**Job Titles**

1. Navigate to **Configuration > Position Configuration > Job Titles**.

   A list of existing job titles appears.

2. In the empty field, enter the new job title.

3. From the drop-down menu, select the associated position type and then click **Add**.

**Hospitals**

1. Navigate to **Configuration > Hospital/Unit(s) > Hospitals**.

   A list of existing hospitals appears.

2. In the empty field, enter the new hospital name and then click **Add**.

**Level of Care**

Levels of Care are commonly thought of as logical groupings of units/departments. Level of Care is one of the ways staff may view shifts they are qualified to request.

**Example:** Example: ICU, CCU, and CVICU departments might logically be grouped into a Level of Care labeled Critical Care.

1. Navigate to **Configuration > Position Configuration > Level of Care**.

   A list of existing levels of care appears.

2. In the empty field, enter the new level of care and then click **Add**.

**Unit/Locations**

1. Navigate to **Configuration > Hospital/Unit(s) Configuration > Unit/Locations**.

   The Unit/Locations page appears with the Unit/Location Settings tab selected.

2. Click **Add Location**.
3. In the warning message dialog, click **Yes** to proceed.

The first hospital on the list default into the Hospital field.

4. If needed, in the Hospital drop-down menu, select the hospital that corresponds to the department being added.

5. Continue updating the fields with the desired information.
   - **Day Start** - used to govern schedule target coverage and calendar views; use HH:MM format
   - **Exclude Cross Unit(s)** - select this option if the department should be excluded from statistical calculations in reports designed to measure self-directed floating

   **Tip:** A department in which staff is expected to float (such as a Float Pool) should be excluded from cross unit statistical calculations.
   - **Show Self-Scheduling** - select this option if the department will be self-scheduling and should be shown functionality required to post self-schedule shifts
   - **Allow Employee View of Unit Schedule** - select this option to allow staff to see the unit schedule.

6. Click **Save** to save what you have entered so far.

7. In the confirmation message dialog, click **Close**.

8. Click the **Job Title Defaults** tab.

   This tab is used to set scheduling default positions.

   **Tip:** The ability to see this screen is controlled by Calendar Scheduling permission.

9. Click **Add**.

10. Click in the **Job Title** field and select from the drop-down menu the job title to be used as the default scheduling position.

11. Select the default scheduling position from the **Default Position** drop-down menu.

12. Select the default open shift management shift posting template from the **Default Shift Template** drop-down menu.
13. Ignore the HPPD and Licensed HPPD options.

**Tip:** These are placeholders for future functionality.

14. Click **Save**.

15. In the confirmation message dialog, click **Close**.

16. Continue entering information on the remaining tabs: Target Settings, Target Coverage, and Target by Census.

17. Click **Save** on each tab.
   - Target Coverage Tab: Enter coverage for each job title.

**Tip:** Coverage can be entered one day at a time or right-click and select an auto-fill option to automatically add coverage across the row or entire grid.

Once targets are set, they remain set for each period until you change them.

### Target Coverage Tab: Enter coverage for each job title:

<table>
<thead>
<tr>
<th>RN</th>
<th>Sun 05/09</th>
<th>Mon 05/10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day 0630-1030</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Day 1030-1430</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Eve 1430-1830</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eve 1830-2230</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Tip:** If you would like to copy the targets from a prior period, choose the desired period and click **Copy Targets From**.

### Employee Statuses

1. Navigate to **Configuration > Employee Configuration > Employee Statuses**.
   
   A list of existing employee statuses appears.

2. In the empty field, enter the new employee status.
Tip: It may be helpful to capture the FTE status or expected hours worked in a week or a pay period (in addition to the employee status), especially if scheduling is not being used in conjunction with ShiftSelect Open Shift Management. This will assist the manager in making informed decisions as to whether the employee will be in overtime at the time of shift award.

3. Select the appropriate **Eligible for Incentives** option and then click **Add**.
   - **Always** - employee will always see incentives on every shift posted with an incentive
   - **Never** - employee will never see incentives on any shift posted with an incentive, but rather will see every shift posted with the default wage type (generally "regular" or "base" rate)
   - **After commitment** - employee will see shifts posted with incentive at the incentive rate at the first login after having been awarded their required hours (as built in Employee Commitment Configuration)

### Wage Rates

1. Navigate to **Configuration > Employee Configuration > Job Titles**.

   A list of existing wage rates appears.

2. In the empty field, enter the new wage rate.

3. Enter the **Multiplier**.

   The wage multiplier is used for reports and calculates the base rate times the multiplier. Thus, an employee with a base rate of $20.00 requesting a shift with a multiplier of 1.5 will have their rate calculated (and displayed on the shift award screen) as $30.00.

4. Click **Add**.

5. Optional. After the new wage rate record is saved, select the Per Diem Default option and then click **Save**.

   The Per Diem Default option is used to display shifts to employees with statuses who are either never eligible to see shifts with incentives or who have not yet met their commitment at the time of shift request.

### Skill Groups

1. Navigate to **Configuration > Employee Configuration > Skill Groups**.

   A list of existing skill groups appears.

2. In the empty field, enter the new skill group and then click **Add**.

**Note:** Skill Groups are no longer used in Centricity ShiftSelect but still must be added. The Skill Group records must match the Position Type records.
Skills/Credentials

1. Navigate to Configuration > Employee Configuration > Skills/Credentials.
   A list of existing skills and credentials appears.
2. In the empty field, enter the new skill or credential.
3. Select whether the new entry is a Skill or a Credential.

Tip: The following steps are optional.
4. From the drop-down menus, select the appropriate Skill Group and Position Type.
5. If needed, enter a short definition in Brief Description field.
6. Enter a number of days in the Grace Period field.
7. If needed, select the Prevent Scheduling? option.
8. Click Add.

Employee Commitment Configuration

1. Navigate to Configuration > Employee Configuration > Employee Commitment Configuration.
   A list of existing employee commitment configurations appears.
2. From the drop-down menus, select the appropriate Employee Status and Commitment Type.
3. In the remaining fields, enter the appropriate values. If needed, enter a short definition in Brief Description field.

Example: Example: If the employee is required to give 24 hours in a 4-week per diem scheduling commitment period and 12 of which must be on a weekend, then there would be a total hours entry of 24, a weekend hours entry of 12, and a scheduling period entry of 1.

4. Click Add.

Edit Weekend Configuration

1. Navigate to Configuration > Hospital/Unit(s) Configuration > Edit Weekend Configuration.
   A list of existing weekend configurations appears.

Tip: Weekend Configuration settings are used in calculating employee commitment weekend scheduled hours on the Employee Commitment Report.
2. From the drop-down menus, select the appropriate Hospital, Employee Status, Weekend Start day and time, and Weekend End day and time.
3. Click **Save**.

**Primary Shift Configuration**

1. Navigate to **Configuration > Hospital/Unit(s) Configuration > Primary Shift Configuration**.
   
   A list of existing primary shift configurations appears.

   **Note:** Primary shifts are those that are shifts regularly worked by employees, such as 0700 to 1500.

2. Enter the **Start Time** and **End Time** in hhmm format, such as 0700 and then click **Add**.

**Safe Scheduling Options**

1. Navigate to **Configuration > Hospital/Unit(s) Configuration > Safe Scheduling Configuration**.
   
   The Safe Scheduling Configuration page appears.

2. Fill in the appropriate information and then click **Save**.

**Overtime Warning Configuration**

1. Navigate to **Configuration > Hospital/Unit(s) Configuration > Overtime Warning Configuration**.
   
   The Overtime Warning Configuration page appears.

2. Fill in the appropriate information and then click **Save**.

**Role Configuration**

Permission components govern system administrator visibility into the system. Roles are high-level categories containing sets of permissions used by administrators with various job titles. System administrators are then configured in Centricity ShiftSelect and assigned the roles with the permissions for the functions they are allowed to perform. For a description of each available permission, see **Permission Descriptions** (on page 87).

1. Navigate to **Configuration > Admin Configuration > Role Configuration**.
   
   The role configuration page appears.

2. From the Role drop-down menu, either select an existing role or **Create New Role** to add a new role.

3. Enter the name of the new role and select the permissions this role should have.

4. Click **Save**.
Management Admins

1. Navigate to Configuration > Admin Configuration > Manage Admins.
   The manage admins page appears.
2. Click the Create New link.
3. Enter the employee’s User name, Password, and Email Address.

   **Tip:** The employee will be prompted to change the password and, if necessary, enter the email address when logging on the next time.
4. Click Save & Continue.
5. Enter the employee’s demographic information, select an Admin Type (role), and assign the unit/locations that the employee will perform administrative functions.

   **Tip:** In the Unit/Locations Managed field, press CTRL or SHIFT to select multiple units.
6. Click Save.

Permission Descriptions

The following table provides permission descriptions in Centricity ShiftSelect.

<table>
<thead>
<tr>
<th>Permission</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Edit Agency Employees</td>
<td>Authorizes user to add the names of agency resources and create agency profiles.</td>
</tr>
<tr>
<td>Agency Reconciliation Report</td>
<td>Authorizes user to display and run the Agency Reconciliation Report, which assists the organization in reconciling agency hours against invoices from the agency.</td>
</tr>
<tr>
<td>Allow Drag and Drop Scheduling</td>
<td>Authorizes the user to drag and drop scheduled employees from one day/shift/unit to another (in unit calendar and multi-unit calendar).</td>
</tr>
<tr>
<td>Approve Pending Employee Requests</td>
<td>A request for non-duty time comes to the manager in pending status. This permission authorizes the user to approve/deny employee requests for time off.</td>
</tr>
<tr>
<td>Audit Report</td>
<td>Authorizes user to display and run the Audit Report, which assists in identifying transactions that occurred and who performed them.</td>
</tr>
<tr>
<td>Award Self Schedule Shifts</td>
<td>Allows ability to award self-scheduled shifts.</td>
</tr>
<tr>
<td>Award Shift</td>
<td>Authorizes user to award an open shift to a requester.</td>
</tr>
<tr>
<td>Permission</td>
<td>Definition</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Award Shift to Agency</td>
<td>Authorizes user to award an open shift to a requester submitted by the agency (for their assigned departments). If admin does not have the Award Shift to Agency function assigned to them, they can view requests from agencies, but not award shifts to an agency employee.</td>
</tr>
<tr>
<td>Awarded Shifts Report</td>
<td>Authorizes user to display and run the Awarded Shifts Report, which displays all shifts awarded on a particular date or range of dates.</td>
</tr>
<tr>
<td>Calendar Scheduling Configuration</td>
<td>Authorizes user to configure default positions, shift templates, and targets for assigned departments.</td>
</tr>
<tr>
<td>Change Password</td>
<td>Authorizes user to change employee password.</td>
</tr>
<tr>
<td>Cost Savings Report</td>
<td>Authorizes user to display and run the Cost Savings Report, which displays all hours for categories chosen across selected dates, calculates costs of those resources and compares those costs to what the organization would have spent had all hours been awarded to agency (uses default or custom configured agency rates in calculating agency costs).</td>
</tr>
<tr>
<td>Create Shift in Employee Centric Calendar</td>
<td>Authorizes user to create shifts in the Employee Centric Calendar.</td>
</tr>
<tr>
<td>Create/Edit Admins</td>
<td>Authorizes user to configure solution administrator roles, create individual solution administrators, and assign them to roles.</td>
</tr>
<tr>
<td>Create/Edit Announcements - Agency</td>
<td>Authorizes user to create announcements visible to agency staff when they log in.</td>
</tr>
<tr>
<td>Create/Edit Announcements - Overall</td>
<td>Authorizes user to create announcements visible to all managers and all staff when they log in.</td>
</tr>
<tr>
<td>Create/Edit Announcements - Unit Location</td>
<td>Authorizes user to create announcements for authorized departments visible to all staff when they log in. Does not allow creation of announcements visible to all managers and/or all staff.</td>
</tr>
<tr>
<td>Create/Edit Care Types</td>
<td>Authorizes user to configure levels of care in the solution. Levels of care are generally groupings of like departments, such as Med Surg, Critical Care, etc.</td>
</tr>
<tr>
<td>Create/Edit Employee Groups</td>
<td>Authorizes user to create self-scheduling groups.</td>
</tr>
<tr>
<td>Create/Edit Employee Statuses</td>
<td>Authorizes user to configure employee statuses in the solution. Employee statuses are generally groupings of like employees, such as Full Time, Part Time, Per Diem, etc.</td>
</tr>
<tr>
<td>Permission</td>
<td>Definition</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Create/Edit Hospitals</td>
<td>Authorizes user to configure hospitals in the solution. Hospitals are usually, but not always, disparate facilities with separate tax identification numbers.</td>
</tr>
<tr>
<td>Create/Edit Job Titles</td>
<td>Authorizes user to configure job titles in the solution. Job titles are generally individual HR designations for employees, such as RN, LPN/LVN, Unit Secretary, etc.</td>
</tr>
<tr>
<td>Create/Edit Position</td>
<td>Authorizes user to configure positions in the solution. Positions are used to post shifts and consist of a combination of job titles and skills.</td>
</tr>
<tr>
<td>Create/Edit Position Types</td>
<td>Authorizes user to configure position types in the solution. Position types are the highest category, anything configured within a position type is confined to that position type. Example, job titles and positions configured within one position type cannot see shifts for job titles and positions configured within another position type.</td>
</tr>
<tr>
<td>Create/Edit Primary Shifts</td>
<td>Authorizes user to enter primary shifts.</td>
</tr>
<tr>
<td>Create/Edit Self Schedule</td>
<td>Allows access to Configuration &gt; Hospital/Unit(s) Configuration &gt; Self-Scheduling Configuration screen.</td>
</tr>
<tr>
<td>Create/Edit Shift Notes</td>
<td>Authorizes user to configure shift notes in the solution. Shift notes are used to document information of interest and can be found in the unit and multi-unit calendars.</td>
</tr>
<tr>
<td>Create/Edit Shift Templates</td>
<td>Authorizes user to configure shift templates in the solution. Shift templates are used to post shifts using Power Post and consist of each component of the Create A Shift Wizard consolidated into a single object.</td>
</tr>
<tr>
<td>Create/Edit Skill Groups</td>
<td>Authorizes user to configure Skill Groups in the solution. Skill Groups are no longer used by the solution; however, they must be added and must match the Position Types in order to complete a successful build.</td>
</tr>
<tr>
<td>Create/Edit Skills and Credentials</td>
<td>Authorizes user to configure skills and credentials in the solution. These are used to match qualified employees to posted shifts using configured positions.</td>
</tr>
<tr>
<td>Create/Edit Unit Locations</td>
<td>Authorizes user to configure units/departments in the solution. Unit locations are used to identify where shifts are to be worked. They must have unit/department identifiers and unique names within the same facility.</td>
</tr>
<tr>
<td>Permission</td>
<td>Definition</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Create/Edit Wage Rates</td>
<td>Authorizes user to configure wage rates in the solution. Wage rates are used to identify how shifts will be paid in the solution. They contain a description and multipliers. Multipliers are used in calculating $ on ShiftSelect reports.</td>
</tr>
<tr>
<td>Credential Report</td>
<td>Authorizes the user to generate the Credential Report.</td>
</tr>
<tr>
<td>Display Employee List in Calendars</td>
<td>Authorizes the user to display the Employee list accordion. If not selected, does not allow user to display the employee list.</td>
</tr>
<tr>
<td>Display Total ShiftRewards Points</td>
<td>Authorizes user to display total number of points earned (when ShiftRewards functionality is being used).</td>
</tr>
<tr>
<td>Download Archived Files</td>
<td>Authorizes user to download awarded shifts that have previously been downloaded via the interface, also referred to as archived shifts. This is useful if the previously downloaded file is no longer available or another administrator downloaded the file and you cannot access it. You might also need to download the shifts again if they need to be imported into a third-party scheduling tool.</td>
</tr>
<tr>
<td>Download Awarded Shifts</td>
<td>Authorizes user to download awarded shifts via the interface.</td>
</tr>
<tr>
<td>Edit Agency Wage Rate Configuration</td>
<td>Authorizes user to define custom (other than default) wage rates by agency, for any configured position. Allows wage rate setup for week day, eve, night and weekend day, eve, night.</td>
</tr>
<tr>
<td>Edit census</td>
<td>Authorizes the user to enter/edit census information on the unit calendar (backend configuration property must be set to true).</td>
</tr>
<tr>
<td>Edit Employees Not In My Unit/Location</td>
<td>Authorizes user to edit profiles of employees outside the list of departments authorized to a particular admin.</td>
</tr>
<tr>
<td>Edit Pending Shifts</td>
<td>Authorizes user to approve the records requiring approval when the upload of needs interface is used. The Upload Results Report reflects the number of shifts that were uploaded successfully and need approval. These shifts are not posted until approved.</td>
</tr>
<tr>
<td>Edit Profile</td>
<td>Authorizes user to edit profiles of employees within the list of departments authorized to a particular admin.</td>
</tr>
<tr>
<td>Edit Weekend Configuration</td>
<td>Authorizes user to define custom (other than default) weekend start and end times for any configured employee status in any defined hospital.</td>
</tr>
<tr>
<td>Permission</td>
<td>Definition</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Employee Commitment Configuration</td>
<td>Authorizes user to define required hour commitments for each employee status and commitment type (regular, on call, non-duty). Employees with identified commitments display on Employee Commitment Report. Required hours can be defined for total hours, and then how many of the total hours must be worked on evenings, nights and weekends. Hours are defined for a specific number of per diem periods.</td>
</tr>
<tr>
<td>Employee Commitment Report</td>
<td>Authorizes user to display and run the Employee Commitment Report, which assists the organization in reconciling scheduled hours with required hours for a particular per diem period. Displays variance in the event required hours are less than scheduled hours. Displays zero in the event scheduled hours exceed required hours.</td>
</tr>
<tr>
<td>Employee Payroll Report</td>
<td>Authorizes user to display and run the Employee Payroll Report, which assists the organization in identifying awarded shift hours and associated incentives. Displays employees of a particular unit/units and the shifts they worked, regardless of where those shifts were worked.</td>
</tr>
<tr>
<td>Employee Upload</td>
<td>Authorizes user to perform the employee upload of demographic data from the HR Solution.</td>
</tr>
<tr>
<td>Last Minute Availability</td>
<td>Authorizes user to view and perform last minute availability functions within the solution.</td>
</tr>
<tr>
<td>Multi-unit Configuration</td>
<td>Authorizes user to configure a personal view of multi-unit calendar (assuming user has rights to view more than one unit).</td>
</tr>
<tr>
<td>Multiple Shift Inactivation</td>
<td>Authorizes user to inactivate more than one shift at a time.</td>
</tr>
<tr>
<td>Multiple Shift Open/Close to Agency</td>
<td>Authorizes user to review a list of open shifts and choose which ones to make visible to agency. The selection is retained on the screen so that the shifts that are open to agency are always displayed. This method provides for discrete situational decision-making surrounding the offering of work to agencies.</td>
</tr>
<tr>
<td>Open Shift to Agency</td>
<td>Displays Open to Agency option on the Create a Shift wizard. Enables the user to value Yes/No in the box to control whether the shift should be opened to agency upon posting.</td>
</tr>
<tr>
<td>OSR Report</td>
<td>Authorizes user to display and run the Organization Status Report, which assists the organization in identifying awarded shift fill rates for shifts filled within the home unit, as well as shifts filled by staff from outside the home unit.</td>
</tr>
</tbody>
</table>

Centricity™ ShiftSelect® v2017.1 Administrator Guide

GE Healthcare Confidential and Proprietary Information.
<table>
<thead>
<tr>
<th>Permission</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overtime Display Rules</td>
<td>Authorizes user to configure settings for overtime warnings, which consist of displaying warning flag, identifying shifts that count toward overtime and number of hours in a day or week employee must exceed to flag them as exceeding configured overtime.</td>
</tr>
<tr>
<td>Permanently delete staff profile</td>
<td>Authorizes user to permanently remove a profile from the solution. Once removed, a profile is no longer visible and cannot be reactivated.</td>
</tr>
<tr>
<td>PowerPost</td>
<td>Authorizes user to post shifts in the solution using the PowerPost functionality.</td>
</tr>
<tr>
<td>Productivity Report</td>
<td>Authorizes user to display and run the Productivity Report, which assists the organization in identifying productivity information and variances.</td>
</tr>
<tr>
<td>Receive Credential Expiration Email</td>
<td>Authorizes user to receive emails regarding expiring credentials according to backend configuration properties (which govern the transactions responsible for triggering emails).</td>
</tr>
<tr>
<td>Receive Email</td>
<td>Authorizes user to receive emails according to backend configuration properties (which govern the transactions. responsible for triggering emails).</td>
</tr>
<tr>
<td>Redemption Report</td>
<td>Authorizes user to display and run the Redemption Report, which displays all ShiftRewards redemptions within a specified time period, including the name of the Administrator who performed each redemption.</td>
</tr>
<tr>
<td>Safe Scheduling Display Rules</td>
<td>Authorizes user to configure settings for safe scheduling warnings, which consist of displaying warning flag (or not showing shifts that violate), identifying maximum hours in a day, hours in a seven-day period, and days in a row.</td>
</tr>
<tr>
<td>Scheduler Shift Approval</td>
<td>Authorizes user to view and approve shifts uploaded into Centricity ShiftSelect that were created from a third-party scheduling solution.</td>
</tr>
<tr>
<td>Scheduler Upload</td>
<td>Authorizes user to upload shifts created in a third-party scheduling solution.</td>
</tr>
<tr>
<td>Search Profile</td>
<td>Authorizes user to search for employee profiles in the solution.</td>
</tr>
<tr>
<td>Search Self Schedule Shifts</td>
<td>Authorized user to search for self-scheduled shifts in the solution.</td>
</tr>
<tr>
<td>Search Shifts</td>
<td>Authorizes user to search for shifts in the solution.</td>
</tr>
<tr>
<td>Setup ShiftRewards Awards</td>
<td>Authorizes user to configure ShiftRewards awards in the solution.</td>
</tr>
<tr>
<td>Permission</td>
<td>Definition</td>
</tr>
<tr>
<td>------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Setup ShiftRewards Points</td>
<td>Authorizes user to configure ShiftRewards points in the solution.</td>
</tr>
<tr>
<td>Shift Connect (Add/Delete Quick Shifts)</td>
<td>Authorizes user to add or delete quick shifts in the Matrix calendar.</td>
</tr>
<tr>
<td>Shift Connect (Scheduling)</td>
<td>Authorizes user to view and schedule in the Matrix calendar.</td>
</tr>
<tr>
<td>Shift Connect (View Only)</td>
<td>Authorizes user to view the Matrix calendar.</td>
</tr>
<tr>
<td>Shift Shortcuts Configuration</td>
<td>Authorizes user to build shift shortcuts in the solution.</td>
</tr>
<tr>
<td>Shift Subtype Configuration</td>
<td>Authorizes user to build shift subtypes in the solution. Also allows user to set shift notations (for calendar display).</td>
</tr>
<tr>
<td>ShiftRewards Adjustment</td>
<td>Authorizes user to make manual adjustments to employee ShiftReward points (adding or subtracting).</td>
</tr>
<tr>
<td>ShiftRewards Adjustments Report</td>
<td>Authorizes user to display and run the ShiftRewards Adjustments Report, which shows all the ShiftRewards adjustments that have been made, including the employee that had their points adjusted, the administrator who made the adjustment, when the adjustment was made and why.</td>
</tr>
<tr>
<td>ShiftRewards Summary Report</td>
<td>Authorizes user to display and run the ShiftRewards Summary Report, which provides a summary of ShiftReward points Earned, Redeemed, Available, and Pending for each individual staff member. It also shows the total points available for redemption on the solution.</td>
</tr>
<tr>
<td>StaffReach Usage</td>
<td>Authorizes the user to view StaffReach utilization.</td>
</tr>
<tr>
<td>Subtype Occurrence Report</td>
<td>Authorizes the user to generate the Subtype Occurrence Report.</td>
</tr>
<tr>
<td>Time and Attendance Export</td>
<td>Authorizes the user to execute the time and attendance export.</td>
</tr>
<tr>
<td>Unassign Awarded Shift</td>
<td>Authorizes the user to unaward a previously awarded shift.</td>
</tr>
<tr>
<td>Unfilled Shifts Report</td>
<td>Authorizes the user to run the Unfilled Shifts Report, which returns a list of posted shifts that have not been awarded. The report may be used to identify areas that have trouble filling open needs. The report will allow administrators to preview the coming week or look at past unfilled shifts by week, month or year. It can be grouped in four ways: Unit/location, Position, Shift (day/evening/night), and Rate of Pay.</td>
</tr>
<tr>
<td>Permission</td>
<td>Definition</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Unit Payroll Report</td>
<td>Authorizes the user to run the Unit Payroll Report, which shows the payroll information for shifts to be worked in the selected unit/location(s) and that are to be worked on the dates for which the report is generated. The report data is grouped by the home unit/location of the staff member that the shift was awarded. Under each unit/location, the staff members are listed along with their shifts for that unit/location.</td>
</tr>
<tr>
<td>Unlock Profile</td>
<td>Authorizes the user to unlock a profile that has been locked due to too many user login attempts.</td>
</tr>
<tr>
<td>User Report</td>
<td>Authorizes the user to run the User Report, which gives a quick view of the staff member’s activity for a specific organization, hospital, or unit. It displays profile status and login/request/award information.</td>
</tr>
<tr>
<td>Utilization Report</td>
<td>Authorizes the user to run the Utilization Report, which shows the number of shifts posted and how many bids were placed on these shifts. The report gives detailed information on all closed shifts and calculates the ratio of filled (awarded) shifts to un-filled shifts.</td>
</tr>
<tr>
<td>View Acuity</td>
<td>Authorizes the user to view the acuity values brought in from the acuity interface.</td>
</tr>
<tr>
<td>View Admins</td>
<td>Authorizes the user to view the list of Admins created under Manage Admins.</td>
</tr>
<tr>
<td>View Census</td>
<td>Authorizes the user to view census information on the unit calendar (backend configuration property must be set to true).</td>
</tr>
<tr>
<td>View Employee Credential (Lic.) Number</td>
<td>Authorizes the user to view the employee credential or license number. Clearing this option will cause the user to see ***** in place of credential/license numbers.</td>
</tr>
<tr>
<td>View Employee Credentials</td>
<td>Authorizes the user to view the employee credentials. To view both credentials and numbers, both this option and the View Employee Credential License option must be selected.</td>
</tr>
<tr>
<td>View Pay Information</td>
<td>Authorizes the user to view the base rate and other wage information recorded in the solution. Clearing this option will cause the user to see **** in place of $ amounts.</td>
</tr>
<tr>
<td>View Pending Shifts</td>
<td>Authorizes the user to view shifts awaiting approval after execution of the core schedules upload interface.</td>
</tr>
<tr>
<td>View Position Details</td>
<td>Authorizes the user to view shift detail information.</td>
</tr>
<tr>
<td>View Qualified Employees</td>
<td>Authorizes the user to view lists of employees qualified to see individual positions.</td>
</tr>
<tr>
<td>Permission</td>
<td>Definition</td>
</tr>
<tr>
<td>----------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>View Scheduler Upload Errors</td>
<td>Authorizes the user to view error logs as a result of the core schedules upload.</td>
</tr>
<tr>
<td>View Self Schedule Shifts</td>
<td>Allows ability to view self-scheduled shift requests.</td>
</tr>
<tr>
<td>View Shift Notes</td>
<td>Authorizes user to view shift notes in the solution. Shift notes are used to document information of interest and can be found in the unit and multi-unit calendars.</td>
</tr>
<tr>
<td>View Shift Templates</td>
<td>Authorizes the user to view the list of shift templates built in the solution.</td>
</tr>
<tr>
<td>View Shifts</td>
<td>Authorizes the user to view the shifts in the solution.</td>
</tr>
<tr>
<td>View Staff Profile</td>
<td>Authorizes the user to view the employee profiles in the solution.</td>
</tr>
<tr>
<td>View Unit Calendar</td>
<td>Authorizes the user to view the Unit calendar. Prior to version 5.0, and after version 5.011a, users will no longer have the ability to interact with the calendar when this permission is set.</td>
</tr>
<tr>
<td>VMShift Config</td>
<td>Authorizes the user to create a role and a login for each agency.</td>
</tr>
</tbody>
</table>

**Scheduling Setup**

Before shifts can be scheduled, you need to complete some basic setup and each employee to be scheduled must have an active profile.

- Default positions and shift templates are used for scheduling and posting open shifts
- Targets denote the expected numbers of staff for each job title each day.
- If shortcut codes are desired, these must also be built. Shortcuts are display codes for shift start and end times. For example, 0700-1500 might be visually represented on a schedule as D.
- Shift Subtypes enable differentiation within types of shift (for example, a shift type of Working might have subtypes of Charge or Float) and between shifts that have start and/or end times within one hour of each other (for example, shift 1 is 7:00-3:30 and shift 2 is 7:30-4:00).

This section covers default setup (positions, targets, shift templates), as well as building and using shortcuts and subtypes. In some organizations, one or more of these setup tasks fall to managers; in others, to the Functional System Administrators.
Default Positions

A default position is used to schedule an employee using the Matrix calendar. It is also used when dragging someone from the Employee List in the Unit Calendar to a job title in the event an open shift is not present. For this reason, the default position used in Setup should reflect the position with the requirements needed when employees are floated to another department (keeping in mind which employees can be floated where will assist in determining which position (per job title) is best defined as the "default").

To set up default positions, complete the following steps.

1. Navigate to Configuration > Hospital/Unit(s) Configuration > Unit/Locations.
2. In the Unit/Locations list, expand the correct hospital and select the unit.
3. Click the Job Title Defaults tab and then click Add.
4. Click in an empty field in the Job Title column and select a job title from the drop-down menu.
5. From the Default Position drop-down menu, select the position to be used as the default.
6. From the Default Shift Template menu, select the position to be used for posting open shifts.
7. Continue adding job titles and default positions and templates, and when you are finished, click Save.
Targets

Targets allow you to set the number of core employees in each job title needed to staff the department each day.

To set targets, complete the following steps.

1. Click the **Target Coverage** tab.
2. Enter the number of people required for each four-hour block for each job title for each day of the week of the schedule.

**Tip:** Right-click to select Auto-Fill Enter Row or Auto-Fill Entire Grid, if you would like.

**Tip:** If you have a department that does not fall into 4-hour blocks, or has staggered shifts, you may find it helpful to create an ideal schedule, set Display Options to 4 hours, print the schedule with actuals showing, and then transcribe those actual values into the target boxes.

**Tip:** Target coverage rounds to two decimal places, which will enable a department with staggered shift times to match what they need in terms of staffing without having to do those calculations in advance.

**Tip:** Think of each 4-hour box as 1.0, where 1 hour each equals 0.25. So if a staff member comes in at 08:00 and is there through until 11:00, that resource occupies 0.75 of the 7-11 box.
Tip: If you want to total staff together, set targets only for the staff you want to count. For example, you may have 3 RNs and 1 LPN, but want to count them as total licensed. In order to accomplish this, you would choose your default position for both job titles to be "RN (also offered to LPN)" and set the targets for 4 for the RNs, with no targets set for the LPNs. This will enable you to schedule a total of 4 licensed using the Matrix Calendar.

3. After you have entered your targets, click **Save**.

Your default positions, targets, and shift templates can now be used when scheduling and posting open needs using the Matrix Calendar and Ultra PowerPost. They will also be used when opening shifts in the Unit Calendar.

### Shift Shortcuts

Shift Shortcuts enable start and end times to display as codes that are used by each department manager. These shortcuts may be used alone or in combination with shift subtypes, depending on whether shift start or end times overlap by one hour or less.

Keep in mind that Shift Shortcuts are created in a one-to-one relationship with shift start and end times. Thus, if you have a shift that starts at 07:00 and ends at 15:00, you can create a quick shift for 0700-1500. But unless you create a corresponding Shift Shortcut of D (or whatever else you want the shift to display as), that shift will only display as 0700-1500.

**Note:** Shift Shortcuts and corresponding start and end times when creating the corresponding quick shift must match exactly.

**Tip:** You may find it helpful to create all of the desired shift shortcuts, print the list, and then go back to build the corresponding Quick Shifts.

To create a shift shortcut, complete the following steps.

1. Navigate to **Configuration > Shift Configuration > Shift Shortcuts Configuration**.

2. Enter the appropriate information in each field and then click **Add**.

In the following example, notice that a shift with the exact same start and end times has been entered. In this case, the shift is differentiated by the shift subtype. The shift shortcut, although different, does not make this shift unique. It is the shift subtype that makes a shift with overlapping start and end times (one hour or less on either side) unique.

![Shift Shortcut Configuration](image)

### Matrix Calendar

1. Navigate to **Calendars > Matrix Calendar** to create the corresponding Quick Shift(s).
2. Expand the **Quick Shifts** menu on the left.

3. Enter the **Start** time, **End** time, **Shift Type**, and, if needed, **Subtype**.

![Quick Shift](image)

**Things to remember:**

- Quick Shifts with corresponding shortcuts appear above in the Quick Shifts list according to the appropriate shift type. Any Quick Shifts that do not have corresponding subtypes built will display as start and end times.
- Display options must be set to display shifts as Shortcuts (and not Start/End Times) for the shift shortcuts to show.
- Shift Shortcuts can be copied from one department to another if desired. Any shift shortcuts that are copied will not overwrite any that are already there; the copied shortcuts will be appended.

**To copy shortcuts from one department to another, complete the following steps.**

1. Navigate to **Configuration > Shift Configuration > Shift Shortcuts Configuration**.
2. From the drop-down menu, select the appropriate **Unit/Location** for which you want to create new shortcuts.
3. In the **Select one** drop-down menu, select the department from which you want to copy.
4. Click **Copy**.
   - The copied shortcuts appear in the list.
5. Click **Save** to save the new shortcuts for this department.

**Shift Subtypes**

Shift Subtypes are used to further differentiate Working, On Call, and Non-Duty Shifts. Some common examples of shift subtypes are:

- Working: Charge, Float
- On Call: Trauma, Level 1, Level 2
- Non-Duty: Sick, Vacation, Holiday, FMLA.

Shift subtypes are also used to characterize as unique shifts with start and/or end times that overlap each other by one hour or less. While shift shortcuts are unique to individual departments, shift subtypes are global in that they are seen by anyone with access to a Shift Subtype drop-down menu.
To create a shift subtype, complete the following steps.

1. Navigate to Configuration > Shift Configuration > Shift Subtype Configuration.
2. Enter the appropriate information in each field and then click Add.

The following fields are available:

- **Name** - a description or definition of the subtype being created
- **Quick Click Order** - this dictates what is displayed to the user when editing shifts on the unit calendar using the right-click "quick click" functionality
- **Display Name** - this dictates what is displayed to the user in the drop-down menu when choosing a shift subtype
- **Shift Notation** - this dictates what is displayed to the user next to the name of the employee in the Unit Calendar (field limit = 2 characters)
- **Shift Type** - indicates the type of shift for which you are building the subtype
- **Counts towards Commitment** - allows you to decide if shifts with this subtype should count toward the commitments of employees
- **Counts towards Overtime** - allows you to decide if shifts with this subtype should count toward the overtime setting
- **Counts towards Safe Schedule** - allows you to decide if shifts with this subtype should count toward the safe scheduling settings
- **Counts towards Productivity** - allows you to decide if shifts with this subtype should count toward productivity
- **Counts towards Employee Weekly Totals** - counts shifts with these subtypes toward weekly totals in the Matrix calendar during scheduling
- **Visible to Employees** - allows you to decide if shifts with this subtype should be visible to employees when they are requesting time off via the Employee Calendar.

**Note:** Only non-duty shifts can be flagged as Visible to Employees.

- **Export** - select if shifts with this subtype will be exported through an interface
- **Is Charge Nurse** - determines if the shift is considered a charge shift
- **Remove** - removes a shift subtype when you click Save.

Once a shift subtype is built, it is available for use when creating Quick Shifts, Shortcuts, and Shift Templates. It is also available when editing shifts. Shift subtypes are included in the Employee Payroll Report, and this report can be filtered by Shift Subtype as well.
Self-Scheduling Setup

Before shifts can be scheduled using self-scheduling, you need to complete some basic setup.

- Permissions govern which administrators and managers have access to self-scheduling.
- Unit/locations denote which departments see self-scheduling functionality via the Matrix Calendar.
- Creation of Scheduling Groups is optional and can be used to determine which sets of individuals see self-scheduled shifts first (for example Rotational Group A, B, or C) or what shifts they see (such as Experienced or Novice).
- Shift Templates must be built specifically for self-schedule shifts, and these are used to post self-schedule shifts using Ultra Power-Post.
- The Maximum Hours each employee status from each self-scheduling department can schedule within a given calendar week is identified.
- Primary Shifts, which can be defined regardless of whether self-scheduling is being used, are used to provide a default display of self-schedule shifts to each employee using Employee Calendar to view and request self-schedule needs.

This section covers the default setup for self-scheduling. Self-scheduling setup must be completed in advance of managers being able to post, and users being able to view, self-schedule shifts.

Configure Self-Scheduling

To set up self-scheduling, complete the following steps.

1. Navigate to Configuration > Hospital/Unit(s) Configuration > Unit/Locations.
2. Expand the hospitals and in the appropriate departments, select the Show Self-Scheduling option.
3. Click Save for each.
4. Navigate to Configuration > Hospital/Unit(s) Configuration > Scheduling Group Configuration.
5. Enter the names of the different groups that will be self-scheduling and then click Add.
7. Click the Create New link, build self-scheduling Shift Templates for each position that will be used to post Self Schedule shifts.

Tip: Be sure to choose Self Schedule from the Post As drop-down menu.
8. Select any limitations for the first Phase.

If shifts will open to all qualified, do not choose any restrictions.

| Phase 1 |
|-----------------|-----------------|-----------------|-----------------|
| Template Name:  | Staff Sched HVTU Group E |
| Positions:      | Critical Care RN - Burns |
| Hospital/Unit:  | HVTU/2011 |

Shift only open to employees having:

Job Title Restriction:
(Select this ONLY if you want to further restrict this shift to just this job title as listed in the employee profile.)

Scheduling Group Restriction:
(Select this ONLY if you want to further restrict this shift to just this scheduling group(s) as listed in the employee profile.)

Level of Care Restriction:
(Select this ONLY if you want to further restrict this shift to.

9. Build remaining template information and click Save as Single Phase (for a single-phase template) or Add Another Phase (for a multi-phase template).

The self-scheduling shift template is now ready to be used when posting open self-scheduling needs using the Matrix Calendar and Ultra PowerPost.

To set maximum hours, complete the following steps.

1. Navigate Configuration > Shift Configuration > Self Scheduling Configuration.

2. Select a Unit Location and Employee Status, enter the Maximum Hours, and click Add.

Productivity Setup

This section outlines the steps required to configure Centricity ShiftSelect to capture target staffing based on either imported acuity data or pre-defined census driven staffing. It also outlines the steps required to enable calculation of hours per unit of service. There are certain prerequisites (configuration items that must be enabled) before the build can be completed. Contact your Client Services Representatives if you have any questions about prerequisite "backend" settings. This section assumes all required configuration settings have been enabled.
Configure Productivity

To update the unit/location settings, complete the following steps.

1. Navigate to Configuration > Hospitals/Unit(s) Configuration > Units/Locations.
2. Expand the correct hospital and select a department.
3. Enter the number of beds (this number generally is associated with either available or total beds).
4. Click the Target Settings tab and enter the Budget value (the budgeted hours per patient day, or BHPPD).
5. Optional. Enter the Coverage Warning Threshold values and select the corresponding color.

Note: If your organization is using standardized coverage warning thresholds, do not enter any values in this area.
6. Select the desired option to be used for reporting census type.
   - Average Daily Census (ADC) - displays the calculated average daily census (ADC) in the Daily Summary section of the Unit Calendar and Multi-Unit calendar. Select this option for census information that is being manually entered or imported from a third-party acuity solution.
   - Midnight Census - displays the imported midnight census value from the ADT/Census interface.
7. Select the desired option to be used for displaying census/acuity driven targets.
   - Display Target by Volume - displays the total number of employees working compared to the target value calculated in Target by Census
   - Display Target values imported from Acuity System - displays the total number of employees scheduled compared to target values imported from a third-party acuity solution

Target by Census

To set the target by census, complete the following steps.

1. Navigate to Configuration > Hospitals/Unit(s) Configuration > Units/Locations.
2. Expand the correct hospital and select a department.
3. Click the Target by Census tab.
4. Configure the target by census for the initial four-hour period.
Note: Be sure to leave the last value empty.

<table>
<thead>
<tr>
<th>From</th>
<th>To</th>
<th>RN</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>10</td>
<td>2</td>
</tr>
<tr>
<td>11</td>
<td>20</td>
<td>3</td>
</tr>
<tr>
<td>21</td>
<td>30</td>
<td>4</td>
</tr>
<tr>
<td>31</td>
<td></td>
<td>5</td>
</tr>
</tbody>
</table>

Note:

5. Once the target by census has been configured for the initial four-hour period, click the next four-hour block, right-click in the census values area, and select Copy Values from Previous Shift.

6. Repeat these steps for the remaining four-hour periods.

7. Click Save.

Productivity Calculation

In the Job Title Defaults tab, the Include in HPPD and Licensed columns are used in productivity calculations and displayed in Unit and Multi-Unit Calendars. On the Shift Subtype Configuration page, if the option is selected, any shifts that use this subtype will be counted toward the productivity calculations in the Unit and Multi-Unit Calendars.

1. Navigate to Configuration > Hospital/Unit(s) Configuration > Unit/Locations.
2. Expand the correct hospital and select a department.
3. Click the Job Title Defaults tab.
4. As needed, select the Include in HPPD and Licensed options.
5. Click Save.
7. As needed, select the Counts toward Productivity option for each subtype that should count.
8. Click Save.

View Productivity Information

Calendar display options govern what productivity information is visible on the Unit and Multi-Unit Calendars. These settings can be enabled and disabled as needed.

1. Navigate to Calendars > Unit Calendar or Multi-Unit Calendar.
2. On the left, click **Coverage Display Options** and select the options you would like to see.

- Display Volume
- Desired Coverage
- Census/Acuity/Volume Driven Target
- Daily Summary
- Shift Summary

3. Click Submit.

   The calendar refreshes with the requested information.

4. Enter the census or volume value.

   The calculations change accordingly.