2022

Scheduler Desk Guide

DHHS TeleStaff

Developed by the Enterprise Organizational Change Management Team
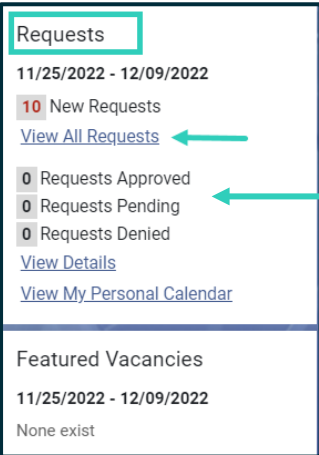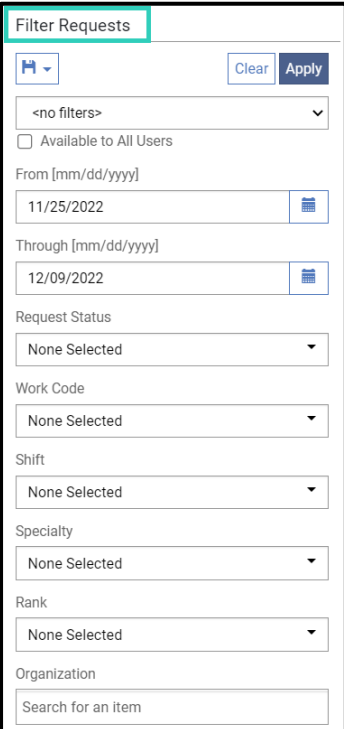
12/7/2022

Welcome to the DHHS TeleStaff Desk Guide for **Schedulers**. This guide provides written and visual steps for completing common tasks as a Scheduler in the TeleStaff system.
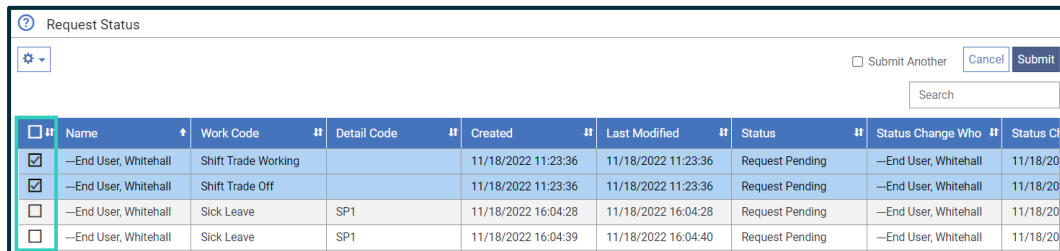
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Chapter 1: Approve and Deny Requests

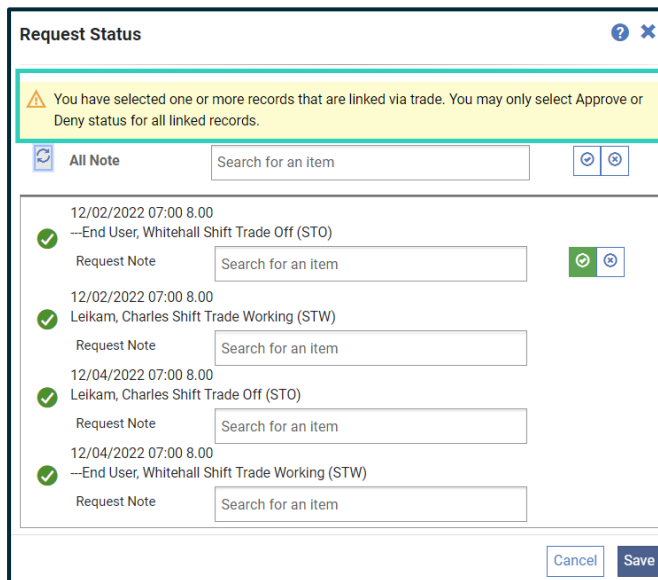DHHS TeleStaff allows schedulers to manage requests for leave, shift trades, and overtime.

Steps	Description
1.	The top of the **Requests** table on your dashboard displays a count of new requests received within the time period listed. Click the **View All Requests** link to see the details of each **new** request. **Requests** 11/25/2022 - 12/09/2022 10 New Requests View All Requests 0 Requests Approved 0 Requests Pending 0 Requests Denied View Details View My Personal Calendar Featured Vacancies 11/25/2022 - 12/09/2022 None exist The second half of the table lists **Approved**, **Pending** and **Denied** requests. These are alerts of a status change for your work code requests for the defined period of time.
2.	Use the **Filter Requests** box on the left to sort your new requests by a specific date range, status, work code, etc. **Filter Requests** Clear Apply <no filters> ☐ Available to All Users From [mm/dd/yyyy] 11/25/2022 Through [mm/dd/yyyy] 12/09/2022 Request Status None Selected Work Code None Selected Shift None Selected Specialty None Selected Rank None Selected Organization Search for an item

3.	Click the checkbox next to the request(s) you want to review.

Note:	For multiple requests that are linked, you can click the checkbox next to each request and approve or deny them all at once. You will only be able to select one action for all linked requests, meaning you can approve all of them or deny all of them.
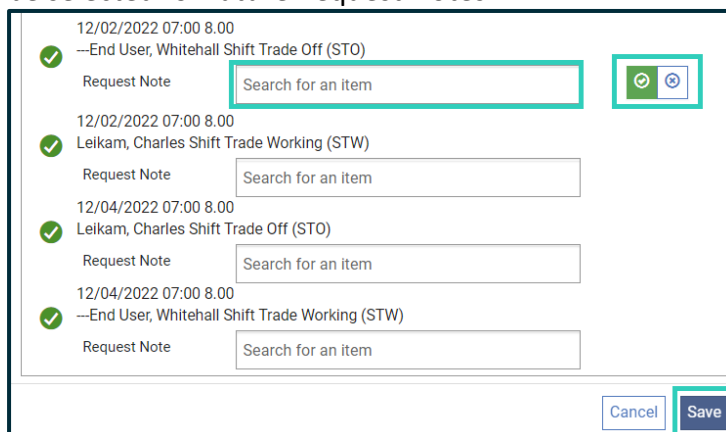
4.	Click the **green checkmark** to approve the request or click the **X** to deny the request. Then click the **Save** button.
	Note: Entering a **Request Note** is optional. All notes are saved in the system and can be selected for future Request Notes.
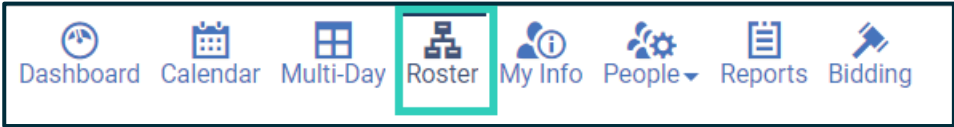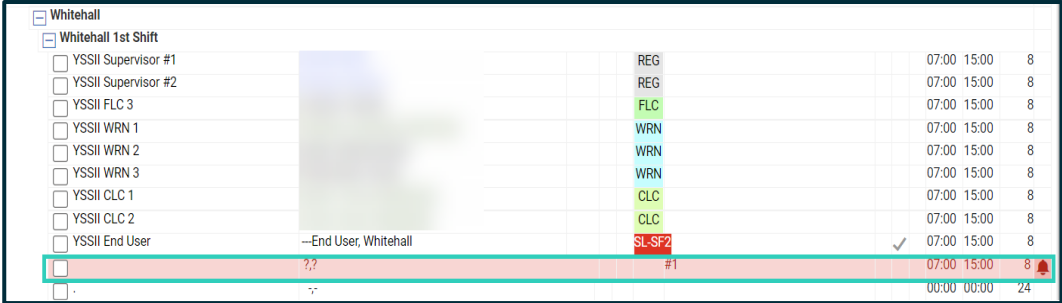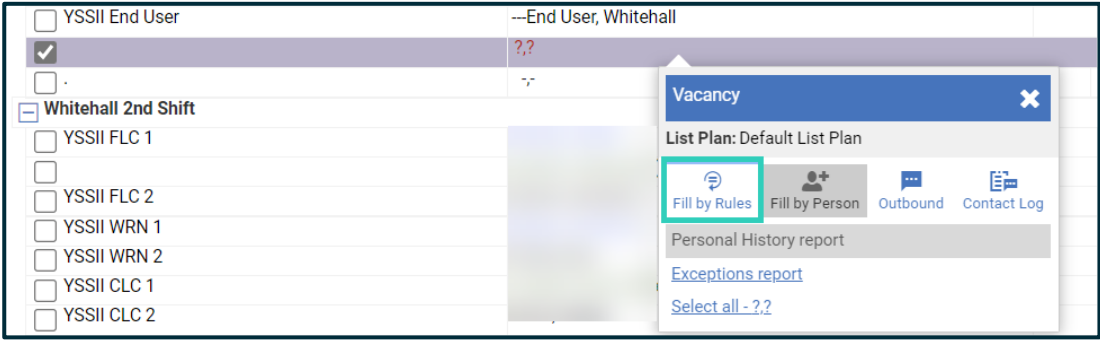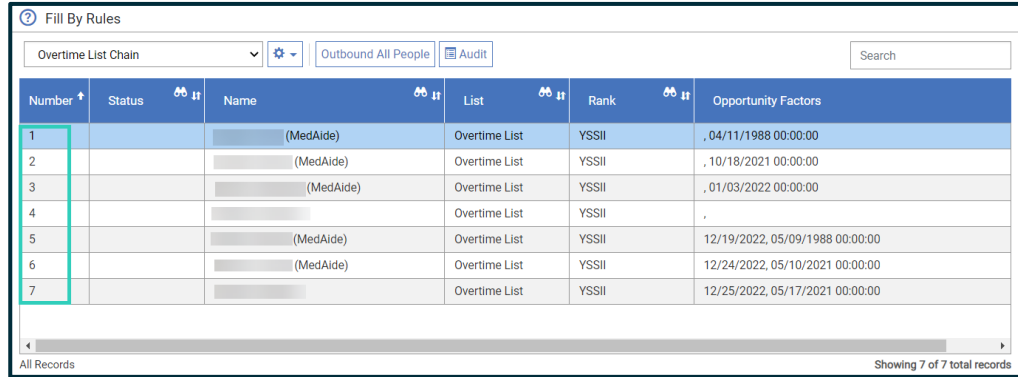
Chapter 2: Fill Vacancies

Schedulers are responsible for maintaining the schedules for their organization, which includes managing staffing levels and filling vacancies on the Roster. DHHS TeleStaff has been configured to follow your facility's business policies to schedule employees in vacancies for a day or a period.

Steps	Description
1.	Click the **Roster** icon on the **Navigation** bar.
2.	A vacancy on the roster is highlighted in **red** with an alarm bell.
3.	Click on the vacancy line item to see your options for filling the vacancy.
4.	Click the **Fill by Rules** options.

5.	The **Fill by Rules** window displays a list of qualified employees who are available to fill the vacancy in contact order.
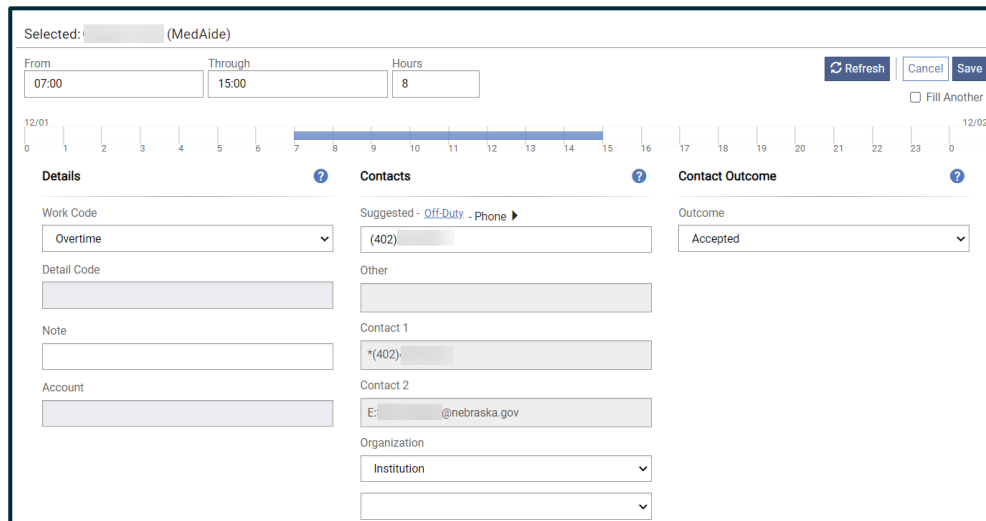
6.	The contact information for the selected employee is displayed below the table.

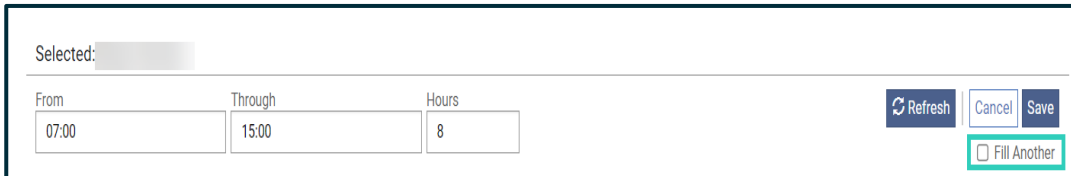| 7.	Contact the employee, record the outcome, then click the **Save** button. The individual who accepts the shift will show on the roster in place of the vacancy.
	Note: When you select the Accepted option and click Save, the Fill by Rule page will close and return you to the roster.

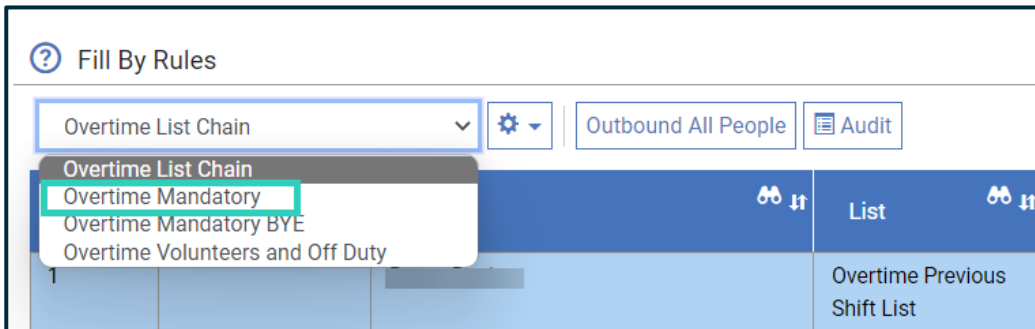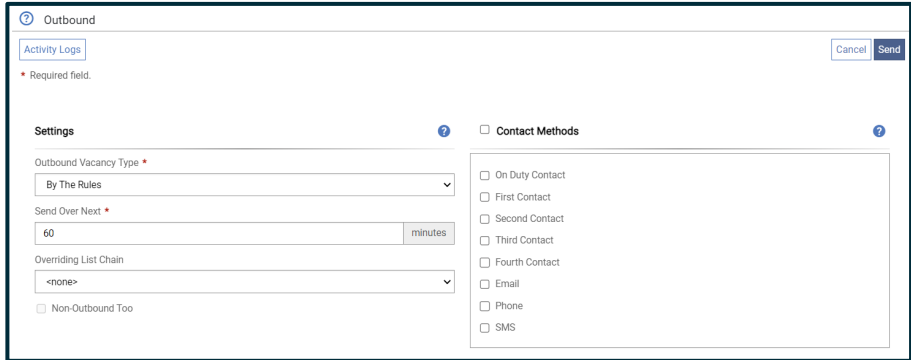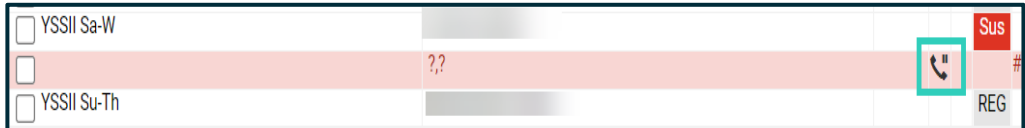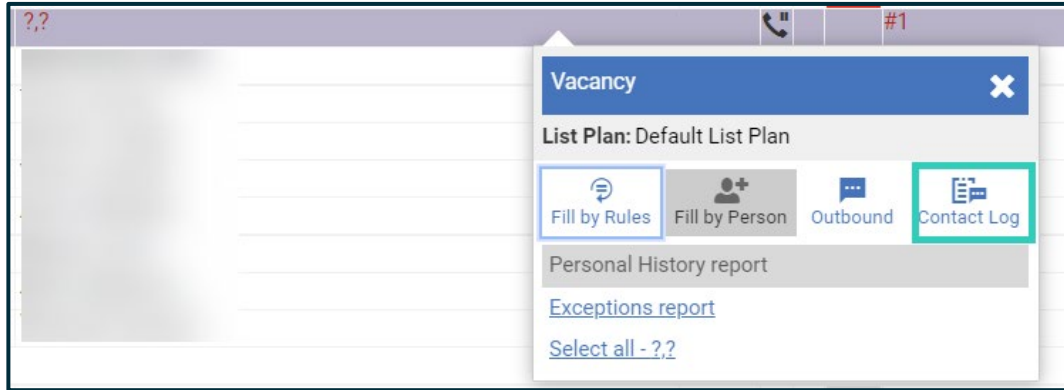|	
Note:	To keep the **Fill by Rule** window open in the case of a response other than Accepted, use the **Fill Another** option. • Click the **Fill Another** checkbox, change the outcome to **Rejected**, and click **Save**. At this point, the Fill by Rule window will refresh to find the new #1 person. • When you find an employee to fill the vacancy, deselect the **Fill Another** option, change the outcome to **Accepted,** and click **Save**.
Note:	If you need to use the **Mandatory List** instead of the **Overtime List**, click the **List Chain** drop-down and select the Mandatory List chain. The view changes to display the applicable employees.

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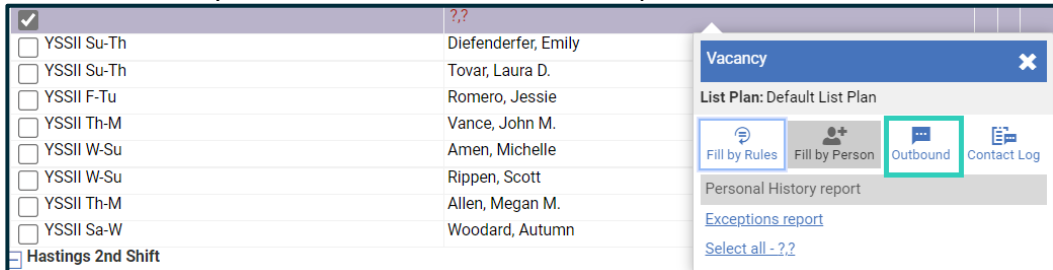
2.1 Outbound Interactions

When offering employees extra duty, policy dictates which employees must be contacted, in what order, the contact methods used, the frequency of contact, and more.

Leverage the outbound feature to have TeleStaff call employees to offer work opportunities. TeleStaff is configured to use the organizational rules to call and offer opportunities to the most qualified and available employees, automating the Fill by Rules feature.

1.	Click the vacancy line and select the **Outbound** option.
2.	The **Outbound** window opens. The Outbound Vacancy Type, choices are: **By the Rules** - Employees are contacted according to your facility's rules. The order of calls matches the candidate list in the Fill By Rules window. This is the default setting. **By Person** - Bypasses the rules to staff any selected employee. Assign the correct work code from the work code menu. Review the remaining fields and change default settings as needed. Click **Send** to initiate the outbound.
3.	The roster shows a phone icon, indicating the outbound module is working on the vacancy.

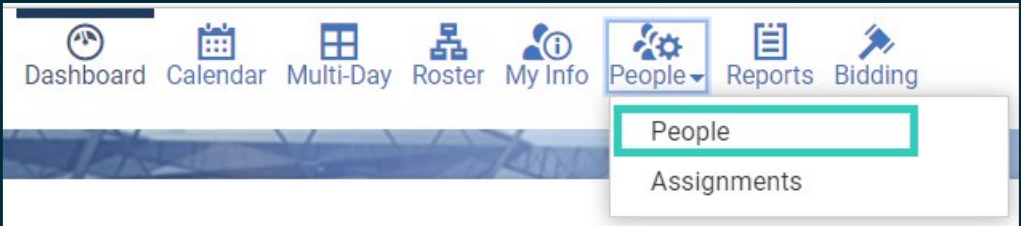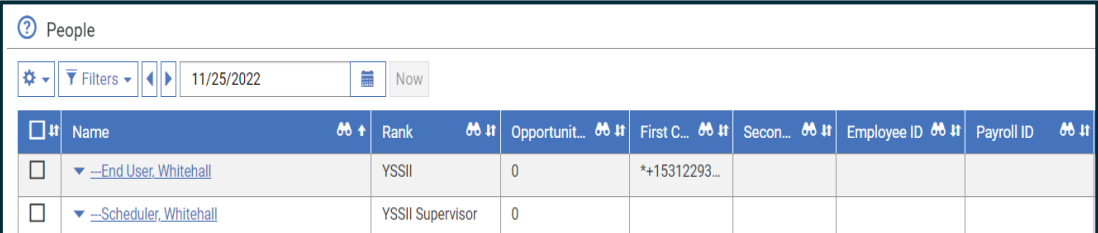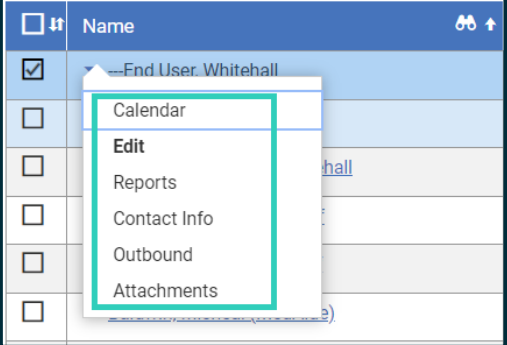| 4.	TeleStaff tracks the system-generated contacts with employees selected to fill a vacancy. Click the vacancy to view the **Contact Log**.
5.	The **Contact Log** displays call details.

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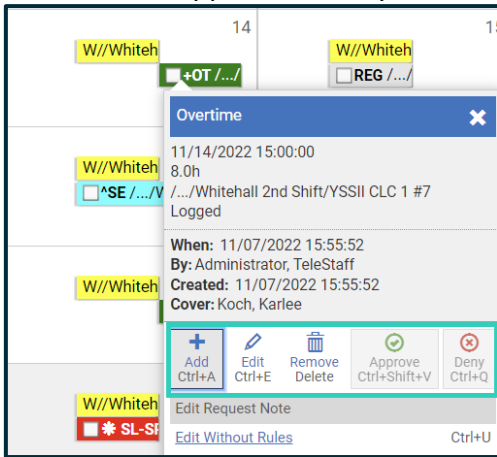
Chapter 3: The People Page

The People page displays employees with active records and active Profiles. The Scheduler can find employees in this area to further perform common functions for employees such as accessing their calendar, resetting passwords, running employee-specific reports, and updating an employee's contact information.

Steps	Description
1.	Click the **People** icon on the **Navigation** bar.
2.	The **People** window displays a list of active employees assigned to your facility. Use the filters to narrow your results or view inactive employees.
3.	To see the list of options available, click the down arrow next to the applicable employee's name.

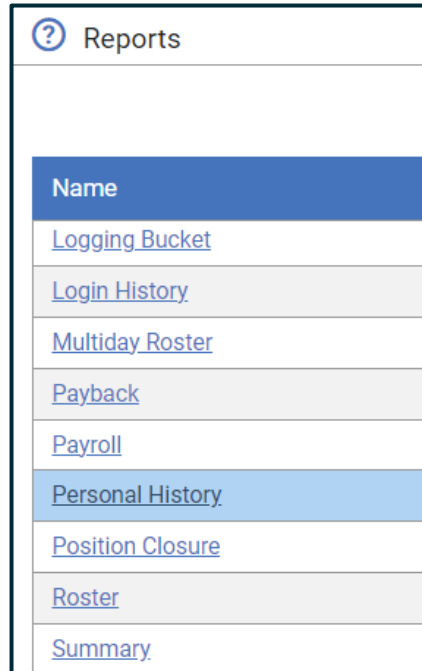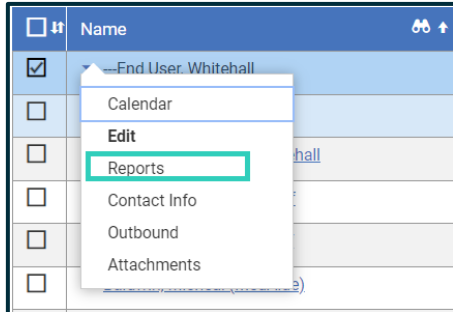| 4.	Click the **Calendar** option to view the employee's schedule or make changes by adding, editing, approving, denying, or removing a work code.
5.	Click the applicable **Work Code** on the employee's calendar, then choose whether to add, edit, remove approve or deny the work code. t
6.	Click the **Edit** option to view the employee's **My Info** section which allows you to review and update their information, change their TeleStaff password, or view the employee's personal reports.
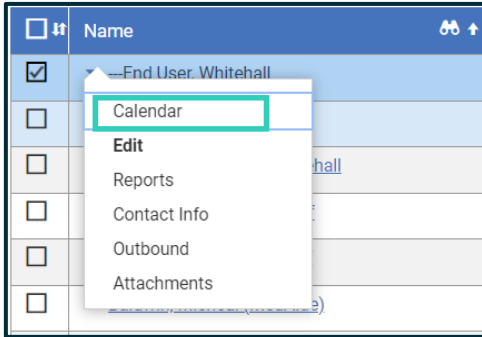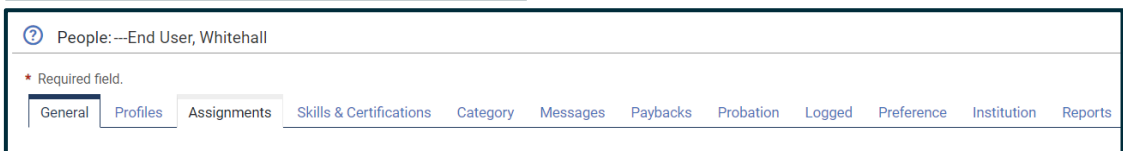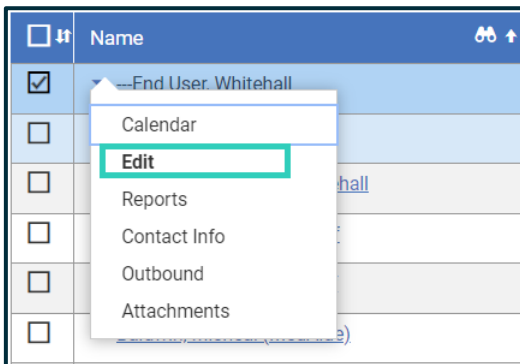
7.	Click the **Reports** option for quick access to employee-specific reports for the selected employee.
8.	Click the **Contact Info** for quick access to the employee's phone numbers.

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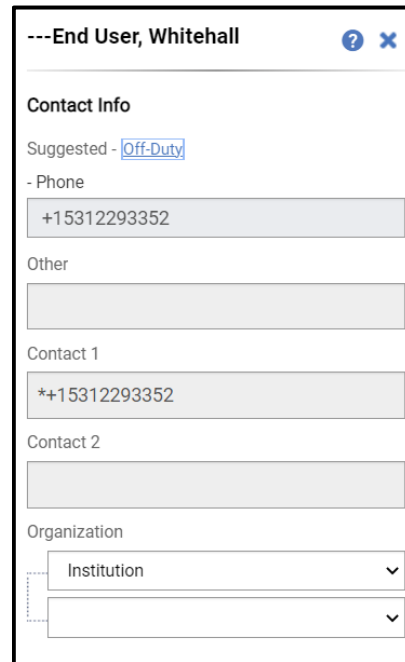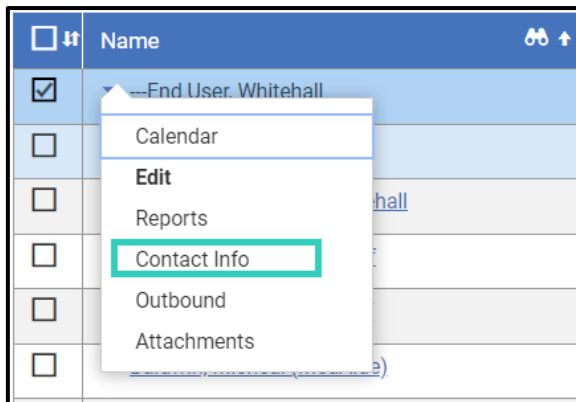
9.	Click the **Outbound** option to view a call log of contacts to the employee.

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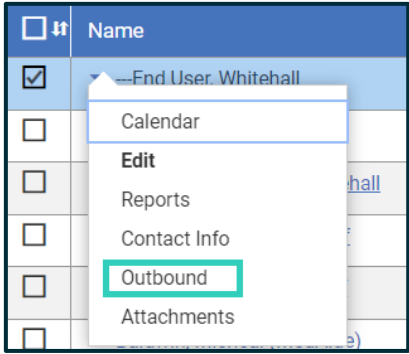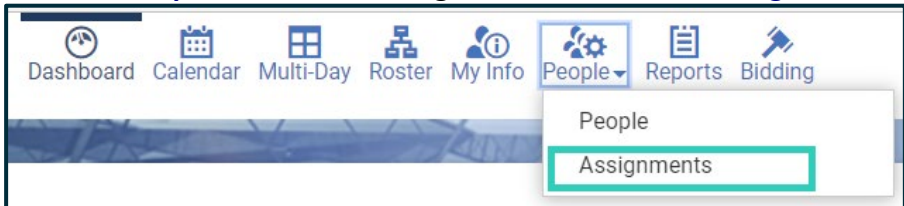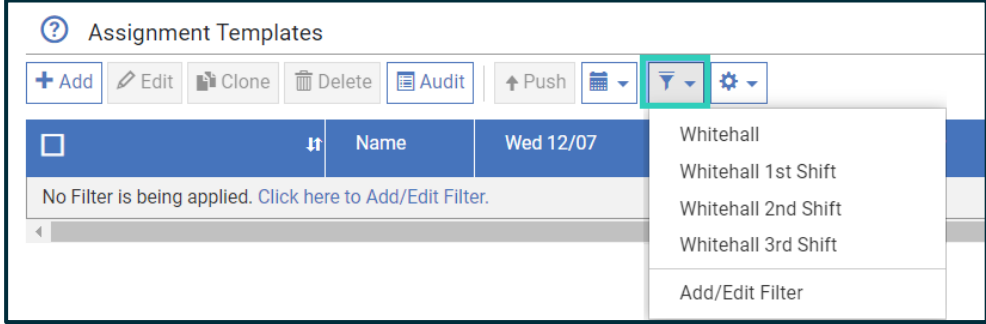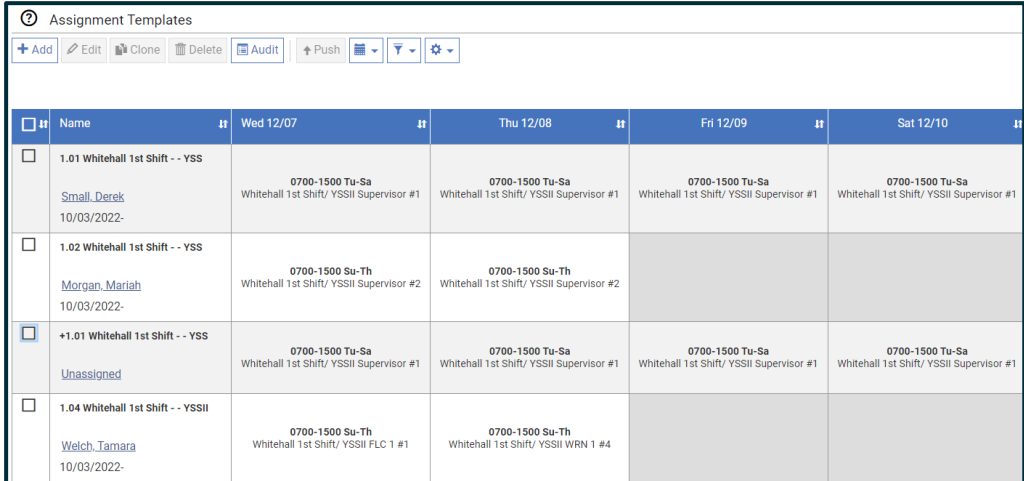
Chapter 4: Using Templates
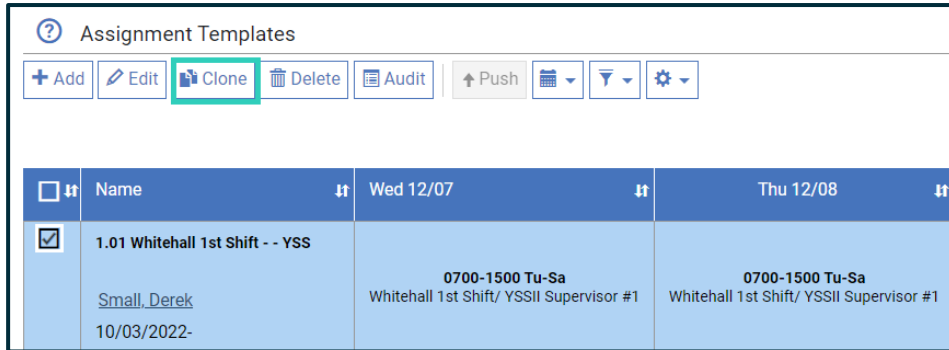
Permanent assignments are created and maintained using Assignment Templates. The feature simplifies the assignment modification process and ensures employees are assigned to the correct location.

4.1 Creating Templates

As a best practice, use the cloning feature to create new templates when necessary. Then, edit the template as needed.

Steps	Description
1.	Click the **People** icon on the **Navigation** bar and select **Assignment**.
2.	Click the **Filter** icon to select the applicable location.
3.	A calendar view opens for the location you selected.

4.	Click the checkbox to the left of the assignment template you would like to clone then click the **Clone** button. **Note:** You must select an assignment template from the calendar for the Clone button to enable.
1.	Enter the number of templates you would like to create and click the **OK** button.
2.	The newly created assignment template will display at the bottom of the calendar labeled as **Unassigned**.
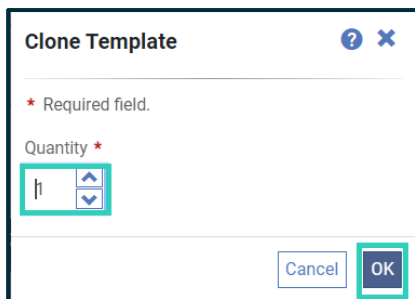
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4.2 Assigning a Template

Complete the steps below to assign an employee to a newly created template.

1.	The newly created assignment template will display at the bottom of the calendar labeled as **Unassigned**. Click the **Unassigned** link to add an employee to the template.
2.	Start entering the employee's name and a list matching your entries will display. Select the applicable employee from the list.
3.	Enter a **Start Date** then click **Save**. **Note:** If you are adding multiple employees to this assignment template, click the Add Person button.
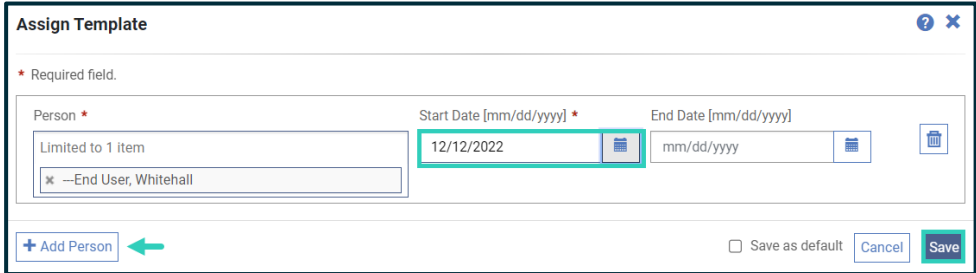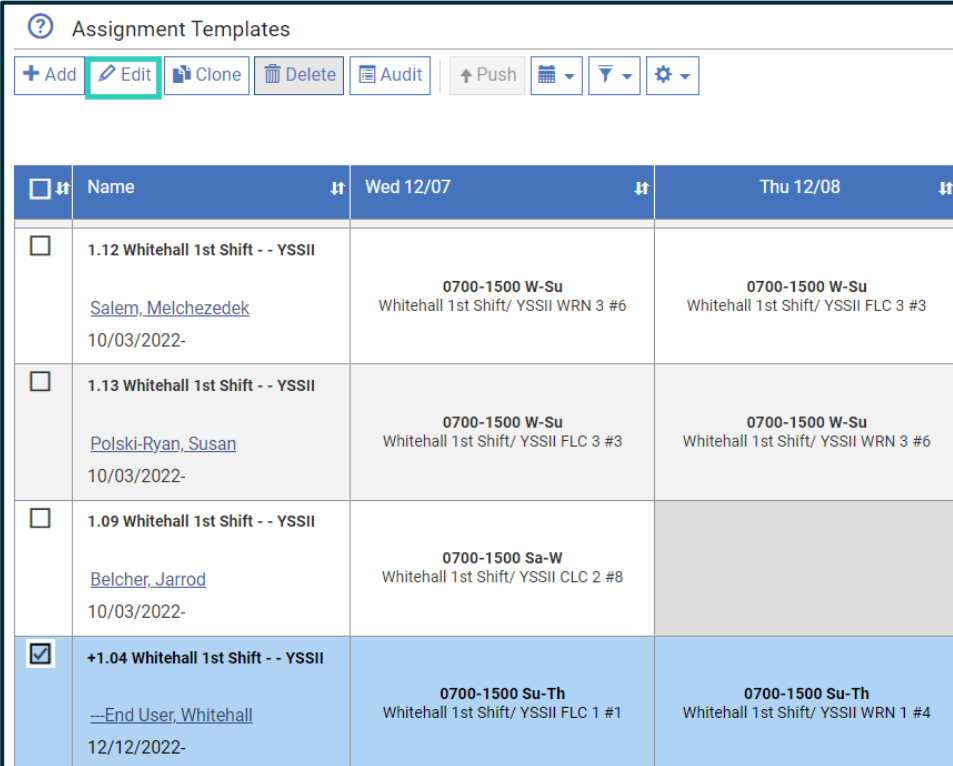
4.	You are returned to the calendar. Scroll down to the bottom of the calendar to see your new entry.

4.3 Editing Assignment Templates

After cloning an assignment template, it may be necessary to modify certain characteristics of the template for the new employee.

1.	Locate the newly assigned template at the bottom of the calendar. Click the checkbox to the left of the template and click the **Edit** button.

Note:	Update the fields as necessary. The following fields are required.
	• **Name** - Create a template name using terminology that makes sense when assigning users to various templates.
	• **Shift** - Select the shift for this assignment.
	• **Organization** - Assignment detail information, such as the organization location of the assignment. Search according to the lowest level to assign the employee.
	• ***On Duty** – Select a location for the assignment. This field is not denoted as required since this does not apply to all facilities. Only change this field if your facility requires it.*

Note:	When selecting the Organization, be sure to search using the position name or abbreviation to ensure all characteristics of the position are included in the template.
Example	**Sample of an assignment template with one schedule.**

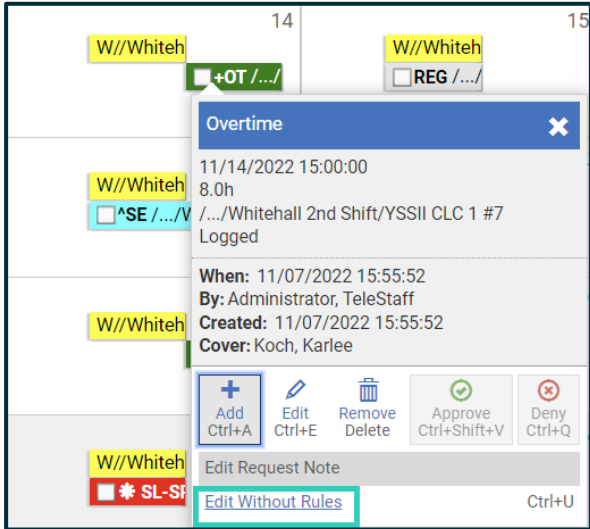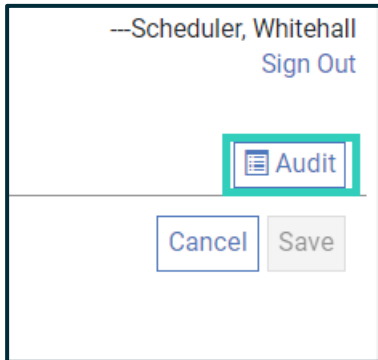| Example	**Assignment template with multiple rotations**. In addition to being allowed to edit the Name, Shift, Organization, and On Duty code, you can also modify the Rotation Settings if applicable.
2.	To modify the **Rotation Settings**, select the applicable rotation in the center of the page and update the settings as needed. Use the **Add** and **Delete** buttons in the upper left corner to increase the number of rotations or remove rotations for the employee assigned to this template.
3.	Once all the necessary fields are complete, save the template by clicking **Done**.
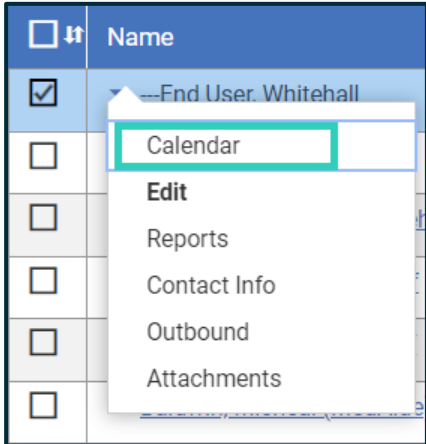
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Chapter 5: Audit and Report Features

Audit features can be found throughout Telestaff.

| Steps	Description
1.	To audit work codes from an employee's calendar, click the **People** icon on the **Navigation** bar. Click the drop-down arrow next to the applicable employee and select the **Calendar** option.
2.	Click the applicable Work Code on the employee's calendar, then select **Edit Without Rules**.

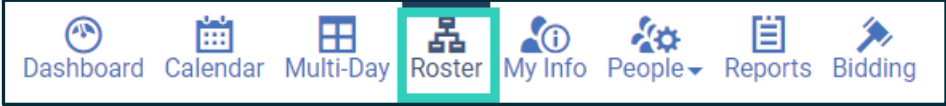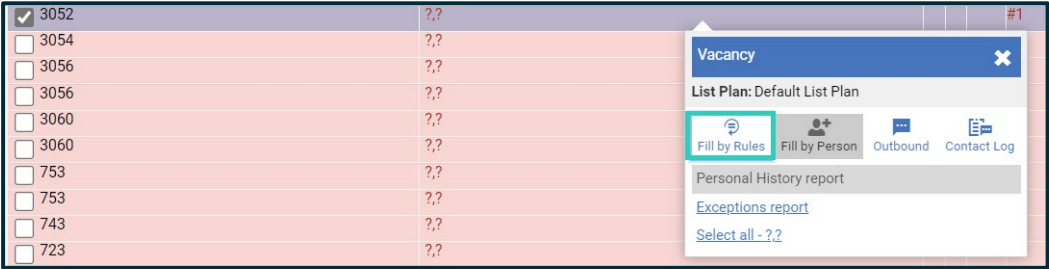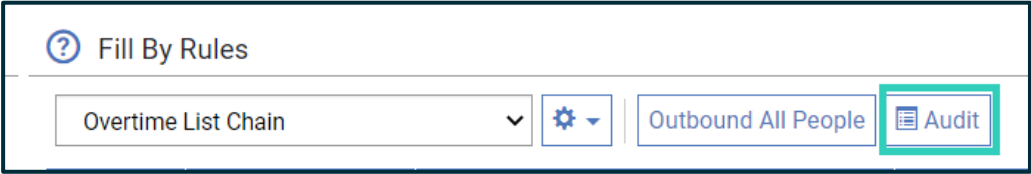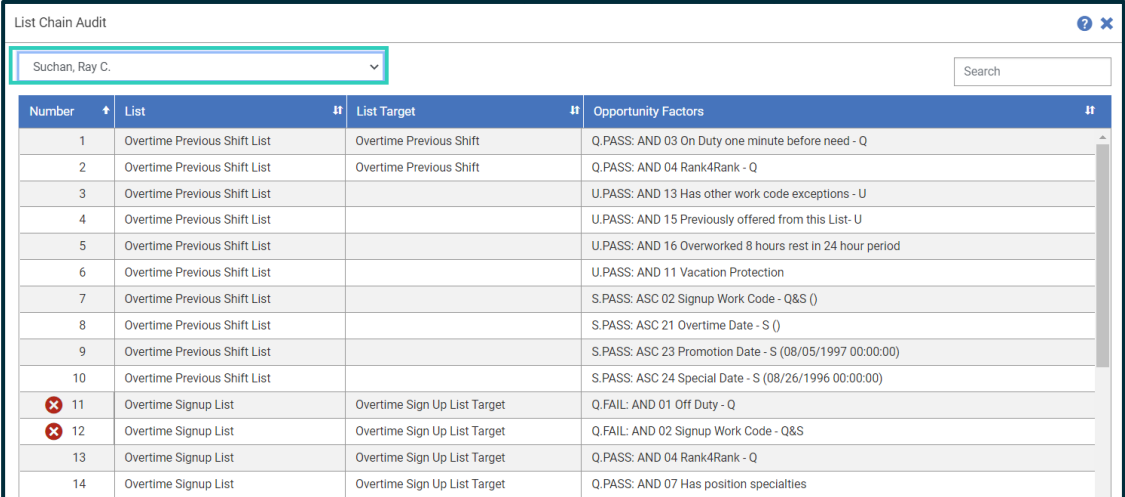| 3.	Click the **Audit** button in the upper right corner.
4.	The audit report displays a history of the work code status and removed records.
5.	Use the drop-down to audit a different work code.
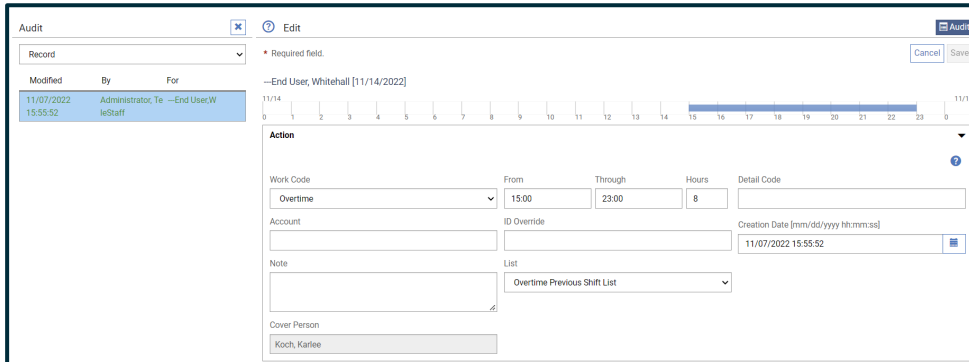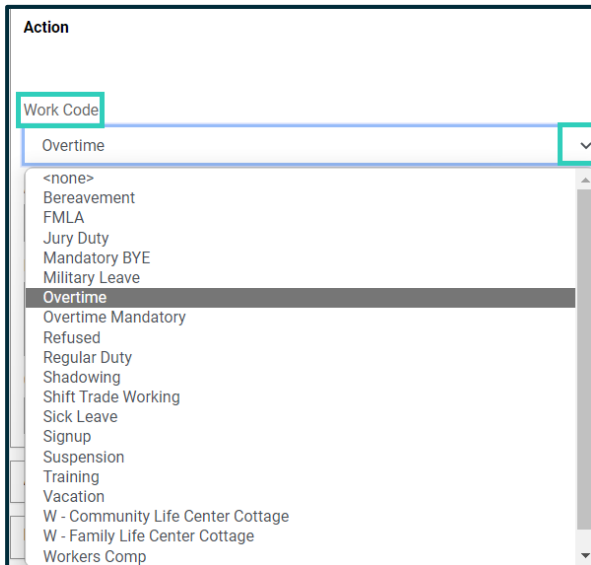
6.	**Fill by Rules** - Displays rules that are passed and failed. This process is helpful to audit the employee's qualifications for vacancies. Click the **Roster** icon on the **Navigation** bar.
7.	Click on a vacancy line item, then select the **Fill by Rules** options.
8.	Click the **Audit** button at the top of the **Fill By Rules** table.
9.	The audit report displays. Use the drop-down to select a different employee.