

MSS3: Standard Schedule Patterns

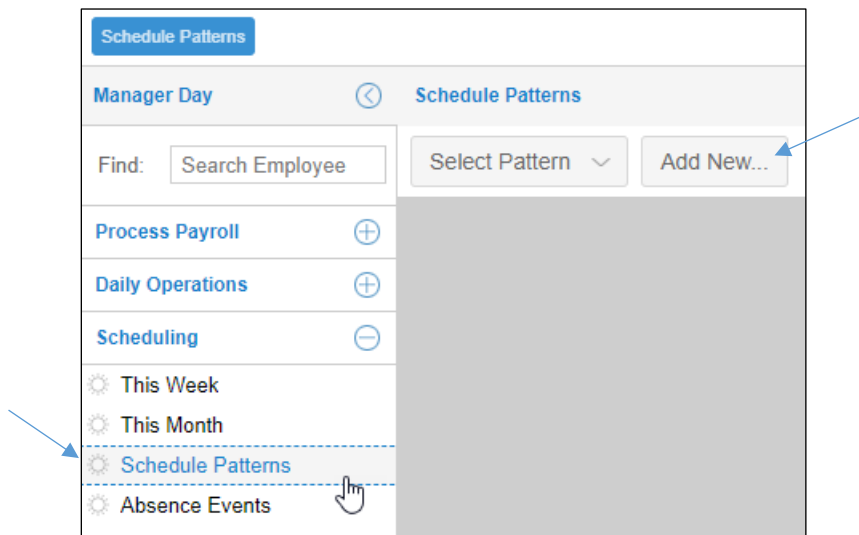
Job Aid

A Standard Schedule Pattern is a work pattern that automatically regenerates for those employees assigned to it. Standard patterns are built on a seven-day structure, or in multiples of seven days. Schedule patterns simplify the scheduling process for employees who work the same schedule each week. You only need to create one schedule and assign the employees to it; future schedules are automatically applied by the system according to the pattern. This type of scheduling is most suited for situations where staffing needs are predictable and repetitive. Any employee can be assigned to the schedule pattern, regardless of their workgroup assignment. You can adjust individual employee schedules as needed without affecting the schedule for the other employees assigned to the schedule pattern.

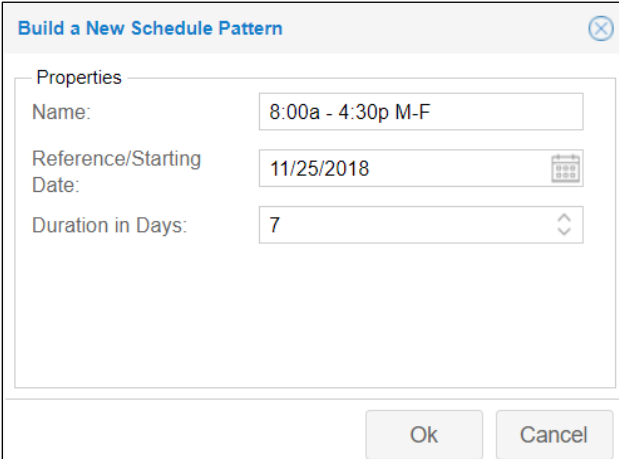
Adding a schedule pattern

To add a schedule pattern:

1. Click the Schedule Pattern menu item, typically located in the Scheduling menu.



2. Click the **Add New** button in the Schedule Patterns page.
3. Enter a name for the schedule pattern in the *Build a New Schedule Pattern* window. Give the pattern a name that will make its purpose easy to understand, such as the time and days of the schedule or the department to which the pattern will be assigned.

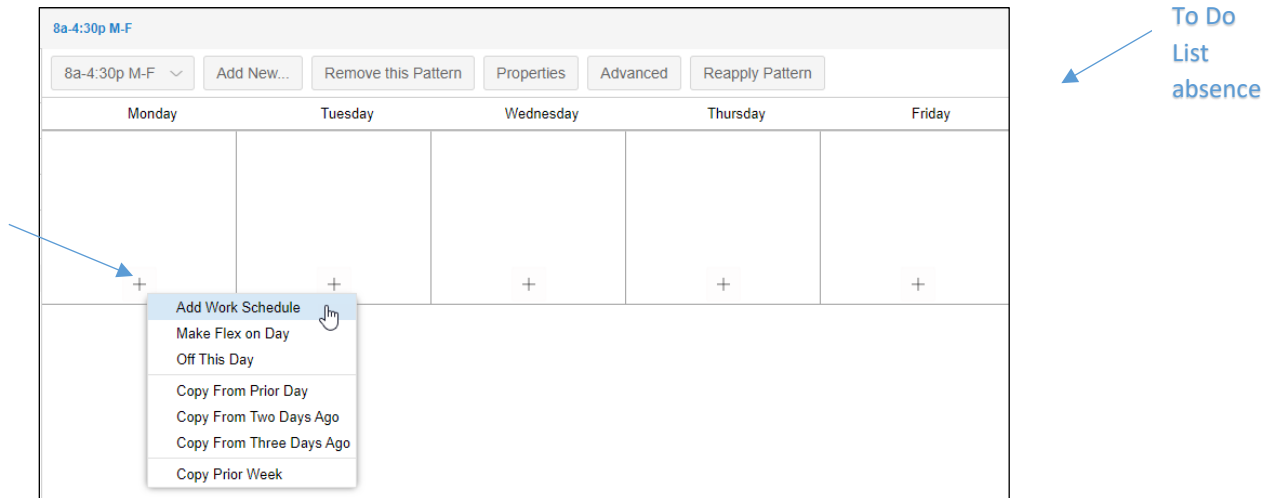


The screenshot shows a dialog box titled 'Build a New Schedule Pattern'. It has a 'Properties' section with three fields: 'Name:' with the value '8:00a - 4:30p M-F', 'Reference/Starting Date:' with the value '11/25/2018' and a calendar icon, and 'Duration in Days:' with the value '7'. At the bottom of the dialog are 'Ok' and 'Cancel' buttons.

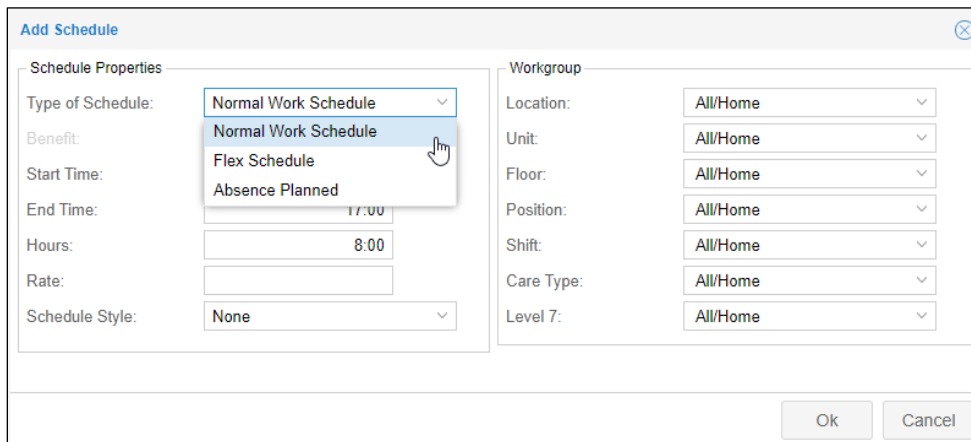
4. Select the date the schedule will begin in the *Reference/Starting Date* field.
5. Select the number of days for the length of the schedule in seven-day increments.

If the duration of your standard schedule pattern is 14 days or longer, set the starting date for the first day of week 1 of your pattern.

6. Click **OK**.
7. Click the **Plus** icon in the first day cell of your schedule pattern and select **Add Work Schedule**.



8. Select the Type of schedule you want to add in the Add Schedule window. Schedule types include:
 - Normal Work Schedule** - a schedule with a defined start and end time
 - Flex Schedule** – a schedule with a defined number of hours but flexible start and end times
 - Absence Planned Schedule** – a schedule that uses a benefit-based planned absence



9. Enter the Start and End times for the Normal Work Schedule. The Flex and Absence Planned schedules do not require start and end times.

10. Select the workgroup associated with the schedule if the employees will be working outside of their home workgroup.

If the workgroup set in the schedule pattern is different from an employee's home workgroup who is assigned to the pattern, a workgroup transfer will occur when the pattern begins. Pay rate changes can also accompany workgroup transfers. A new rate can be set in the standard schedule pattern's Advanced properties.

Add Schedule

Schedule Properties

Type of Schedule: Normal Work Schedule

Benefit: [Empty]

Start Time: 8:00

End Time: 16:30

Hours: 8:00

Rate: [Empty]

Schedule Style: None

Workgroup

Location: Glenwood Gardens

Unit: Skilled Nursing

Floor: All/Home

Position: CNA

Shift: All/Home

Care Type: All/Home

Level 7: All/Home

Ok Cancel

11. Click **OK**.
12. Add schedules to the rest of the week using the same method. Use the copy features for days that have identical schedules.

8a-4:30p M-F

8a-4:30p M-F Add New... Remove this Pattern Properties Advanced Reapply Pattern

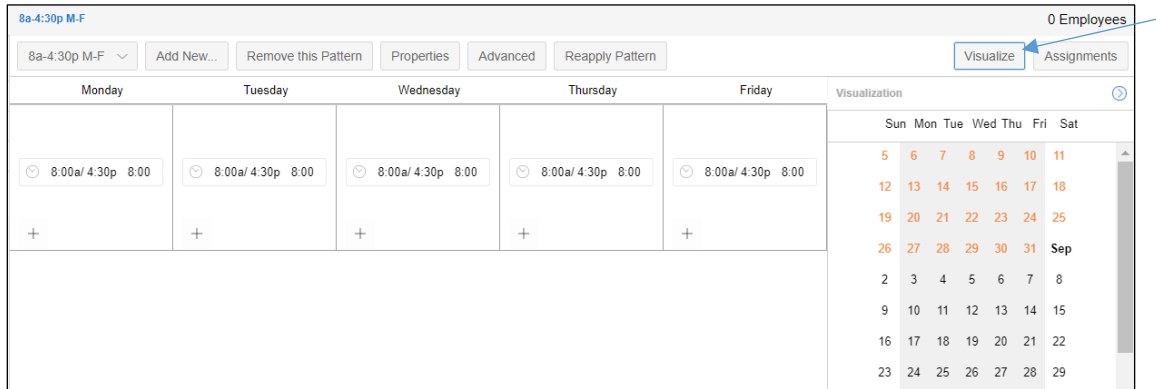
Monday Tuesday Wednesday Thursday

8:00a / 4:30p 8:00

+ + + +

- Add Work Schedule
- Make Flex on Day
- Off This Day
- Copy From Prior Day
- Copy From Two Days Ago
- Copy From Three Days Ago
- Copy Prior Week

To view the full repeating pattern in a calendar view, click the **Visualize** button to expand the Visualization panel. The gray shading in the calendar indicates the days of the pattern.

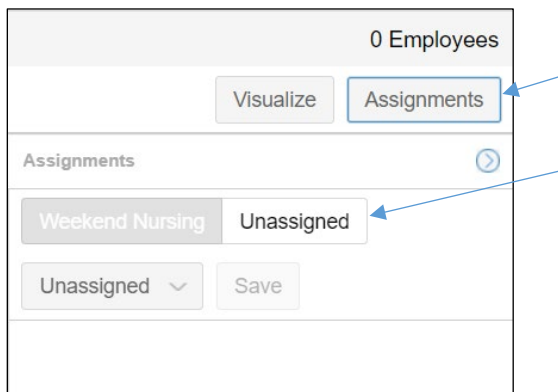


Assigning Employees to the Schedule Pattern

When you have finished building the schedule pattern, you can assign employees to it.

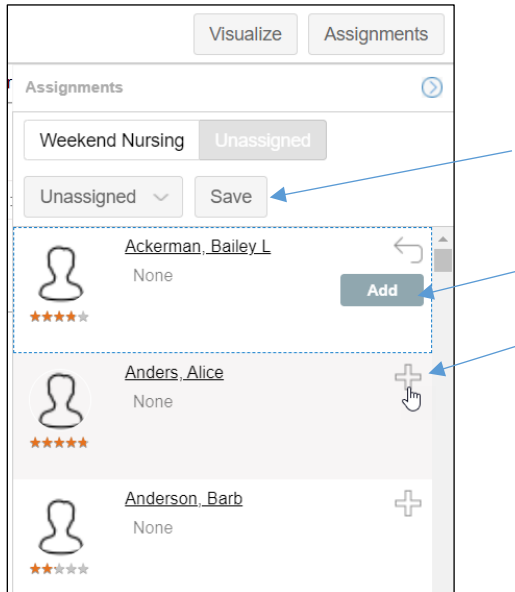
To assign employees to the schedule pattern:

1. Click the **Assignments** button in the schedule pattern page to expand the Assignments panel.

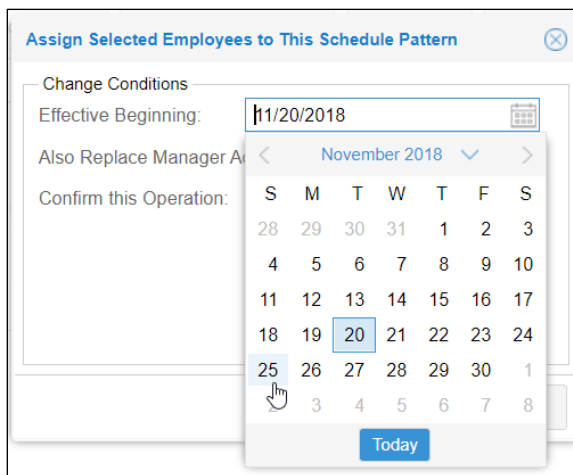


2. Click the **Unassigned** button in the Assignments panel to view a list of employees who do not have a schedule assigned to them.

- Click the Plus icon in each cell of the employees you want to add to the schedule. An Add banner will appear in the employee's cell with an arrow icon that you can click to undo your selection.



- Click the **Save** button at the top of the panel.
- Select the date you want the schedule pattern to be effective, by clicking the calendar icon. The *Effective Beginning* field contains the current date by default.



6. Enable the Also Replace Manager Added Schedules checkbox if you want to remove all schedules added by a manager, including scheduled absences.

Assign Selected Employees to This Schedule Pattern

Change Conditions

Effective Beginning: 11/25/2018

Also Replace Manager Added Schedules:

Confirm this Operation:

Ok Cancel

7. Enable the Confirm this Operation checkbox.
8. Click **OK**.
9. Click the **ReApply Pattern** button to update the employee’s schedules with the new schedule pattern.

8:00a - 4:30p M-F

8:00a - 4:30p M-F Add New... Properties Advanced Reapply Pattern

Sunday Monday Tuesday

8:00a/ 4:30p 8:00 8:00a/ 4:30p 8:00 8:00

+ + + +

The schedule will appear in the employee’s schedules page beginning the date you selected.

Chasten, Gina I (Michicare-Nursing-Licensed Practical Nurse-Kentwood Care-Skilled Nursing) 7895444

Schedules November 2018 (This Month) Assigned (8:00a - 4:30p M-F) Reapply Pattern < Chasten, Gina I > Preferences Service

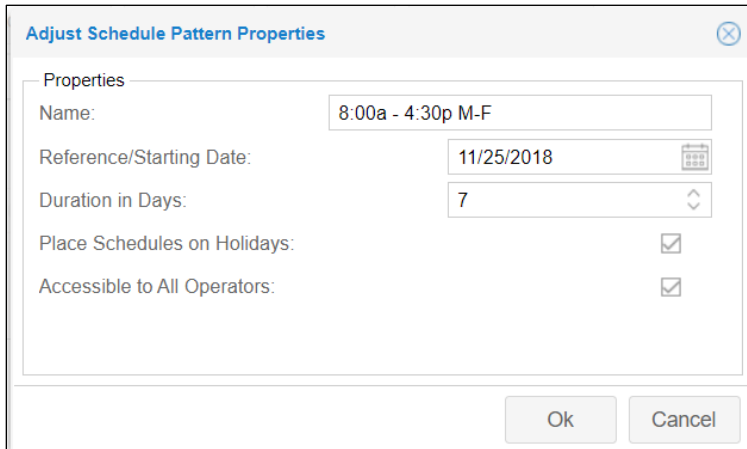
Last Name	First Name	MI	ID	Badge	Pay Class	Division	Facility	Position	Department
Chasten	Gina	I	7895444	5	HRL	Michicare	Kentwood Care	Licensed Practical Nurse	Nursing

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
18 November	19 November	20 November	21 November	22 November	23 November	24 November
+ +	11p/730a 8h Michicare-Nursing-Licensed Practical Nurse-Skilled Nursing-1-10-1	+ +	+ +	+ +	+ +	+ +
25 November	26 November	27 November	28 November	29 November	30 November	1 December
+ +	8a/430p 8h	8a/430p 8h	8a/430p 8h	8a/430p 8h	8a/430p 8h	+ +

Schedule Pattern Properties

To make changes to a schedule pattern, click the **Properties** button in the schedule pattern page. In the Adjust Schedule Pattern Properties window, you can change the schedule pattern name, starting date and duration of the pattern. You can also adjust two features that were not available when the pattern was added:

- Place Schedules on Holidays – Enable this checkbox to add the schedule on company holidays.
- Accessible to All Operators – Enable this to allow other users to access this schedule pattern.



The screenshot shows a dialog box titled "Adjust Schedule Pattern Properties". It contains the following fields and controls:

- Name:** 8:00a - 4:30p M-F
- Reference/Starting Date:** 11/25/2018 (with a calendar icon)
- Duration in Days:** 7 (with a dropdown arrow)
- Place Schedules on Holidays:**
- Accessible to All Operators:**

At the bottom of the dialog are "Ok" and "Cancel" buttons.

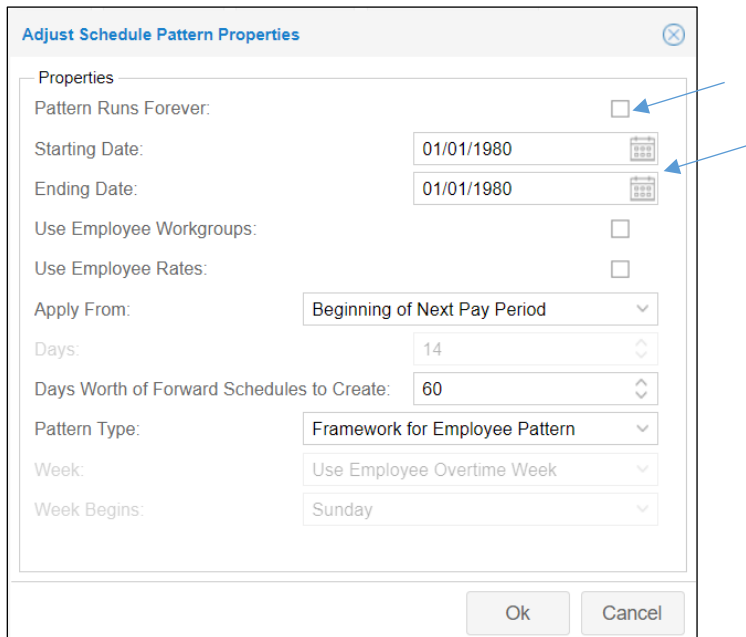
When you have finished making changes, click the **Reapply Pattern** button in the schedule pattern page to update the schedules of the employees who are assigned to the pattern.

Advanced Schedule Pattern Properties

Advanced schedule pattern properties allow you to further define how and when standard schedule patterns are applied and how employee assignments to the pattern are handled.

Two options are available for determining how long the schedule pattern will be applied to an employee's schedule:

- Pattern Runs Forever – the schedule pattern repeats with no expiration date.
- Starting/Ending Dates – the schedule pattern will start and end on the dates selected.



The screenshot shows the 'Adjust Schedule Pattern Properties' dialog box. The 'Pattern Runs Forever' checkbox is unchecked. The 'Starting Date' and 'Ending Date' fields are both set to 01/01/1980. The 'Apply From' dropdown is set to 'Beginning of Next Pay Period'. The 'Days' field is set to 14, and the 'Days Worth of Forward Schedules to Create' field is set to 60. The 'Pattern Type' dropdown is set to 'Framework for Employee Pattern'. The 'Week' dropdown is set to 'Use Employee Overtime Week', and the 'Week Begins' dropdown is set to 'Sunday'. The 'Ok' and 'Cancel' buttons are at the bottom.

An employee's workgroup and rate can be changed in the schedule pattern properties. These changes will override the employee's current workgroup and pay rate. To make these changes, enable the following:

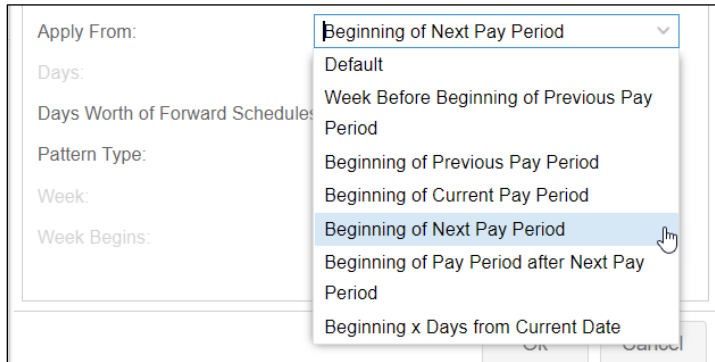
- Use Employee Workgroups - enable this option to override the employee's home workgroup with the workgroup defined in the schedule pattern.
- Use Employee Rates – enable this to override the employee's rate. The new rate is added in the schedule pattern properties.



The close-up shows two checkboxes: 'Use Employee Workgroups:' and 'Use Employee Rates:'. Both checkboxes are currently unchecked.

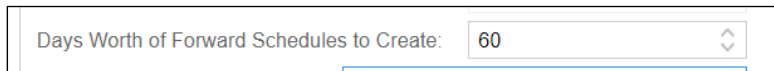
When making changes to a standard schedule pattern, you need to indicate when you want the new pattern to be applied.

- **Apply From** – select a timeframe for when a changed pattern will be applied to the assigned employees' schedules. The **Default** option will apply the changed schedule on the pattern's starting date. If you select the **Beginning X Days from the Current Date** menu item, enter the number of days in *Days* field.



You can define how many days beyond the current date you want the pattern to be displayed in the employees' schedules. For example, you may want employees to see only two weeks of schedules beyond their current week.

- **Days Worth of Forward Schedules to Create** – enter the number of days in advance of the current date you want the pattern to appear in the employees' schedules.



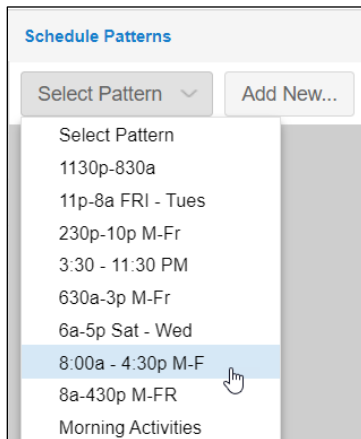
After making changes to a pattern, click the **Reapply Pattern** button to complete the update.

Deleting a Schedule Pattern

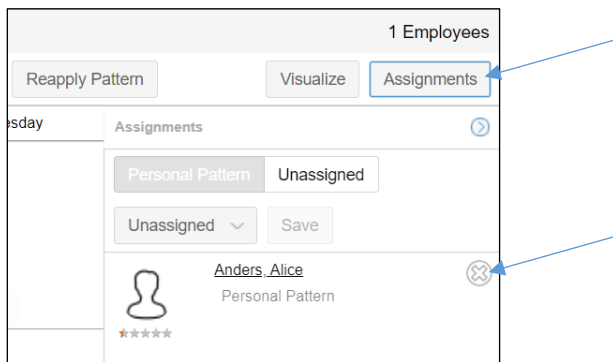
Schedule patterns that are no longer needed can be deleted from the list of patterns in schedule patterns page. Before you can remove the schedule pattern, you must first remove the employees who are assigned to the pattern.


To remove a standard schedule pattern:

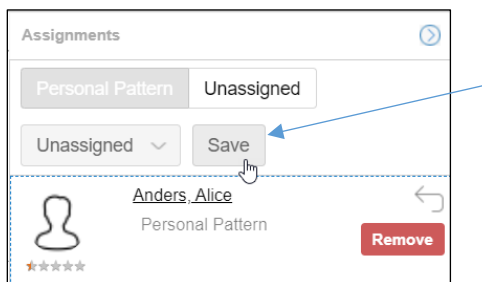
1. Select the standard schedule pattern from the Select Pattern drop-down list in the Schedule Patterns page.



2. Click the **Assignments** button in the schedule pattern page to expand the Assignments panel.



3. Click the  icon in each employee cell and click the **Save** button to remove all of the employees from the schedule pattern. All of the assigned employees must be removed to allow the schedule pattern to be deleted.



4. Confirm the operation. Select a different date and enable the Remove Patterned Schedules after Effective Date checkbox to delay the removal.

Remove Selected Employees From This Schedule Pattern [X]

Change Conditions

Effective Beginning: 11/20/2018 [Calendar Icon]

Remove Patterned Schedules after Effective Date:

Confirm this Operation:

Ok Cancel

5. Click the **Schedule Patterns** button at the top of the schedule pattern page to refresh the page. The Remove this Pattern button will appear in your standard schedule pattern page.
6. Click the **Remove this Pattern** button to remove the schedule pattern.

8:00a - 4:30p M-F

8:00a - 4:30p M-F [Dropdown] Add New... Remove this Pattern

Sunday Monday