

# MSS3: Adding Placeholder Employees for Agency Workers

Job Aid

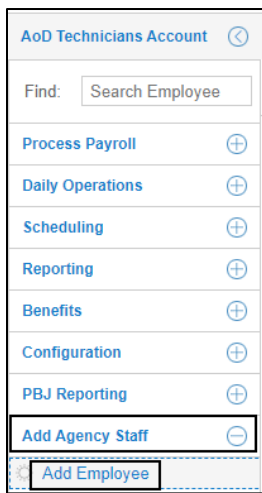
LTC clients usually compile spreadsheets manually and file direct care hours of agency/contract workers for PBJ purposes. This document describes how to set up generic placeholder employees for last minute (late night or weekends) contracting of new agency workers to arrive onsite and punch at clock immediately.

You can add placeholder employees using the Add Employee operation and adjust the sensitivity threshold to accept all fingers. Later, you can modify properties of placeholder employees with those of agency workers, such as last name, first name, workgroup assignment, and more.

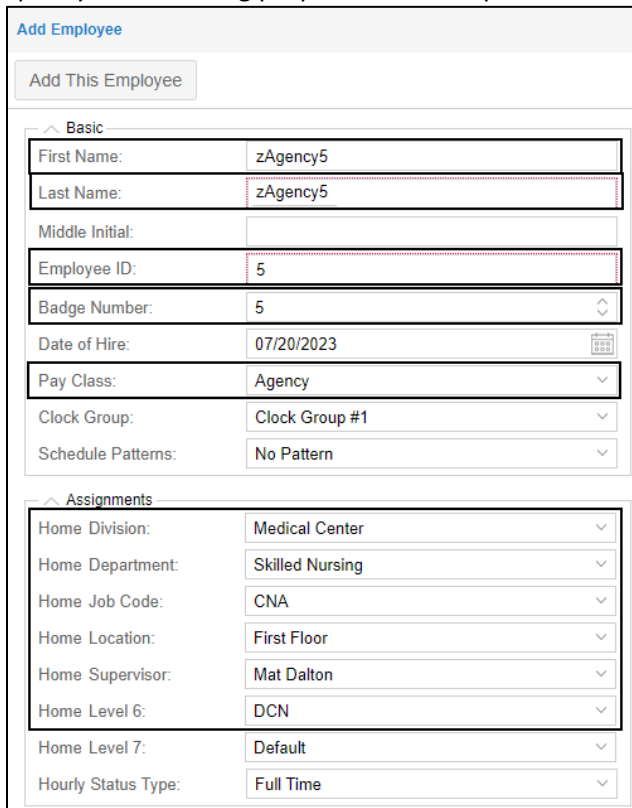
## Add Placeholder Employees

You can add new placeholder employees for agency employees.

1. Click the Plus sign (+) to expand **Add Agency Staff** menu group and select the **Add Employee** menu item.



2. Specify the following properties when a placeholder employee is added.

A screenshot of the 'Add Employee' form. At the top is a button labeled 'Add This Employee'. Below it are two sections: 'Basic' and 'Assignments'. The 'Basic' section contains fields for: First Name (zAgency5), Last Name (zAgency5), Middle Initial (empty), Employee ID (5), Badge Number (5), Date of Hire (07/20/2023), Pay Class (Agency), Clock Group (Clock Group #1), and Schedule Patterns (No Pattern). The 'Assignments' section contains dropdown menus for: Home Division (Medical Center), Home Department (Skilled Nursing), Home Job Code (CNA), Home Location (First Floor), Home Supervisor (Mat Dalton), Home Level 6 (DCN), Home Level 7 (Default), and Hourly Status Type (Full Time).

Property	Descriptions
First Name	Enter <i>zAgency1</i> , <i>zAgency2</i> , <i>zAgency3</i> etc. for placeholder purpose so that new agency workers can immediately punch upon arrival to the facility. Those placeholder employees are easy to find for updating employee properties.
Last Name	Enter <i>zAgency1</i> , <i>zAgency2</i> , <i>zAgency3</i> etc. for placeholder purpose so that new agency workers can immediately punch upon arrival to the facility. Those placeholder employees are easy to find for updating employee properties.
Employee ID	Enter the employee id for the placeholder employee.
Badge Number	Enter the badge number for the placeholder employee.
Pay Class	Select <i>Agency</i> in the <b>Pay Class</b> drop-down list.  <b>Note:</b> <ul style="list-style-type: none"> <li>The pay class <i>Agency</i> is created in the system so that all worked hours from agency workers are included in the Payroll-Based Journal (PBJ) report submitted to CMS.</li> <li>The workers of <i>Agency</i> pay class are not included in the payroll file.</li> <li>The pay class <i>Agency</i> is configured to not receive overtime, shift differentials or holiday payment rules. This pay class can also be configured to different rules based on your needs.</li> </ul>
Assignments	Select a workgroup for each workgroup level.

3. The employee is added with the detailed information displayed on the right side.

**Add Employee**

Add This Employee

^ Basic

First Name:

Last Name:

Middle Initial:

Employee ID:

Badge Number:

Date of Hire:

Pay Class:

New Employee [5] Added [zAgency5, zAgency5]

EmpID:5 Assign WGLLevel 1 WGNuM from [5] to [5]

EmpID:5 Assign WGLLevel 2 WGNuM from [4] to [4]

EmpID:5 Assign WGLLevel 3 WGNuM from [7] to [7]

EmpID:5 Assign WGLLevel 5 WGNuM from [4] to [4]

EmpID:5 Assign ESS PIN from [1497547] to [1589471]

4. Repeat step 1 to 3 to add more placeholder employees.

## Enroll Your Finger Template for Placeholder Employees

Supervisor can temporarily enroll her/his finger template for all placeholder employees and adjust the sensitivity threshold for them with *None, Accept Any Finger* to accept any finger.

1. Enter *agency* in the **Find** field to locate all placeholder employees. Click an agency entry to drill down to this employee's pages.

AoD Technicians Account		Search									
Find: <input type="text" value="agency"/>		Excel		Print Preview		Filter		Clear			
	Process Payroll	Last Name	First Name	MI	ID	Badge	Division	Department	Job Code	Location	Supervisor
	Daily Operations	zAgency1	zAgency1		11	13	Medical Center	Skilled Nursing	CNA	First Floor	Mat Dalton
	Scheduling	zAgency2	zAgency2		22	22	Medical Center	Skilled Nursing	CNA	First Floor	Mat Dalton
	Reporting	zAgency3	zAgency3		33	33	Medical Center	Nursing CNA	CNA	First Floor	Mat Dalton
	Benefits	zAgency4	zAgency4		44	44	Health Care Center	Nursing CNA	CNA	First Floor	Mat Dalton
	Configuration	zAgency5	zAgency5		5	5	Medical Center	Skilled Nursing	CNA	First Floor	Mat Dalton
	PBJ Reporting	zAgency6	zAgency6		6	6	Medical Center	Skilled Nursing	CNA	3rd Floor	Mat Dalton
	Add Agency Staff	zAgency7	zAgency7		7	7	Health Care Center	Nursing CNA	CNA	3rd Floor	David Hales
	Add Employee	zAgency8	zAgency8		8	8	Medical Center	Skilled Nursing	CNA	3rd Floor	David Hales
		zAgency9	zAgency9		9	9	Medical Center	Skilled Nursing	CNA	3rd Floor	David Hales

2. Select **Personal Information** in the first page drop-down list. Then select **Templates** in the second drop-down list. Click **Finger I/V Template**, the **Biometric Template Properties** dialog is displayed.

Personal Information

Templates

Last Name	First Name	MI	ID	Badge
zAgency5	zAgency5		5	5

### Finger I/V Template

Template Index: 0

Verify Threshold: Use Device Settings

Created: May-23 2023 10:27pm

Last Modified: Jun-21 2023 11:28pm

3. Select *None, Accept Any Finger* in the **Verify Threshold** drop-down list. Click Ok.

#### Biometric Template Properties

Properties

Verify Threshold:

None, Accept Any Finger

Remove this Template Pe

Use Device Settings  
Skip Finger Identification  
None, Accept Any Finger  
Low  
Medium  
High

Ok

Cancel

- The **Verify Threshold** is updated with the selected *None, Accept Any Finger*.

Personal Information ▾
Templates ▾

Last Name	First Name	MI	ID	Badge
zAgency5	zAgency5		5	5

**Finger I/V Template**  
 Template Index: 0  
**Verify Threshold: None, Accept Any Finger**  
 Created: May-23 2023 10:27pm  
 Last Modified: Jun-21 2023 11:28pm

- Repeat step 1 to 4 to adjust sensitivity threshold for all placeholder employees.

### Replace Placeholder Employee Properties for Agency Workers

To replace placeholder employee properties by those of Agency workers:

- Enter *zagency* in the **Find** field to locate all placeholder employees. Click an agency entry to drill down to this employee's pages.


AoD Technicians Account		Search									
Find: <input type="text" value="agency"/>		Excel	Print Preview	Filter	Clear						
Process	Last Name	First Name	MI	ID	Badge	Division	Department	Job Code	Location	Supervisor	
Process Payroll	zAgency1	zAgency1		11	13	Medical Center	Skilled Nursing	CNA	First Floor	Mat Dalton	
Daily Operations	zAgency2	zAgency2		22	22	Medical Center	Skilled Nursing	CNA	First Floor	Mat Dalton	
Scheduling	zAgency3	zAgency3		33	33	Medical Center	Nursing CNA	CNA	First Floor	Mat Dalton	
Reporting	zAgency4	zAgency4		44	44	Health Care Center	Nursing CNA	CNA	First Floor	Mat Dalton	
Benefits	zAgency5	zAgency5		5	5	Medical Center	Skilled Nursing	CNA	First Floor	Mat Dalton	
Configuration	zAgency6	zAgency6		6	6	Medical Center	Skilled Nursing	CNA	3rd Floor	Mat Dalton	
PBJ Reporting	zAgency7	zAgency7		7	7	Health Care Center	Nursing CNA	CNA	3rd Floor	David Hales	
Add Agency Staff	zAgency8	zAgency8		8	8	Medical Center	Skilled Nursing	CNA	3rd Floor	David Hales	
Add Employee	zAgency9	zAgency9		9	9	Medical Center	Skilled Nursing	CNA	3rd Floor	David Hales	


- Select **Personal Information** in the first page drop-down list. Then select **Basic** in the second drop-down list. You can modify the Last Name and First Name fields with the real name of the agency worker.

Personal Information ▾
Basic ▾

Last Name	First Name	MI	ID	Badge	Division	Department	Job Code	Location	Supervisor	Level 6
zAgency5	zAgency5		5	5	Medical Center	Skilled Nursing	CNA	First Floor	Mat Dalton	Direct Care Nursing


Last Name: <input type="text" value="zAgency5"/>	
First Name: <input type="text" value="zAgency5"/>	
Middle Initial: <input type="text"/>	
ID Number: <input type="text" value="5"/>	
Badge: <input type="text" value="5"/> <span style="float: right;">Change...</span>	
Pay Class: <input type="text" value="Agency"/> <span style="float: right;">Change...</span>	
Pay Class Eff. Date: <input type="text" value="07/16/17"/>	Photo: <input type="text"/> <span style="float: right;">Browse...</span>
Clock Group: <input type="text" value="Clock Group #1"/>	<span style="background-color: #0070c0; color: white; padding: 5px 10px;">Upload Selected Image</span>
Schedule Pattern: <input type="text" value="None"/> <span style="float: right;">Change...</span>	
Sch. Patt. Eff Date: <input type="text" value="01/01/80"/>	
Date of Hire: <input type="text" value="8/23/15"/>	

3. Select **Workgroup** in the second drop-down list. Then click the Pencil icon () for the current workgroup assignment. The **Adjust Current Home Workgroup Settings** dialog is displayed.


Personal Information		Workgroup									
Last Name	First Name	MI	ID	Badge	Division	Department	Job Code	Location	Supervisor	Level 6	
zAgency5	zAgency5		5	5	Medical Center	Skilled Nursing	CNA	First Floor	Mat Dalton	Direct Care Nursing	
Revert to Earlier Settings		Change Home Workgroup Assignment									
Current											
Adj	Division	Department	Job Code	Location	Supervisor	Level 6	Level 7	Effective	Comments		
	Medical Center	Skilled Nursing	CNA	First Floor	Mat Dalton	Direct Care Nursing	Default	7/29/23			

4. Modify the workgroup for each workgroup level for this agency worker. Click **Ok**.

**Adjust Current Home Workgroup Settings** ✕

<p><b>Properties</b></p> <p>Note: Changes in this area will not maintain historical records. Unless you are simply repairing a mistake, select the "Change Home Workgroup Assignment" button in the toolbar above.</p> <p>Assignment Date: <input type="text" value="7/29/23"/> </p> <p>Notes: <input style="width: 100%; height: 40px;" type="text"/></p>	<p><b>Workgroup</b></p> <p>Division: <input type="text" value="Health Care Center"/></p> <p>Department: <input type="text" value="Nursing CNA"/></p> <p>Job Code: <input type="text" value="CNA"/></p> <p>Location: <input type="text" value="3rd Floor"/></p> <p>Supervisor: <input type="text" value="David Hales"/></p> <p>Level 6: <input type="text" value="Direct Care Nursing"/></p> <p>Level 7: <input type="text" value="Default"/></p>
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5. The current workgroup assignment is updated.

Personal Information		Workgroup									
Last Name	First Name	MI	ID	Badge	Division	Department	Job Code	Location	Supervisor	Level 6	
zAgency5	zAgency5		5	5	Medical Center	Skilled Nursing	CNA	First Floor	Mat Dalton	Direct Care Nursing	
Revert to Earlier Settings		Change Home Workgroup Assignment									
Current											
Adj	Division	Department	Job Code	Location	Supervisor	Level 6	Level 7	Effective	Comments		
	Health Care Center	Nursing CNA	CNA	3rd Floor	David Hales	Direct Care Nursing	Default	7/29/23			

6. Repeat step 1 to 5 to replace placeholder employee properties with those of other agency workers.