

# **Scheduling**

## **Nursing Staff/Resident Ratio for Compliance**

# **Scheduling (continued:)**

## **Nursing Staff/Resident Ratio for Compliance**

**There are four important sections to the **Current Staffing Ratios** window above. They are:**

**First – The **Calendar** (top row - upper left) lets you change the day and lets you view the statistics for that day. **These statistics are based on current residents in the facility.****

# **Scheduling (continued:)**

## **Nursing Staff/Resident Ratio for Compliance**

**Second** – The **Ratios** (top row - middle) gives the **Default** numbers of nurses that should be on duty for each shift and the **Current** numbers of nurses that have been scheduled.

# Scheduling (continued:)

## Nursing Staff/Resident Ratio for Compliance

**Third** – The **Average Hours Per Resident** (top row - upper right) gives the **Default** numbers for RN, LPN and CNA hours per resident that should be on duty and the **Current** scheduled number of nurses for the three categories. If you have a number in **red** in the **Current** column, that means you are understaffed. In the window above the **Current** number is **0.15** for RN vs. the **Default** of 0.4.

# **Scheduling (continued:)**

## **Nursing Staff/Resident Ratio for Compliance**

### **Fourth – The Current Staffing for {date}**

**(second row - full window) whatever date is on the calendar is displayed for the three shifts that cover the 24 hours. Note in the Morning shift (6 AM to 2 PM) there is one RN present. However, there are no RN'S present for the rest of the day. This ties back to the red 0.15 hours in the Average Hours Per Resident block.**

# Scheduling (continued): Schedule by Default

**Fill Default Schedules**

Department:

Job Title:

Starting Date: Monday, May 14, 2007

Ending Date: Sunday, May 27, 2007

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

# **Scheduling (continued):**

## **Schedule by Default**

**Schedule by Default** – If you have a number of employees who work the same shift all the time and you entered that data in the employee **Personnel** file under the **Work Preferences** tab, you can then schedule those employees for any number of weeks you choose.

# **Scheduling (continued):**

## **Schedule by Default**

The way you do this is by selecting the **Department, Job Title**, then select the date on the **Starting Date Calendar** – May 14, 2007 and the **Ending Date Calendar** – May 27, 2007. Once all of the selections have been completed, check on **Fill Default Schedule** (see window above).

# Scheduling (continued): Schedule by Shift

**Schedule By Shift**

Shift: **Nursing - Mornings 6 AM - 2 PM** Department: **Nursing**  
 Starts: **06:00 am** Ends: **02:00 pm** Job Title: **CNA**

Building: **Just Lee Convalescent Cen** Starting Date: **Monday, May 14, 2007** Ending Date: **Sunday, May 27, 2007**  
 Floor: **Floor 1** Station: **Station 2**

Starting Date							Ending Date						
Monday, May 14, 2007							Sunday, May 27, 2007						
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	1	2	3	4	5	29	30	1	2	3	4	5
6	7	8	9	10	11	12	6	7	8	9	10	11	12
13	14	15	16	17	18	19	13	14	15	16	17	18	19
20	21	22	23	24	25	26	20	21	22	23	24	25	26
27	28	29	30	31	1	2	27	28	29	30	31	1	2
3	4	5	6	7	8	9	3	4	5	6	7	8	9

**Employees**

Adeb, Beth	FT
Berns, Billie	FT
Berns, Brad	FT
Berns, Robert	FT
Bing, Billie	FT
Birch, Shanna *P*	PT
Calera, Penny	FT
Carow, David	FT
Carr, Catherine	FT
Cook, Patrick	FT
Copp, Sandy *P*	PT
Cornish, Christine	FT
Davis, Pam	FT
Fry, Stephanie *P*	PT

**Employees To Be Scheduled**

Adeb, Beth
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\*P\* Denotes Agency Pool Employee

View Complete Schedule | View Emp.'s Schedule | View Current Ratios | Reconciliation Rep. | Schedule Shift | Exit Scheduler

# **Scheduling (continued):**

## **Schedule by Shift**

**Schedule by Shift** – Since some employees work odd shifts, those employees can be scheduled by using the schedule by shift window (see above).

In this window you select the **Department, Job Title, Shift, Floor, and Station.**

# **Scheduling (continued):**

## **Schedule by Shift**

Then using the two calendars you select the **Starting Date** – May 14, 2007 and the **Ending Date** – May 27, 2007. Finally, you select one or more employees from the left side **Employees** and with the arrow in the center you move them to the right **Employees To Be Scheduled**. Once all of the selections have been made, click on **Schedule Shift**.



# **Scheduling (continue):**

## **Edit Employee Schedule**

The **Edit Employee Schedule** window (see above) provides the ability to edit an existing employee schedule to schedule:

**Sick Leave**

**Vacation**

**Bereavement**

**Requested Day Off**

**Schedule a Holiday**

**Medical Leave**

**Leave of Absence**

**Cancel a Shift**

# Scheduling (continue):

## Edit Employee Schedule – Cancellation Explanation

The screenshot displays the 'Employee Scheduling' application window. The main window shows the following details:

- Dept: Nursing
- Title: All
- Employee: Beth Adeb
- Current Day's Schedule: Monday, November 29, 2004
- Employee List: Adeb, Beth; Berns, Albert; Berns, Billie; Berns, Brad; Berns, Robert; Bing, Billie; Bingham, Brian; Bink, Candy; Bink, Dale; Birch, Shanna \*P\*; Calder, Renee; Calera, Penny; Carow, David; Carr, Catherine; Carroll, Chasity; Chorak, Chelsey; Cook, Patrick; Copp, Sandy \*P\*; Cornish, Christine; Davis, Pam; Donall, Shanna \*P\*; Dowd, Danielle; Fry, Stephanie \*P\*
- \*P\* Denotes Agency Pool Emplo
- Building: Just Lee Convalescent Cen
- Floor: Floor 1
- Station: Station 1
- Sched. Type: Unschedule
- # of Hours: 8.0
- Start: 06:00 am
- End: 02:00 pm

A 'Cancellation Explanation' dialog box is open, showing the following information:

- Monday, November 29, 2004 06:00 am
- Until
- Monday, November 29, 2004 02:00 pm
- Employee: Beth Adeb
- Cancellation: Sick
- Schedule Replacement
- Explanation: Called in sick on Sunday night.
- Buttons: Save & Schedule Replacement, Cancel

The 'Current Day's Schedule' table on the right shows a grid of time slots from 12:00 a to 11:00 p. The slots from 6:00 p to 11:00 p are highlighted in yellow.

## **Scheduling (continue):**

### **Edit Employee Schedule – Cancellation Explanation**

The above **Cancellation Explanation** screen provides a place to record the reason for the cancellation and the ability to **Schedule a Replacement.**

# Scheduling (continue): Edit Employee - Fill Cancellation

The screenshot displays the 'Employee Scheduling' application window. The main window shows the department 'Nursing' and the employee 'Beth Adeb' for 'Monday, November 29, 2004'. A 'Fill Cancellation' dialog box is open, showing details for 'Robert Berns' in the 'Nursing' department with the job title 'CNA'. The dialog includes a list of 'Available Employees' with 'Berns, Robert' selected. Scheduling details for Monday, November 29, 2004, are shown: 06:00 am to 02:00 pm, with 'Grant Overtime' checked. The location is 'Just Lee Convalescent Center', 'Floor 1', 'Station 1'. Phone numbers are listed as '517-332-5070' and 'Not On File'. Buttons at the bottom of the dialog include 'View Employee's Schedule', 'Work Preferences', 'Schedule Selected Employee', and 'Cancel'. The main window also has buttons for 'View Employee's Schedule', 'View Complete Schedule', 'View Current Ratios', 'Reconciliation Rep.', and 'Exit Scheduler'.

Employee Scheduling

Dept: Nursing Beth Adeb

Title: All Monday, November 29, 2004 Current Day's Schedule

**Fill Cancellation**

Department: Nursing Robert Berns

Job Title: CNA

Monday, November 29, 2004 06:00 am  
Until  
Monday, November 29, 2004 02:00 pm

Grant Overtime

Building: Just Lee Convalescent Center

Floor: Floor 1

Station: Station 1

Phone Numbers  
Phone #: 517-332-5070  
2nd Phone #: Not On File

View Employee's Schedule Work Preferences Schedule Selected Employee Cancel

Floor: Floor 1 Sched. Type: Unschedule # of Hours: 8.0

Station: Station 1 Extended Scheduling Fill Schedule

View Employee's Schedule View Complete Schedule View Current Ratios Reconciliation Rep. Exit Scheduler

## **Scheduling (continue):**

### **Edit Employee - Fill Cancellation**

The **Fill Cancellation** (see window above) provides a list of employees who are available to work the shift and their phone numbers. Once an employee has been contacted and agrees to work the shift, the facility's rules dictate whether to grant overtime or not. To not grant overtime click the **Grant Overtime** button, then click on **Schedule Selected Employee**.

# Scheduling Summary

**Scheduling in a facility is where money can be saved or lost. If you over schedule employees, it is costing you unnecessarily. If you under schedule, you may be saving in the short run, but it will cost you dearly in the long run. The word will get out that the facility is understaffed and not taking care of its residents, plus it can cost you hefty citations.**

# **Scheduling Summary (continued):**

**When we were doing the bottom up research to develop the scheduling portion of the Ball Programs – management module, the above paragraph was the unanimous feedback we received. That is why we built in the **nursing staff to resident ratio calculator** for compliance into the scheduling software. For proprietary reasons we are not going to connect all the dots and in fact there are**

# **Scheduling Summary (continued):**

**missing dots. Let's review the major points of the scheduling program.**

**First** – The scheduling program is for all departments in a facility.

**Second** – The **nursing staff to resident ratio calculator** for compliance is only active for the nursing department

# Scheduling Summary (continued):

**Third** – The **Schedule by Default** is the most economic as you can schedule for months out into the future for those individuals who have a consistent work schedule.

**Fourth** – The **Schedule by Shift** is used for employees who work odd shifts.

**Fifth** – Besides the functions described above

# **Scheduling Summary (continued):**

the **Edit Employee Schedule** is also used to edit existing schedules created by **Schedule by Default** or **Schedule by Shift**.

**Sixth** – Our **Schedule Overtime Cost Report** and its companion **Under Utilized Report** were designed to help schedulers and management keep labor costs within budget.

# **Scheduling Summary (continued):**

**If you have questions about the scheduling programs or any of the other management programs, please reach us by using our **Have a Question?** or **Contact Us** functions on this web site.**