Schedule Module

Thank you to everyone who participated in our preliminary schedule module training. We are thrilled to roll-out this new module that will revolutionize the way we manage our timesheets and schedules!

Please click on the icons below to review training materials and recorded sessions.



The schedule module goes live on Monday, June 12th. Click here to find out where we are in the process!





IPS Schedule Module

Manager Training Desktop

Back to First Page

Overview



Purpose of the Schedule Module

- Create consistent weekly work schedules
- Streamline employee's timecards
- Prevent inaccurate time punches
- Notify employees of updates and changes easily
- Reduce schedule confusion
- Eliminate weekly schedule emails for payroll verification





Logging into IPS





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Employee Information Icon

- Managers can view their team members and any employee who is cross-trained to work at that property.
- Click on the "employee icon" to view contact information and their current schedule.

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Can view employee's past and present schedules. Add/remove job skills Add/remove cost centers Me realizing halfway through the convo that I've been oversharing



Schedule Templates - "Master Document"





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Schedule Templates Icon

- Schedule Template is a MASTER document.
- Anything you edit in the template will carry over into each weekly schedule.
- You can assign shifts to employees that work the same days/hours each week.

Schedule Template Icons



Update Schedule Template

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Schedule Template		SAVE	VALIDATE CONSTRAINTS	OVERRIDE CON	NSTRAINTS UT	ILITIES VIEW BY EM	PLOYEE ••
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USE COST CENTERS FOR SCHEDULER Rows On Page 50 ~ 1 Row 5	<u>.</u>						
Scheduler Location 212 Meramec							

Update Schedule Templates





Assign Shifts Overview

- View number of schedule hours that need to be assigned
- Confirm date range
- View employee names in your roster
- Expand days of the week to assign shifts

Assign Open Shifts



Click on the shift Click "Assign Employee"

Browse and Select Employees		X
Qualified Others		
Search C	L .	
Name	↓↑ Start Date	Hired Date
Test Test2	2017-01-01	2017-01-01

Assign Open Shifts

- A list of employees will appear
 - Available to work the shift
 - Have the appropriate skills to hold post
 - Have been trained at that property

Freeze Assign Shifts

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Generate Schedule





• Manager selects the start date of the schedule.

Generate Schedule

• Click Save.



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• Return to home page

Weekly Schedule

• Click "Schedules"



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View shows past and present schedules.

The filter sorts the newest schedule to the top.

Click on the "pencil" icon to view and edit the schedule further.

Edit Weekly Schedule



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Assign Remaining Shifts

- Assign remaining open shifts
- Unassign a shift and reassign it to a different employee



• Click on the newly assigned shift

Add Notes to a Shift

• Click the note icon

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Add Notes to an Entire Schedule

- Click on the ellipse icon
- Click "add note"

Post Schedule



WHEN YOU SEE AN INCOMING CALL FROM YOUR BOSS ON YOUR DAY OFF memetogo.com



Employee Notifications

Email

Text Message

"To-do" item in bell

Split-Shift Assignments

- Click on the shift
- Select "Manage Shift"
- Click the ellipses icon
- Click "Split Shift"

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Split Shift Assignments

- Update start and end times for first portion of the split shift
- Assign an employee to those work hours
- Click the "Split Shift 01" tab at the top of the screen
- Update start and end times for the second portion of the shift
- Assign an employee to those work hours

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Additional information	03:00	pm ④ 07:00		pm 🥑
	Qualifications			
	Primary Cost Center *			
	212 Meramec			B

• Save
Special Detail Assignments

- Click the ellipses icon
- Select "Add New Shift"

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Special Detail Assignments

Complete all four sections of the task tree.

- Time Adjustment
 Select the day of the week
 - •Start and end time
- Qualifications
 - •Primary cost center •Skills = SPECIAL DETAIL
- Employee Selection
 Assign shift
- Additional Information

•Shift count = identify the number of people required to work the special detail assignment

	<u>APR 12</u> 7:00 am - 3:00 pm			2	12 Meramec 🔡 Special [
JUMP TO	Time Adjustment				
Time Adjustment	Shift Type	Sta	art Date	Shift Date *	
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Employee Selection	Shift Time				
Additional information	07:00 a	m 03:00 pm			
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Troubleshooting – Common Mistakes



Override constraints

Confirm you are not double booking an employee



Schedule Template vs. Weekly Schedule

Cannot publish a template



Additional Features





POST OPEN SHIFTS APPROVE SHIFT-SWAPS



UPDATE JOB UPDATE COST SKILLS CENTERS

Post Open Shifts

Allows manager to publish an open shift for staff to volunteer for.

- Return to your weekly schedule view.
- Click the "edit" icon
- Locate the "Manage Open Shifts" dropdown menu.
- Select "Post open shifts".
- Save.



Post Open Shifts

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SAVE	UNPOST SCHEDULE	MANAGE OPEN SHIFTS	VALIDATE CONSTRAINTS	OVERRIDE CONSTRAINTS			

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\checkmark	04/16/2021		07:00a	03:00p		Lead Lobby Attendar	
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Post Open Shifts

Step 3: Workflow	Open Shift Request Workflow	×	Step 4: Post Until	04/13/2021	
					Post Open Shifts

When employees volunteer for a shift, the manager is notified by email.



If the shift requires manager approval, they will have a "todo" task in their notification bell.



Review Notifications

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Review Notifications

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Account Manager/Lead			,			- •		
Choose Employee(s)	•							

Employee Shift-Swaps

Criteria for shift swapping:

Answer/Solution

Shift swaps use the following criteria and restrictions to select employees for the list of names on the request form:

- 1. Both employees must have the same primary job. Shift swaps do not apply to transfer jobs.
- 2. Both employees must be qualified to work both jobs.
- 3. Both employees must be in the same location.
- 4. The shifts must be a minimum of 72 hours in the future. Normally, the shifts that are being swapped must be the same length.
- 5. However, if the target employee has another shift on the same day, both shifts become available for the swap regardless of the length of the other shift. For example, if Employee A wants to swap an 8-hour shift, and Employee B has an 8-hour shift and a 4-hour shift available on the selected day, both of Employee B's shifts are available for the swap.





Update Job Skills

- Schedules
- Employee information
- Select employee name, click icon

Skills							C	efineSkills 🍃
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	REMOVE SELECTED	ADD SCHEDULER LOCATION		

Update Cost Centers

- Schedules
- Employee information
- Select employee name, click icon

Add Sch	Add Scheduled Scheduler Location									
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	Centene Crescent Garage									
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	Centene Farmington Lobby Facilitators									
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		Close Add								

Update Cost Centers

- Scroll through the list of cost centers
- Select the correct cost center the employee is trained to work at
- Click "Add"

Questions & Answers



BLACKWELL

IPS SCHEDULE MODULE MANAGER DESKTOP TRAINING

TABLE OF CONTENTS

- 1. Logging into IPS
- 2. Employee Information
- 3. <u>Schedule Templates Alpha Document</u>
- 4. Generate Schedule
- 5. Weekly Schedule Beta Document
- 6. <u>Post Schedule</u>
- 7. <u>Split-Shift Assignments</u>
- 8. Special Detail Assignments
- 9. Troubleshooting
- 10. Post Open Shifts
- 11. Review Notifications
- 12. Employee Shift-Swaps
- 13. Update Job Skills
- 14. Update Cost Centers

LOGGING INTO IPS

- 1. Access website: https://secure.ipsonline.net/ta/BLACKWELL.login?rnd=HSN
- 2. Enter username and password
- 3. Sign in
- 4. Locate the Schedules module on the homepage toolbar

EMPLOYEE INFORMATION

- 1. Home page
- 2. Click Schedules icon
- 3. Click Employee Information link
- 4. Displayed is a list of active employees that report to the manager
- 5. Locate the employee name and click the Employee Information icon
 - a. Main Tab
 - i. Locate profile information specific to the employee
 - b. Payroll Tab
 - i. Blank content

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- c. Schedules Tab
 - i. Displays published work schedules assigned to the employee
 - ii. Add/remove Job Skills
 - iii. Add/remove Cost Centers

SCHEDULE TEMPLATES – MASTER DOCUMENT

- 1. Home page
- 2. Click Schedules icon
- 3. Click Schedule Templates link
- 4. Click Edit icon (pencil)
- 5. Click Ellipses icon (...)
- 6. Click **View by Week** link
- 7. Click the **Blue Arrow** beside each day of the week (expand view)
- 8. Click on the **Open Shift**
- 9. Click Assign Employee link
 - a. Select the name of an employee from the **Qualified** list
 - i. Employee is available to work, appropriate job skills, and been trained at the property
 - ii. Employee is eligible to hold post
 - b. Select the name of an employee from the **Others** list
 - i. Employee does not meet the three qualifying factors and will require a manager override to place them on the schedule for that particular shift
 - c. Repeat process until shift openings have been permanently assigned to workforce that will continuously fill the same shifts each week
- 10. Click Ellipses icon (...)
- 11. Click Freeze Assigned Shifts link

GENERATE SCHEDULE

- 1. Home page
- 2. Click Schedules icon
- 3. Click Schedule Templates link
- 4. Click Gear icon
- 5. Pop-up window asks manager to confirm they wish to generate a schedule

a. Click Yes

- 6. Click the Calendar icon.
 - a. Select the correct start date of the schedule. Start dates must be a Monday.
 - b. Click Save

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WEEKLY SCHEDULE – JUNIOR DOCUMENT

- 1. Home page
- 2. Click Schedules icon
- 3. Click Schedules link
- 4. Locate newly generated schedule

a. Schedules are automatically sorted with the newest version at the top of the list

- 5. Click the Edit icon (pencil)
- 6. Click the Ellipses icon (...)
- 7. Click View By Week link
- 8. Click the **Blue Arrow** beside each day of the week (expand view)
- 9. Click on the **Open Shift**
- 10. Click Assign Employee link (assign remaining open shifts)
 - a. Select the name of an employee from the Qualified list
 - i. Employee is available to work, appropriate job skills, and been trained at the property
 - ii. Employee is eligible to hold post
 - b. Select the name of an employee from the Others list
 - i. Employee does not meet the three qualifying factors and will require a manager override to place them on the schedule for that particular shift
 - c. Repeat process until shift openings have been permanently assigned to workforce that will continuously fill the same shifts each week
- 11. Add "shift-notes" by clicking on the **Assigned Shift**
 - a. Click the Notes icon
 - b. Type notes relevant to that specific shift assignment
 - c. Click Save
- 12. Add "schedule-notes" by clicking the Ellipses icon
 - a. Click Add Note
 - b. Type notes relevant to the entire schedule
 - c. Click Save

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POST SCHEDULE

- 1. View weekly schedule
- 2. Click Ellipses icon (...)
- 3. Click Post Schedule
- 4. Employees receive notifications via email, text, and to-do bell in HCMToGo app

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SPLIT-SHIFT ASSIGNMENTS

- 1. View weekly schedule
- 2. Click on the Open Shift
- 3. Click Manage Shift

- 4. Under "Shift Time", click the Ellipses icon (...)
- 5. Click Split-Shift
 - a. A new tab appears at the top of the pop-up window. This is the second shift generated by the split-shift request
- 6. Update each portion of the "Manage Shift" tree for each shift (1, 2, 3+)
 - a. Time Adjustment
 - i. Enter the start and end time of the first portion of the shift
 - b. Qualifications
 - i. Enter the type of job skill required for the first portion of the shift
 - c. Employee Selection
 - i. Locate the employee assigned to the first portion of the shift
 - d. Additional Information
 - i. No update required
 - e. Click Save
- 7. Repeat the "Manage Shift" tree for each portion of the split-shift

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SPECIAL DETAIL ASSIGNMENTS

- 1. View weekly schedule
- 2. Click Ellipses icon (...)
- 3. Click Add New Shift
- 4. Complete all sections of the "Manage Shift" tree
 - a. Time Adjustment
 - i. Select the day of the week
 - ii. Enter start and end time
 - b. Qualifications
 - i. Identify the primary cost center
 - ii. Enter the job skill required for the post.
 - Job skill should be SPECIAL DETAIL unless the post requires a specific job skill that limits the potential workforce by a unique skillset (I.e. Lobby Attendant, Armed Security Officer, etc.)
 - c. Employee
 - i. Assign the shift to an employee
 - d. Additional Information
 - i. Identify the number of employees required for the special detail assignment.
 - ii. Shift Count = number of employees needed

TROUBLESHOOTING

Common mistakes are:

- 1. Thoroughly review all override constraint alerts before continuing. The system will alert you when an employee is over-scheduled, exceeding 40-hours per week, or does not have the necessary job skills to cover the shift.
- 2. Confirm why the alert is presented and understand what you are overriding beforehand.
- 3. Do not confuse the ALPHA document with the BETA document.
 - a. The ALPHA document cannot be "posted" for the employees to view.
 - b. If you cannot locate a "Post Schedule" option in the ellipses icon, you are editing the ALPHA document and not the weekly schedule.
- 4. Contact Human Resources with questions. 314-993-3800 x4 or HR@blackwellinc.com.

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POST OPEN SHIFTS

Allows manager to publish open shifts for employees to volunteer for.

- 1. View weekly schedule
- 2. Click the Edit icon (pencil)
- 3. Locate the Manage Open Shifts dropdown menu
- 4. Click Post Open Shifts
- 5. Click Save
- 6. Click Manage Open Shifts button
- 7. Select all **Open Shifts**
- 8. Select all Available Employees
- 9. Click **Post Open Shifts**
- 10. Select a deadline for employees to volunteer for shifts. Click the Calendar icon and pick a date

REVIEW NOTIFICATIONS

- 1. Home page
- 2. Click Bell icon
- 3. Review notifications in the managers inbox
- 4. Sort notifications by clicking the **Filter** icon
 - a. Select the type of notification
- 5. Approve/reject notifications to remove them from the manager's inbox

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EMPLOYEE SHIFT-SWAPS

Employees can swap shifts with a coworker through their desktop or mobile app.

Required criteria:

- 1. Both employees must have the same primary job. Shift swaps do not apply to transfer jobs.
- 2. Both employees must be qualified to work both jobs.
- 3. Both employees must be in the same location.

- 4. The shifts must be a minimum of 72 hours in the future. Normally, the shifts that are being swapped must be for the same length of time.
- 5. However, if the target employee has another shift on the same day, both shifts become available for the swap regardless of the length of time. For example, if Employee A wants to swap an 8-hour shift, and Employee B has an 8-hour shift and a 4-hour shift available on the selected day, both of Employee B's shifts are available for the swap.

UPDATE JOB SKILLS

- 1. Home page
- 2. Click Schedules icon
- 3. Click Employee Information link
- 4. Locate the correct employee
- 5. Click the **Employee Profile** icon
- 6. Click the Schedules tab
- 7. Scroll down to the **Skills** section
 - a. Click Add Skill
 - b. Locate the correct skill within the master list
 - c. Checkmark the box
 - d. Click Add New Skill
- 8. Click Save

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UPDATE COST CENTERS

- 1. Home page
- 2. Click Schedules icon
- 3. Click Employee Information link
- 4. Locate the correct employee
- 5. Click the Employee Profile icon
- 6. Click the Schedules tab
- 7. Scroll down to the Scheduled Cost Centers section
 - a. Click Remove Selected or Add Scheduler Location
 - b. Locate the name of the property that should be removed/added to the employee profile
 - c. Checkmark the box
 - d. Click Remove/Add
- 8. Click Save

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IPS Schedule Module

Employee Training Smart Phone

Back to First Page



Purpose of module

How to navigate HCMToGo

Review work schedules

Schedule notifications

Shift Swaps

Special Detail assignments





Create	Create consistent weekly work schedules
Streamline	Streamline timecards and payroll processing
Prevent	Prevent inaccurate time punches
Notify	Notify employees of updates easily
Reduce	Reduce schedule confusion
Eliminate	Eliminate weekly schedule emails for payroll verification

WHEN YOU SEE AN INCOMING CALL FROM YOUR BOSS

ON VOUR-DAV OFF

It's too bad I can't unsubscibe from work emails.



Schedule Notifications



Posted Schedule Notification – Text Message







Logging into HCMToGo



Access My Schedule





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May 16 SUN					
Not Scheduled					
May 17 MON					
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From				03:00p	
То				11:00p	
V DETAILS					
May 18 TUE					
Shift		03	:00p - 11	:00p 😰	
From				03:00p	
То				11:00p	
V DETAILS					
May 19 WED					

My Schedule Details

🛅 📢 May 16 - May 22 🕨	Y
Мау 17 мом	(1 shift)
Test Test1	11:00p - 07:00a
Cost Centers	212 Meramec
Skill	Lobby Attendant



Employee Shift Swaps

Criteria for shift swapping:

Answer/Solution

Shift swaps use the following criteria and restrictions to select employees for the list of names on the request form:

- 1. Both employees must have the same primary job. Shift swaps do not apply to transfer jobs.
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- 5. However, if the target employee has another shift on the same day, both shifts become available for the swap regardless of the length of the other shift. For example, if Employee A wants to swap an 8-hour shift, and Employee B has an 8-hour shift and a 4-hour shift available on the selected day, both of Employee B's shifts are available for the swap.
| May 17 MON | |
|------------|-----------------|
| Shift | 03:00p - 11:00p |
| From | 03:00p |
| То | 11:00p |

➤ DETAILS

Shift Swap



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Shift Change Request	×	
May 17 MON 03:00p - 11:00p	V DETAILS	
Shift Swap Coverage Request		
Search and select employee		
📰 ┥ May 16 - May 22 🕨	Y	
Мау 17 мом	(1 shift)	
DETAILS	11:00p - 07:00a	
Cost Centers	212 Meramec	
Skill	Lobby Attendant	
Send All		
CANCEL SUBN	4IT	

Shift Swaps Require Manager Approval





Open Shifts



Pick up extra hours

Teamwork

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View open shifts at different properties

Special detail assignments

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View Open Shifts

Identify Open Shift Days

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	Cost Center	Skill	Shift
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~	DETAILS		
	212 Moramoo	Lobby Attandant	02:00p - 11:00p
~	DE.	j	
	Submitt	ing Open Shift Req	uest

Pick Up Open Shift

Open Shift Notifications

- Manager receives notifications
- Manager approves/denies shift assignment



Open Shift Pending Manager Approval

Open Shift Manager Approval

Blackwell Staff: Notice of Posting and/or Modification to your Schedule

?

hr@blackwellinc.com(hr@blackwellinc.com via sendgrid.net) To OMissy Blackwell

 (i) If there are problems with how this message is displayed, click here to view it in a web browser. We could not verify the identity of the sender. Click here to learn more. The actual sender of this message is different than the normal sender. Click here to learn more. Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Dear Test,

Your schedule was either Posted or Changed. Please review the table below as this update affects you.

Here is your new current schedule:

Schedule Date	From Time(Min)	From Time(Max)	To Time(Min)	To Time(Max)	Total Time	Scheduler Location
Mon May 17, 2021	-	-	-	-	-	-
Tue May 18, 2021	-	-	-	-	-	-
Wed May 19, 2021	-	-	-	-	-	-
Thu May 20, 2021	07:00a		03:00p			212 Meramec
Fri May 21, 2021	-	-	-	-	-	-
Sat May 22, 2021	-	-	-	-	-	-
Sun May 23, 2021	-	-	-	-	-	-

You can also view your most current schedule anytime within IPS or the HCMToGo mobile application.

Click Login to view.

Updated My Schedule

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My Schedule > Schedule							
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May 3	MON						



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May 1	SAT							
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May 3	MON							

Work Holidays



Questions & Answers

BLACKWELL

IPS Schedule Module

A successful project rollout requires a dedicated and highly involved test group to experience the functionality, report their findings, and develop training materials for a companywide launch.

Three Components of a Successful Company Project

