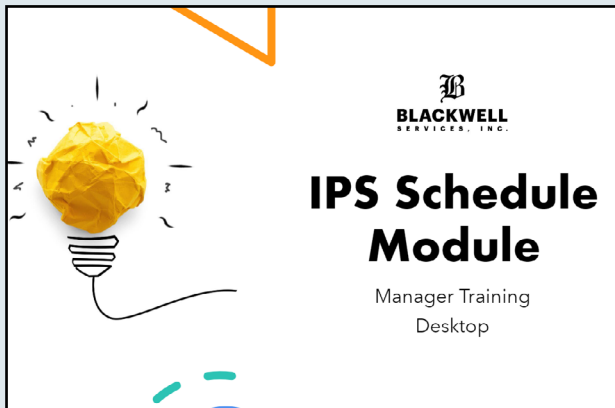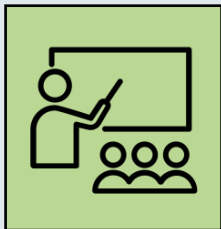# Schedule Module

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.
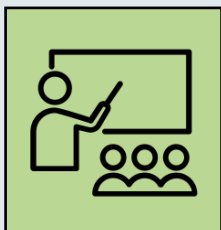
Manager Training Materials
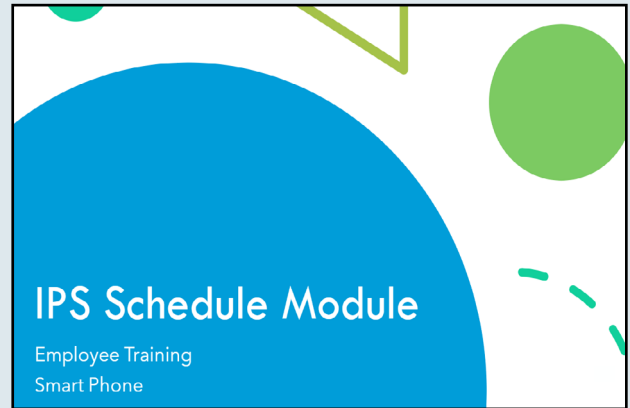

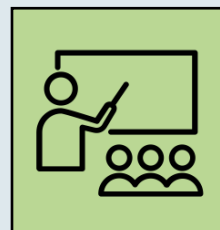*powerpoint presentation for managers*

 Manager Training
Recorded Presentation

 Manager Training
Written Instructions

Employee Training Materials

powerpoint presentation for employees

 Employee Training
Recorded Presentation

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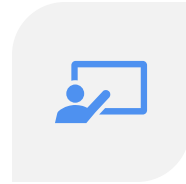Click here to find out where we are in the process!**

BLACKWELL
SERVICES, INC.

IPS Schedule Module
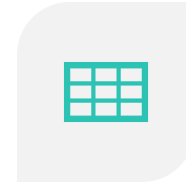
Manager Training
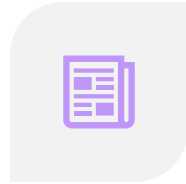
Desktop

Overview

1. PURPOSE OF MODULE

2. HOW TO NAVIGATE IPS
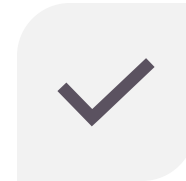
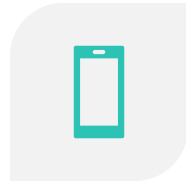**3. CREATE SCHEDULES**

4. PUBLISH SCHEDULES

5. REVISE SCHEDULES

6. SHIFT SWAPS

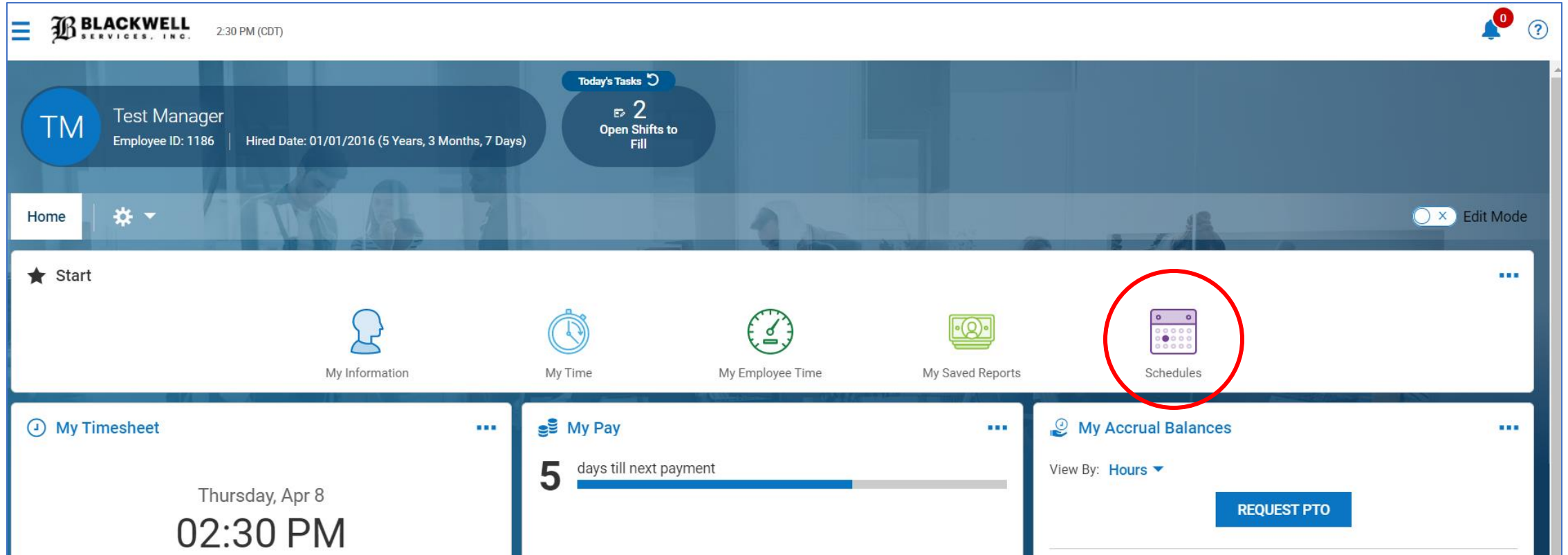**7. SPECIAL DETAIL ASSIGNMENTS**

8. DESKTOP AND SMART PHONE ACCESS

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

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.

BLACKWELL SERVICES, INC.

2:40 PM (CDT)

← Edit Employee

UTILITIES   DOWNLOAD PDF

Employee: Test Test1 (BLACKWELL) (1188)

Try the New Look

Main   Payroll   Schedules   ✎ Edit Tabs

Account Information

EIN* BLACKWELL
Primary EIN* BLACKWELL
Username* TTest
Salutation
First Name* Test
Last Name* Test1
Middle
Suffix
Nickname
First Screen [Security Profile Default]
Locale (Language & Formats) Company Default
Time Zone Central

SECURITY QUESTION
Question
Answer

Personal Information

Employee Id* 1188
Account Status User Only   Add To New Hire Export ☑
Primary Email
Secondary Email
Personal Email
Work Phone Not Selected   Primary ○
Cell Phone Not Selected   314-541-2385   Primary ◉
Home Phone Not Selected   Primary ○

ADDRESS*
Country United States
Street 1414 Lemon Drop Ave
Zip 63119
City Rock Hill
State Missouri

Address: Rock Hill, MO, USA
Address Accuracy: 4 - Town (City, Village)
Latitude: 38.6075525
Longitude: -90.3784505
State: Missouri
County: Saint Louis
City: Webster Groves

☐ USE SEPARATE MAILING ADDRESS

View username and contact information.

BLACKWELL
SERVICES, INC.
12:56 PM (CDT)

← Edit Employee

UTILITIES   DOWNLOAD PDF

Employee: Test Test1 (BLACKWELL) (1188)

Try the New Look

Main   Payroll   Schedules   ✎ Edit Tabs

Schedule

‹ April 5 - 11, 2021 ›

			TYPE	START DATE	FROM (MIN)	FROM (MAX)	TO	TOTAL (HH.00)	SCHEDULER LOCATION	DAY TYPE	IS SCHEDULED OFF
Mon	5		Fixed	Mon	03:00p		11:00p		212 Meramec		No
Tue	6			Tue							
Wed	7		Fixed	Wed	11:00p		07:00a		212 Meramec		No
Thu	8		Fixed	Thu	12:00p		05:00p		212 Meramec		No
Fri	9		Fixed	Fri	07:00p		07:00a		212 Meramec		No
Sat	10			Sat							
Sun	11			Sun							

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"

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

Day

Month

Year

Edit

Generate schedule

Update Schedule Template

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"

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

Generate Schedule

Generate Schedule

- Manager selects the start date of the schedule.

- Click Save.
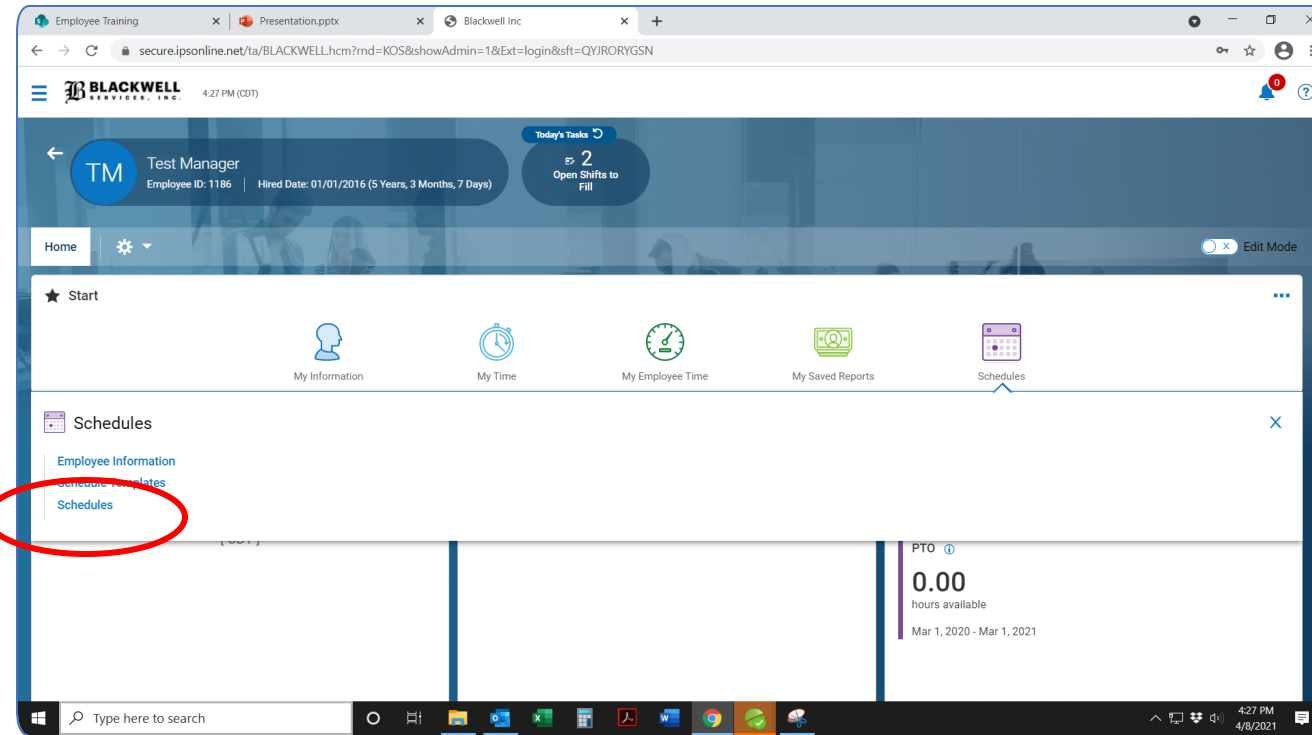
Weekly Schedule

- Return to home page

- Click "Schedules"

Locate New Weekly Schedule

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

Assign Remaining Shifts

- Assign remaining open shifts

- Unassign a shift and reassign it to a different employee
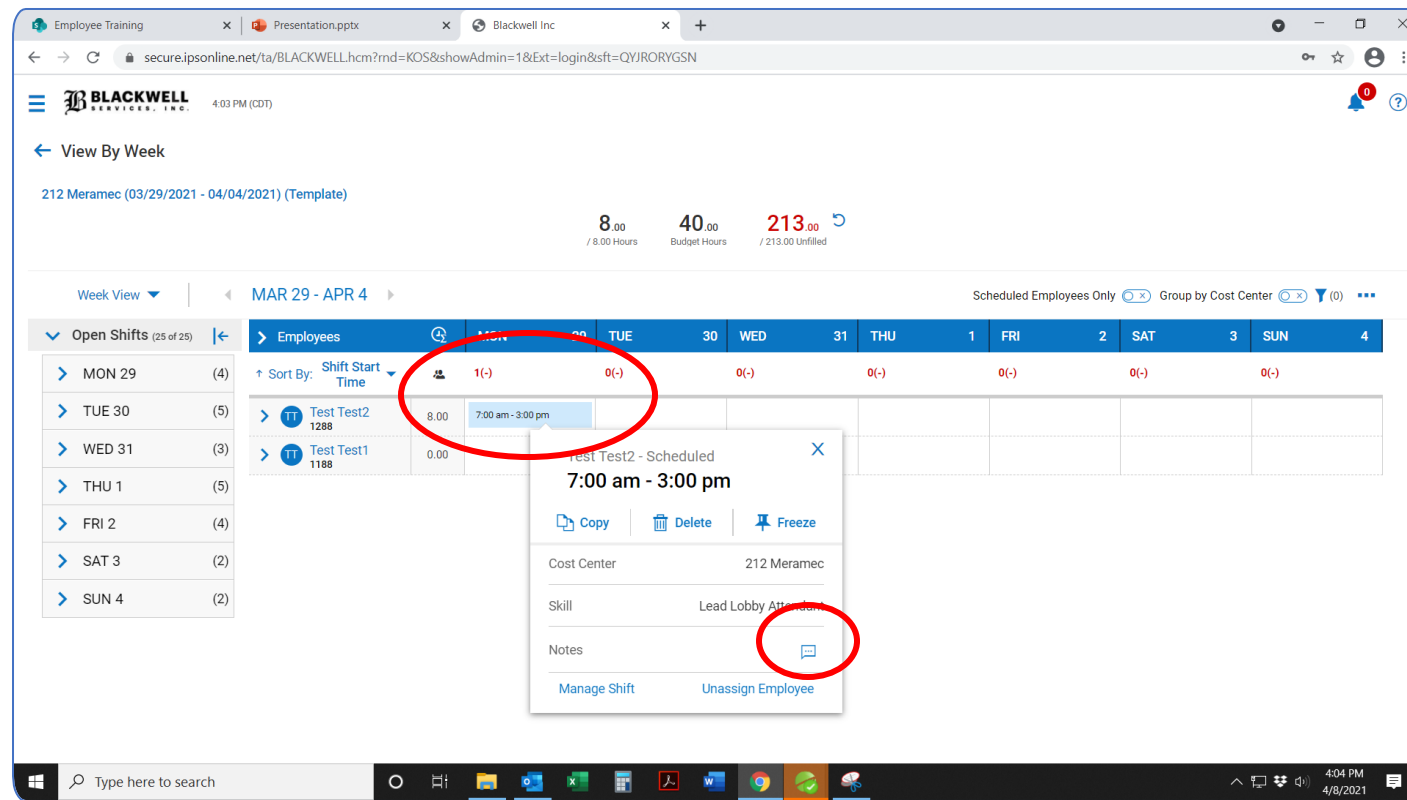
Add Notes to a Shift

- Click on the newly assigned shift
- Click the note icon
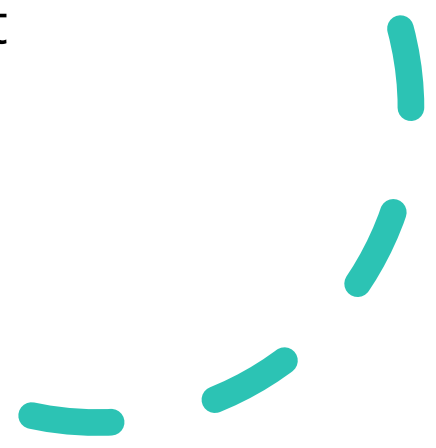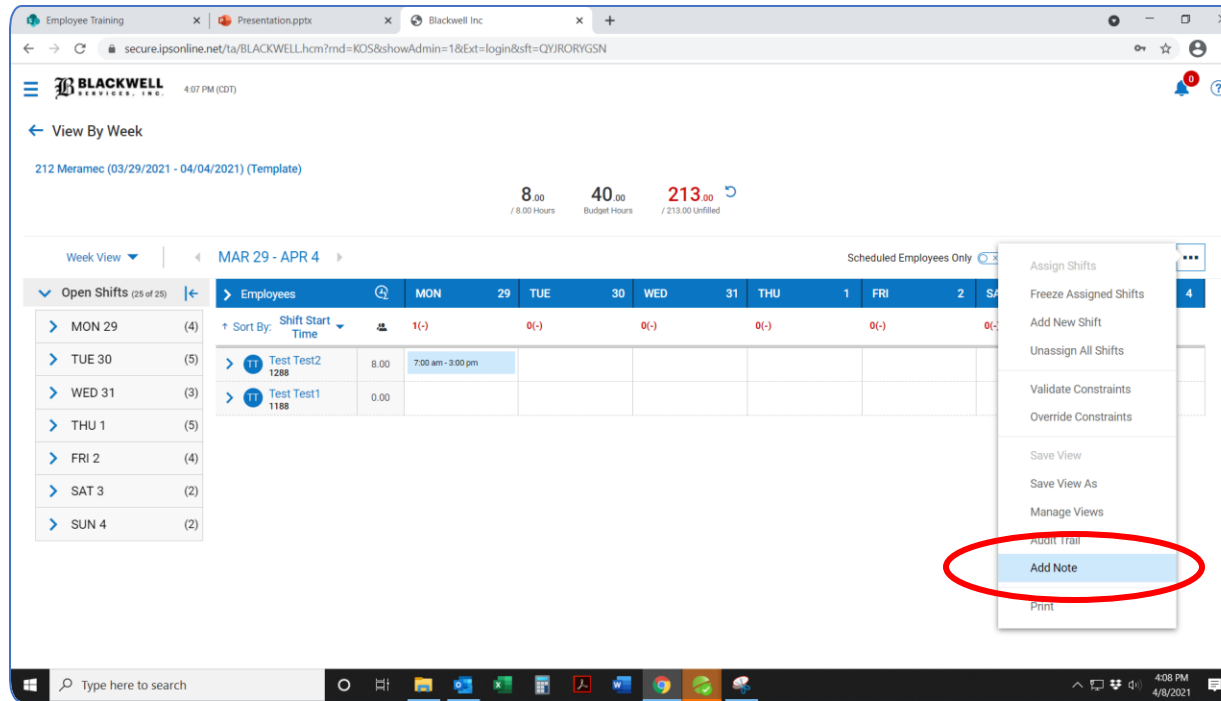
Add Notes to an Entire Schedule

- 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
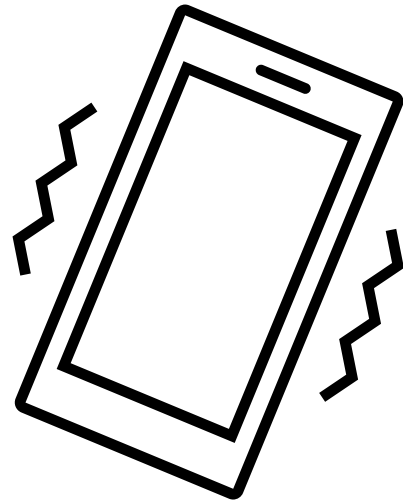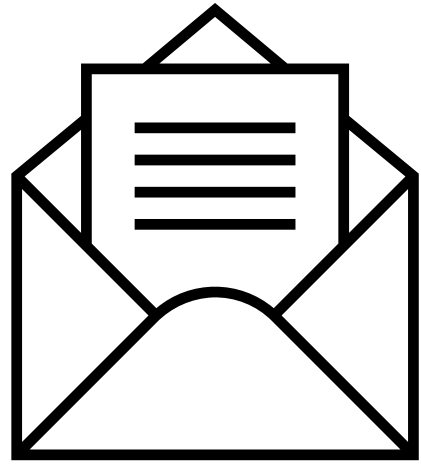
Employee Notifications

Email

Text Message

"To-do" item in bell
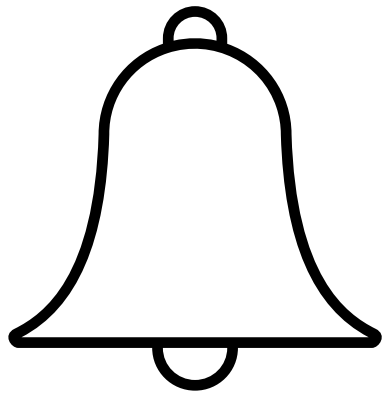
Split-Shift Assignments

- Click on the shift

- Select "Manage Shift"

- Click the ellipses icon

- Click "Split Shift"
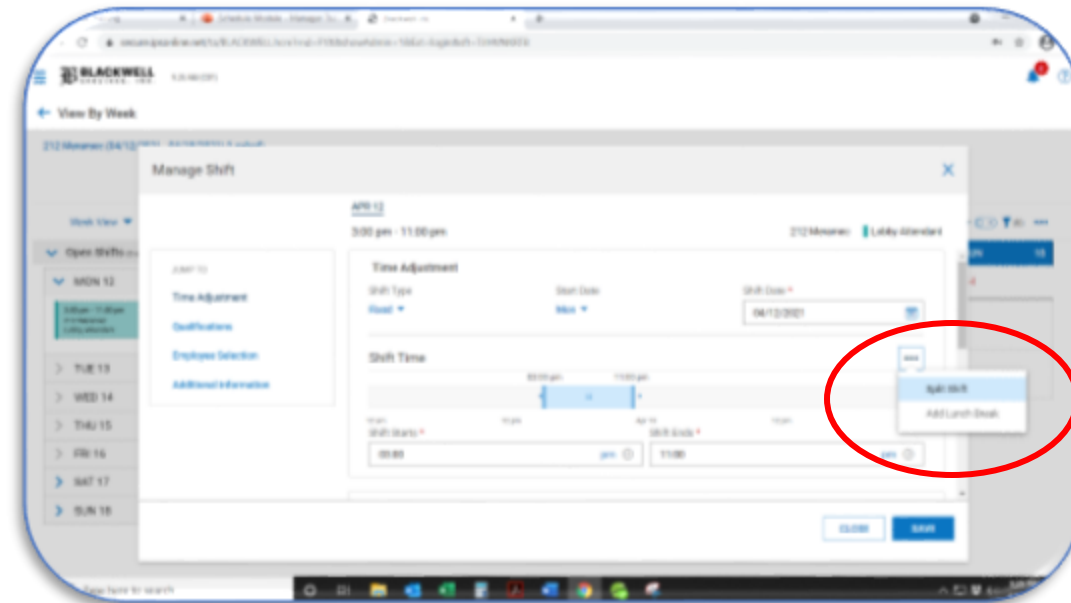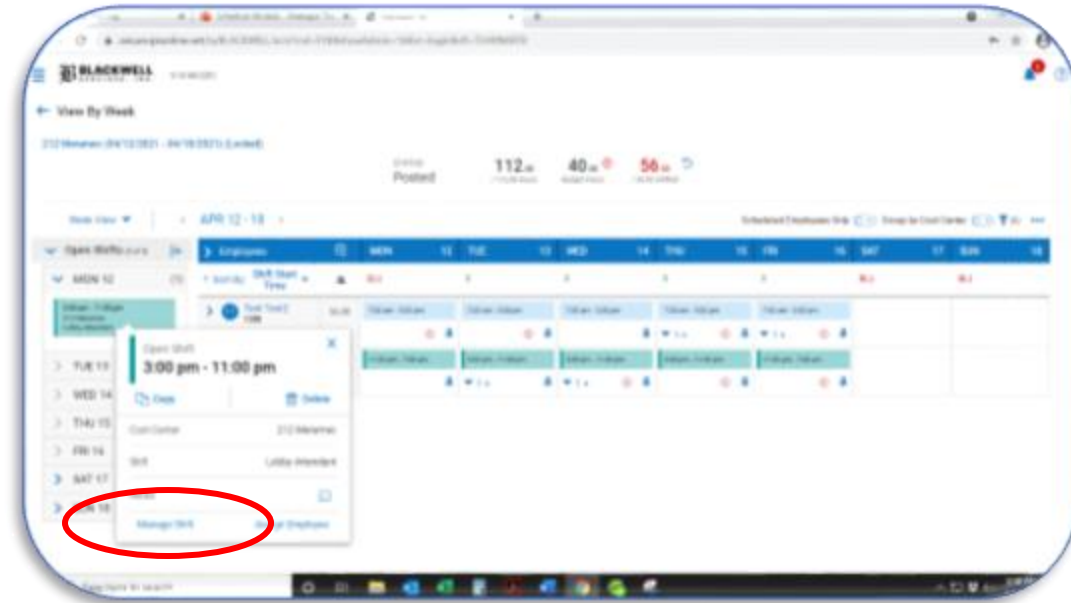
Split Shift Assignments

- 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

- Save

Special Detail Assignments

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

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

Troubleshooting — Common Mistakes

Override constraints

Confirm you are not double booking an employee

Schedule Template vs. Weekly Schedule

Cannot publish a template

I HAVE NO IDEA HOW I FIXED IT
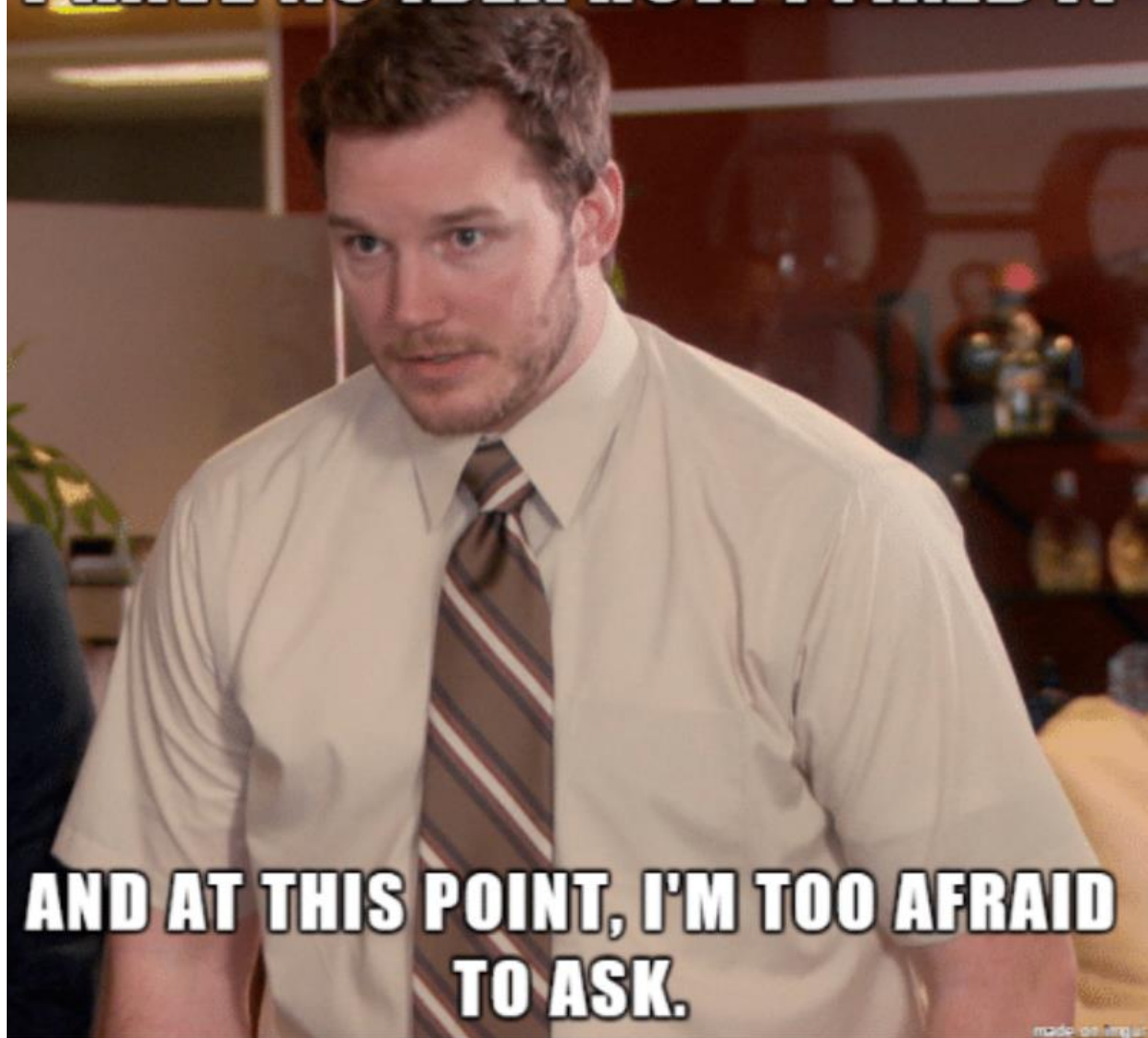
AND AT THIS POINT, I'M TOO AFRAID TO ASK.
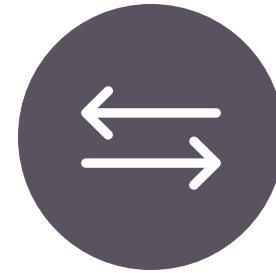
Post Open Shifts

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

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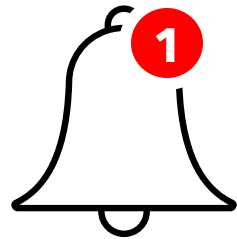
If the shift requires manager approval, they will have a "to-do" task in their notification bell.

Open Shift Requested - Message (HTML)

File | Message | Help | Acrobat | Tell me what you want to do

Delete | Respond | Teams | Quick Steps | Move | Tags | Editing | Speech | Language | Zoom

Open Shift Requested

noreply@ipsonline.net
To ○ Missy Blackwell

Mon 4/12/2021 4:03 PM

ⓘ Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Request details:

Requester: Test Test2

Shift Date: 04/13/2021

Shift Time: 07:00a-03:00p

Thanks.

Review Notifications

Review Notifications

Manager selects the employee's name and approves/rejects.

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

Update Cost Centers

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

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
S E R V I C E S , I N C.

IPS SCHEDULE MODULE
MANAGER DESKTOP TRAINING

TABLE OF CONTENTS

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

Back to First Page

   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**

⇧

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**

↑

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

↑

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

⬆

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.
         1. 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.

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

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**

⬆

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**

⬆

IPS Schedule Module

Employee Training

Smart Phone

Overview

Purpose of module

How to navigate HCMToGo

Review work schedules

Schedule notifications

Shift Swaps

Special Detail assignments

Purpose of the Schedule Module

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

Schedule Notifications

Text message

Email

To-do bell

Posted Schedule Notification – Text Message

Today 11:03 AM

Hi Marissa Blackwell,

Schedule: 212 Meramec (05/17/2021 - 05/23/2021) (Locked) has been Posted.

Thank you!
Reply STOP on +13142075422 to unsubscribe.

Text Message
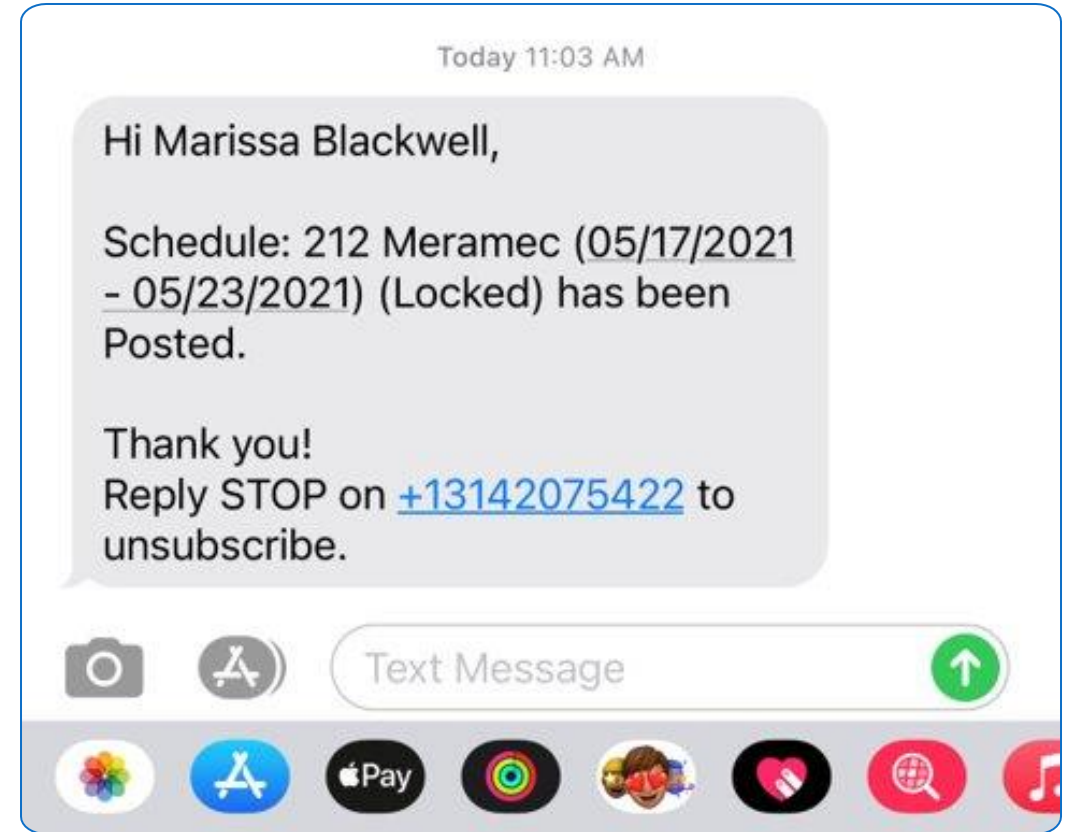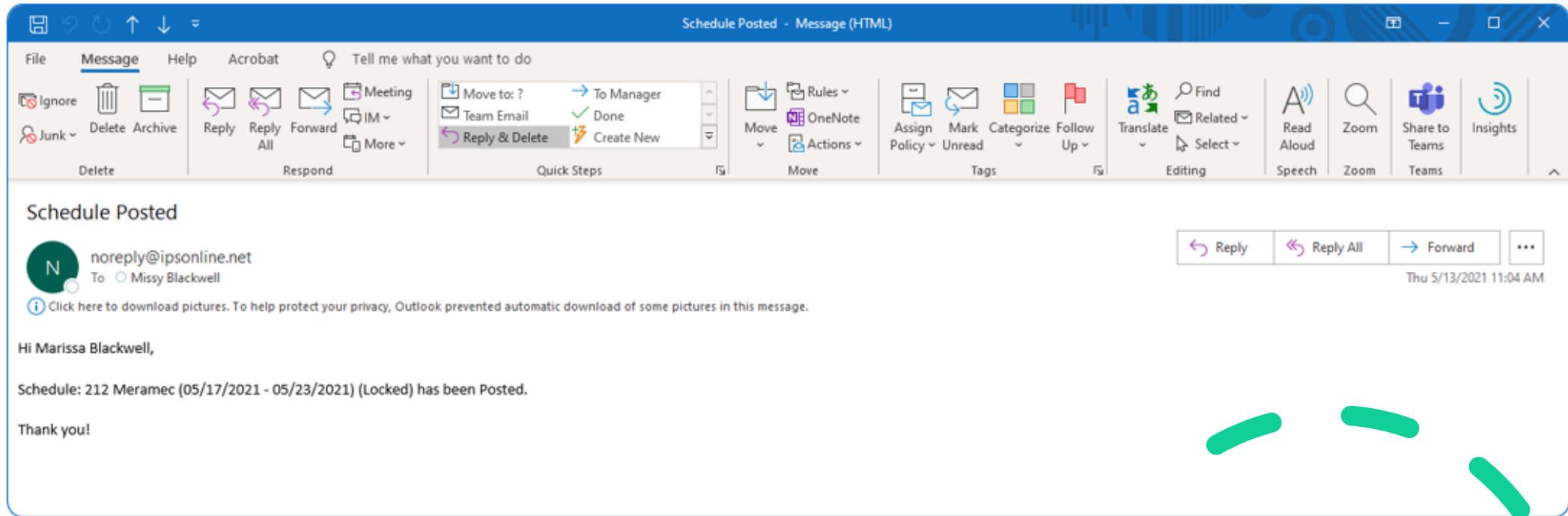
Posted Schedule Notification - Email

Logging into HCMToGo
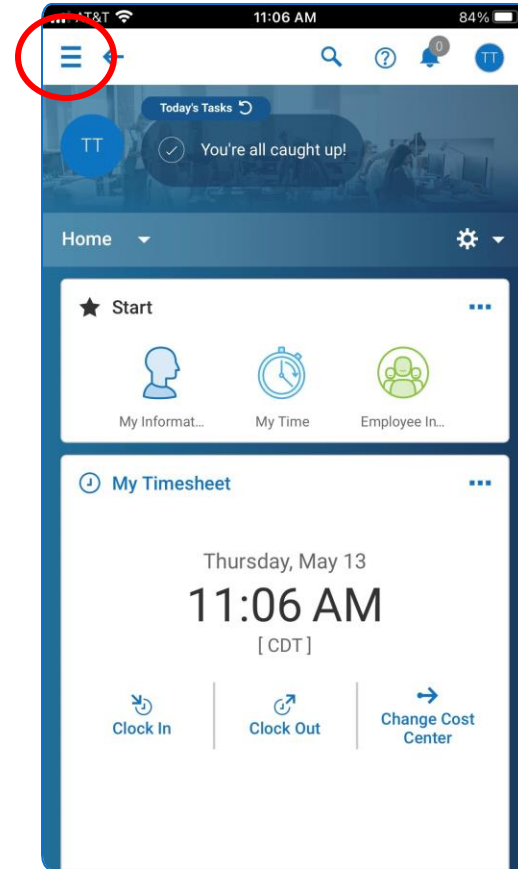
Access My Schedule
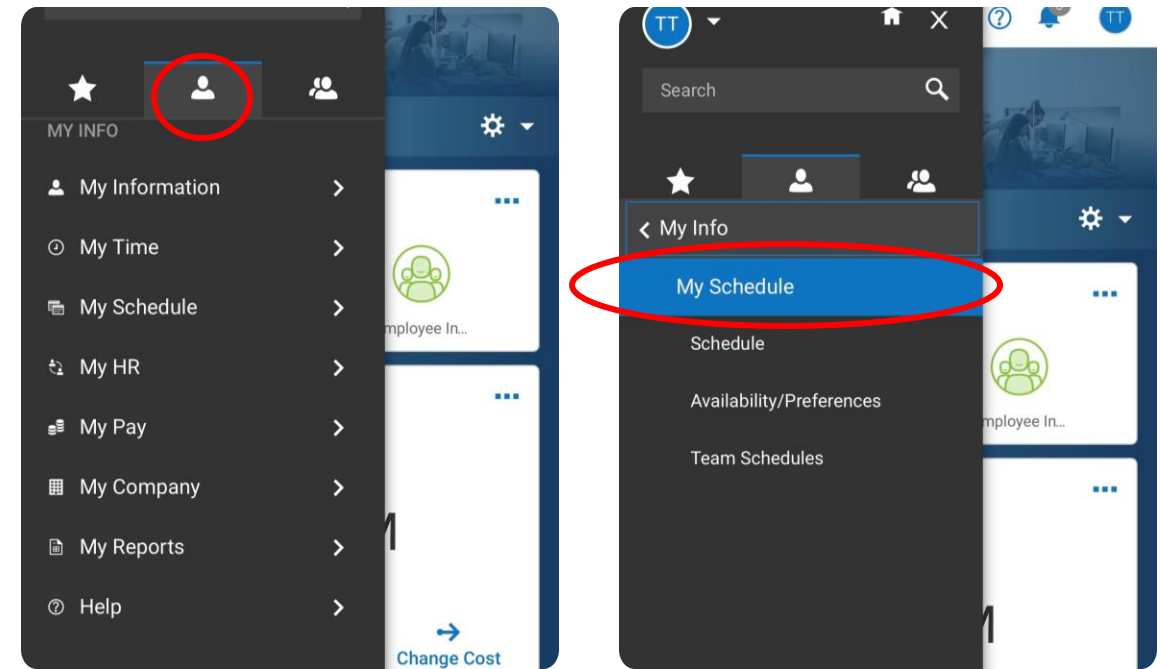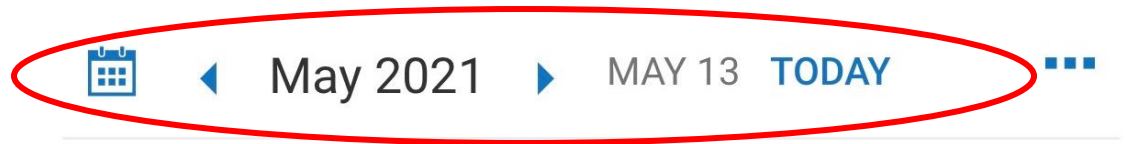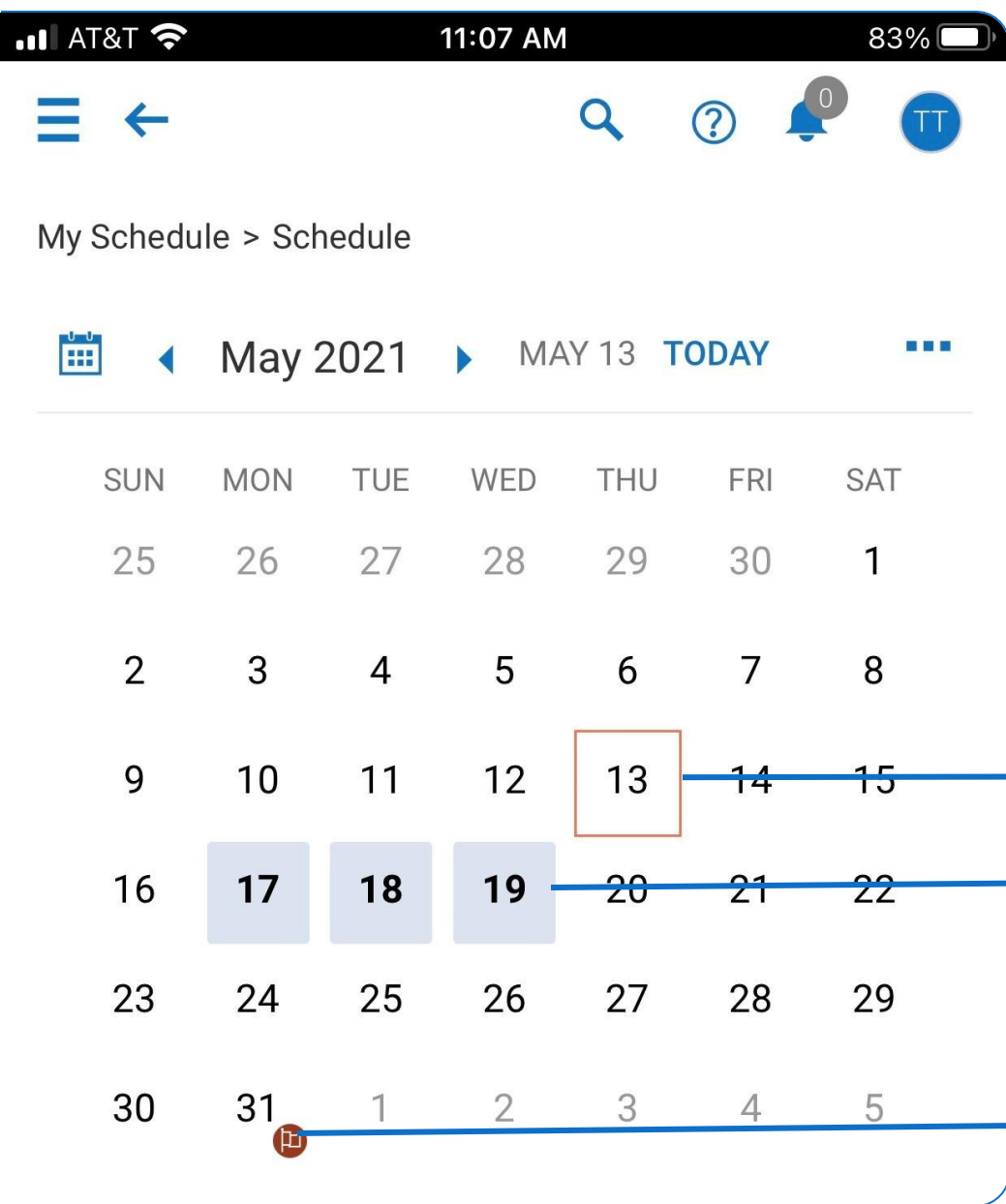
View My Schedule

Current day of the week

Days you are scheduled to work

Work holiday

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.

May 17 MON

Shift   03:00p - 11:00p

From   03:00p

To   11:00p

DETAILS

Shift Swap

Shift Swap Request

Shift Swaps Require Manager Approval

NOTIFICATION TO COWORKER

IF THEY ACCEPT THE SHIFT SWAP, A NOTIFICATION IS SENT TO THE MANAGER

MANAGER APPROVAL IS REQUIRED

BOTH EMPLOYEES ARE NOTIFIED OF THE DECISION

Open Shifts

Pick up extra hours

Teamwork

View open shifts at different properties

Special detail assignments

View Open Shifts

Pick Up Open Shift

Open Shift Notifications

- Manager receives notifications
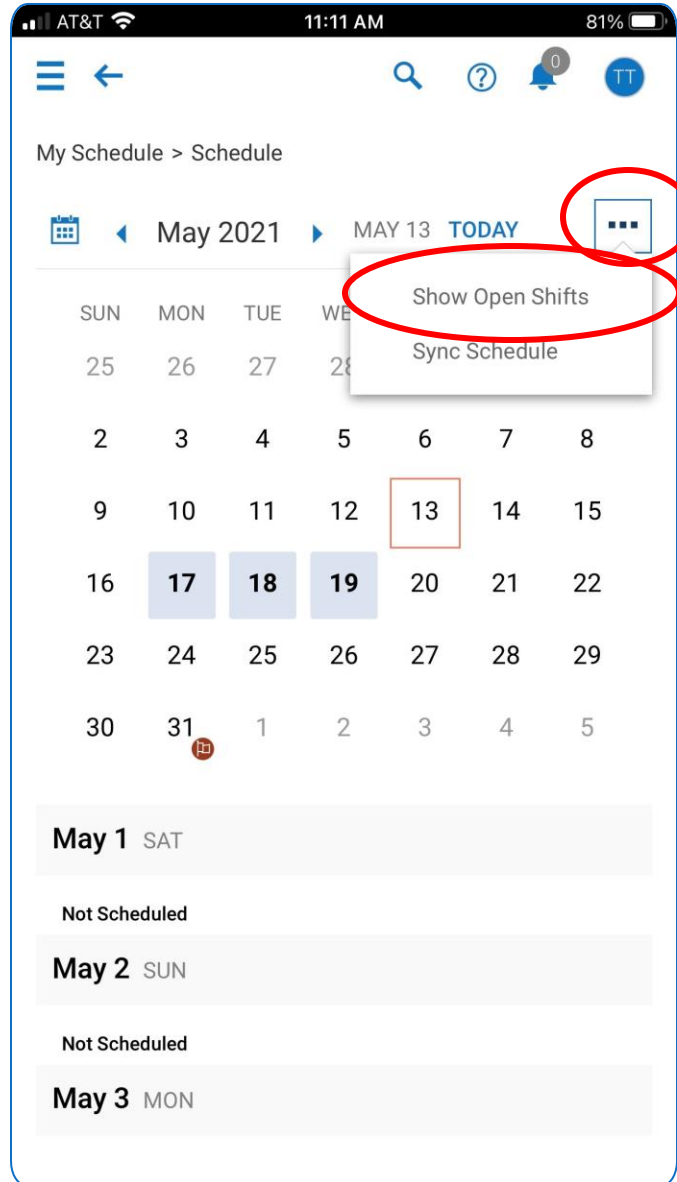- Manager approves/denies shift assignment
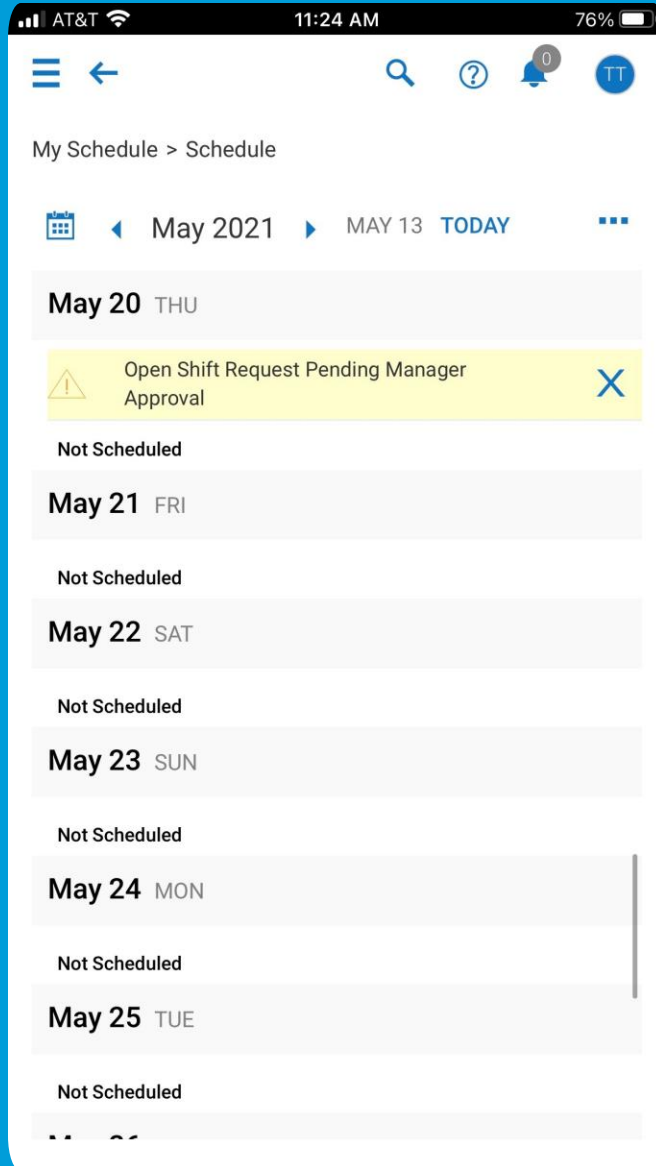
Open Shift Pending Manager Approval

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 ○ Missy Blackwell

ⓘ 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.

Questions & Answers

BLACKWELL
SERVICES, INC.
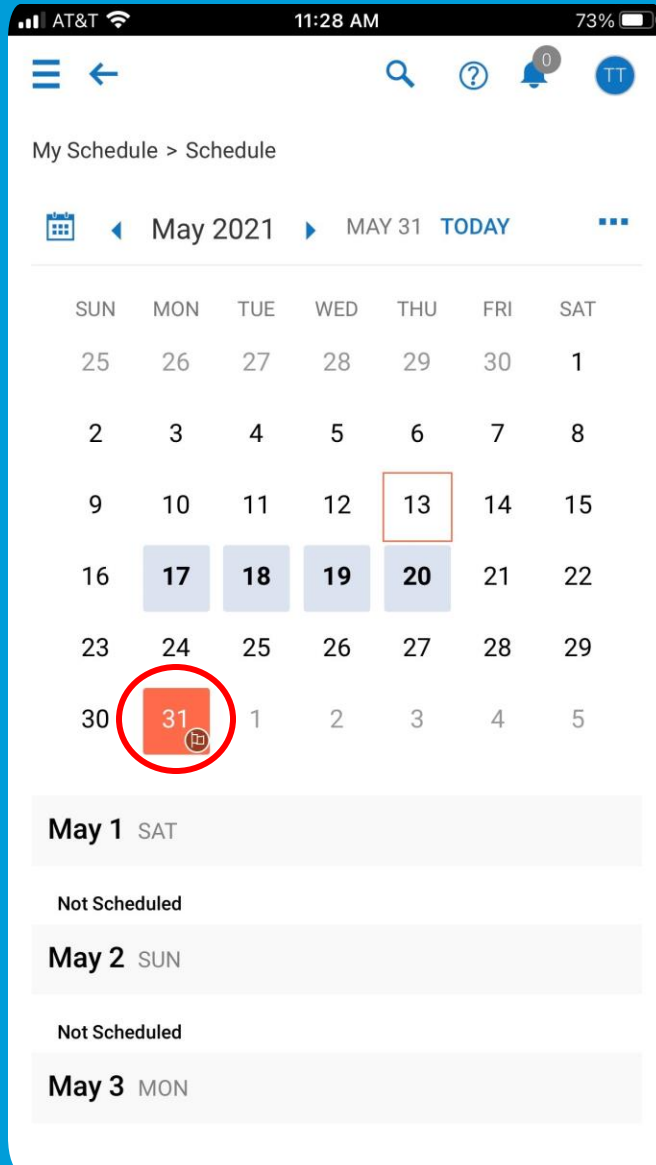
IPS Schedule Module

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.
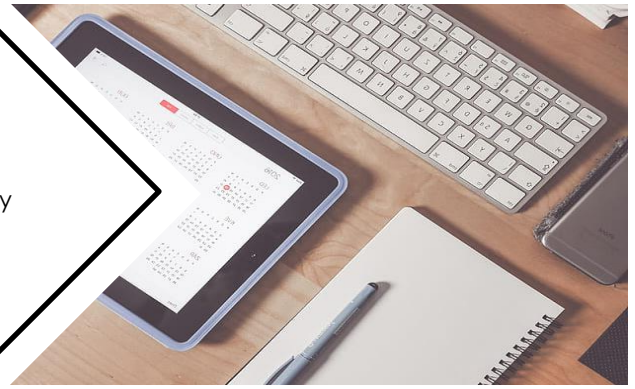
Three Components of a Successful Company Project

Dedicated Test Group

Test Functionality

Create Training Materials

Companywide Launch: July 12, 2021

Identify Test Group	Create Training Materials	Train Test Group	Experiment	Provide Feedback	Analyze Data	Draw Conclusions

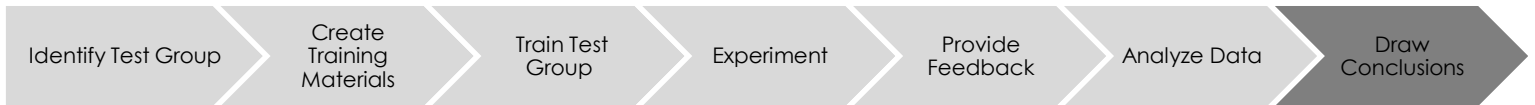|	Date Range	Responsible Group	Description
☒	5/12/21-5/13/21	Human Resources	Fix test manager permissions in IPS. Ensure IPS homepage has the correct "Schedule" widget and test functionality of each feature.
☒	5/12/21-5/13/21	Christine Summers	Inform team they are part of the IPS Schedule Module test group. Explain HR will communicate further steps in a memo addressed to their team members only.
☒	5/14/21	Human Resources	HR dispatches a company memo explaining the purpose of IPS Schedule Module and the expectations of the team test group. Announce upcoming training schedule and their mandatory participation.
☒	5/17/21-5/21/21	Human Resources	Conduct IPS Schedule Module training for the employees
☒	5/24/21-5/28/21	PLC 7701 Team	1st Test Week: Test functionality of IPS Schedule Module. Report to HR experiences, issues, and general feedback.
☒	5/31/21-5/4/21	PLC 7701 Team	2nd Test Week: Test functionality of IPS Schedule Module. Report to HR experiences, issues, and general feedback.
☒	5/31/21-6/4/21	PLC 7701 Team	Possible 3rd Test Week: Assess experiences thus far and determine if a third test week is necessary. If not, proceed to next step.
☒	6/7/21-6/11/21	PLC 7701 Team	Continue using the IPS Schedule Module permanently. Blackwell, Inc. will rollout the feature to the rest of the company.
☒	6/7/21-6/11/21	Human Resources	HR dispatches a company memo explaining the purpose of the IPS Schedule Module and the expectations for the workforce. Announce upcoming training schedule and employee's mandatory participation.
☒	6/14-21-6/25/21	Human Resources	Conduct IPS Schedule Module training for remaining managers and employees
☒	6/28/21-7/2/21	Workforce	1st Test Week: Teams test functionality of IPS Schedule Module. Report to HR experiences, issues, and general feedback.
☐	7/5/21-7/9/21	Workforce	2nd Test Week: Teams test functionality of IPS Schedule Module. Report to HR experiences, issues, and general feedback.
☐	7/12/21+	Workforce	Company is live with IPS Schedule Module. This feature is a requirement for proper team scheduling and payroll processing.