

OnShift Schedule X User Guide

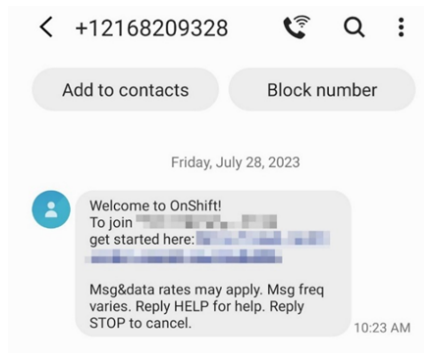
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Getting Started – Registering and Logging In

Follow the simple steps below to register and start using OnShift Schedule X.

1. Go to OnShift Schedule X at <https://schedule.onshift.com/>.
2. Your administrator will start your account registration. Once invited, you'll receive a **text message** with a link to get started. **Select the link** to start the sign-up process.



3. **Enter and confirm your email address.** Select **Continue**.
4. **Enter and confirm your password.** Ensure your password meets the **requirements** listed on screen. Select **Continue**.
5. You'll receive a message on screen encouraging you to download the mobile app from the Apple Store or Google Play Store. If you select "No thank you..." at the bottom of the page, you'll receive a **message confirming your account creation**, prompting you to **check your email inbox** to verify your account. This page will redirect after five seconds.



Account Created



Please verify your email address by clicking the link in the email we sent you.

Redirecting you in...

3 seconds

6. From the email, **click the link to verify your account**. You'll receive a confirmation on screen and a link to go Back to OnShift. **Click the link to go back to OnShift** and enter your email and password to log in.



Email Verified

Your email address was successfully verified.

Back to OnShift

How do I access OnShift Schedule X in the future?

You can access OnShift Schedule X through the browser on your phone by going to <https://schedule.onshift.com/>. Or download the OnShift app from the [Android](#) or [iOS](#) app store.

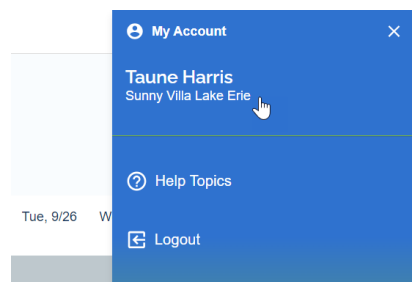
In addition to this user guide, helpful training videos and resources can be found in the OnShift Schedule X help center. Access the help center by logging in to OnShift Schedule X, selecting your name on the upper right corner, and selecting Help Topics.

Managing Your Profile Settings

Setting Notification and Communication Preferences

You can set your preferred communication methods in OnShift Schedule X. Choose how you want to be notified, the type of communications you want to receive, and be automatically notified based on your selections.

1. After logging in, **select your name** from the **dropdown menu** on the upper right corner.



2. Make sure your contact number and email address are up to date.
3. **Set your preferred communication method**—text, email, or none—for each of the following options: announcements, new open shifts, posted schedules, shift request approvals, and new shift requests.
4. **Save** to complete.

OnShift

My Account

my account

Taune Scheduler

Personal Profile

Contact Number

(888) 888-8888

Contact Email

Preferred Communication Method

Announcements

☐ Text ☐ Email ☒ None

New Open Shifts

☒ Text ☐ Email ☐ None

Posted Schedules

☐ Text ☒ Email ☐ None

Shift Request Approvals

☒ Text ☐ Email ☐ None

New Shift Requests

☒ Text ☐ Email ☐ None

Account Management

Your login information

Save

Resetting Your Password

1. Select **Forgot Password**, then **Continue**. Confirm your email address on the next screen and **Continue**. You'll receive a message directing you to check your email.

The first screenshot shows the 'Enter Your Password' screen with the OnShift logo. It has input fields for email (taune-scheduler@onshiftdemo.com) and password, with 'Edit' and 'Continue' buttons. A red arrow points to the 'Forgot password?' link. The second screenshot shows the 'Forgot Your Password?' screen with the OnShift logo, a text input for email (taune-scheduler@onshiftdemo.com), and 'Continue' and 'Back to OnShift' buttons. The third screenshot shows the 'Check Your Email' screen with an envelope icon, instructions to check the email, and a 'Resend email' button.

2. The email you received contains a link to complete the password reset. Select **Reset Password** to go back to OnShift Schedule X, where you can complete the reset.

The screenshot shows an email from OnShift titled 'Reset Your Password'. It includes the OnShift logo, a message about the password reset request, a 'Reset Password' button, and contact information for support. The footer contains a link to support@onshift.com.

Once your password is updated, you'll receive confirmation on screen alongside a link to go back to Schedule, where you can log in with your updated password. You'll also receive an email confirming the change.

Creating Your First Schedule

Shift Requirements

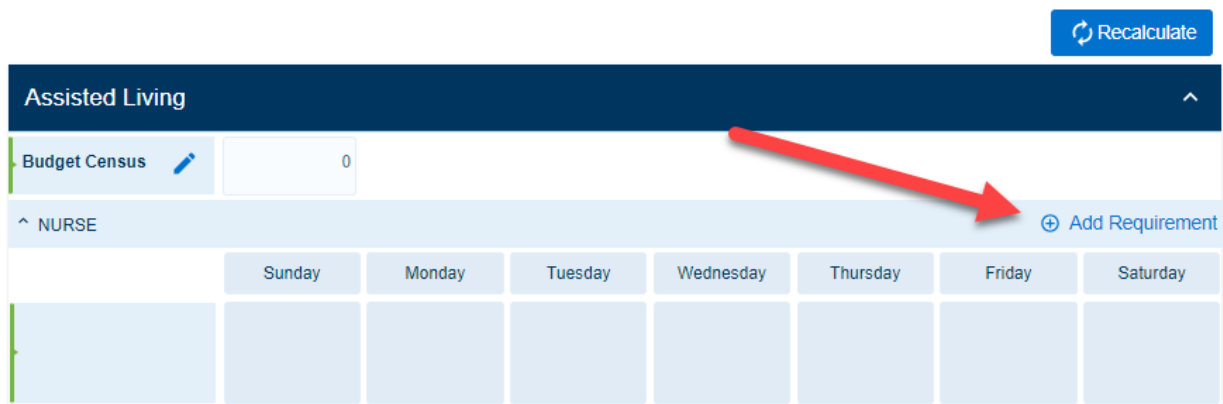
Shift requirements define how many hours, at what times, and which positions in departments require schedule coverage. Shift requirements form the basis for defining whether shifts appear open or not to schedulers and workers. Daily requirement updates can be changed directly on the schedule

Shift requirements are not needed to schedule shifts. They're best used in departments where coverage and 24-hour staffing goals are required. For more ad-hoc scheduling modes, like activities, it may be best to just schedule workers directly.

Adding a Shift Requirement

1. Ensure the department and position are enabled under [Departments and Positions](#).
2. From the main menu, select **Settings >Shift Requirements**. Select the **department** you want to work on and expand it using the dropdown arrow. You'll see the different positions set up in your community.
3. Select **Add Requirement**.

Shift Requirements



The screenshot shows the 'Shift Requirements' interface for the 'Assisted Living' department. At the top right is a 'Recalculate' button. Below the department name is a 'Budget Census' field with a value of 0. A red arrow points from this field to the 'Add Requirement' button, which is located at the bottom right of the interface. The interface also displays a table with columns for days of the week (Sunday through Saturday) and a row for 'NURSE'.

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
NURSE							

4. Enter the Start Time, End Time, days of the week, and number of people needed. **Save**.

Add Shift Requirement

Nurse

Start Time *

7:00 AM

End Time *

3:00 PM

Select days

S M T W T F S

How many workers do you need? *

3

Cancel

Save

Assisted Living

Budget Census

0

^ NURSE

Add Requirement

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
7:00a - 3:00p							
7.5 hrs							
NURSE	3 ppl	3 ppl	3 ppl	3 ppl	3 ppl	3 ppl	3 ppl

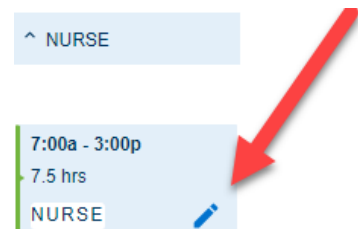
5. Repeat for any other **Position** and **Shift Time** combinations.

Editing a Shift Requirement

1. Select the **pencil** icon to edit.
2. Modify the shift requirements as needed and **Save**.

Deleting a Shift Requirement

1. Select the **pencil** icon to edit.
2. Select the **trash can** icon on the upper right to delete.



Edit Shift Requirement

Nurse

Start Time *

7:00 AM

End Time *

3:00 PM

Select days

S M T W T F S

How many workers do you need? *

3

Cancel

Save

Shift requirements update automatically overnight for today and for the next 12 weeks of the schedule.

If changes to shift requirements require immediate updating on the schedule, select **Recalculate** in the shift requirement settings. It may take a few minutes to update on the schedule, depending on the schedule size.



Shift requirements will appear as Open Shifts and are available to schedule workers to.

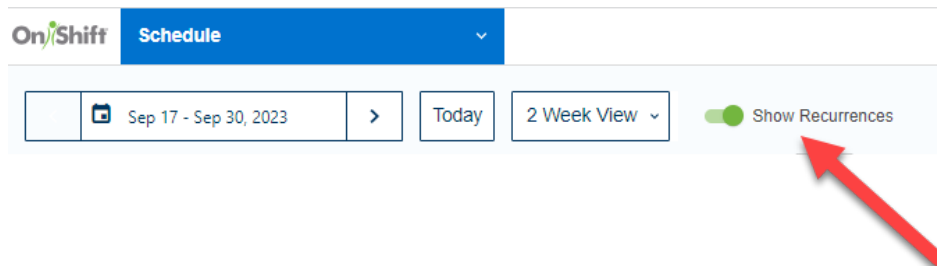
A screenshot of the 'Assignment | Add' form. The form has a blue header bar with the text 'Assignment | Add' and a close button (X). Below the header, there are several dropdown menus: 'Departments *' with 'Assisted Living' selected, 'Positions *' with 'Nurse' selected, 'Shift begins on' with 'Sep 21, 2023' selected, and 'Location' with 'Floor 1 | F1' selected. Below these is a section titled 'Select from shift requirements' with a dropdown menu showing '7:00 AM - 3:00 PM (8 hrs)' and 'Custom time'. A red arrow points to the '7:00 AM - 3:00 PM (8 hrs)' option. At the bottom of the form are two buttons: 'Cancel' and 'Save'.

Create a Schedule Template for Recurring Shifts

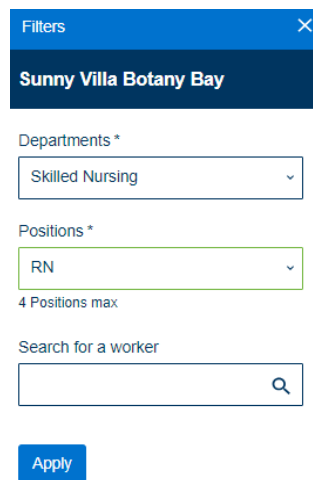
Using Schedule Templates on the 2-week view lets you see and set recurring shift schedules for full- and part-time workers on a view similar to paper-based scheduling.

1. Before getting started, make sure [shift requirements](#) are entered in community settings.

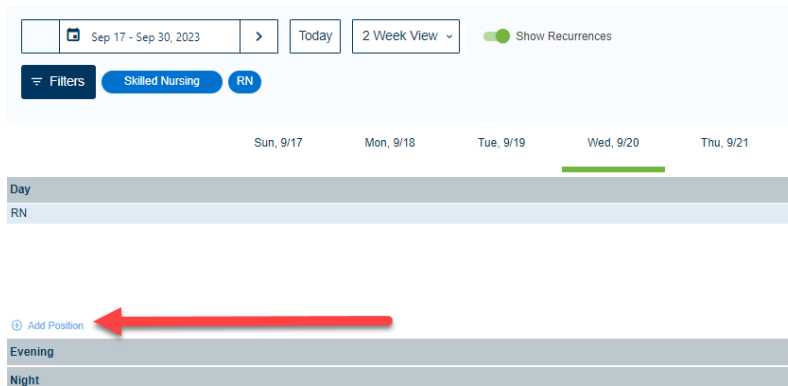
2. On the 2-week view, select **Show Recurrences** at top.



3. Set your **filters** to the department and position(s) to work on.



4. Expand the day part for this recurring schedule.
5. Select **Add Position** under the day part to bring a worker assignment dropdown on screen.



☒ Show Recurrences

Sun, 9/17 Mon, 9/18 Tue, 9/19 Wed, 9/20

Day	Sun, 9/17	Mon, 9/18	Tue, 9/19	Wed, 9/20
RN				
Assign worker				

Evening
Night

- From the dropdown, **select a worker** to assign. **Save**. The worker's name is added to the schedule.

Assign Worker
×

Type *

Employee

Select from available workers

Alden Chaney ×

- To assign the worker to a recurrence, select the **+ plus icon** under the date their recurrence should begin. Select the **shift time**.

Sun, 9/17 Mon, 9/18 Tue, 9/19

Day	Sun, 9/17	Mon, 9/18	Tue, 9/19
RN			
Alden Chaney			

Select Shift
6a - 2:30p

8. Select the recurrence schedule from the available options:

- **2/4** is a 2-on, 4-off schedule.
- **Weekly** will schedule the specified day of the week to the worker at a weekly recurrence. Repeat these steps for other days of the week following a weekly recurrence.
- **Biweekly** will schedule the specified day of the week to the worker at a biweekly, or every other week, recurrence. Repeat these steps for other days of the week following a biweekly recurrence.
- **4/2** is a 4-on, 2-off schedule.

The screenshot shows a worker's schedule for Alden Chaney. The interface includes a header with dates Sun, 9/17, Mon, 9/18, and Tue, 9/19. Below this is a table with columns for Day, RN, and worker name. A dropdown menu is open, showing options: Occurs, 2/4, Weekly, Bi-Weekly, and 4/2. The worker's name is Alden Chaney. Below the table, there is a link to Add Position and a section for Evening and Night shifts.

9. Once selected, the recurrence will appear on the worker's schedule for all dates moving forward. Example is a 4/2 schedule:

The screenshot shows a worker's schedule for Alden Chaney. The interface includes a header with dates from Sun, 9/17 to Sat, 9/30. Below this is a table with columns for Day, RN, and worker name. The worker's name is Alden Chaney. The schedule shows a 4/2 recurrence pattern for the 4th, 11th, 18th, 25th, and 1st of the month. The worker's name is Alden Chaney.

Repeat this process to create templates for all recurring schedules for your community.

Editing a Recurring Schedule

To make changes to a recurring shift on a particular date, **select the shift** on the schedule, then **Remove Shift**. You will need to reassign the shift.

If a worker with a recurring schedule is moved to a new schedule under a different day part, **hover on the worker's name** on the schedule, then **Edit**. You'll be asked if you want to keep the original shifts for reassignment. If a different worker will be assigned to this recurrence, keep

this option selected. **Save**, and the recurrence will appear on the schedule for assignment to another worker. The original worker will be moved to the new day part selected.

To remove a recurrence that's no longer needed, select the trash can icon and confirm.

If a worker with a recurring schedule is terminated, the recurrence will remain on the schedule, and a different worker can be assigned in their place.

Completing the Schedule (Adding Non-Recurring Shifts)

After you've [set up recurring schedules](#) via templates, you can add any ad-hoc positions or non-recurring schedules.

1. On the 2-week view, ensure the option to Show Recurrences is off (shows gray).

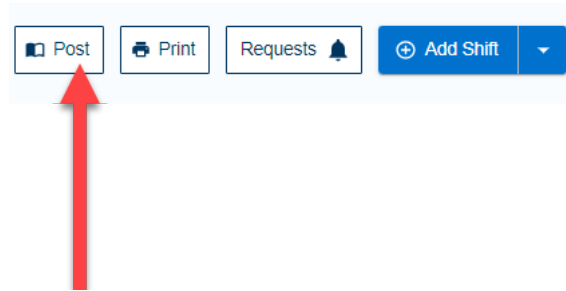


2. Go to **Filters** and select the **department** and **position(s)** to work on. **Save** and an empty schedule will appear.
3. Select **Add Shift**.
4. Select a **Department**, **Position**, **Shift begins** on date (usually the first day of the week), a **Location** (optional), and a shift from **Select from shift requirements** or a **Custom time**. Select if you're scheduling an **Employee** or (optional) **Agency**. Select all the **workers** that would work that day/shift/position combination. **Save**.
5. The workers are added to the schedule.
6. Use [Copy a Shift](#) to copy that shift to the rest of their schedule.
7. Repeat for all departments/positions/shifts/workers.

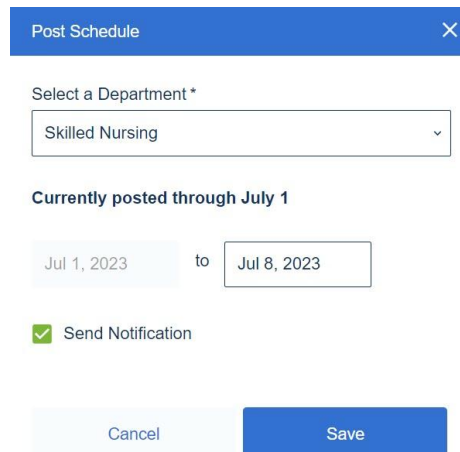
Posting the Schedule

Schedules are posted by department. Once posted, any worker qualified to work a position in that department will see scheduled shifts and open shifts. Once the schedule is posted, it *cannot* be unposted for any past period. It *can* be unposted for any upcoming period.

1. In the schedule menu, select **Post**.



2. Select the **Department** and the **Date to post through**.
3. Select whether or not to **Send Notification** of the posted schedule. If you opt to send notification, workers will receive the notification based on their individual communication preferences.

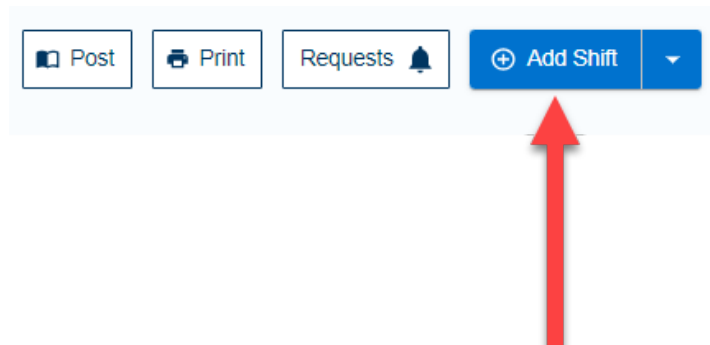
A screenshot of a 'Post Schedule' dialog box. The title bar is blue with the text 'Post Schedule' and a close button (X). The main area is white and contains the following elements: a label 'Select a Department *' above a dropdown menu showing 'Skilled Nursing'; a label 'Currently posted through July 1' above a date range selector showing 'Jul 1, 2023' to 'Jul 8, 2023'; a checkbox labeled 'Send Notification' which is checked; and at the bottom, two buttons: 'Cancel' and 'Save'.

4. **Save**. The schedule is now posted.

Managing the Schedule

Adding a Shift

1. To add a shift to the schedule, from the **Schedule** view, select **Add Shift**.

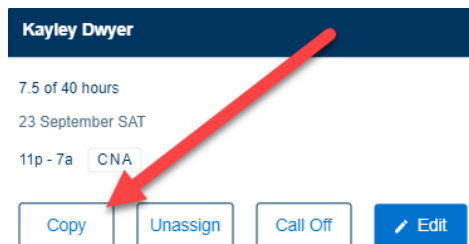


2. Select the **Department**, **Position**, what **date** the shift begins on, an optional Location, and **Shift Requirements** for the shift time.
3. Select either an internal **Employee or Agency**, then select from listed available **workers**. Select all the workers that would work that day/shift/position combination.
4. **Save** and the shift is added to the worker's schedule.

Copying a Shift

Copying shift by shift is a useful tool for departments that have regular, though not fully recurring, schedules.

1. **Filter** the schedule to the department and positions you wish to copy from.
2. Select either the **Week View** or **2-Week View**.
3. Once the schedule loads, **select the shift** to copy.
4. Select **Copy**.



5. **Select the days** to copy the shift to. Light gray days indicate an already scheduled shift at that time.

Copy Shift

Kayley Dwyer

Shift to be copied

11:00 PM - 7:00 AM CNA

Select the dates to copy this shift to

September 2023

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	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
1	2	3	4	5	6	7

Days in grey are disabled due to a conflicting shift

☒ Copy location assignment

Cancel

Save

6. **Save** and the shifts are added to the schedule.

Managing Overtime

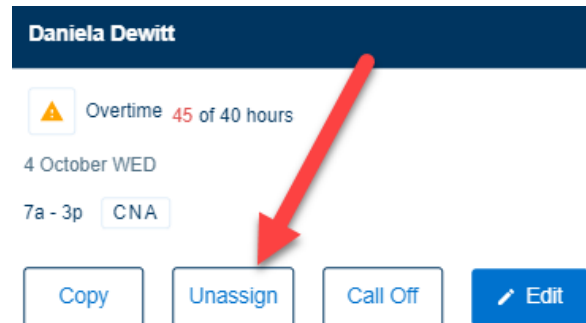
Overtime is visible for certain workers, based on the overtime rules set for your community. Overtime is visible on all schedule views.

On the week and 2-week views, open shifts will display with an orange fill and border on the date. Dates with no open shifts display with a green checkmark.



Anyone scheduled into overtime will appear in an orange box with an overtime warning indicator. Adjust the worker's schedule to Unassign and remove any overtime where necessary.

1. **Select the shift** you want to remove.
2. Select **Unassign**.

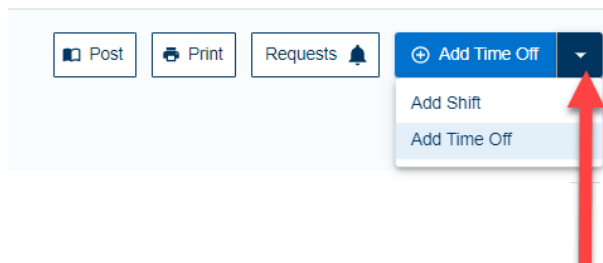


3. **Confirm** the deletion, and the shift will be removed from the worker's schedule.

Managing Time Off

Adding Time Off

1. Select the blue arrow on the **+Add Shift** button.
2. Select **Add Time Off**.



3. Select the **Worker**; **Time Off Type**; **Start Date** and **Time**; and **End Date** and **Time**.

Time Off | Add

Worker
Adriana Van Wegberg

Time Off Type
Jury Duty

Start Date
Sep 18, 2023 6:00 AM

End Date
Sep 18, 2023 5:00 PM

Cancel Save

- The Time Off is added to the schedule.

Adriana Van Wegberg

8a - 4:30p



8a - 4:30p

8a - 4:30p

8a - 4:30p

Removing Time Off

- Select the time off to be removed.
- Select **Unassign**.

Adriana Van Wegberg

Jury Duty

Start:

End:

OFF

Monday September 18, 2023

Monday September 18, 2023

06:00 AM

05:00 PM

Unassign

- The Time Off is removed.

Managing No Calls/No Shows and Other Call Offs

Workers who no call/no show or otherwise call out of a shift can be recorded on the schedule.

- Select any **Schedule** view.
- Select the shift** that needs to be called off.
- Select **Call Off**.
- Select the **Reason** for the call off.
- Add any **notes** for internal scheduler reference..
- Save**.
- The worker is removed from the schedule, the **Open shift** count increased, and the worker/shift record is logged in the call off section.

Carrie Blount

40 of 40 hours

21 September THU

6a - 2:30p RN

Floor 1 | F1

Copy

Unassign

Call Off

Edit

Review Call Off

Carrie Blount

RN

21 September THU

6a - 2:30p

Reason for call off *

Sick

Notes regarding call off (optional) *

Not feeling well

Cancel

Save

1 Call Offs

Call Offs

Carrie Blount

THU, 21 September

6a - 2:30p

RN

Managing your Census for Care Budgets

Communities with care budgets defined can manage the census directly on the schedule on both the week and 2-week views.

Monitor census daily as needs change to ensure you are meeting the budgets. Up to 3 daily observations can be added to support California state requirements. The day's census will be carried forward into the future until it is changed. You can further track the care budget reports in the Report Center.

1. After filtering by department and position, select the day's **census budget number** at the bottom of the schedule to view or edit.

DAY					
EVENING					
NIGHT					
CNA					
	Open Shifts	✓	✓	✓	✓
CNA B	6p - 6a	6p - 6a	6p - 6a	+	+
CNA C	6p - 6a	6p - 6a	6p - 6a	+	+
CNA D	+	+	+	6p - 6a	6p - 6a
CNA E	+	+	+	6p - 6a	6p - 6a
CNA G	+	+	+	6p - 6a	6p - 6a
Skilled Nursing Census		26	27	29	30

2. If applicable enter up to **3 daily observations**, using the dropdown to select the corresponding day part. **Save.**

Tue, September 19

Day	30	
Eve...	31	
Night	31	

Avg 31

Save Changes

- Once entered, the census value is carried forward to all days in the future until changed, at which point all future days will update to the new value.

Using the Message Center

Use the Message Center to communicate with workers about general upcoming community events or notes, to ask workers to fill a shift, or to communicate scheduling updates. Workers will receive the message in their own inbox-only message center, and be notified of messages based on their [communication preferences](#).

As a scheduler, the Inbox shows the messages you've received (likely to be empty) and the Outbox shows the messages you've sent. Tap on any message to view more details.

Message Center

New Message

Inbox

Outbox

1 - 19 of 19

Chris Davis	Open shift notification ...	Hi Chris, we have a few openings next week, chec...	Jul 19
Assisted ...	You have a new annou...	The August schedule is posted. Please let me kno...	Jul 19
Chris Davis	You have a new annou...	Hello everyone, the August schedule is posted. We...	Jul 12

Send an Announcement

- From the **Message Center**, select **New Message**.
- Select **Announcement**. Select which **departments**, **positions**, and **workers** to send to.
- Enter the **Message Body** and select whether you'd like it scheduled in the future or not. If not scheduled, the message will send immediately.
- Select **Schedule** or **Send**.

New Message

What kind of message is this?

☒ Announcement
 ☐ Open shift

Select department

All departments

Select position(s)

All positions

Select workers

All workers

You have selected 110 worker(s)

Clear all

Message Body

Mandatory meeting next Thursday at 12 pm.
Lunch will be provided.

Send an Open Shift Message

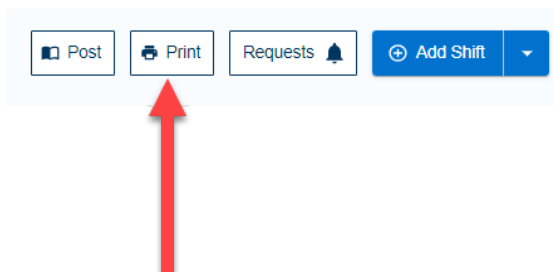
1. From the **Message Center**, select **New Message**.
2. Select **Open Shift** option. Select which **departments**, **positions**, and **workers** to send to.
3. Type the **Message Body** and select whether you'd like it scheduled in the future or not. If not scheduled, the message will be sent immediately.
4. Select **Schedule** or **Send**.

The screenshot shows the 'New Message' dialog box. At the top, it says 'What kind of message is this?' with two radio buttons: 'Announcement' and 'Open shift'. The 'Open shift' option is selected. A green callout box points to the 'Open shift' option with the text: 'We'll include a link to the open shifts page in this message.' Below this, there are three selection fields: 'Select department' (dropdown menu showing 'Skilled Nursing'), 'Select position(s)' (dropdown menu showing 'RN'), and 'Select workers' (dropdown menu showing 'Bond, Lucy', 'Blount, Carrie', and 'Chaney, Alden'). Below these fields, it says 'You have selected 3 worker(s)' with a 'Clear all' link. The 'Message Body' section contains a text area with the text: 'We have several open shifts for next week. Please check OnShift for more details.' At the bottom, there is a checkbox labeled 'Schedule send in the future (optional)' which is unchecked. At the very bottom, there are two buttons: 'Send' and 'Cancel'.

Printing the Schedule

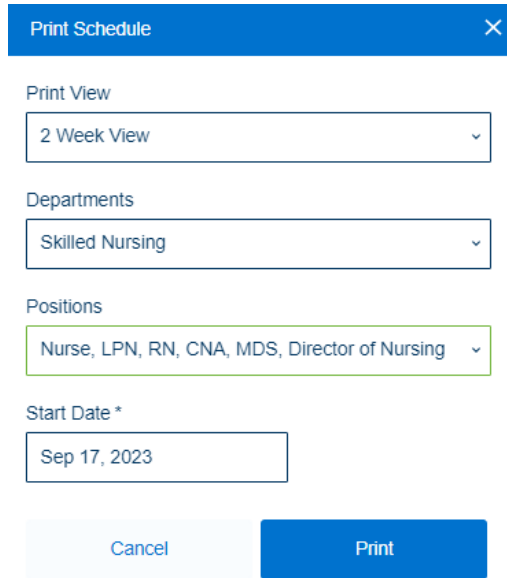
You can print the day view and 2-week view directly from the schedule.

1. Select **Print**



2. Select the **Print View (Per Day or 2-Week)**, **Department**, and **Position(s)**, and **Start Date**.

3. Select **Print**.

A modal dialog box titled "Print Schedule" with a close button (X) in the top right corner. It contains four dropdown menus: "Print View" (set to "2 Week View"), "Departments" (set to "Skilled Nursing"), "Positions" (set to "Nurse, LPN, RN, CNA, MDS, Director of Nursing"), and "Start Date *" (set to "Sep 17, 2023"). At the bottom are two buttons: "Cancel" and "Print".

Print Schedule

Print View

2 Week View

Departments

Skilled Nursing

Positions

Nurse, LPN, RN, CNA, MDS, Director of Nursing

Start Date *

Sep 17, 2023

Cancel Print

4. A PDF will download to your Internet browser's downloads area. Open from there to print the schedule.

Worker Experience Overview

The worker experience is a mobile-optimized web view designed for smartphones. Workers can view their schedule; see messages; and request open shifts, trades and fill-ins.

Workers have the same registration, login, and lost password experience as schedulers. Refer to the [Getting Started](#) and [Resetting Your Password](#) sections for step-by-step instructions.

Workers can manage their communication preferences by selecting My Account from the profile icon on the upper right. From here, they can modify their contact number and email used for communications, set [communication preferences](#), and view their account login information.

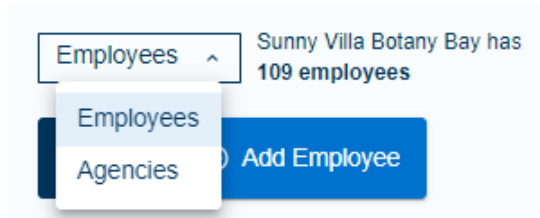
Managing Workers

Adding, Inviting, and Editing Workers

Most workers will be added to OnShift Schedule X when your community is first created or through integration with your HR information system. However, there may be times you need to add a worker directly to OnShift Schedule X. To create a worker profile:

1. From the main menu, select **Workers**.

2. From the dropdown menu on the upper left, select either **Employees or Agencies**, depending on your need. In this example, we'll add an employee.



3. Select **Add Employee**.
4. **Enter profile details** for the worker. Fields are optional unless noted:
 - Personal details:
 - i. First Name, Last Name (required)
 - ii. Mobile phone number (required)
 - iii. Email address
 - Employment details:
 - i. Home Community (required) – this will default to the community you are logged in to and cannot be changed.
 - ii. [Shared Communities](#) – other communities the individual is approved to work at.
 - iii. Positions (required)
 - iv. External/Punch ID and Hire Date
 - Schedule Management Enabled – select this for admin users who will need access to schedule shifts.

Personal Profile

First name

Last name

Mobile Phone Number

Contact Email

Employment Details

Home Community

Shared Communities

Positions *

External / Punch ID

Hire Date

Schedule management enabled ☐

5. **Save**. You'll be directed back to the worker list.
6. Find the newly added worker in the list and **Send Invite**. This will send a link to the worker via SMS/text message. Invite links are specific to each user.

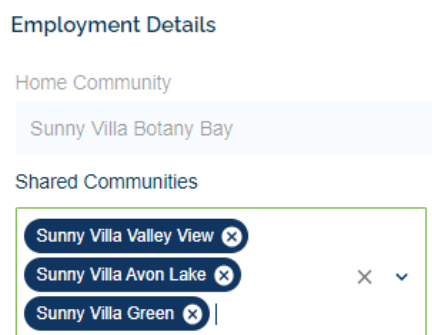


The worker will complete the sign-up process. Make sure the worker downloads the OnShift app so they can use the app after signing up.

Setting Up Shared Workers

Qualified individuals can be identified, shared, and assigned across multiple communities.

1. On the **worker profile**, scroll to **Employment Details**.
2. Choose the **Shared Communities** where this individual can work.



3. **Save** and the worker is now eligible to view, request, and cover shifts at the shared communities selected.

Worker profiles and shared communities can be updated at any time, but only by the scheduler who manages the worker's home community, and only while they're logged in to that home community.

As a scheduler, you cannot change your own shared communities and cannot change the shared communities of other schedulers.

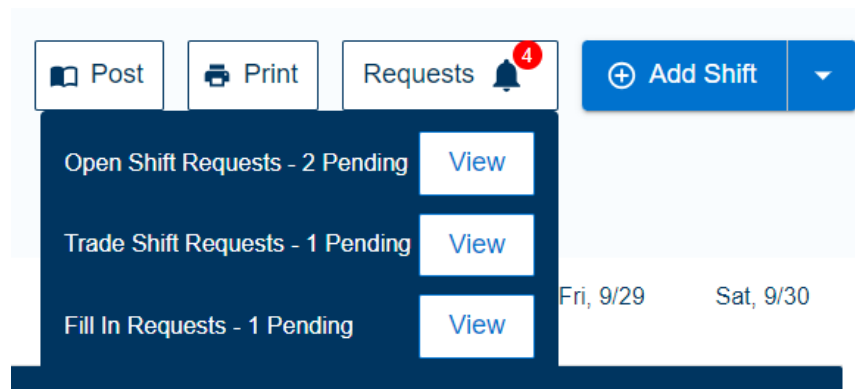
So long as they maintain the same employee ID, workers who move to a different home community will transfer automatically when such a change is made in your human resources information system.

Managing Requests on the Schedule

Workers can view and request shifts in their home community and any shared communities they're a part of. They can request open shifts, request trades, and request a coworker to fill in for them.

As a scheduler, you'll receive requests from shared workers the same way you receive requests for workers in your home community. You'll be notified of open shift requests, trade requests, and fill-in requests based on your [personal communication and notification settings](#). Whether a request is approved or denied, the requester will receive a notification based on their preferred communication method.

Use **Requests** on the schedule view to open a dropdown menu and manage requests.



Managing Open Shift Requests

1. Select **View** next to **Open Shift Requests**.
2. On the Open Shift Requests view, note the worker's currently **Scheduled Hours** and **Hours Requested** and either **Approve** or **Deny** the request.

Request Center

OPEN SHIFT REQUESTS - 2 PENDING

TRADE REQUESTS - 1 PENDING

FILL IN REQUESTS - 1 PENDING

Filters

Skilled Nursing

RN

Pending

			Scheduled Hrs	Shift Requested	Hours Requested	Status	Submitted On	
1	Tova Loncar	RN	0 hrs	Sat September 23, 2023 7:00 AM - 3:30 PM	8.5 hrs	PENDING	Fri September 22, 2023	Deny Approve
2	Tova Loncar	RN	40 hrs	Sun September 24, 2023 7:00 AM - 3:30 PM	8.5 hrs	PENDING	Fri September 22, 2023	Deny Approve

3. If approved, the shift will be added to the worker on the schedule.

Managing Trade Requests

1. Select **View** next to **Trade Shift Requests**.
2. On the Trade Requests view, review the requesting worker's current shift, hours, etc.

Request Center

OPEN SHIFT REQUESTS - 2 PENDINGTRADE REQUESTS - 1 PENDINGFILL IN REQUESTS - 1 PENDING

FiltersSkilled NursingRNPending

	Status	Submitted On
Employee requesting trade Tova Loncar Scheduled Hrs 40 hrs Scheduled shift: Wed September 27, 2023 7:00 AM - 3:30 PM RN 9 hrs Trading shift with Lucy Bond starting on Wed, September 27th 2023 at 10:00 am Comments: 	PENDING	Fri September 22, 2023 Scheduled shift: Lucy Bond RN 7 hrs Select the shift to trade: Select Shift DenyApprove

3. Under the other worker's name on the right, use the dropdown to **select the shift to trade**, then **Approve** or **Deny** the trade.

StatusSubmitted On

PENDING

Fri September 22, 2023

Scheduled shift:
Lucy Bond RN 7 hrs
Select the shift to trade:
Thu September 28, 10:00 AM - 5:30 PM
DenyApprove

Managing Fill In Requests

1. Select **View** next to **Fill In Requests**.
2. On the Fill In Requests view, review the requesting worker's current shift, hours, etc.
3. **Approve** or **Deny** the request under the other worker's name on the right.

Request Center

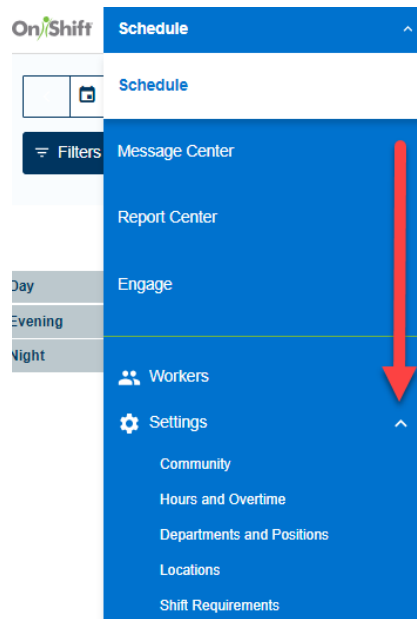
OPEN SHIFT REQUESTS - 2 PENDINGTRADE REQUESTS - 1 PENDINGFILL IN REQUESTS - 1 PENDING

FiltersSkilled NursingRNPending

	Status	Submitted On
Employee requesting fill in Tova Loncar Scheduled Hrs 32 hrs Scheduled shift: Sat September 30, 2023 7:00 AM - 3:30 PM RN 9 hrs Fill in request with Lucy Bond for their shift starting on Sat, September 30th 2023 at 7:00 am Comments: 	PENDING	Fri September 22, 2023 Employee filling in: Scheduled Hrs: Lucy Bond RN 15 hrs DenyApprove

Managing Community Settings

Community settings are managed via the Settings option under the main menu on the upper left. Access to these settings may be limited or unavailable, as determined by your organization.



Community Settings

Update your community's physical address under **Community**.

Hours and Overtime

Update your community's hours and overtime rules under **Hours and Overtime**. Field definitions are as follows:

Field	Function
How long is your work period?	Determines whether a period is 1 or 2 weeks. Set to one week where overtime is 40 hours, set to two weeks where overtime is 80 hours.
What's the first day of your next work period?	Sets an anchor date that determines when work weeks start and end. Set to a calendar date corresponding to a date the work period starts (i.e. Thurs. to Wed, or Sun. to Sat.).

For the start of the work period selected above, what time of the day do you begin calculating overtime?	Sets the rule for when overtime and general hours calculations should start and end in a given work period. Answers the question "What's your earliest shift of the day?"
How do you count hours that cross midnight?	Sets the rule for determining how hours cut across midnight boundaries. The only option currently is Day shift starts , meaning any shift that crosses midnight will have all the hours count to the date of the shift start (day 1).
How do you calculate overtime?	Sets value for period overtime and an alternate rule for daily overtime. Set 40 for 1 week, 80 for 2 weeks.
Add Day Rule	Optional day rule for daily overtime.
When do you deduct paid breaks?	Sets rule for determining how scheduled hours are deducted to correctly calculate hours given expected paid breaks. Any shift over X hours worked will have Y minutes deducted. Additional rules can be set for longer shifts.



Settings

settings - hours and overtime

Hours and Overtime

This form has been disabled to protect the integrity of your schedule. Changes to these settings need to be applied by an Onshift Administrator.

How long is your work period?

☒ One Week ☐ Two Weeks

What's the first day of your next work period?

Jan 2, 2022

For the start of the work period selected above, what time of the day do you begin calculating overtime?

12:00 AM

How do you count hours that cross midnight? *

Day shift starts

For example, night shifts that cross a pay period

How do you calculate overtime?

Max Hours *

40 per work period

Max Hours *

8 per day

When do you deduct paid breaks?

At *

6 hours worked

Deduct *

30 minutes

Departments and Positions

Use **Departments and Positions** to select which departments and positions you want to view on the schedule, worker profiles, filters, and when sending messages.

Departments and Positions

What departments would you like to schedule?

Activities	☒ Add all to the schedule	☐ Add shifts based on occupancy	▼
Administration	☒ Add all to the schedule	☐ Add shifts based on occupancy	▼
Assisted Living	☒ Add all to the schedule	☐ Add shifts based on occupancy	▼
Dining	☒ Add all to the schedule	☐ Add shifts based on occupancy	▼
Housekeeping	☒ Add all to the schedule	☐ Add shifts based on occupancy	▼
Independent Living	☒ Add all to the schedule	☐ Add shifts based on occupancy	▼
Skilled Nursing	☒ Add all to the schedule	☐ Add shifts based on occupancy	^

CNA	☒ Schedule	☐ Shifts based on occupancy
Director of Nursing	☒ Schedule	☐ Shifts based on occupancy
LPN	☒ Schedule	☐ Shifts based on occupancy
MDS	☒ Schedule	☐ Shifts based on occupancy
Nurse	☒ Schedule	☐ Shifts based on occupancy
RN	☒ Schedule	☐ Shifts based on occupancy

[Cancel](#) [Save](#)

Locations

Use the **Locations** setting to set up the different location areas within your community, to specify where each shift is scheduled.

1. To add a new location, select **Add Location**.
2. Enter the **location name**, an identifying **abbreviation**, and **Save**.

Locations

Sunny Villa Botany Bay has
5 assignments

Location Name	Abbreviation	
CPR Certified	CP	<button>Save</button>
Floor 1	F1	<button>Save</button>
Floor 2	F2	<button>Save</button>
Floor 3	F3	<button>Save</button>
Med Cart	MC	<button>Save</button>
<button>+ Add Location</button>		

When shifts are tagged with locations, you'll see the location reflected on the shift assignment.

The screenshot shows a shift assignment modal for Lucy Bond. The modal displays the following information: 40 of 40 hours, 21 September THU, 6a - 2:30p, RN, and Floor 1 | F1. Two red arrows point to the location information: one points to 'F1' in the shift header above the modal, and the other points to 'Floor 1 | F1' inside the modal. At the bottom of the modal are four buttons: Copy, Unassign, Call Off, and Edit.