

Staffing Dashboard Overview

This job aid explains how to use the Staffing dashboard and customize it to your preferences.

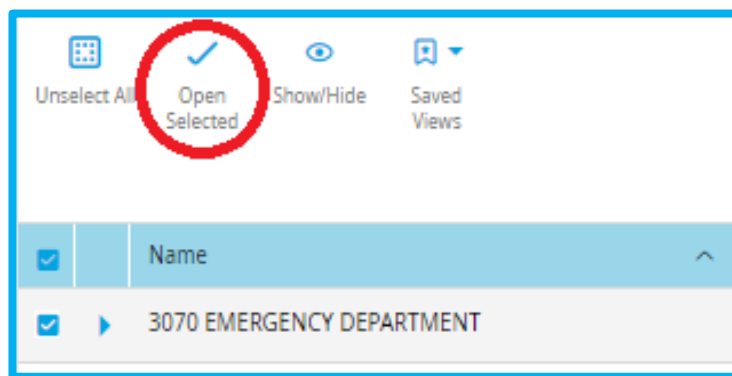
About Staffing Dashboards

- The staffing dashboard allows you to have quick access to your staffing needs for a single day.
- There, you can make adjustments to the schedule based on unforeseen events, like an employee missing their shift, calling in sick, etc.

How to Access a Dashboard View

Navigation: Main Menu > Schedule > Staffing Dashboard

- After selecting your desired department, select **Open Selected** for the detailed view of the department.

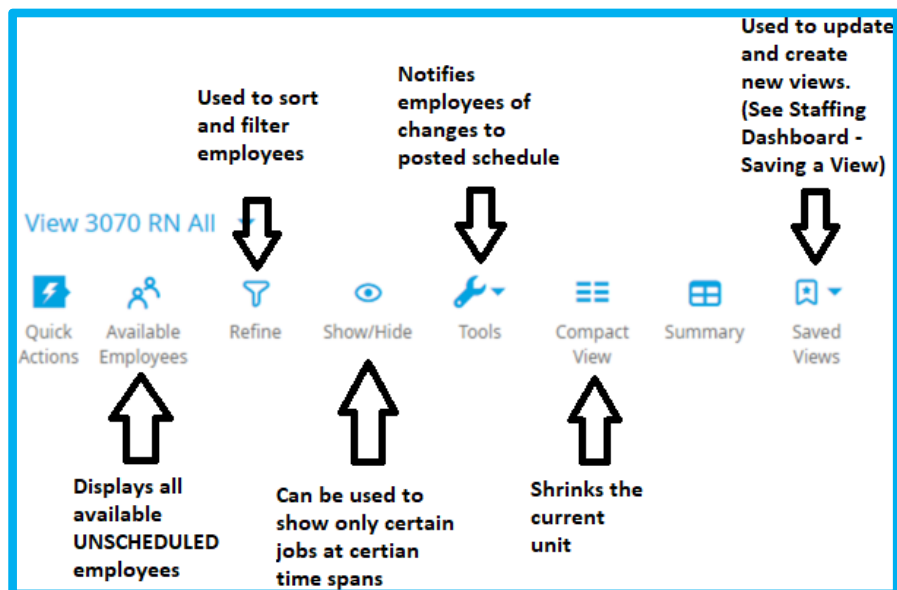


- From there, you can access several settings in order to customize this view to your liking.

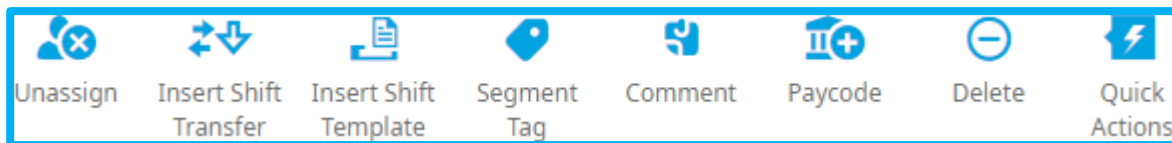
CRTCL CARE/3365 MICU/1000					
Under	Over	Planned	Scheduled	Volume	
↓ 5	✓ 0	6.5	1.5	N/A	▼
HUH, TEST USE... RN		7:30 AM - 8:00 PM		^	
RN		7:30 AM - 8:00 PM			

Navigating your Dashboard View

Below is a quick overview on what each setting in the toolbar does

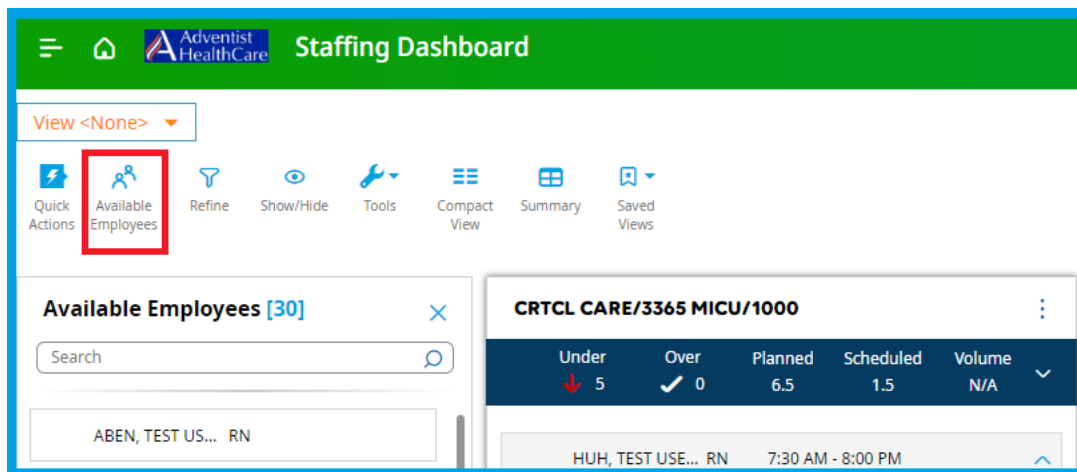


Selecting Quick Actions will pull up additional settings. This functions similarly to the settings in **Schedule**.



Available Employees

- Selecting **Available Employees** will feature all the employees that are available and NOT scheduled for the day



Refine

- Selecting Refine allows you to sort and filter employees within the dashboard view.
 - E.g. (Filter only employees that have RN as their primary job as pictured below)

The 'Refine' dialog box has a close button (X) in the top right corner. It features two tabs: 'Sort' and 'Filter', with 'Filter' currently selected. Below the tabs is a search bar labeled 'Search'. A section titled 'Primary Job Starts With RN' with a minus icon is shown. Below this is a list of filter categories, each with a right-pointing chevron: Agency Supplier, Employee ID, Employee Name, Employee Pay Rule, Expected Pay Period Hours, Home Department, Incoming Requests Count, Phone Number, Primary Job (with 'Starts Wit...' visible), Scheduled Total Hours, and Worker Type.

Show/Hide

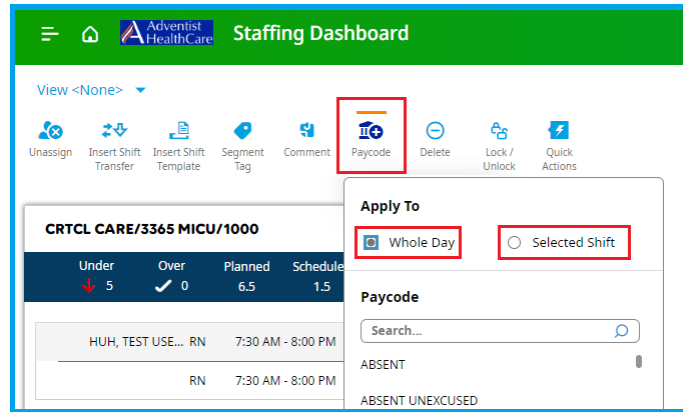
- Selecting Show/Hide allows you to show only certain jobs, timespans, shifts, etc.

The 'Show/Hide' dialog box has a close button (X) in the top right corner. It features a 'Time Span' section with a dropdown menu showing 'HUH ED - 0730-1130'. Below this is a 'Jobs' section with a list of job roles, each with a checked checkbox: All Jobs, Admstr, AdmSupp, Chair, Chrg, Cntrctr, and Coord.

The 'Shifts' dialog box has a close button (X) in the top right corner. It features a 'Shifts' section with two radio buttons: 'All' (selected) and 'Coverage Settings'. Below this is a 'Display' section with a checked checkbox for 'Open Shifts'. The 'Volume Calculation' section has three radio buttons: 'Default' (selected), 'Start', and 'End'. At the bottom is a blue button labeled 'Restore Default Filters'.

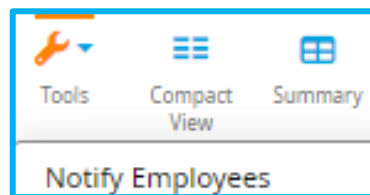
Paycodes

- When adding a paycode to an employee who has multiple shifts entered for one day, a new **Apply To** option enables you to specify whether you want the paycode applied to the **Whole Day** or the **Selected Shift**.
- Similar to the schedule you can add Paycodes by using your **Quick Actions > Paycode**, or right clicking directly on the shift.



Tools

- Selecting Tools only shows one option, Notify Employees
 - This will notify every employee of changes made to their posted schedules



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