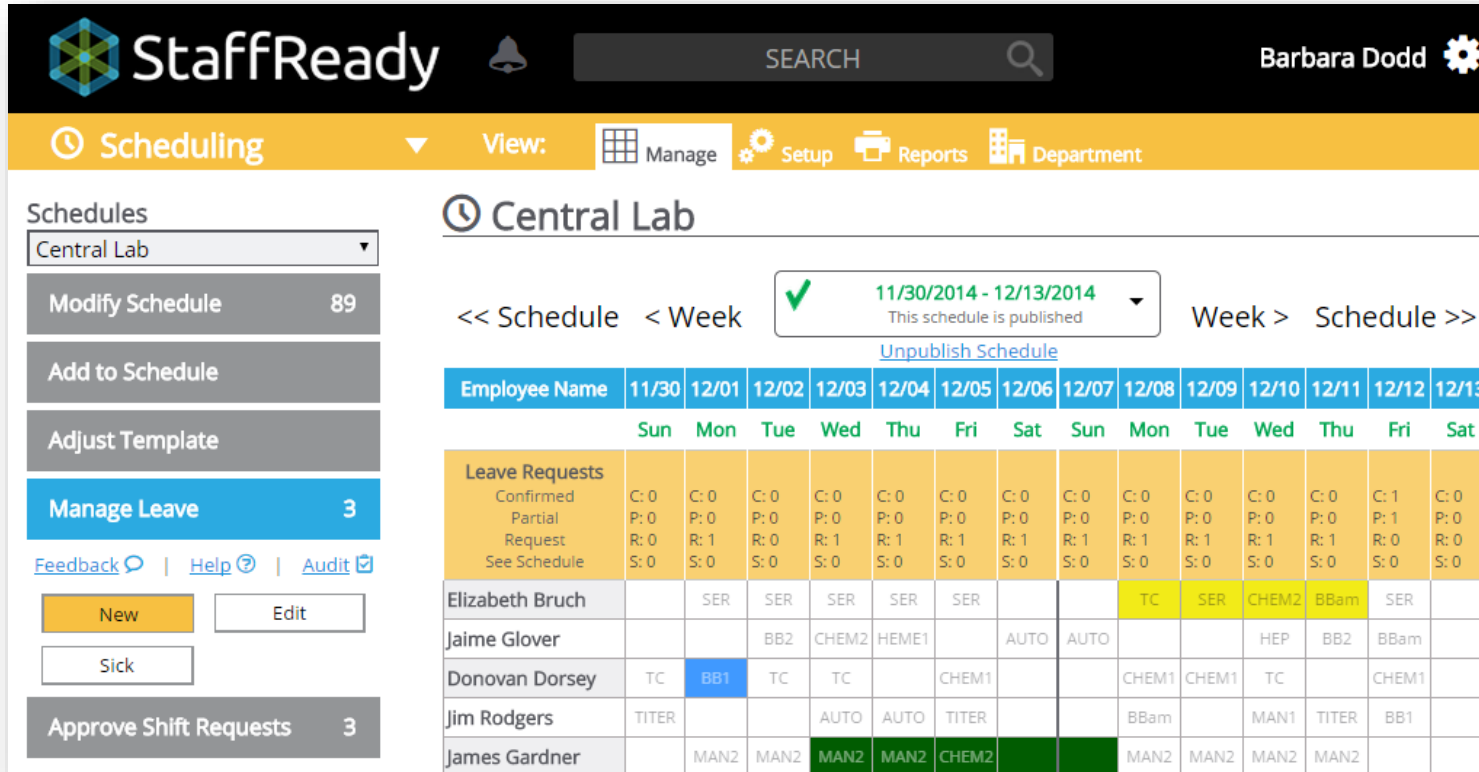


Scheduling Perspective – Manage View

Manage Leave

This reference guide provides an overview of each mode from the **Manage Leave** submenu within the **Manage View** in the StaffReady Scheduling Module. The following process steps and instructional information are provided within this document:

- **Overview**
- **New**
- **Edit**
- **Sick**



The screenshot displays the StaffReady interface for the 'Manage Leave' view. The top navigation bar includes the StaffReady logo, a search bar, and the user name 'Barbara Dodd'. The main navigation area shows 'Scheduling' and 'View: Manage' with sub-options for 'Setup', 'Reports', and 'Department'. On the left sidebar, there are buttons for 'Modify Schedule' (89), 'Add to Schedule', 'Adjust Template', 'Manage Leave' (3), and 'Approve Shift Requests' (3). The main content area is titled 'Central Lab' and shows a calendar for the week of 11/30/2014 to 12/13/2014. A notification indicates the schedule is published. Below the calendar is a table of leave requests for several employees.

Employee Name	11/30	12/01	12/02	12/03	12/04	12/05	12/06	12/07	12/08	12/09	12/10	12/11	12/12	12/13
	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Leave Requests														
Confirmed	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 1	C: 0
Partial	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 1	P: 0
Request	R: 0	R: 1	R: 0	R: 1	R: 1	R: 1	R: 1	R: 1	R: 1	R: 1	R: 1	R: 1	R: 0	R: 0
See Schedule	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0
Elizabeth Bruch		SER	SER	SER	SER	SER			TC	SER	CHEM2	BBam	SER	
Jaime Glover			BB2	CHEM2	HEME1		AUTO	AUTO			HEP	BB2	BBam	
Donovan Dorsey	TC	BB1	TC	TC		CHEM1			CHEM1	CHEM1	TC		CHEM1	
Jim Rodgers	TITER			AUTO	AUTO	TITER			BBam		MAN1	TITER	BB1	
James Gardner		MAN2	MAN2	MAN2	MAN2	CHEM2			MAN2	MAN2	MAN2	MAN2		

Overview

The **Manage Leave** submenu allows you to create new leave, edit existing leave requests, and add sick leave to the schedule.

Overview of the Manage Leave Menu

At the top of the grid editor in the gold row you can view the amount of confirmed leave, parital leave, and requested leave for each date.

In the **Manage Leave** menu indicator window you can see how many leave requests are still in the request state.

		Publish Schedule														
Add to Schedule		Employee Name	12/07	12/08	12/09	12/10	12/11	12/12	12/13	12/14	12/15	12/16	12/17	12/18	12/19	12/20
Adjust Template			Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Manage Leave 2		Leave Requests	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0
Feedback Help Audit		Confirmed	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0
New Edit		Partial	R: 0	R: 1	R: 1	R: 1	R: 0	R: 0	R: 0	R: 0	R: 0	R: 1	R: 1	R: 1	R: 1	R: 0
Sick		Request	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0
		See Schedule														
		OPEN SHIFT														
		Donovan Dorsey		CHEM1	CHEM1	CHEM1	CHEM1	CHEM1				TC	TC		TC	
		Angela Reed		BB2	HEME1	MAN1	MAN1	BB2			BB2	CHEM1		BB2		BB2
		Elizabeth Bruch		TC	SER	CHEM2	BBam	SER			SER	SER	SER	SER	SER	

New

Using the New Mode

1. In the left navigation pane, click **Manage Leave**.
2. Click **New**.
3. Click the day for the employee that is requesting leave.

Donovan Dorsey		CHEM1	CHEM1	CHEM1	CHEM1	CHEM1	
Angela Reed		BB2	HEME1	MAN1	MAN1	BB2	
Elizabeth Bruch		TC	SER	CHEM2	BBam	SER	
Jim Rodgers					TITER	BB1	
Jaime Glover	AUTO	BBam		BB2	TC	MAN1	
Dennis Alvarez		SURG				BB1	PA
Joe Fox			BB1	BB1	BB1	HEME1	

4. On the **Leave Type** menu, click the type of leave requested.
5. In the **Leave Begins** and **Leave Ends** boxes, type the beginning and ending dates of the leave request.
6. To request specific times off within a given day, type the times in the corresponding **time** boxes.
7. In the **Reason for Leave/New Note** box, type any information you would like the schedule manager to be aware of.
8. Click **Save Changes**.

Request/Edit Leave
✕

Leave Request

History

Conversation

Leave for Schedule

Leave Request

Employee* ⓘ

Leave Type* ⓘ

Request Date* ⓘ

 :

Leave Begins* ⓘ

 :

Leave Ends* ⓘ

 :

Conversation

AReed@Nov 4 2015 2:32:51:647PM

Status ⓘ

Edit

In the **Edit** mode you can review, confirm or deny, and edit leave requests.

Review Leave

1. In the left navigation pane, click **Manage Leave**.


2. Click **Edit**.

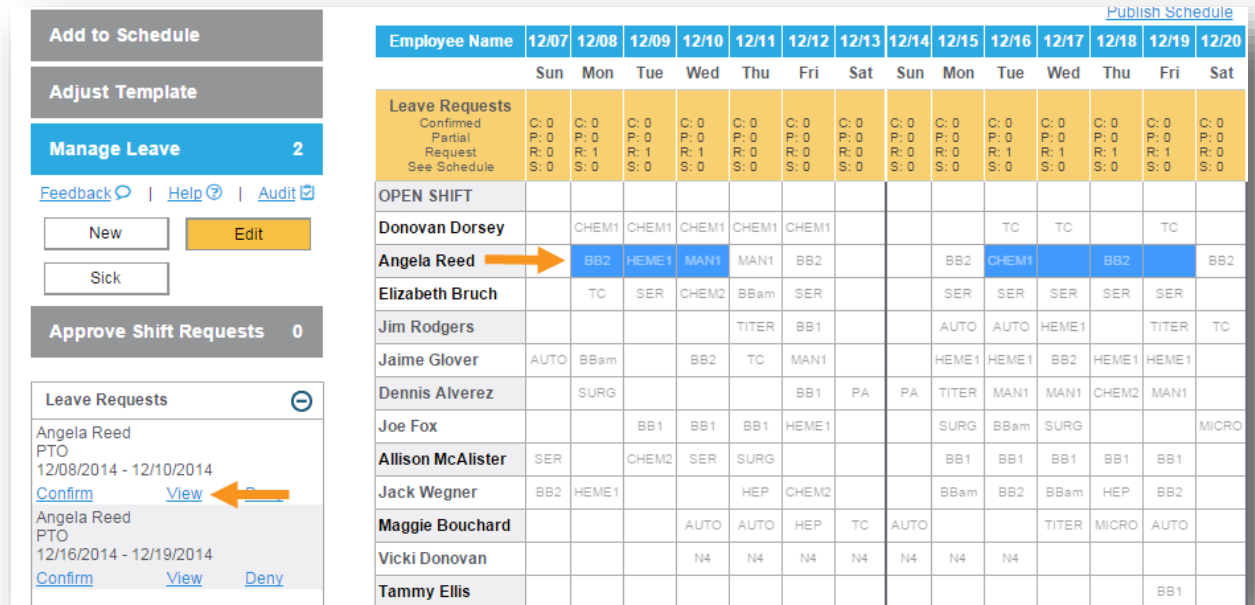
3. In the **Leave Request** side window for the request you wish to review, click **View**

or

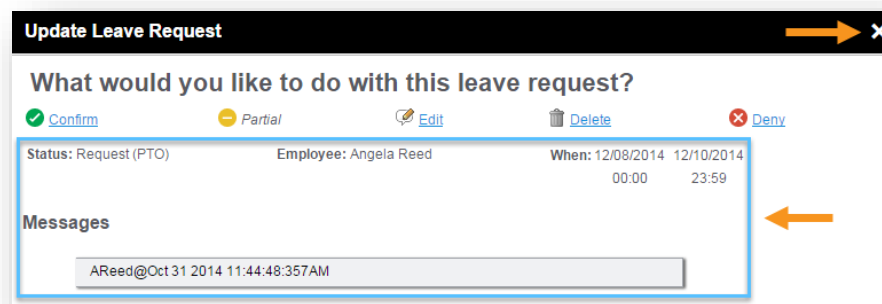
Click the leave request on the schedule.

Note: All the details about the leave request are included on the Update Leave Request Window.

4. Click on the **close** button  on the Update Leave Request window that displays.



Employee Name	12/07	12/08	12/09	12/10	12/11	12/12	12/13	12/14	12/15	12/16	12/17	12/18	12/19	12/20
Leave Requests														
Confirmed	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0	C: 0
Partial	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0	P: 0
Request	R: 0	R: 1	R: 1	R: 1	R: 0	R: 0	R: 0	R: 0	R: 0	R: 1	R: 1	R: 1	R: 1	R: 0
See Schedule	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0	S: 0
OPEN SHIFT														
Donovan Dorsey		CHEM1	CHEM1	CHEM1	CHEM1	CHEM1				TC	TC		TC	
Angela Reed		BB2	HEME1	MAN1	MAN1	BB2			BB2	CHEM1		BB2		BB2
Elizabeth Bruch		TC	SER	CHEM2	BBam	SER			SER	SER	SER	SER	SER	
Jim Rodgers					TITER	BB1			AUTO	AUTO	HEME1		TITER	TC
Jaime Glover	AUTO	BBam		BB2	TC	MAN1			HEME1	HEME1	BB2	HEME1	HEME1	
Dennis Alvarez		SURG				BB1	PA	PA	TITER	MAN1	MAN1	CHEM2	MAN1	
Joe Fox			BB1	BB1	BB1	HEME1			SURG	BBam	SURG			MICRO
Allison McAlister	SER		CHEM2	SER	SURG				BB1	BB1	BB1	BB1	BB1	
Jack Wegner	BB2	HEME1			HEP	CHEM2			BBam	BB2	BBam	HEP	BB2	
Maggie Bouchard				AUTO	AUTO	HEP	TC	AUTO			TITER	MICRO	AUTO	
Vicki Donovan				N4	N4	N4	N4	N4	N4	N4				
Tammy Ellis													BB1	



Update Leave Request

What would you like to do with this leave request?

Confirm Partial Edit Delete Deny

Status: Request (PTO) Employee: Angela Reed When: 12/08/2014 - 12/10/2014
00:00 - 23:59

Messages

AReed@Oct31 2014 11:44:48:357AM

Confirm and Deny Leave

1. In the left navigation pane, click **Manage Leave**.
2. Click **Edit**
3. In the Leave Request side window for the leave you wish to confirm or deny, click **Confirm** or **Deny**.

or

Click the leave request on the schedule that you would like to confirm or deny.

Click **Confirm** or **Deny**.

Add to Schedule

Adjust Template

Manage Leave 2

Feedback | Help | Audit

New Edit

Sick

Approve Shift Requests 0

Leave Requests

Angela Reed
PTO
12/08/2014 - 12/10/2014
[Confirm](#) [View](#) [Deny](#)

Angela Reed
PTO
12/16/2014 - 12/19/2014
[Confirm](#) [View](#) [Deny](#)

[Publish Schedule](#)

Employee Name	12/07	12/08	12/09	12/10	12/11	12/12	12/13	12/14	12/15	12/16	12/17	12/18	12/19	12/20
	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Leave Requests	C:0 P:0 R:0 S:0	C:0 P:0 R:1 S:0	C:0 P:0 R:1 S:0	C:0 P:0 R:1 S:0	C:0 P:0 R:0 S:0	C:0 P:0 R:0 S:0	C:0 P:0 R:0 S:0	C:0 P:0 R:0 S:0	C:0 P:0 R:0 S:0	C:0 P:0 R:1 S:0	C:0 P:0 R:1 S:0	C:0 P:0 R:1 S:0	C:0 P:0 R:1 S:0	C:0 P:0 R:0 S:0
OPEN SHIFT														
Donovan Dorsey		CHEM1	CHEM1	CHEM1	CHEM1	CHEM1				TC	TC		TC	
Angela Reed		BB2	HEME1	MAN1	MAN1	BB2				BB2	CHEM1		BB2	BB2
Elizabeth Bruch		TC	SER	CHEM2	BBam	SER			SER	SER	SER	SER	SER	TC
Jim Rodgers					TITER	BB1			AUTO	AUTO	HEME1		TITER	TC
Jaime Glover	AUTO	BBam		BB2	TC	MAN1			HEME1	HEME1	BB2	HEME1	HEME1	
Dennis Alvarez		SURG				BB1	PA	PA	TITER	MAN1	MAN1	CHEM2	MAN1	
Joe Fox			BB1	BB1	BB1	HEME1			SURG	BBam	SURG			MICRO
Allison McAlister	SER		CHEM2	SER	SURG				BB1	BB1	BB1	BB1	BB1	
Jack Wegner	BB2	HEME1			HEP	CHEM2			BBam	BB2	BBam	HEP	BB2	
Maggie Bouchard				AUTO	AUTO	HEP	TC	AUTO			TITER	MICRO	AUTO	
Vicki Donovan				N4	N4	N4	N4	N4	N4	N4				
Tammy Ellis													BB1	

Edit Leave

1. In the left navigation pane, click **Manage Leave**.
2. Click **Edit**.
3. In the Leave Request side window, click **View** on the leave request you would like to edit

or

Click the leave request on the schedule that you would like to edit.

Add to Schedule

Adjust Template

Manage Leave 2

Feedback | Help | Audit

New Edit

Sick

Approve Shift Requests 0

Leave Requests

Angela Reed
PTO
12/08/2014 - 12/10/2014
[Confirm](#) [View](#) [Deny](#)

Angela Reed
PTO
12/16/2014 - 12/19/2014
[Confirm](#) [View](#) [Deny](#)


[Publish Schedule](#)

Employee Name	12/07	12/08	12/09	12/10	12/11	12/12	12/13	12/14	12/15	12/16	12/17	12/18	12/19	12/20
	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Leave Requests	C:0 P:0 R:0 S:0	C:0 P:0 R:1 S:0	C:0 P:0 R:1 S:0	C:0 P:0 R:1 S:0	C:0 P:0 R:0 S:0	C:0 P:0 R:0 S:0	C:0 P:0 R:0 S:0	C:0 P:0 R:0 S:0	C:0 P:0 R:0 S:0	C:0 P:0 R:1 S:0	C:0 P:0 R:1 S:0	C:0 P:0 R:1 S:0	C:0 P:0 R:1 S:0	C:0 P:0 R:0 S:0
OPEN SHIFT														
Donovan Dorsey		CHEM1	CHEM1	CHEM1	CHEM1	CHEM1				TC	TC		TC	
Angela Reed		BB2	HEME1	MAN1	MAN1	BB2				BB2	CHEM1		BB2	BB2
Elizabeth Bruch		TC	SER	CHEM2	BBam	SER			SER	SER	SER	SER	SER	TC
Jim Rodgers					TITER	BB1			AUTO	AUTO	HEME1		TITER	TC
Jaime Glover	AUTO	BBam		BB2	TC	MAN1			HEME1	HEME1	BB2	HEME1	HEME1	
Dennis Alvarez		SURG				BB1	PA	PA	TITER	MAN1	MAN1	CHEM2	MAN1	
Joe Fox			BB1	BB1	BB1	HEME1			SURG	BBam	SURG			MICRO
Allison McAlister	SER		CHEM2	SER	SURG				BB1	BB1	BB1	BB1	BB1	
Jack Wegner	BB2	HEME1			HEP	CHEM2			BBam	BB2	BBam	HEP	BB2	
Maggie Bouchard				AUTO	AUTO	HEP	TC	AUTO			TITER	MICRO	AUTO	
Vicki Donovan				N4	N4	N4	N4	N4	N4	N4				
Tammy Ellis													BB1	

- Click **Edit** on the Update Leave Request window that displays.



Sick

Sick Leave

- In the left navigation pane, click **Manage Leave**.
- Click **Sick**.
- Click the box in the grid for the employee and day that the employee is sick.
- In the **Start Date** and **End Date** boxes, type the beginning and ending dates of the sick leave from the calendar date picker. 
- Click **Next >**.

Angela Reed		BB2	HEME1	MAN1	MAN1	BB2	
Elizabeth Bruch		TC	SER	CHEM2	BBam	SER	
Jim Rodgers					TITER	BB1	
Jaime Glover	AUTO	BBam		BB2	TC	MAN1	
Dennis Alvarez		SURG				BB1	PA
Joe Fox			BB1	BB1	BB1	HEME1	

Shifts in the **Sick Shift** table appear in the **Manage Shifts** window with icons that provide a visual representation of the status of the shifts. The following legend defines the meaning of each icon:

-  The currently active shift
-  The shift has been reassigned

6. Click **Unassign** to move the active shift to the **Unassigned Shifts** line of the schedule editor.
7. Click **Next>** to select a different shift to unassign.
8. Click **Go To Summary >>** to advance to the **Summary** menu.



Create Sick Leave ✕

< Previous Next > Go to Summary >>

MANAGE SHIFTS

Sick Employee: Jaime Glover

Sick Shifts

Status	Assignment	Shift Time	Location	Job Description	Schedule	
	BB2	Wed Dec 10, 14:00 - 22:30	5th Floor-West	Blood Bank - Evening	Central L...	 Unassign

Qualified Fill-In Employees

Name	Phone Number	Worker Status	Total Hours	Before	After	
Elizabeth Bruch	1-(509)1001001 x0	CHEM2 (14:00 - 22:30)	36	40.0	40.0	Assign Shift
Donovan Dorsey	1-(509)1001001 x0	CHEM1 (7:00 - 15:30)	20	40.0	47.0	Assign Shift
Allison McAlister	1-(509)1001001 x0	SER (9:00 - 17:30)	40	34.0	39.0	Assign Shift
Tom LaRowe	1-(509)1001001 x0	Not Working	60	24.0	32.0	Assign Shift
Angela Reed	1-(509)1001001 x0	MAN1 (8:00 - 16:30)	40	40.0	46.0	Assign Shift
Jack Wegner	1-(509)1001001 x0	Not Working	40	32.0	40.0	Assign Shift
Melissa Temple	1-(509)1001001 x0	N1 (21:00 - 5:30)	60	32.0	39.0	Assign Shift
Meghann Schuman	1-(509)1001001 x0	Not Working	60	24.0	32.0	Assign Shift

[Show Unqualified Employees](#)

< Previous Next > Go to Summary >>

Assign the Sick Employee's Shifts

When you opt to manage shifts, the **Manage Shifts** window and the **Shift Information** (with the shifts currently assigned to the sick employee displayed) and **Qualified Employees** tables launch so you can assign the shifts to other employees. The **Qualified Fill-In Employees** table contains information about each employee (phone number, availability, and if overtime would occur) to assist your decision about assigning the shift,

Assign Shifts

1. To make a different shift active, click **Next >**.
2. If you want more employees to choose from for the shift, click **Show Unqualified Employees**.
3. In the row for the employee you want to assign the active shift to, click **Assign Shift**.
4. Click **Go To Summary >>** to advance to the **Summary** window.
Note: Summary is a brief overview of all actions that were completed in the Create Sick Leave window.
5. Click **Finish** once you have assigned all the shifts within the **Shift Information** table.

Create Sick Leave [X]

< Previous [Next >] Go to Summary >>

MANAGE SHIFTS

Sick Employee: Jaime Glover

Sick Shifts

Status	Assignment	Shift Time	Location	Job Description	Schedule
➔	BB2	Wed Dec 10, 14:00 - 22:30	5th Floor-West	Blood Bank - Evening	Central Lab Unassign

Qualified Fill-In Employees

Name	Phone Number	Worker Status	Total Hours	Before	After	
Elizabeth Bruch	1-(509)1001001 x0	CHEM2 (14:00 - 22:30)	36	40.0	40.0	Assign Shift
Donovan Dorsey	1-(509)1001001 x0	CHEM1 (7:00 - 15:30)	20	40.0	47.0	Assign Shift
Allison McAlister	1-(509)1001001 x0	SER (9:00 - 17:30)	40	34.0	38.0	Assign Shift
Tom LaRowe	1-(509)1001001 x0	Not Working	60	24.0	32.0	Assign Shift
Angela Reed	1-(509)1001001 x0	MAN1 (8:00 - 16:30)	40	40.0	46.0	Assign Shift
Jack Wegner	1-(509)1001001 x0	Not Working	40	32.0	40.0	Assign Shift
Melissa Temple	1-(509)1001001 x0	N1 (21:00 - 5:30)	60	32.0	39.0	Assign Shift
Meghann Schuman	1-(509)1001001 x0	Not Working	60	24.0	32.0	Assign Shift

[Show Unqualified Employees](#)

< Previous [Next >] Go to Summary >>

Conflicting Shift Assignments

If you assign a shift to an employee that conflicts with an existing shift assignment, the **Edit Assigned Shift** window will open.

The **Sick Shift Detail** area displays information for the shift you are attempting to assign to the fill-in employee.

The **Fill-In Employees' Current Shift(s)** area displays information about the shift already assigned to the fill-in employee.

On the **Shift Actions** menu, you have three choices:

- Keep the shift assigned to the employee
- Unassign shift
- Assign the shift to another employee

You can either make a selection and then click **Save Changes**

Or

Click **Cancel**.

Qualified Fill-In Employees

Name	Phone Number	Worker Status	Total Hours	Before	After	
Elizabeth Bruch	1-(509)1001001 x0	CHEM2 (14:00 - 22:30)	36	40.0	40.0	Assign Shift
Donovan Dorsey	1-(509)1001001 x0	CHEM1 (7:00 - 15:30)	20	40.0	47.0	Assign Shift
Allison McAlister	1-(509)1001001 x0	SER (9:00 - 17:30) ←	40	34.0	00.0 →	Assign Shift
Tom LaRowe	1-(509)1001001 x0	Not Working	60	24.0	32.0	Assign Shift

Manage Shift > Edit Assigned Shift [X]

Manage Fill-In Employee

Sick Shift Detail ←

Location: Blood Bank Job Description: BB1 Schedule: Central Lab

Joe Fox

Wed, Dec 10
BB1 (7:00 - 15:30)

Allison McAlister

Wed, Dec 10
SER (9:00 - 17:30)

Conflicts

Allison McAlister: The employee is already working the SER shift during an overlapping time.

Fill-In Employee's Current Shift(s) ←

Assignment	Shift Time	Location	Job Description	Schedule
SER	Wed Dec 10, 9:00 - 17:30	TLC-North	Serology	Central Lab

Shift Actions ←

Keep shift(s) assigned to Allison McAlister

Unassign shift(s)

Assign shift(s) to

←