

Purpose

The Schedule Planner widget accomplishes all of the most common and fundamental functions of scheduling. It offers multiple views, powerful editing capabilities from the toolbar and context menus, and plenty of shortcuts to make your work faster and easier.

Use the Staffing Assistant/Call List to find the most appropriate employee to work an open shift, or replace an employee who can no longer work a shift.

You may search for resources for Extra Shift in multiple ways. You can start at the Job, Unit, Building, Service Line or Facility level. Ultimately the Schedules Rules, Availability and Job Transfer Sets determine who will be presented regardless of the level you start at.

This guide assumes Open Shifts have been generated and Workload is updated.

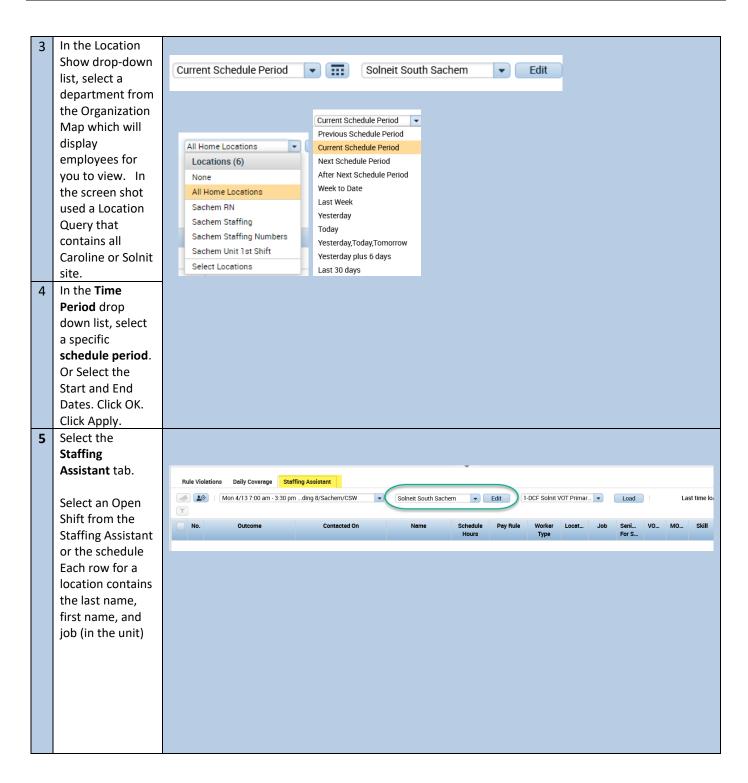


Staffing Assistant/Call List

	Steps to Call List	from Building Level	Descriptio	on
1	From the Home Page, click the Plus "+" next to the My Information Tab. Next select Manage My Department	My Information	My Information My Timecard	Q + Manage My Department
2	From the Related items list, click Scheduler Planner TRX . This version is specifically for presenting employees outside of the target area to fill openings.	Genies Schedule Planner TRX Setup Genies CT Staffing Widget Schedule Planner		
	When using this planner, you will get a larger list of employees on the schedule. This happens because the Job Transfer Set controls the list. When you want to view a normal Primary Job list, go to Scheduler Planner instead of the Scheduler Planner TRX			



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6 Select 1-DCF Solnit VOT Primary or Trx Procedure Set OR whichever Procedure set applies to your agency.

> Click **Load**. The table displays qualified and available employees in the order of best match.

Select the employee and add a pay code in the same cell as the shift

For Mandatory OT openings click 2-DCF MOT Solnit Primary or Trx OR whichever

Procedure Set applies to your agency.

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