



**ENHANCED EMPLOYEE SELF SERVICE**

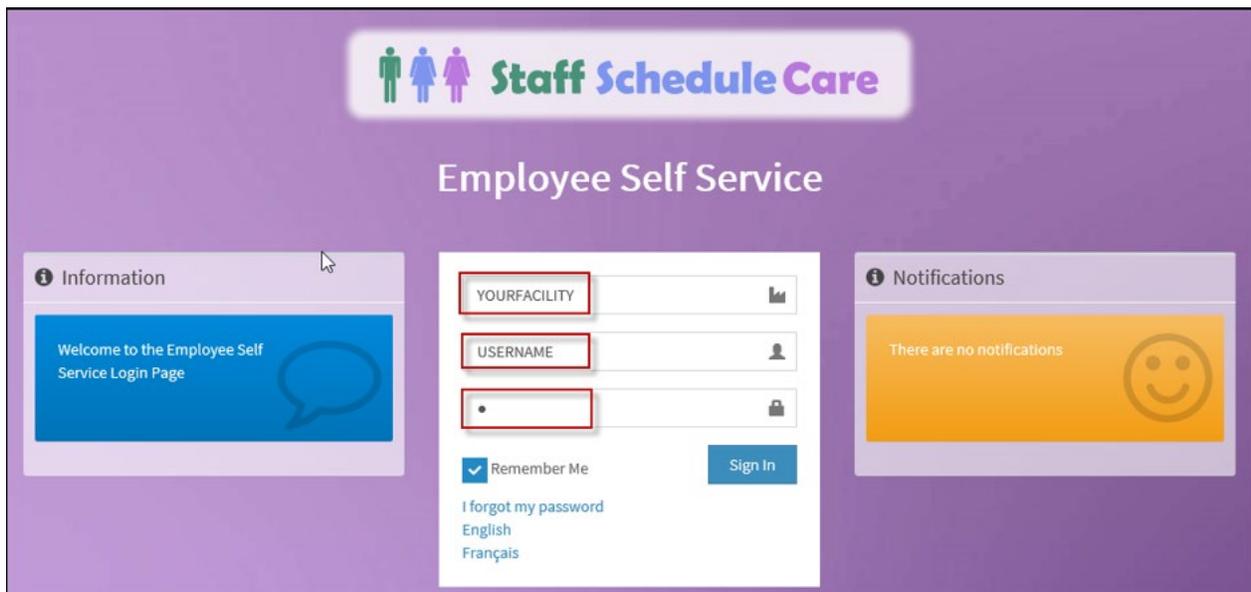
**EMPLOYEE LOG IN INFO:**  
**Employee:** \_\_\_\_\_  
**URL:** <https://newportal.staffschedulecare.com>  
**Facility:** **NCManorPREVIEW**  
**Login:** \_\_\_\_\_ (3-digit employee ID)  
**Default Password:** 123 (must change at 1<sup>st</sup> login)

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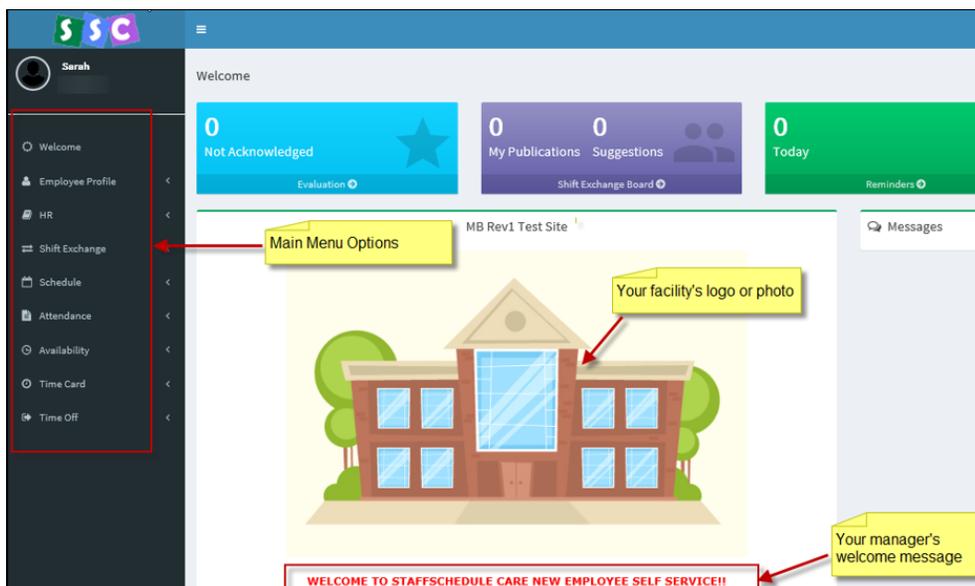
## ENHANCED EMPLOYEE SELF SERVICE

### Log In Steps

- Navigate to **https://newportal.staffschedulecare.com/?**
- Enter your facility name **NCMANORPREVIEW**
- Enter your Username: (3-digit employee ID)
- Enter your password.
- Click Sign In.

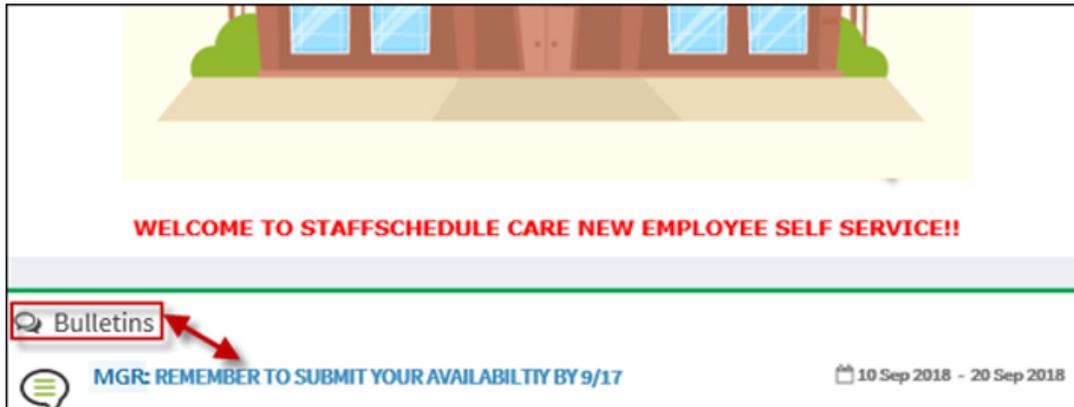


The following view will appear (or similar):



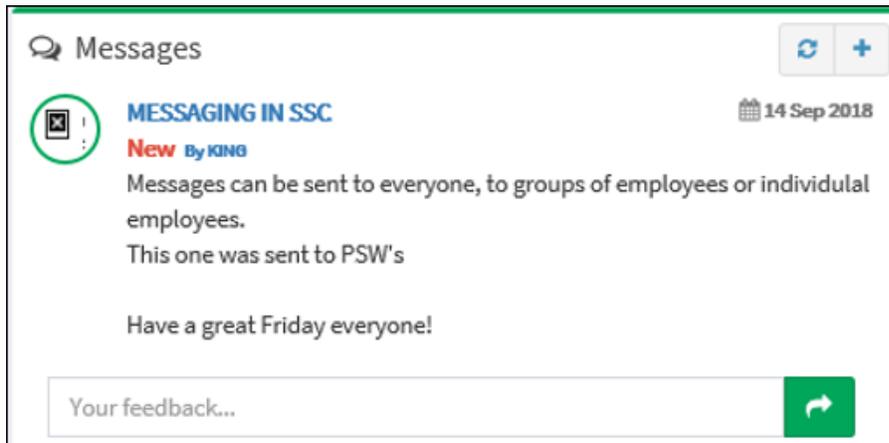
## Access Bulletins

Bulletins will be displayed below the employee welcome message.



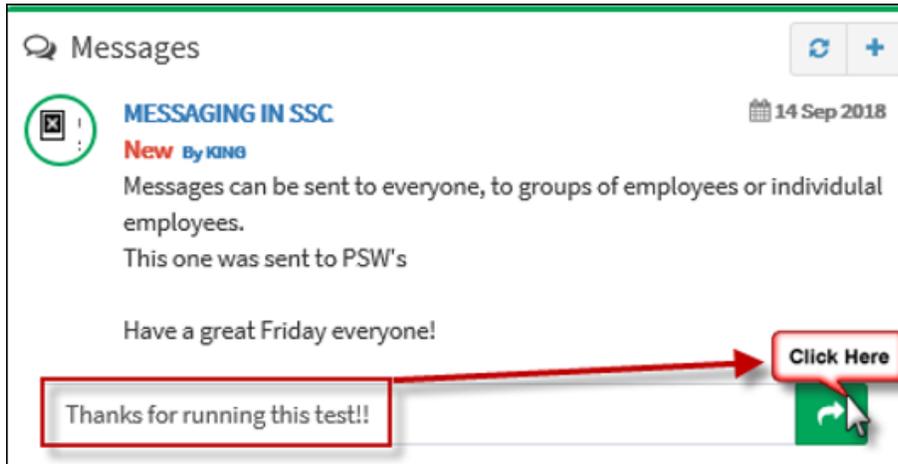
## Send / Receive Messages

Messages are displayed on the **Welcome** menu on the right side.

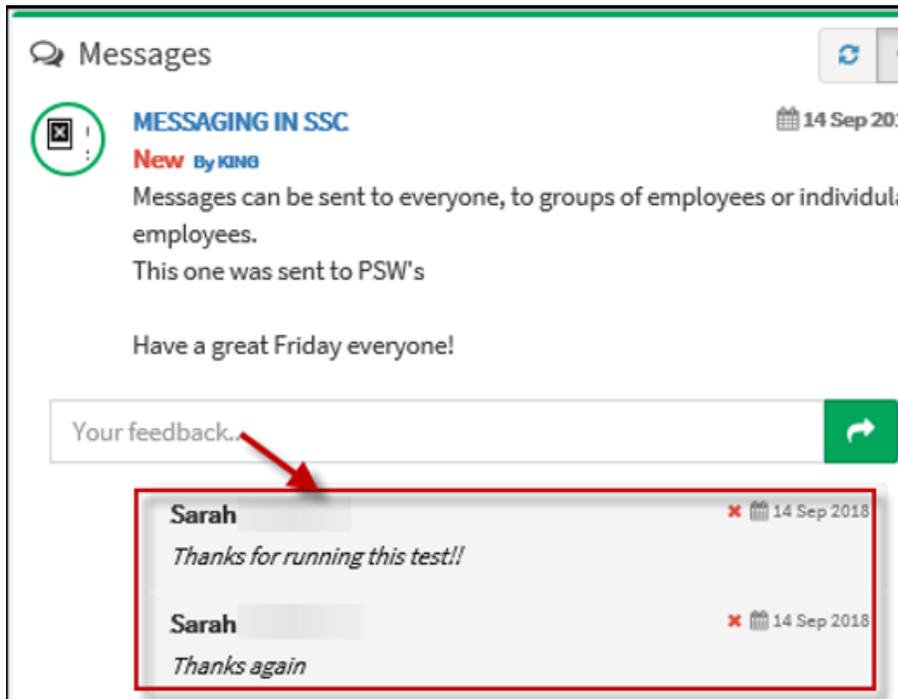


## Incoming Messages

You may provide your feedback to the person who sent you a message by completing the *Your feedback* section on the bottom of the message menu. Once complete, send your message by clicking on the arrow as shown.

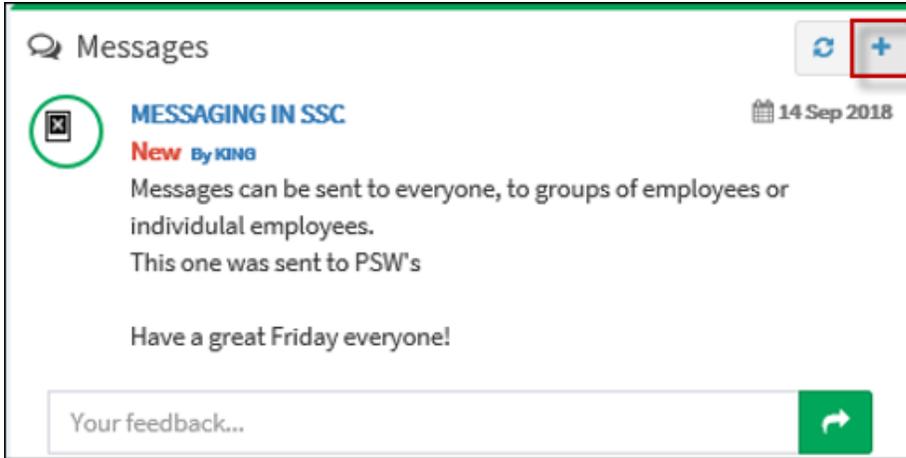


Your feedback will appear below the corresponding incoming message. Please note that you may provide feedback more than once. This example below has two feedback replies:

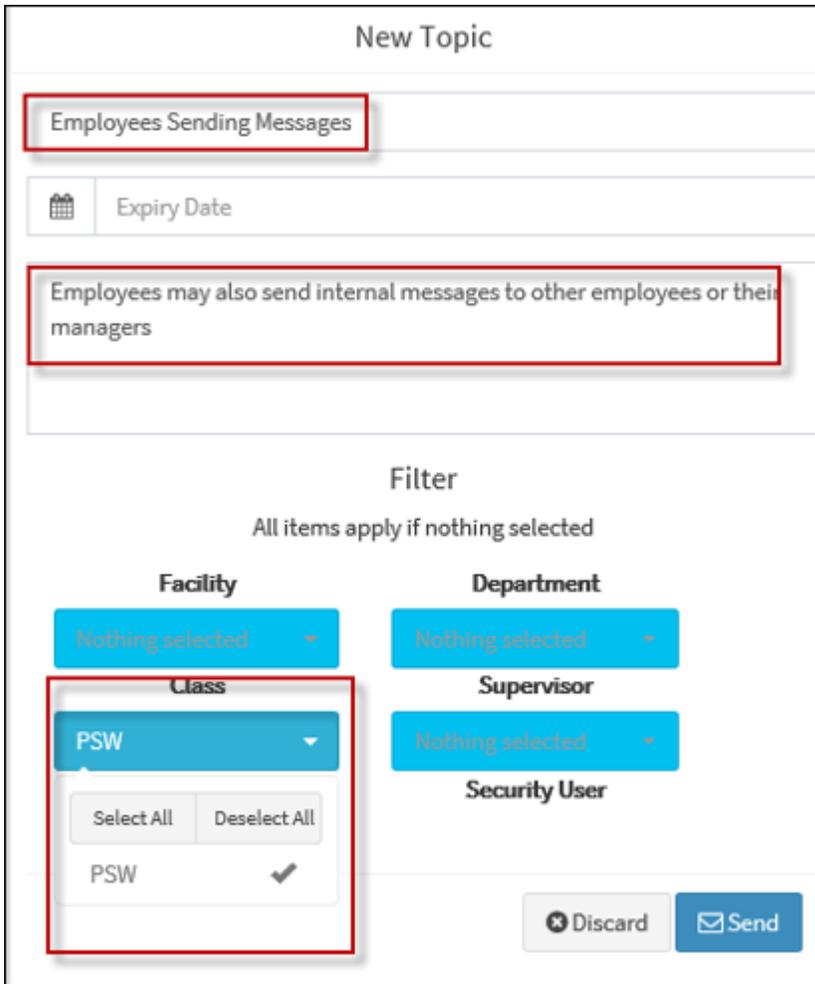


## Outgoing Messages

You may also send messages to other employees, groups of employees and managers. To create a new message, click on the “+” symbol as shown.



On the *New Topic* menu, create the heading and body of your message in the sections shown:



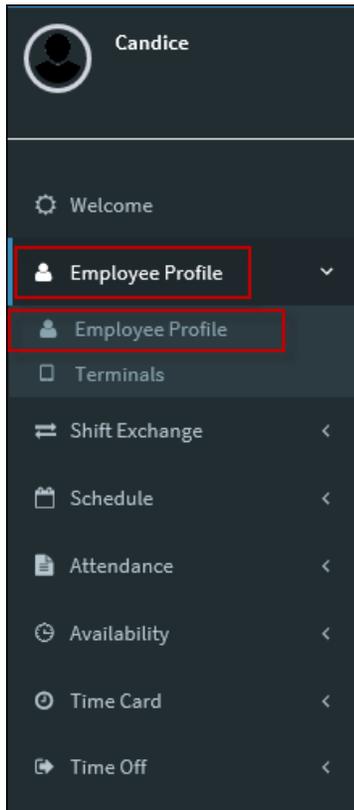
Under the *Filter* section, select the employee, manager or group you would like to send a message to. To access individual employees, click the arrow to see the complete list for that group, and select your employee (below):



Click *Send*.

## Personnel Information

Navigate to *Employee Profile / Employee Profile*.

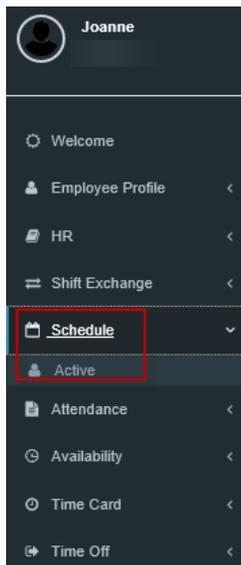


The following menu will appear:

1. Access will vary depending on security settings
2. A summary of employee data will appear on the left side (image below)
3. The detail of the data will appear on the right
4. The ability to edit personal data will depend on security settings

## View Schedule

From the menu on the left side, navigate to *Schedule/Active* as shown (left):



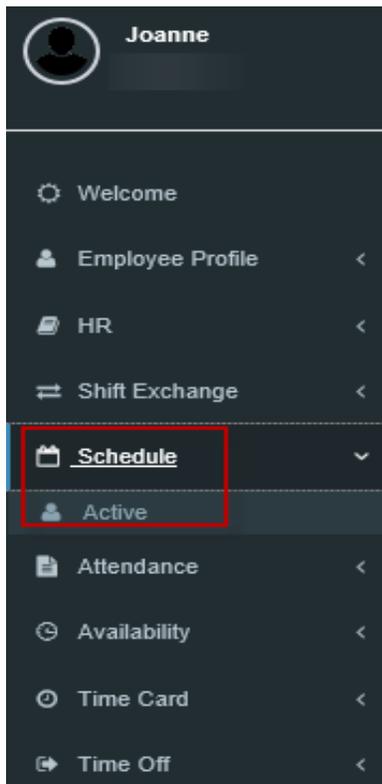
The calendar for the current month will appear displaying your schedule shown in green (see below).

**Note:** Attendance Codes are visible as well. You will see VAC on several of the dates below:

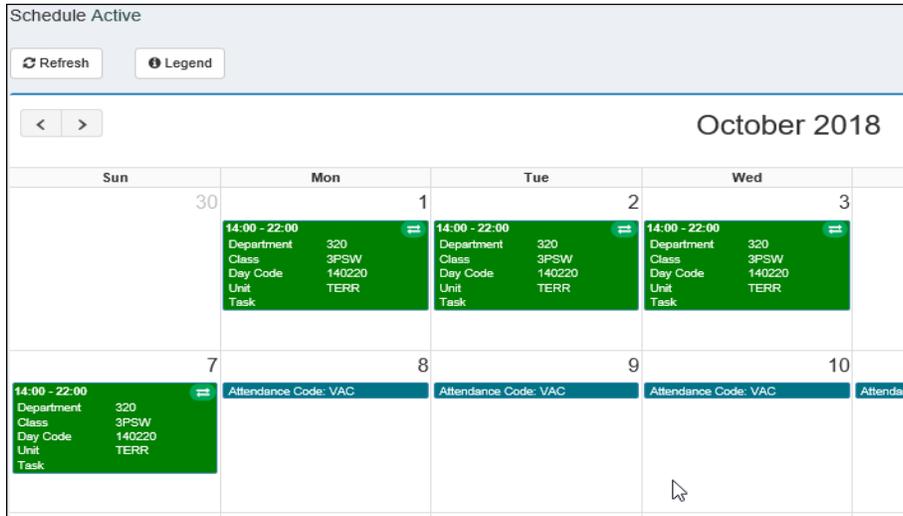
Schedule Active				
Refresh		Legend		
<		October 2018		
>				
Sun	Mon	Tue	Wed	Thu
30	1	2	3	
	14:00 - 22:00 Department 320 Class 3PSW Day Code 140220 Unit TERR Task	14:00 - 22:00 Department 320 Class 3PSW Day Code 140220 Unit TERR Task	14:00 - 22:00 Department 320 Class 3PSW Day Code 140220 Unit TERR Task	
7	8	9	10	
14:00 - 22:00 Department 320 Class 3PSW Day Code 140220 Unit TERR Task	Attendance Code: VAC	Attendance Code: VAC	Attendance Code: VAC	Attendance Code: VAC

## Submit a Shift Exchange

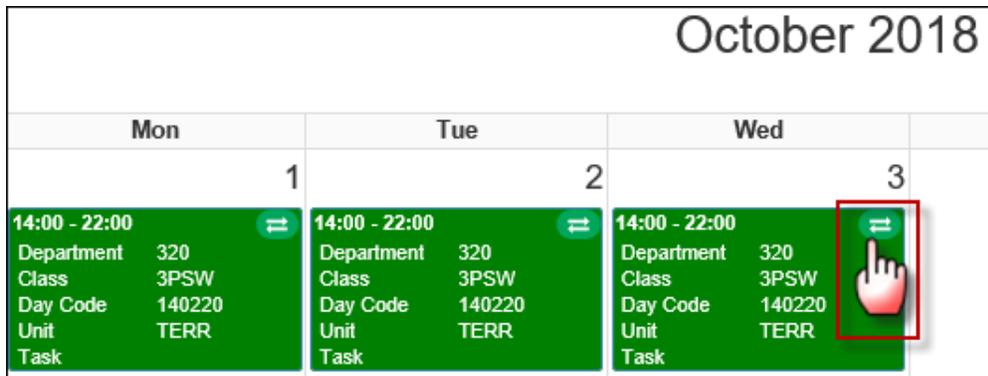
From the menu on the left-hand side, navigate to *Schedule / Active*:



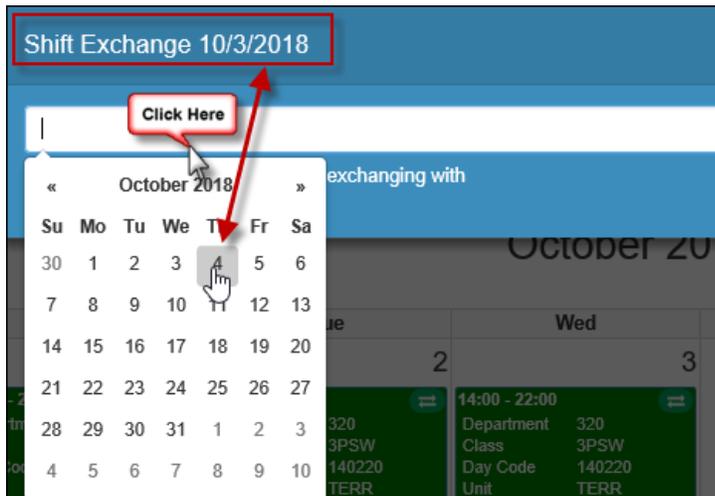
The calendar for the current month will appear displaying your schedule shown in green.



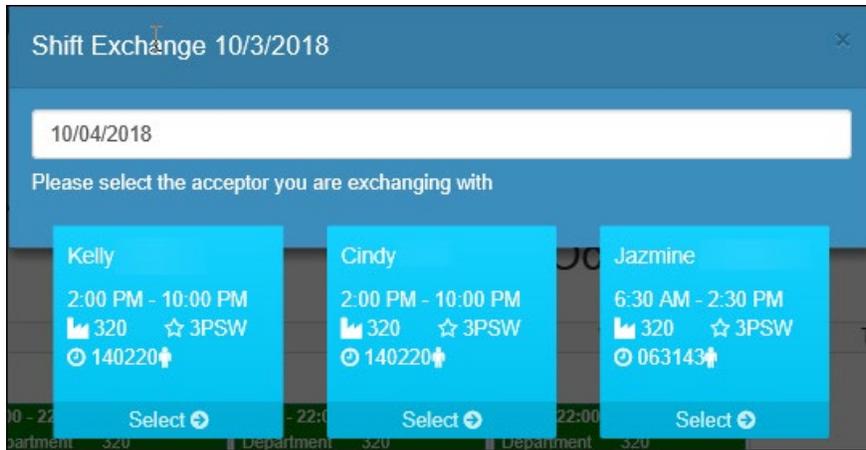
To access the *Shift Exchange* option menu, click as shown on the icon below.



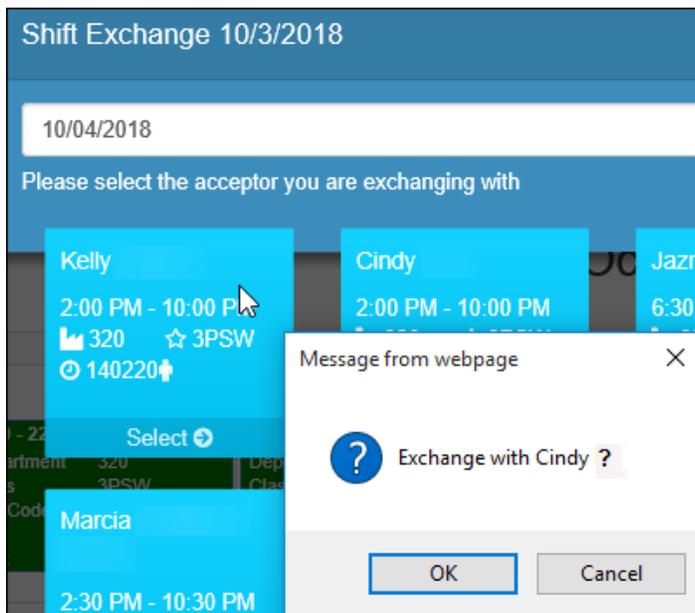
From the **Date menu**, click within the white default date bar to access the calendar.



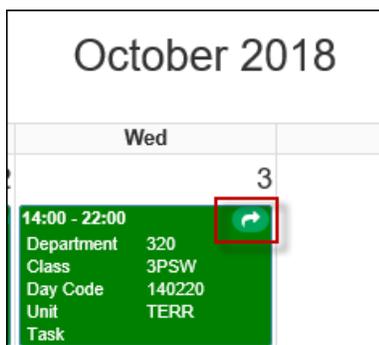
As soon as you select the date, the system will display employee(s) available for exchange. Select the employee you wish to exchange with by clicking anywhere on the *Select* option bar at the bottom of each employee selection menu.



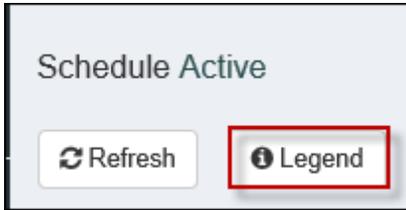
You have chosen Cindy. Click OK to confirm your selection.



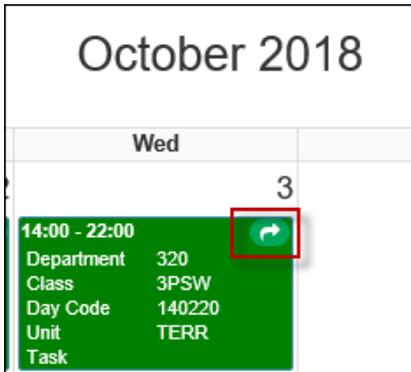
Once confirmed you will notice the icon on that date has changed.



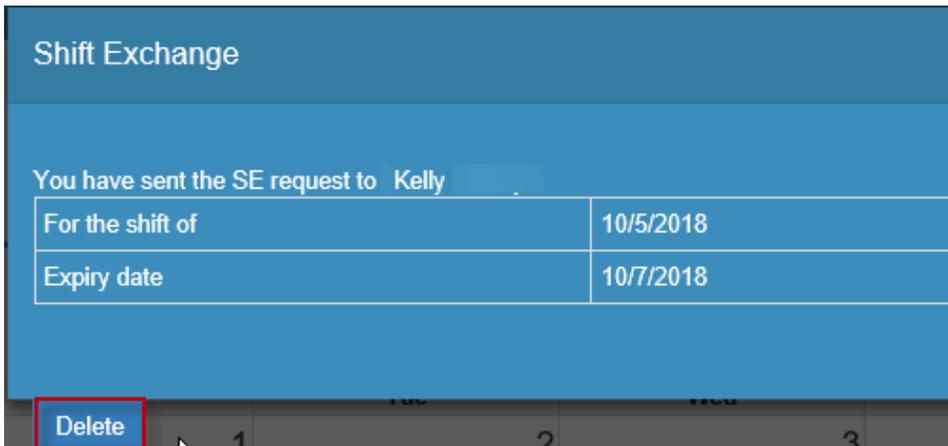
This indicates that YOU have requested an exchanged. To review what the different icons mean, click the *Legend* at the top of your page.



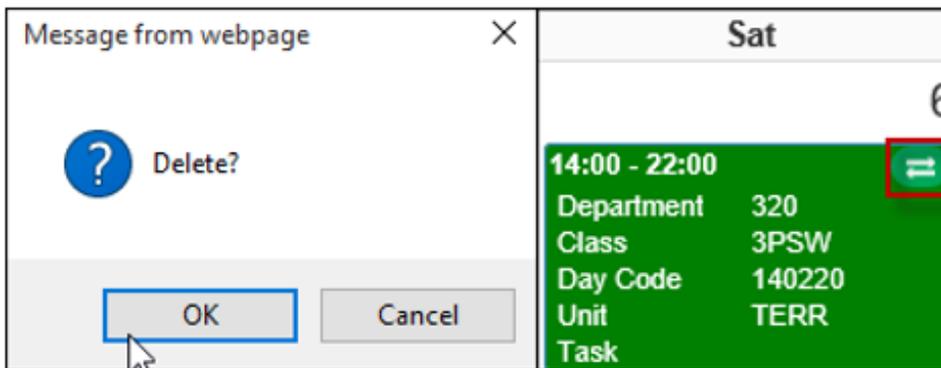
To delete a shift exchange prior approval, click on the arrow icon.



The details of the exchange will appear.



Click *Delete* and *OK* once the confirmation appears:



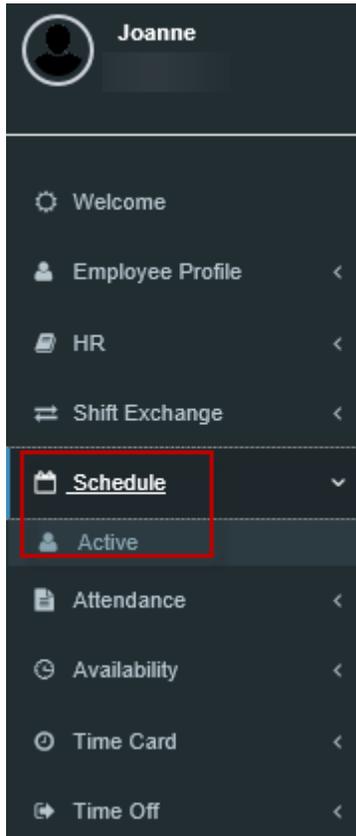
Once deleted, the regular icon will appear again (above right).

**Note:** As long as no manager action has been taken, you may delete a shift exchange request that another employee has approved or one that has been denied by another employee. You

may also deny a request that you have already approved. In all these cases, the original shift will once again appear with the default icon, allowing you or the other employee to begin again.

## Accept a Shift Exchange

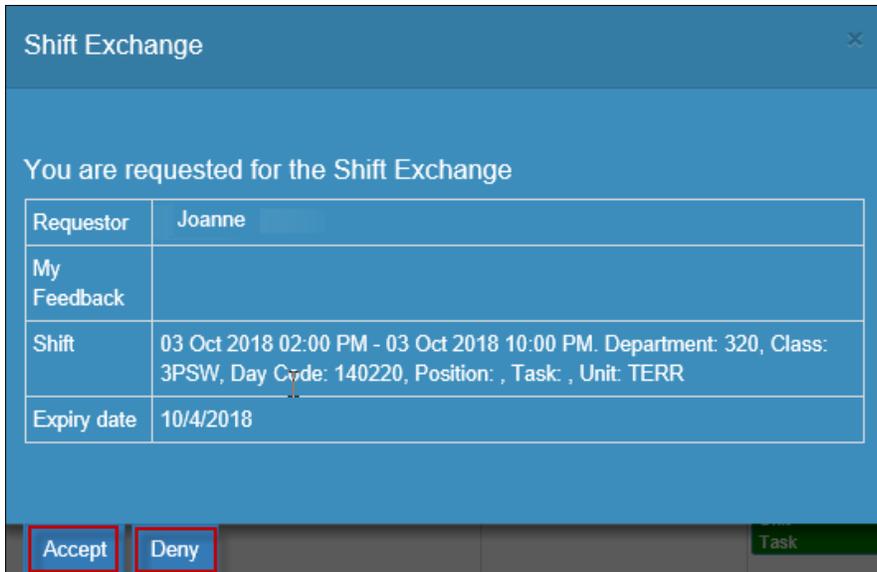
From the menu on the left-hand side, navigate to *Schedule / Active*.



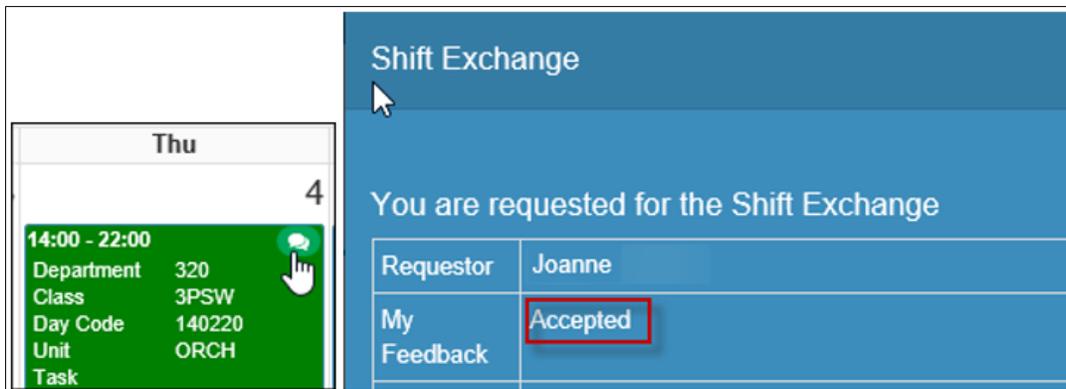
To see and process your *Shift Exchange* requests from other employees, click the icon shown below.

October 2018		
Wed	Thu	Fri
3	4	5
	<div style="background-color: #008000; color: white; padding: 5px;"><p>14:00 - 22:00 </p><p>Department 320</p><p>Class 3PSW</p><p>Day Code 140220</p><p>Unit ORCH</p><p>Task</p></div>	<div style="background-color: #008000; color: white; padding: 5px;"><p>14:30 - 22:30 </p><p>Department 320</p><p>Class 3PSW</p><p>Day Code 143223</p><p>Unit ORCH</p><p>Task</p></div>

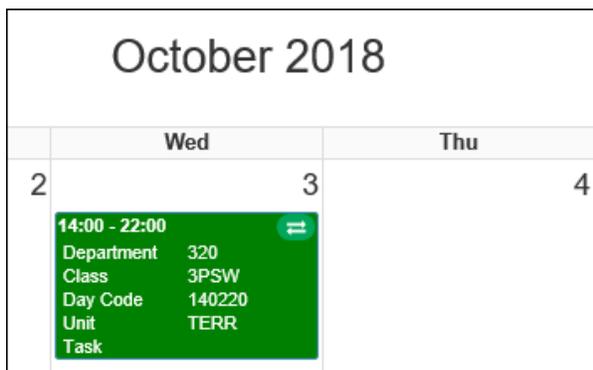
Click *Accept* or *Deny* on the bottom section of the *Shift Exchange* confirmation menu. The *My Feedback* section will be auto-populated once you select your response and is not editable.



In this example, the shift has been *Accepted*. Notice the icon has changed (below left) and the *My Feedback* section (below right) is now populated, indicating your acceptance:



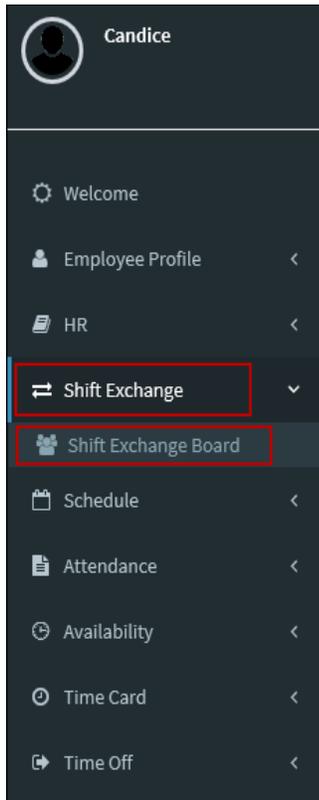
The shift will not be updated on your calendar until the manager has approved the exchange. If no approval is required, your calendar will immediately be updated. Either way, your calendar will be updated as follows, in this case with the exchanged shift appearing on the 3<sup>rd</sup> and the 4<sup>th</sup> is now unbooked.



## Shift Exchange Board

The *Shift Exchange* menu is only for the *Shift Exchange Board*, which allows you to display shifts you would like to exchange for others to see, without having to immediately select another employee to exchange with.

From the menu on the left side, navigate to *Shift Exchange/Shift Exchange Board*.



The system will display the employee's available shifts to be published for exchange (*left side*) with a calendar (*right side*) to publish the shifts on.

The screenshot shows the 'Shift Exchange Board' interface. On the left is a 'Shift List' with four entries, each with a date, time range, and a 'Check' button. On the right is a calendar for May 2019 with a grid of dates from 28 to 16.

Sun	Mon	Tue	Wed	Thu
28	29	30	1	2
5	6	7	8	9
12	13	14	15	16

**Shift List**  
Draggable

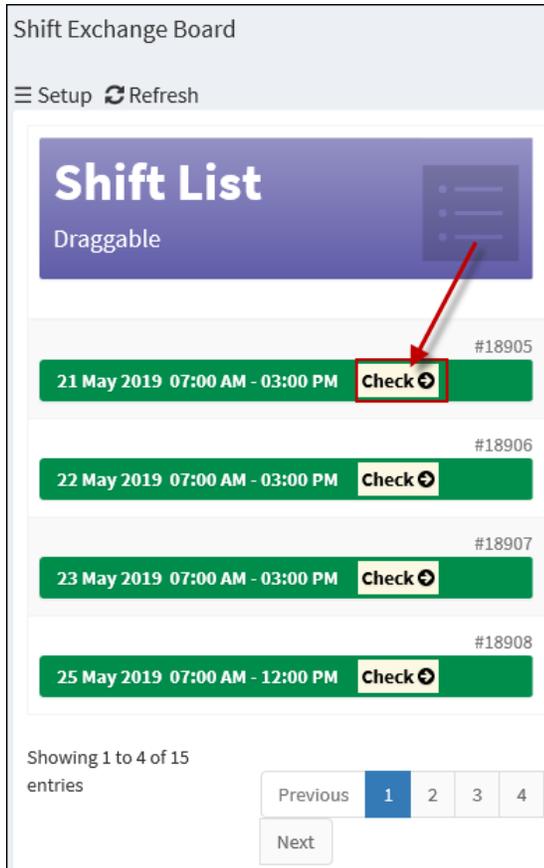
- #18905  
21 May 2019 07:00 AM - 03:00 PM Check
- #18906  
22 May 2019 07:00 AM - 03:00 PM Check
- #18907  
23 May 2019 07:00 AM - 03:00 PM Check
- #18908  
25 May 2019 07:00 AM - 12:00 PM Check

Showing 1 to 4 of 15 entries

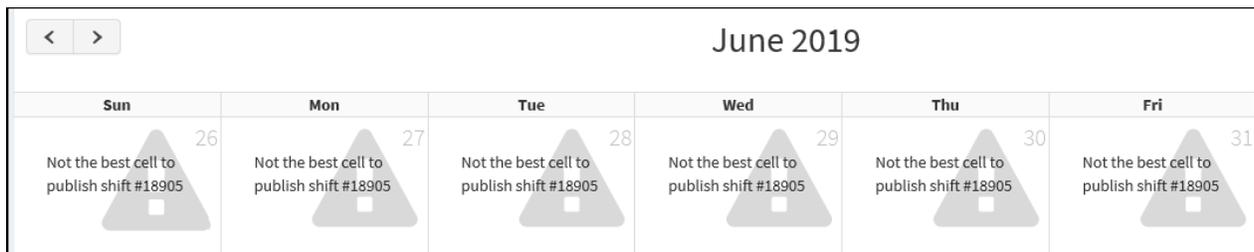
Previous 1 2 3 4 Next

Before publishing your shift to be exchanged, you can check to see what days are recommended as the best to publish your shift based on other employees' availability to take the shift.

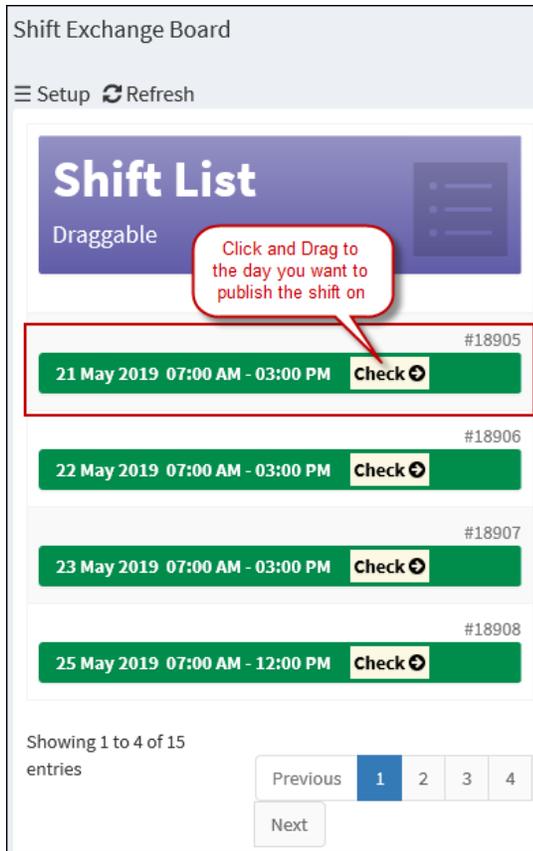
In order to see the recommended days, click *check* beside the shift you want to publish.



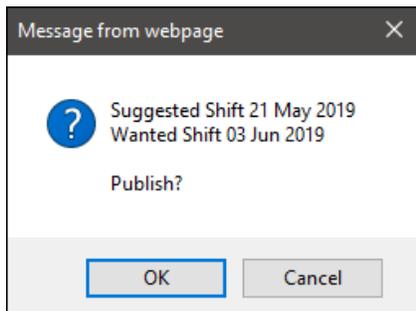
Once *Check* has been selected, the system will generate a message on each day indicating if the day is the best to publish is the shift on.



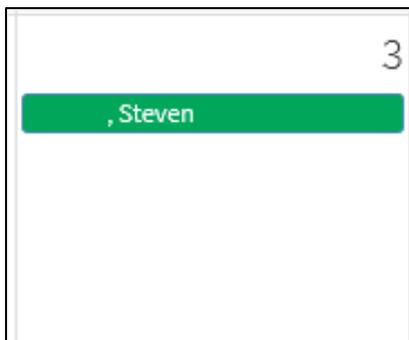
To publish a shift, click, hold and drag the shift to the day you want to exchange it for.



When you release the shift on the day you want to exchange for, you will receive a message confirming the details i.e., Suggested shift for exchange and the wanted shift.



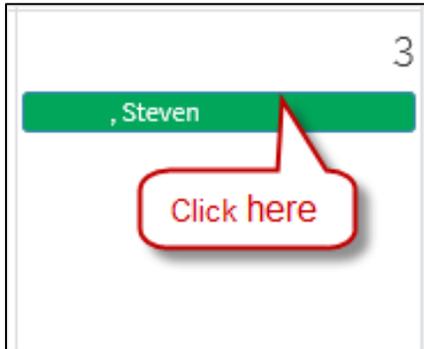
Once confirmed you will notice your shift published on the calendar.



Other employees can now see the shift and choose do the shift exchange as requested.

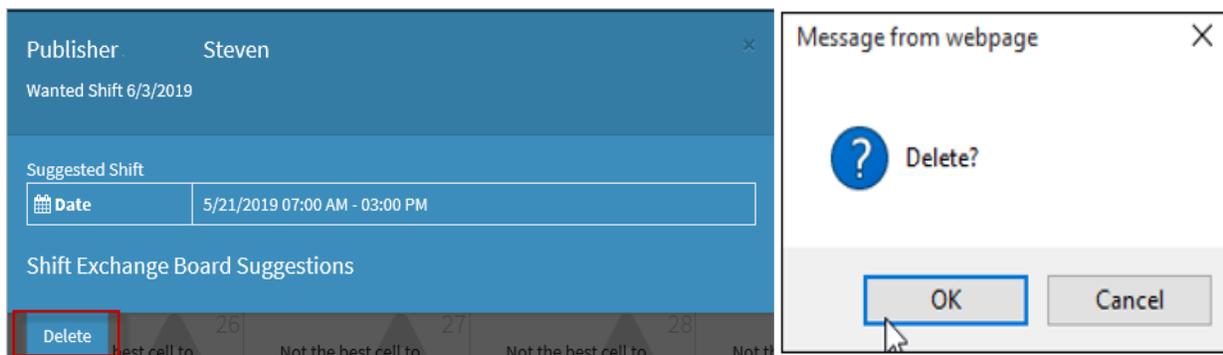
You can delete the shift that has been published up until it has been accepted for shift exchange with another employee.

Click on the shift you have published.



The shift details will appear including the wanted shift and the shift you have published.

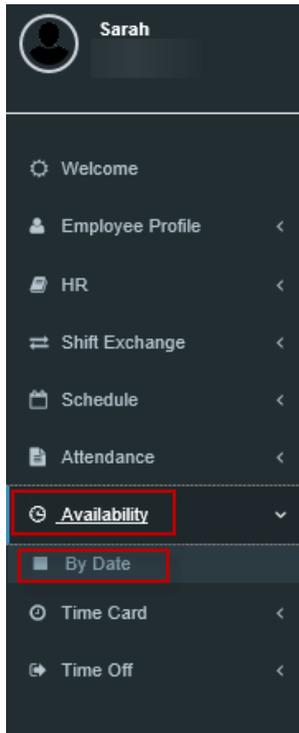
You can now click delete and OK once the confirmation appears.



Once deleted, the shift will no longer will appear on the calendar

## Availability- Edit

From the menu on the left hand side, navigate to *Availability / By Date*.



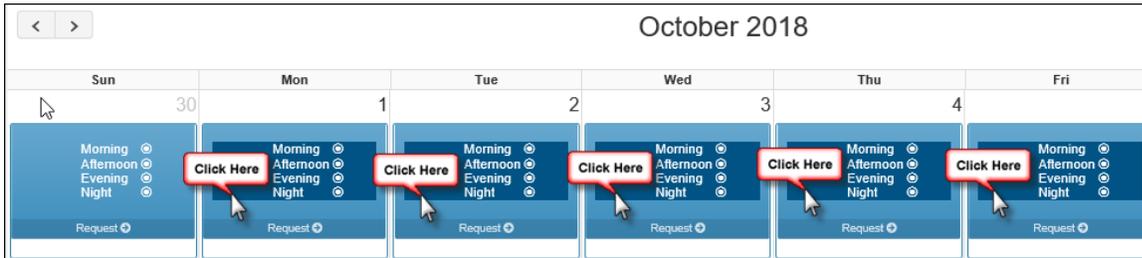
The calendar for the current month will appear displaying your existing availability.

October 2018			
Mon	Tue	Wed	Thu
1	2	3	4
Morning <input checked="" type="checkbox"/> Afternoon <input checked="" type="checkbox"/> Evening <input checked="" type="checkbox"/> Night <input checked="" type="checkbox"/> Request <input type="text"/>	Morning <input checked="" type="checkbox"/> Afternoon <input checked="" type="checkbox"/> Evening <input checked="" type="checkbox"/> Night <input checked="" type="checkbox"/> Request <input type="text"/>	Morning <input checked="" type="checkbox"/> Afternoon <input checked="" type="checkbox"/> Evening <input checked="" type="checkbox"/> Night <input checked="" type="checkbox"/> Request <input type="text"/>	Morning <input checked="" type="checkbox"/> Afternoon <input checked="" type="checkbox"/> Evening <input checked="" type="checkbox"/> Night <input checked="" type="checkbox"/> Request <input type="text"/>
8	9	10	11
Morning <input checked="" type="checkbox"/> Afternoon <input checked="" type="checkbox"/> Evening <input checked="" type="checkbox"/> Night <input checked="" type="checkbox"/> Request <input type="text"/>	Morning <input checked="" type="checkbox"/> Afternoon <input checked="" type="checkbox"/> Evening <input checked="" type="checkbox"/> Night <input checked="" type="checkbox"/> Request <input type="text"/>	Morning <input checked="" type="checkbox"/> Afternoon <input checked="" type="checkbox"/> Evening <input checked="" type="checkbox"/> Night <input checked="" type="checkbox"/> Request <input type="text"/>	Morning <input checked="" type="checkbox"/> Afternoon <input checked="" type="checkbox"/> Evening <input checked="" type="checkbox"/> Night <input checked="" type="checkbox"/> Request <input type="text"/>

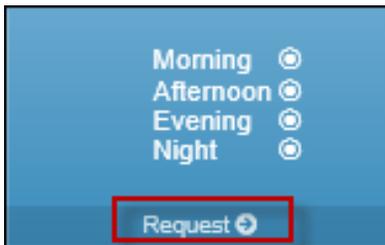
**Note:** Availability follows the shift designation of *Morning*, *Afternoon*, *Evening* or *Night*. The circle beside the shift type is filled in when available (All available above).

Click on or beside the shift type on the date(s) to edit. To deselect, simply click again.

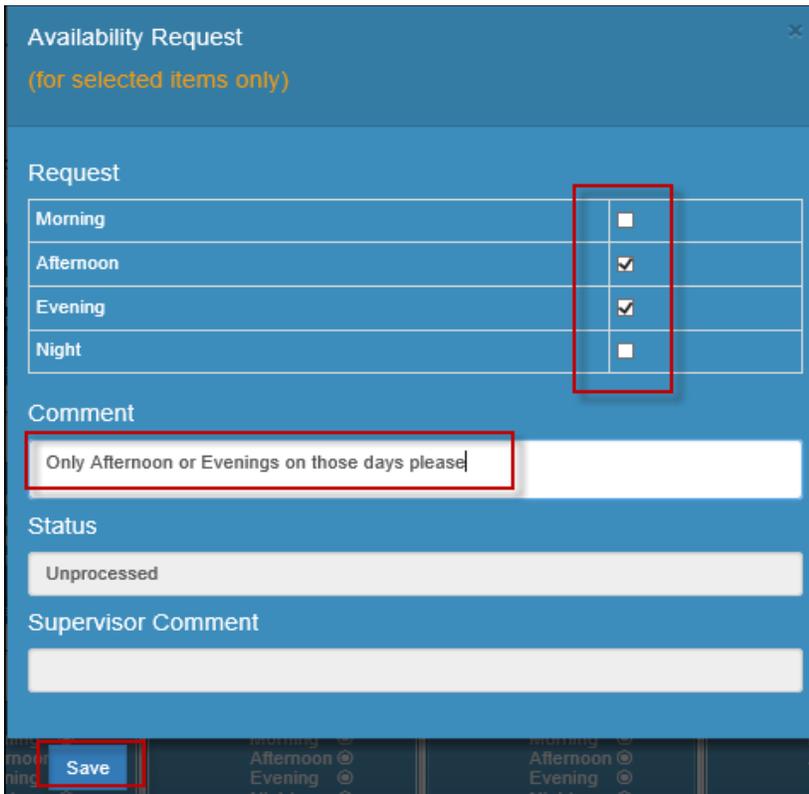
The date will display a dark blue band when selected (the 1<sup>st</sup> to the 5<sup>th</sup> are selected below):



Click *Request*. If you have selected multiple dates, you may click *Request* on any one of them.



The following menu will appear:



Under *Request*, tick the boxes beside the shift(s) you are available for (only *Afternoon* and *Evening* above).

Add a comment for your manager (optional).

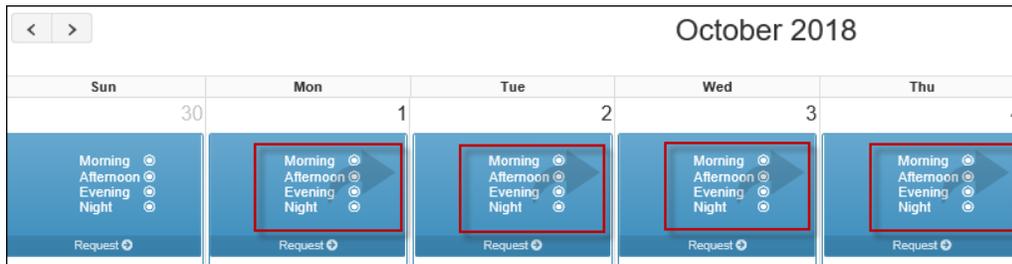
Click **Save**.

## Availability - Manager Approval

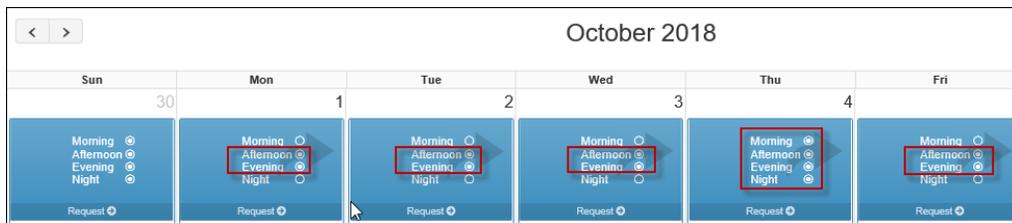
Follow the process for edit Availability.

Await manager approval (if required) to see the changes on your calendar. If no manager approval is required, you will see the changes immediately on your calendar.

**Note:** The edited availability is indicated with a shadowed arrow within the dates selected:



When the manager has approved your request, you will see the change on your calendar as shown below.



Notice that the 4<sup>th</sup> was denied and all the shift types are still available. The manager may also add a comment (optional).

Once a request has been approved, it may only be edited by the manager.

The screenshot shows the 'Availability Request' form for 10/04/2018. It includes a table of shift types with checkboxes for selection. The 'Request' section shows checkboxes for Morning, Afternoon, Evening, and Night. The 'Comment' section contains the text 'Only Afternoon or Evenings on those days please'. The 'Status' is set to 'Denied', and the 'Supervisor Comment' is 'Unfortunately this date will not work'.

Shift Type	Selected
Morning	<input checked="" type="checkbox"/>
Afternoon	<input checked="" type="checkbox"/>
Evening	<input checked="" type="checkbox"/>
Night	<input checked="" type="checkbox"/>

Shift Type	Requested
Morning	<input type="checkbox"/>
Afternoon	<input checked="" type="checkbox"/>
Evening	<input checked="" type="checkbox"/>
Night	<input type="checkbox"/>

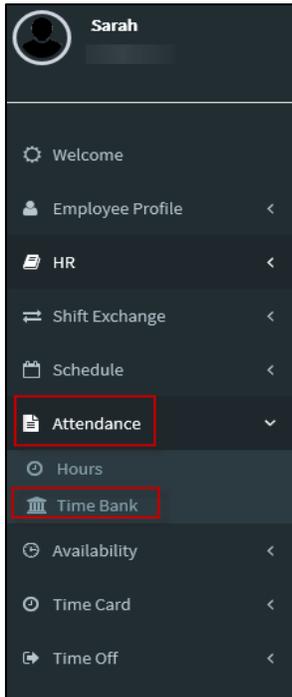
Comment: Only Afternoon or Evenings on those days please

Status: Denied

Supervisor Comment: Unfortunately this date will not work

## Time Banks

From the menu on the left hand side, navigate to *Attendance / Time Bank*.



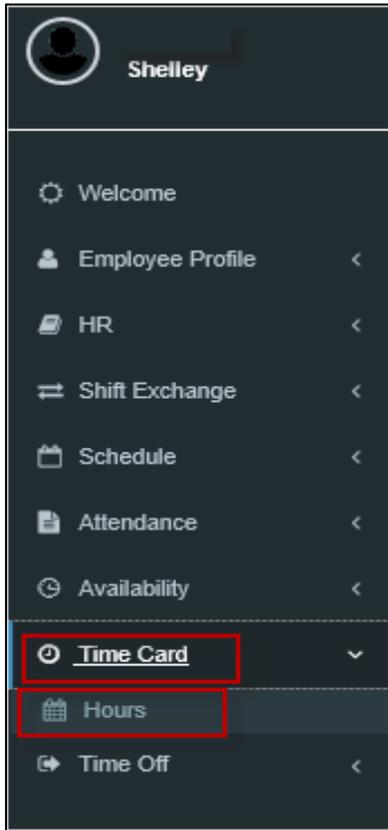
The time bank information will appear as shown below:

Time Bank					
Regular		● Current Year Hours ● Current Year Dollars ● Next Year Hours ● Next Year Dollars		■ Show in Days	
Code	Description	Carry Over	Earned	Taken	Balance
SICK	SICK	0.00	75.00	29.00	46.00
VAC	VACATION	0.00	925.00	8.00	917.00

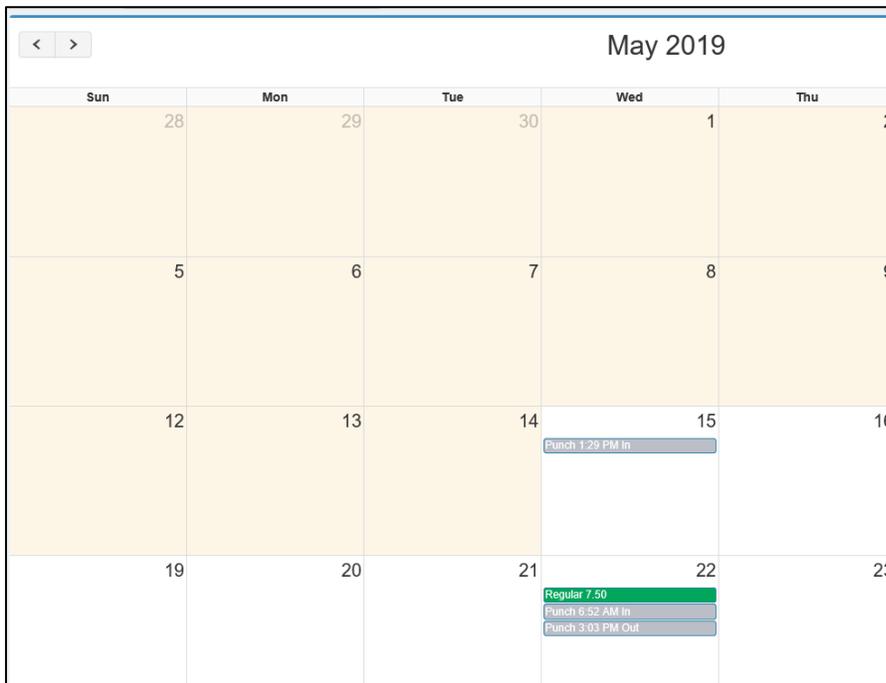
**Note:** The hours will appear in HH:MM format (hours and minutes).

## Time Card – View

From the menu on the left side, navigate to *Time Card / Hours*:



Note: The *Time Card* will appear in calendar view



On the left side you will be able to see your total amount of hours within the selected pay period broken down into Regular, Holiday, Overtime, Premiums, and Attendance(i.e., Vacation, sick etc.)



Total Hours	
Days	14
Regular	7.50
Holiday	0.00
Overtime	0.00
Premium	0.00
Attendance	0.00
<b>Grand Total</b>	<b>7.50</b>

Underneath the total hours section, you will be able to view the colour legend that coincides with the colours on the *Time Card*.

For example, Regular hours indicate in the legend as green, therefore all regular hours worked will appear in green on the timecard on the right side.

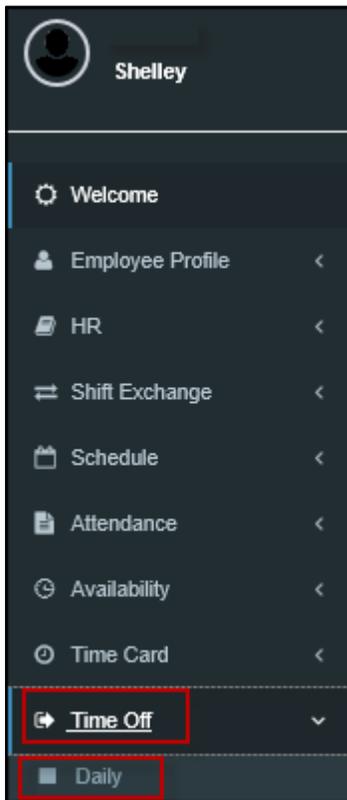


On the bottom left hand side you will see an option to filter. Anything selected will show on your time card and anything unselected will not be included in the *Time Card* screen.

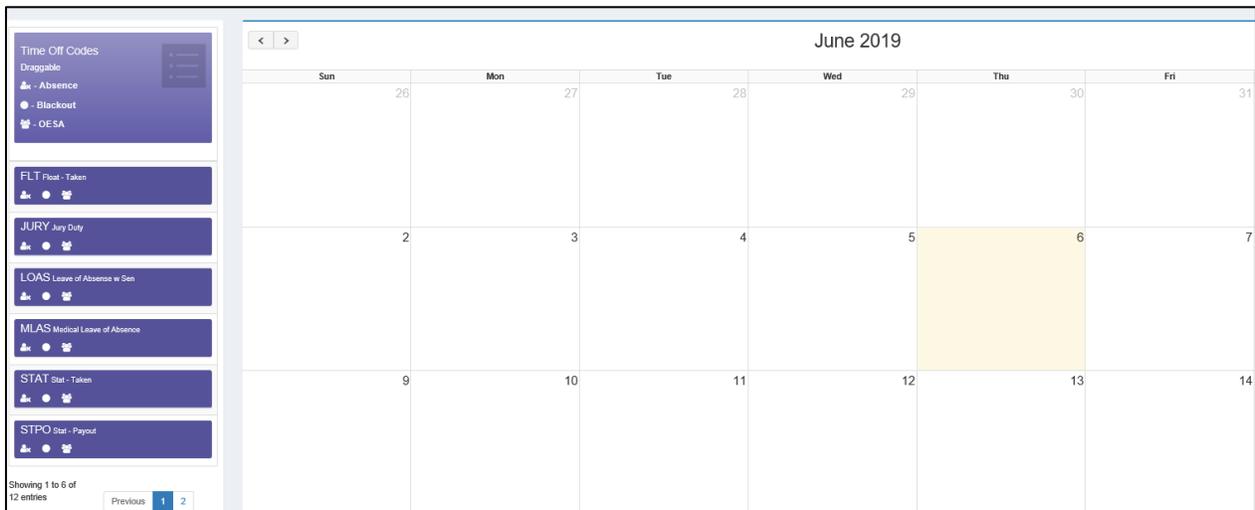


## Submit Time Off Request

From the menu on the left side, navigate to *Time Off/Daily*.

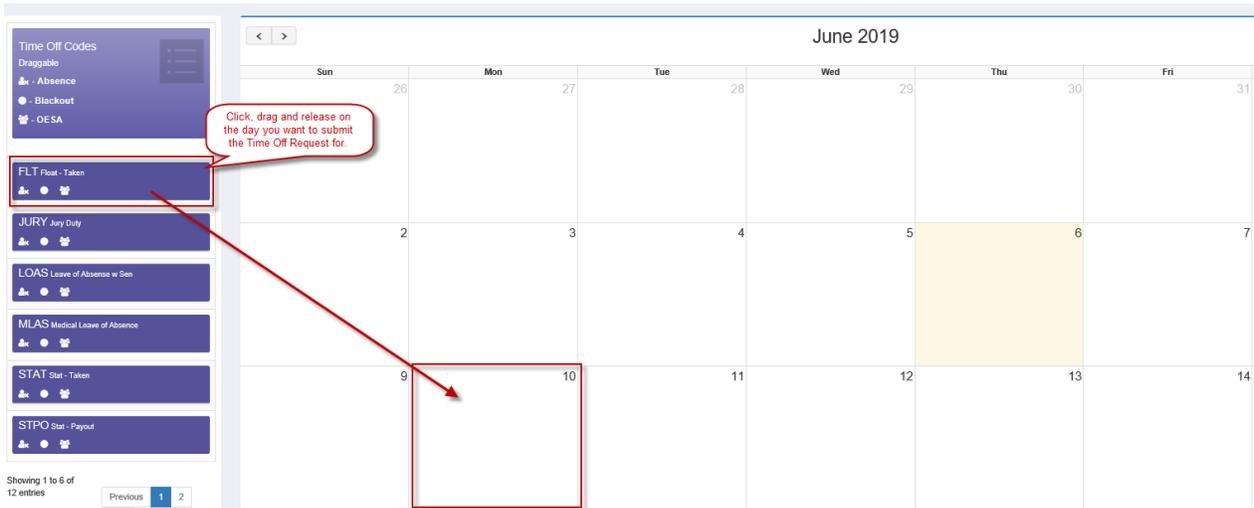


The calendar for the current month will appear that will show any time off requests already submitted.

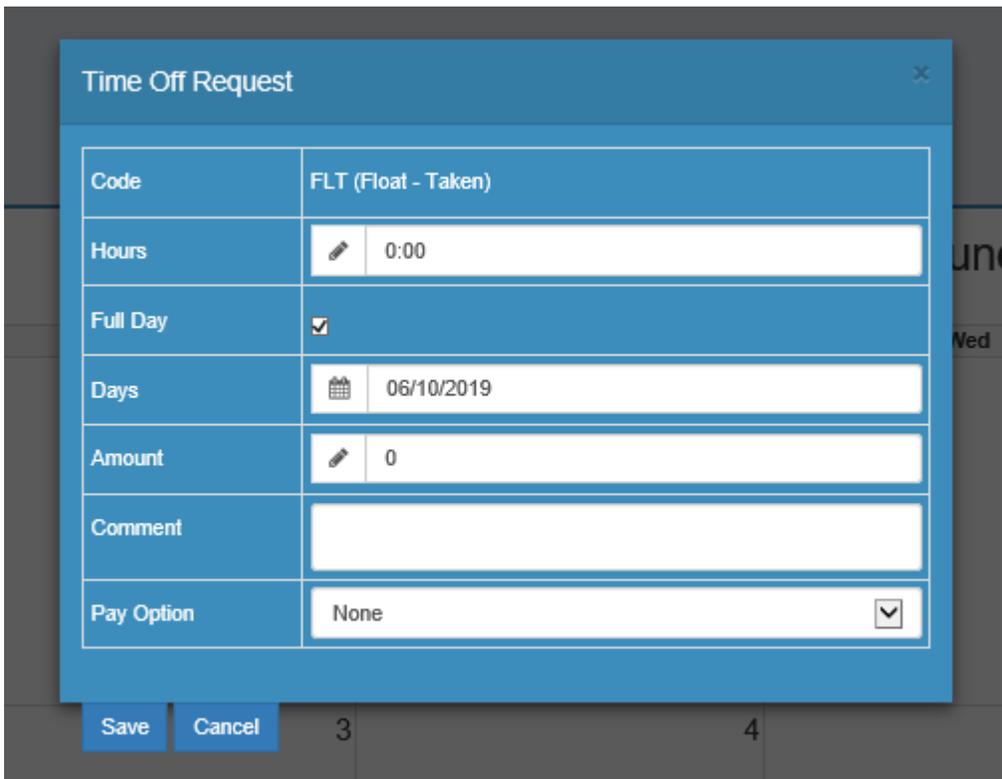


**Note:** This screen is draggable

To process your *Time Off Request*, please click, drag and drop the code from the left hand side and drop it onto the day in which you want to take the time on.



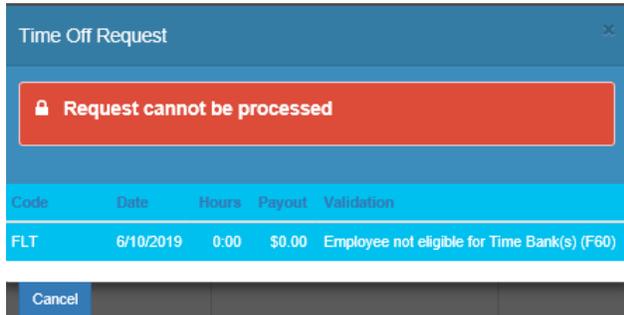
:  
Once released, the system will generate the below pop-up.



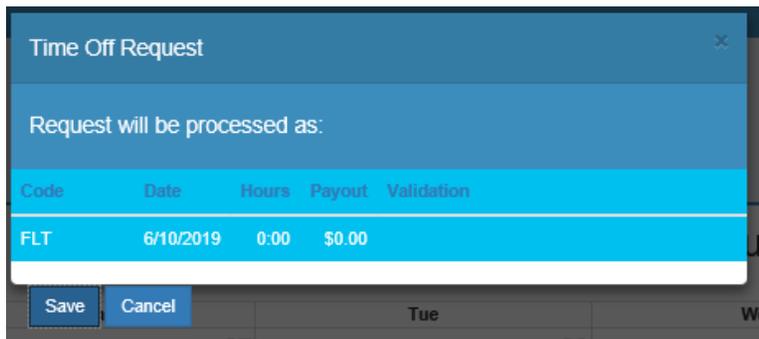
You will be able to enter the number of hours you want to take, select multiple dates, and write any comments for your manager.

Select Save

The system will then try to process your request. If you do not have enough time in your bank, or you are not eligible for the bank, the below pop-up will appear:



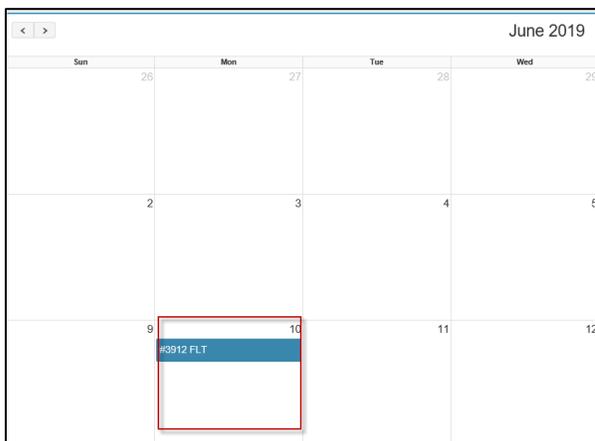
If this pop-up appears, you will not be able to submit your request for approval. If you do have enough time in your bank and you are eligible for the bank, the below pop-up will appear:



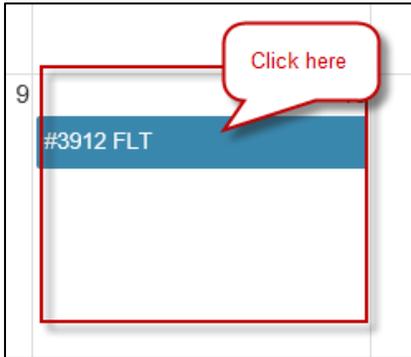
This will be where you will be able to confirm the details of your request.

Once you confirm the details, you can select "save". This will send your request to your manager for approval.

Once you have submitted the Time Off Request, a blue box will appear on the day in which you submitted it on with a reference number.



If you would like to see the details of the request and/or delete/make changes to the request, select the blue box on the day.



The following pop-up will appear:

A screenshot of a 'Time Off Request #3912' pop-up window. The window has a blue header with the title and a close button. Below the header is a table with the following fields:

Code	FLT (Float - Taken)
Hours	<input type="text" value="0:00"/>
Full Day	<input checked="" type="checkbox"/>
Days	<input type="text" value="06/10/2019"/>
Amount	<input type="text" value="0"/>
Comment	<input type="text"/>
Supervisor Comment	<input type="text"/>
Pay Option	<input type="text" value="None"/>
Priority	Usual
Status	Unprocessed

At the bottom of the window are three buttons: 'Save', 'Delete', and 'Cancel'.

In this screen, you will be able make any changes and/or delete request prior to your manager approving/denying the request.

Note: If your manager has approved/denied the request, you will not be able to make any more modifications or delete the request.