Quick Reference Guide

ENHANCED EMPLOYEE SELF SERVICE

††† Staff Schedule Care

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 1st 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.

1	🛉 Staff Schedule Co	are							
Employee Self Service									
Information Welcome to the Employee Self Service Login Page	YOURFACILITY	Notifications There are no notifications							

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:

Qŧ Me	ssages	0 +
	MESSAGING IN SSC New By KING Messages can be sent to everyone, to groups of employees. This one was sent to PSW's Have a great Friday everyone!	∰ 14 Sep 2018 oyees or individulal
Your	feedback.	t
	Sarah Thanks for running this test!!	🗙 🎬 14 Sep 2018
	Sarah Thanks again	🗙 🎬 14 Sep 2018

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:

New Topic							
Employees Sending Messages							
Expiry Date	Expiry Date						
Employees may also send inte managers	Employees may also send internal messages to other employees or their managers						
	Filter						
All items a	pply if nothing selected						
Facility	Department						
Nothing selected 💦 👻	Nothing selected						
Class	Supervisor						
PSW 👻	Nothing selected 🚽 👻						
Select All Deselect All	Security User						
PSW 🖌	Send Send						

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:

Employee Profile					
Change image Delete image		Name and Address N	Notifications Emergency Contact	Shift And Schedule Group Assi	gnment Login
		Title		Address 1	123 Main Street
		Last Name	М	Address 2	
Sarah			Required field		
Created 1/1/0001 Updated 9/10/2	2018	First Name	Sarah	City	Anytown
Facility	Manor	Initiala		Province	ON- ONTARIO
Department	32	moats		rioville	ON ONTARIO
Class	PSW	Birth Date		Postal Code	нононо
Employee Number	137	SIN		Phone	555-222-3333
Badge	137	Email	Sarah@anyemal.com	× Cell phone	555-333-2222
Status	A				
Employee Type	Part Time	Extension		Additional phone 1	
		Languaga	0. Linknown	Additional phone 2	
		Language	o onknown	Additional priorie 2	
		Gender		Race	
			Save		

- 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							
2 Refresh 0 Legend							
< >					Oc	tober 20	18
Sun	Mon			Tue		Wed	
30		1		-	2	3	}
	14:00 - 22:00 Department 32 Class 3P Day Code 14 Unit TE Task	(₩ 20 2220 RR	14:00 - 22:00 Department Class Day Code Unit Task	220 3PSW 140220 TERR	14:00 - 22:00 Department Class Day Code Unit Task	220 3PSW 140220 TERR	
7		8		(9	10)
14:00 - 22:00 Department 320 Class 3PSW Day Code 140220 Unit TERR Task	Attendance Code: VA	AC	Attendance Coo	le: VAC	Attendance Co	xde:VAC	Attendan
					2		

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.

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Schedule A	ctive											
C Refresh	0 L	.egend]									
< > October 2018												
	Sun			Mon	4		Tue	2		Wed	2	
		30	14-00 - 22-00			14-00 - 22-00		2	14:00 - 22:00		ن ا	
			14:00 - 22:00 Department Class Day Code Unit Task	320 3PSW 140220 TERR	e	Department Class Day Code Unit Task	320 3PSW 140220 TERR	e	Department Class Day Code Unit Task	320 3PSW 140220 TERR	=	
		7			8			9			10	
14:00 - 22:00 Department Class Day Code Unit Task	320 3PSW 140220 TERR	=	Attendance Co	de: VAC		Attendance Co	de: VAC		Attendance Co	de: VAC		Attendan
									2			

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

October 2018							
Mon		Tue		Wed			
	1		2			3	
14:00 - 22:00 F Department 320 Class 3PSW Day Code 140220 Unit TERR Task	 14:00 - 22:00 Department Class Day Code Unit Task 	320 3PSW 140220 TERR	Ħ	14:00 - 22:00 Department Class Day Code Unit Task	320 3PSW 140220 TERR	<u> </u>	

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.

Shift Exchange 1	0/3/2018				
10/04/2018 Please select the acc	eptor you are ex	changing with			
Kelly 2:00 PM - 10:00 F	2:0 W 2:0 W 0 1	idy 0 PM - 10:00 PM 320 ☆ 3PSW 40220∯	, ,	Jazmine 6:30 AM - 2:30 PM ▲ 320 ☆ 3PSW ② 063143	
10 - 22 Select →	- 22:0	Select O	22:00 epanment	Select 🕑	

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



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

October 2018						
V	Ved					
		3				
14:00 - 22:00		(r)	1			
Department	320					
Class	3PSW					
Day Code	140220					
Unit	TERR					
Task						

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

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

	October 2018							
	Wed							
2			3					
	14:00 - 22:00 Department Class Day Code Unit Task	320 3PSW 140220 TERR						

The details of the exchange will appear.

Shift Exchange				
You have sent the SE request to Kelly				
For the shift of	10/5/2018			
Expiry date	10/7/2018			
	100			
Delete 1 2	3			

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

Message from webpage	×		Sat	
				6
? Delete?		14:00 - 22:00 Department Class	320 3PSW	=
OK Can	cel	Day Code Unit Task	140220 TERR	

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.



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.

Shift Exchange			
You are re	quested for the Shift Exchange		
Requestor	Joanne		
My Feedback			
Shift	03 Oct 2018 02:00 PM - 03 Oct 2018 10:00 PM. Department: 320, Class 3PSW, Day Cyde: 140220, Position: , Task: , Unit: TERR	5:	
Expiry date	10/4/2018		
Accept	Deny		

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:

	Shift Exchange ▶		
Thu			
4	You are requested for the Shift Exchange		
Department 320	Requestor Joanne		
Class 3PSW Day Code 140220 Unit ORCH Task	My Accepted Feedback		

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 3rd and the 4th 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.

Shift Exchange Board					
\equiv Setup 2 Refresh					
Shift List	< >			May 201	9
Draggable	Sun	Mon	Tue	Wed	Thu
	28	29		1	2
#18905 21 May 2019 07:00 AM - 03:00 PM Check O #18906					
22 May 2019 07:00 AM - 03:00 PM Check O	5	6	7	8	9
#18907					
25 May 2019 07:00 AM - 12:00 PM Check O	12	13	14	15	16
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.

Shift Exchange Board				
\equiv Setup 2 Refresh				
Shift List			/	
	02.00 B M		#18	3905
21 May 2019 07:00 AM -	03:00 PM	Check O		
22 May 2019 07:00 AM -	03:00 PM	Check 🕄	#18	3906
23 May 2019 07:00 AM -	03:00 PM	Check 🕄	#18	3907
			#18	3908
25 May 2019 07:00 AM -	12:00 PM	Check 🕄		
Showing 1 to 4 of 15				
entries	Previous	1 2	3	4
	Next			

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.

< >			June 201	9	
Sun	Mon	Tue	Wed	Thu	Fri
26 Not the best cell to publish shift #18905	27 Not the best cell to publish shift #18905	28 Not the best cell to publish shift #18905	29 Not the best cell to publish shift #18905	30 Not the best cell to publish shift #18905	31 Not the best cell to publish shift #18905

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

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Shift Exchange Board				
\equiv Setup 2 Refresh				
Shift List Draggable Clic the dr publi	k and Drag ay you wan sh the shift	to t to on		
21 May 2019 07:00 AM -	03:00 PM	Check C	#10 •	3905
			#1	3906
22 May 2019 07:00 AM -	03:00 PM	Check C	>	
			#1	3907
23 May 2019 07:00 AM -	03:00 PM	Check C		
			#1	3908
25 May 2019 07:00 AM -	12:00 PM	Check C	2	
Showing 1 to 4 of 15				
entries	Previous	1	2 3	4
	Next			

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.

Message f	from webpage	×
?	Suggested Shift 21 May 2019 Wanted Shift 03 Jun 2019 Publish?	
E	OK Cancel	

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

	3
, Steven	

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.

	3
, Steven Click here	

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.

Sarah	
Ö Welcome	
Employee Profile	<
 	<
—	<
🗂 Schedule	<
Attendance	<
G <u>Availability</u>	~
By Date	
O Time Card	<
🕒 Time Off	<

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

		October 20	18
Mon	Tue	Wed	Thu
1	2	3	4
Morning ● Afternoon ● Evening ● Night ● Request ○	Morning ⊕ Afternoon ⊕ Evening ⊛ Night ⊕ Request €	Morning ⊛ Afternoon ⊛ Evening ⊛ Night ⊛ Request ©	Morning ⊕ Afternoon ⊕ Evening ⊕ Night ⊕ Request O
8	9	10	11
Morning ⊛ Afternoon ⊛ Evening ⊛ Night ⊛ Request €	Morning ● Afternoon ● Evening ● Night ● Request ●	Morning ⊛ Afternoon ⊛ Evening ⊛ Night ⊛ Request ©	Morning ⊛ Afternoon ⊛ Evening ⊛ Night ⊛ Request O

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^{st to} the 5th 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:

Availability Request		
(for selected items only)		
Request		
Morning		
Afternoon	M	
Evening	v	
Night		
Comment		
Only Afternoon or Evenings on those days please		
Status		
Unprocessed		
Supervisor Comment		
nor Save Afternoon a Afternoon Evening	rnoon © ning ©	

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.

< >	October 2018				
Sun	Mon	Tue	Wed	Thu	Fri
30	1	2	3	4	5
Morning ⊛ Aftermoon ⊕ Evening ⊛ Night ⊛	Morning O Afternoon ⊙ Evening ⊙ Night O	Morning O Afternoon © Evening ⊛ Night O	Morning O Afternoon ⊙ Evening ⊙ Night O	Morning ⊛ Afternoon ⊚ Evening ⊛ Night ⊛	Morning O Afternoon ⊙ Evening ⊙ Night O
Request 🥹	Request 📀	Request O	Request 📀	Request 🛛	Request O

Notice that the 4th 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.

Availability Request ×					
10/04/2018					
Morning	Γ	M			
Afternoon					
Evening					
Night					
Request					
Morning					
Afternoon					
Evening					
Night					
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.

0	Sarah			
)				
¢	Welcome			
٩	Employee Pro	ofile	<	
Ø	HR		<	
11	Shift Exchang	e	<	
Ľ	Schedule		<	
1	Attendance		~	
血	Time Bank			
G	Availability		<	
0	Time Card		<	
۵	Time Off		<	

The time bank information will appear as shown below:

Time Bank				
Regular	Current Year Hours Ourrent 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	14 000
Regular	7.50
Holiday	0.00
Overtime	0.00
Premium	0.00
Attendance	0.00
Grand Total	7.50

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 ledgend as green, therefore all regular hours worked will appear in green on the timecard on the right side.

Hour Types	
Draggable	
Regular	
Holiday	
Attendance	
Punch	Ð
• Overtime	
Premium	

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.

Filter		
🗹 Regular		
Holiday		
Overtime		
✓ Premium		
Attendance		
Punch		
✓ Time Off		
Select All	Deselect All	

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Submit Time Off Request

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

Shelley	
Q Welcome	
💄 Employee Profile	<
🔊 HR	<
≓ Shift Exchange	<
🛱 Schedule	<
Attendance	<
③ Availability	<
⊘ Time Card	<
➡ <u>Time Off</u>	~
Daily	

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

Time Off Codes	< >			June 2019		
Draggable	Sun	Mon	Tue	Wed	Thu	Fri
Riskout	26	27	28	29	30	31
FLT Float - Taken						
åx ● ₩						
JURY Jury Duty ≜x ● 營	2	3	4	5	6	7
LOAS Leave of Absense w Sen						
MLAS Medical Leave of Absence						
STAT Stat-Taken ▲ ● 營	9	10	11	12	13	14
STPO Stat - Payout						
Showing 1 to 6 of 12 entries Previous 1 2						

Note: This is screen is dragable

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.

Code	FLT (Float - Taken)
Hours	
Full Day	Z
Days	6/10/2019
Amount	
Comment	
Pay Option	None

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

2

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 popup will appear:

Time Of	f Request			
🔒 Re	quest cann	ot be p	rocess	ed
FLT	6/10/2019	0:00	\$0.00	Employee not eligible for Time Bank(s) (F60)
Cancel			-	

If this pop-up appears, you will not 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:

Time Off Request ×							
Request will be processed as:							
Code		Hours	Payout	Validation			
FLT	6/10/2019	0:00	\$0.00				
Save	Cancel			Tue		W	

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:

Time Off Request #3912					
Code	FLT (f	FLT (Float - Taken)			
Hours	ø	0:00			
Full Day	V				
Days	m	06/10/2019			
Amount	ø	0			
Comment					
Supervisor Comment					
Pay Option	None				
Priority	Usual				
Status	Unprocessed				
Save Delete 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.