AIMS Action Items for Leaders

Session 5:

MyConnection/Implementation Timeline

October 12, 2022

Please note: Some of the paths shown in MyConnection in this presentation may not be available until after the implementation of AIMS.

Screen examples you will see are not available until after AIMS implementation.

SHA Treaty Land Acknowledgement

We would like to acknowledge that we are gathering on **Treaty 2, 4, 5, 6, 8, and 10 territory** and **the Homeland of the Métis**.

Recognizing this history is important to our future and our efforts to close the gap in health outcomes between Indigenous and non-Indigenous peoples.

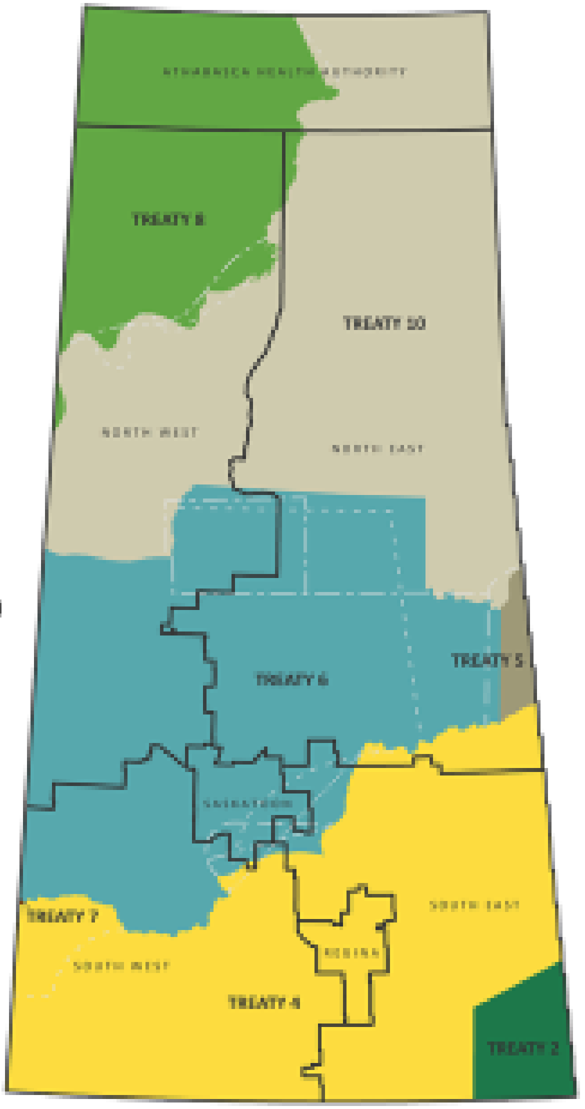
www.saskhealthauthority.ca/trc

Saskatchewan **Health Authority**

Treaty Territories and Saskatchewan Health Authority Areas

Depictions of Treaty boundaries are subject to variation. These boundaries are usually not surveyed and are estimated based on written descriptions.

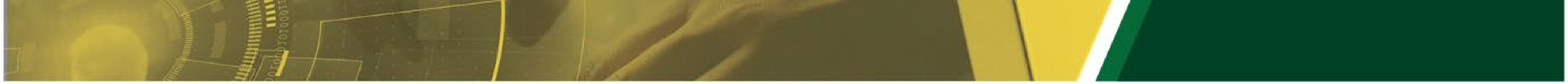
This map displays the Pre-1975 Treaties (Historic Treaties) in colour, as provided by Crown-Indigenous Relations and Northern Affairs Canada. The grey lines indicate alternate boundaries compiled from various sources.



Welcome

Session Topics

October 12, 2022	**MyConnection/Timetable for Implementation**
October 13, 2022	**Scheduling (Session III – Day in a Life of a Scheduler)**
October 13 to November 13, 2022	**Scheduling Demo and Q and A Sessions**
October 19, 2022	**Finance**
October 26, 2022	**Topical Areas of Concern**



New: All Employee and Staff Scheduling Sessions (Daily)

All Employee Scheduling Sessions	Staff Scheduling Sessions
Audience: All Staff Time: 12:00-12:30 Topics: Leave Requests (Vacation, medical appointments, etc.) Notifications (Scheduling tasks, schedule changes, leave requests, etc.) Validating Time (Interim process, premium hours) Advanced Scheduling: Shift Bid Online – (HR Staff Scheduling Units fSaskatoon /fCypress, and Providence Place)	Audience: Anyone who performs scheduling duties during regular and “off hours” (i.e. charge nurses) Times: 7:30-8:00 | 10:30-11:00 | 12:30-13:00 | 16:30-17:00 | 19:30-20:00 Topics: Replacing Staff (Booking off, managing open shifts, call-in list, scheduler dashboard) Adding Additional Staff (Book on additional staff, extend current staff, call-in lists) Unit Schedules (View schedules) Validating Time (Interim process, premium hours)

- Please Note: These sessions will address questions about this functionality, but will not be able to address the more complex individual scheduling inquiries.
- Check out the AIMS Learning Calendar to register. Go to MyConnection and refer to the link under the Announcements area on the main page.

Q and A Chat

Please submit all questions in the Q and A Chat, which can be found by clicking on the three dots in the lower right hand corner of your screen.

Questions put in the regular chat will not be tracked.

Overview of Today's Session

Leader Supports

Important Tools

- Job Posting Exception Form
- AIMS Scheduling Security Access Form
- AIMS Manager's Checklist
- AIMS Manager's Toolkit

MyConnection Support Paths

- MyKnowledge Library
- MyConnection Service Tiles
- Submitting a Case to MyConnection
- Case Follow-up in MyConnection
- Phone MyConnection (upon the AIMS implementation)

Implementation Timelines

- Key Dates for Implementation

Pre-Implementation Duties

Security Access Request

- Please note that many individuals were recently provided with access to learning materials for the various areas.

- Being provided access to learning materials does not mean that access to the relevant AIMS functionality is automatic.

- Employees given access have been instructed to approach their Managers to request that security access be provided to them.

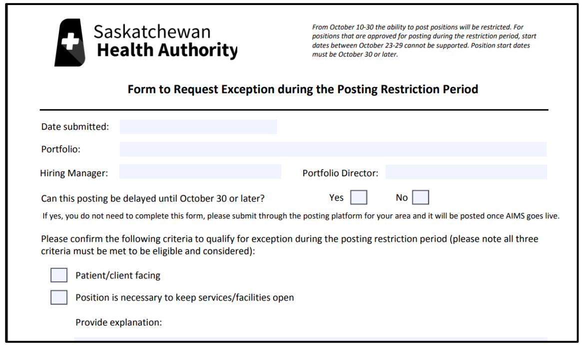
- For Scheduling, a Security Access Form can be found in the AIMS Manager’s Toolkit.

- For Human Resources and Finance, the Manager should submit a case through MyConnection requesting this access be provided to the employee:

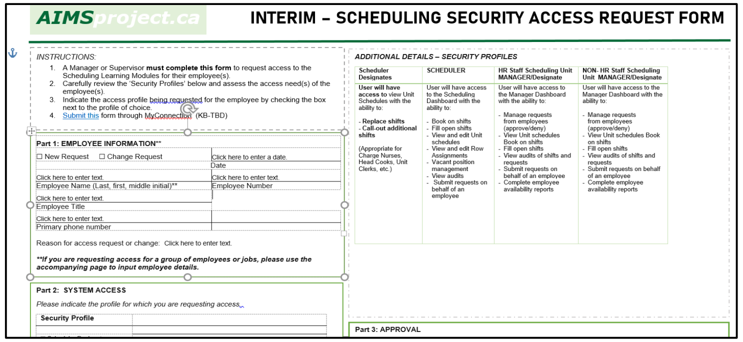
    - MyConnection > Support for MyConnection (tile) > Questions about AIMS

Important Tools found in the AIMS Manager's Toolkit

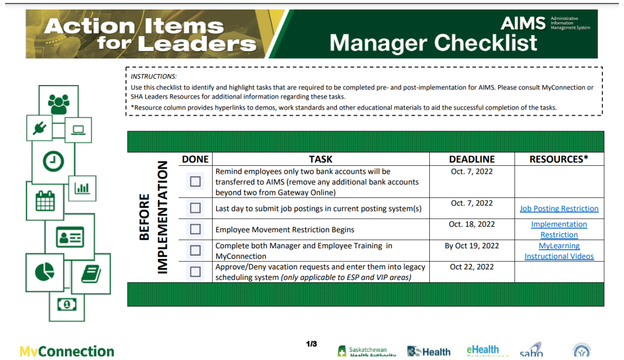
Job Posting Exception Form (New)



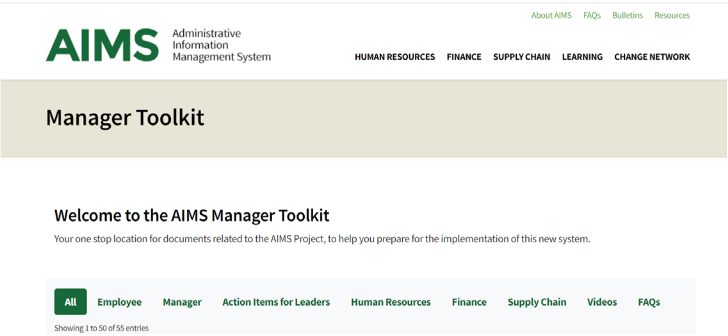
AIMS Scheduling Security Access Form (New)



AIMS Manager's Checklist (New)



AIMS Manager's Toolkit



MyConnection

- MyConnection is the ‘front door’ to the Administrative Information Management System (AIMS).
- All AIMS functionality will be accessed by first logging into MyConnection.
- The system has been designed, so that employees know that they have one destination for all their needs.
- Users of the system will move from MyConnection to the AIMS functionality without needing to log in to a new system
- MyConnection is the focal point for a wealth of information on a wide range of topics, as well as providing support for questions submitted through ‘cases.’

MyConnection Support Features

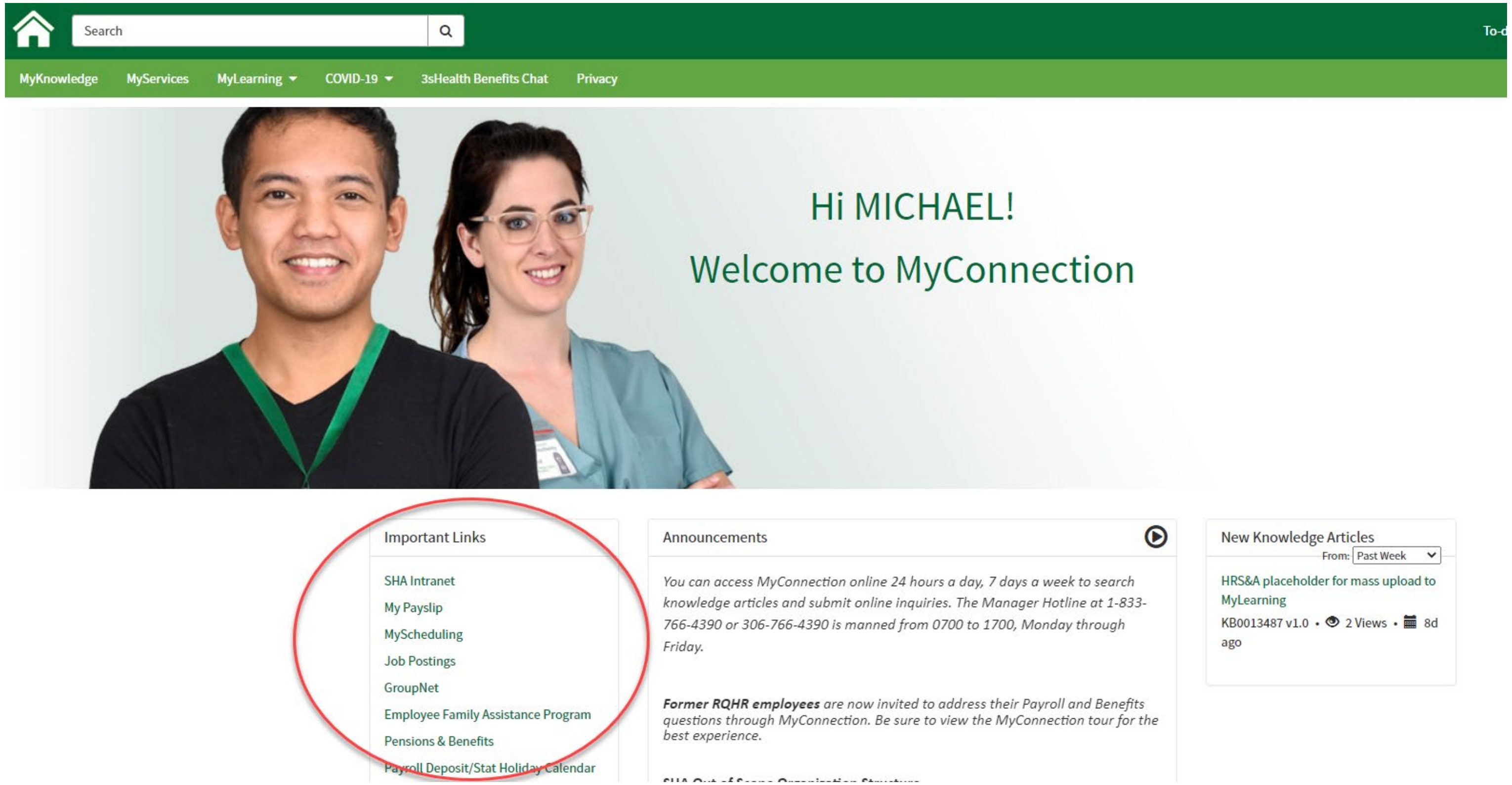
- MyConnection offers several support features including:
  - Important Links
  - Announcements
  - MyKnowledge Library
  - Service Tiles
  - Ability to Submit Inquiries
  - Access by Phone

MyConnection Important Links

On the home page of MyConnection, you will find the Important Links section.

This area contains quick links to the most commonly requested destinations within MyConnection.

It provides quick and easy access to the areas you may most commonly visit.

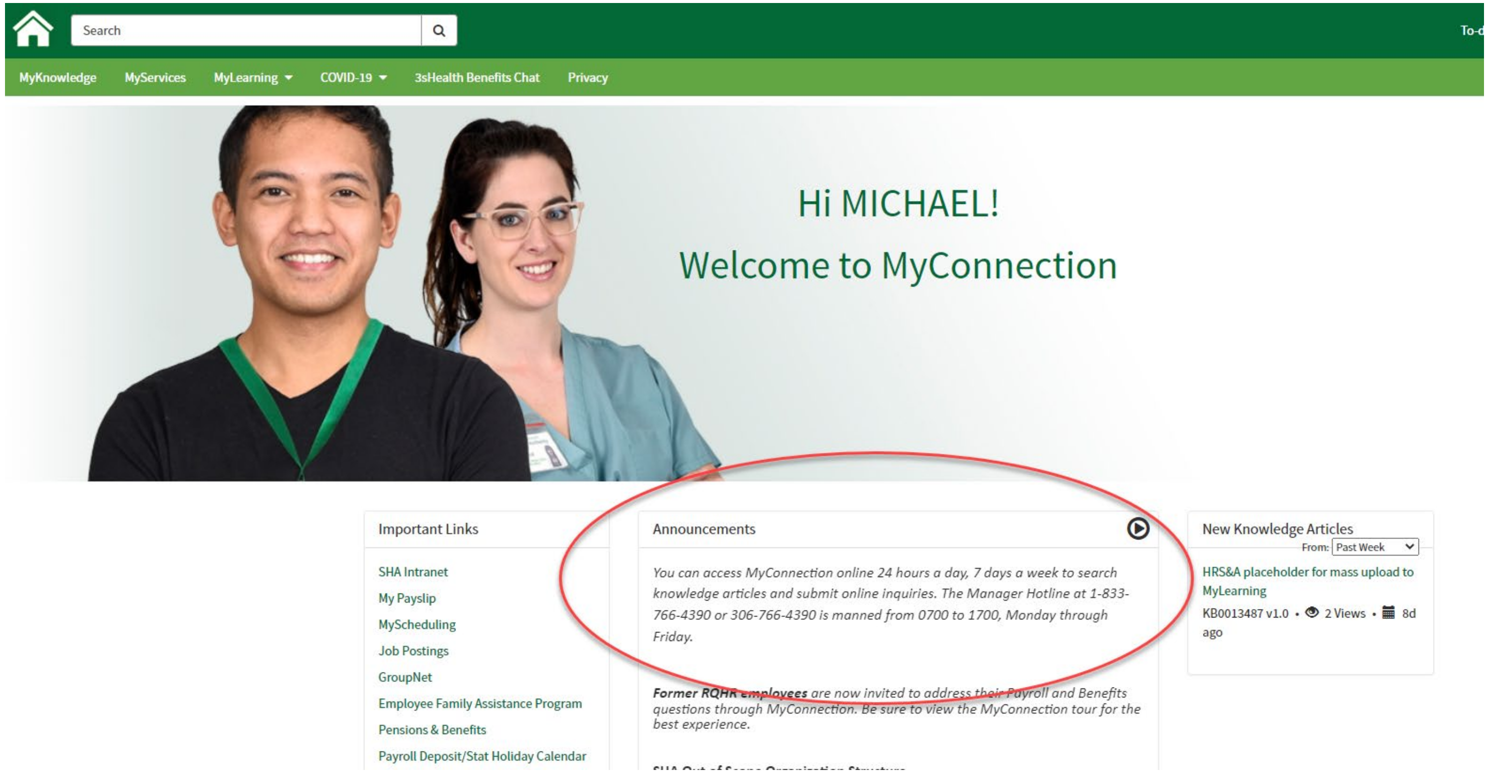


MyConnection Announcements

The MyConnection Announcements area provides current information and updates on a wide range of topics.

It is here that you will find links to resources such as:

- Action Items for Leaders Session Registration
- AIMS Manager Toolkit
- AIMS Calendar of Learning Sessions
- AIMS All Employee Learning Video
- AIMS FAQs

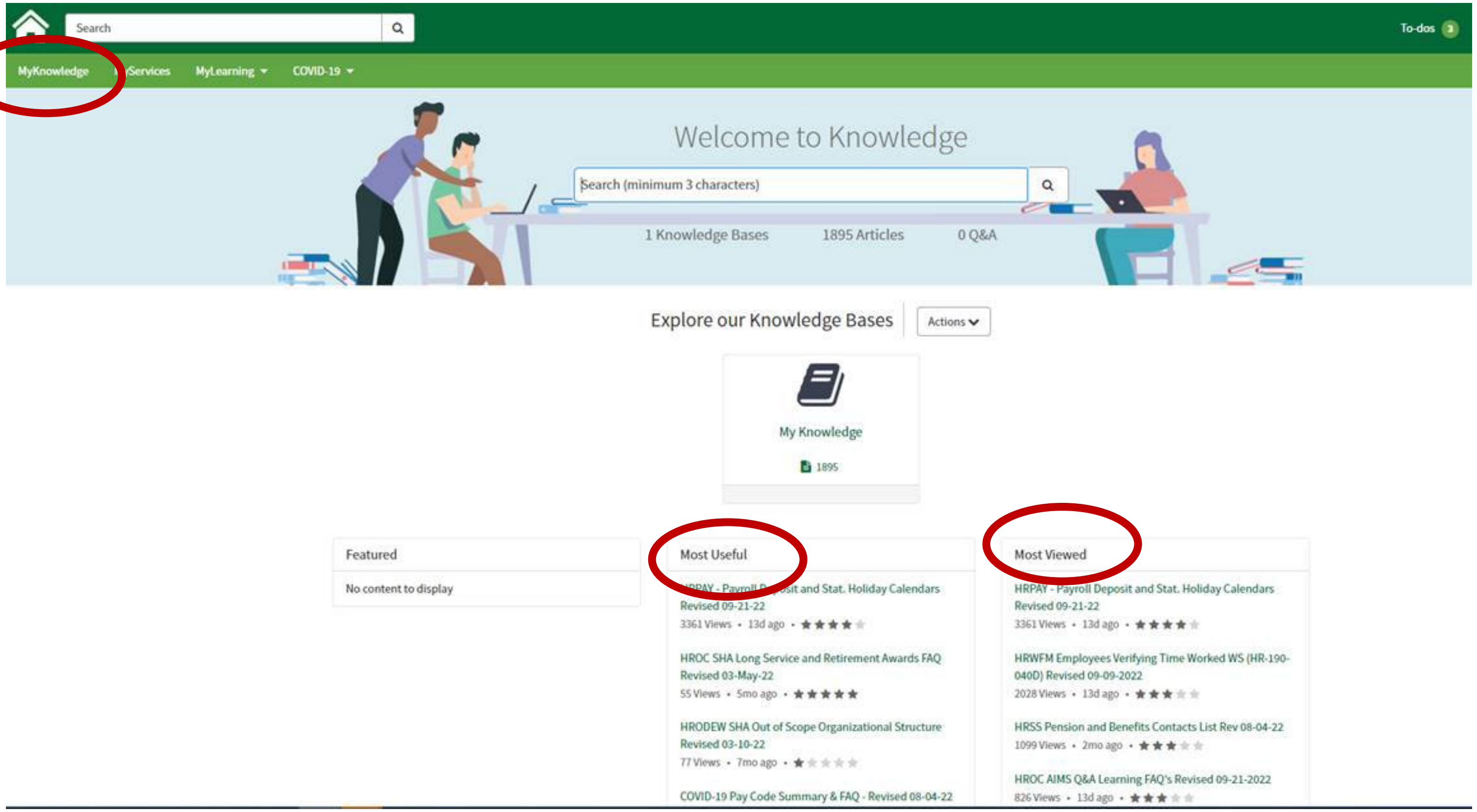


MyKnowledge Library

- The MyKnowledge Library contains various documents for employees and managers to reference. These are available 24-7, and can include standards of work (SOW's), Quick Reference Guides (QRG's) and information documents.

- In order to better refine your search, use a keyword OR Click the Knowledge Base and THEN FILTER to bring up the categories

- Featured articles, most useful, and most viewed are at the bottom of the page.



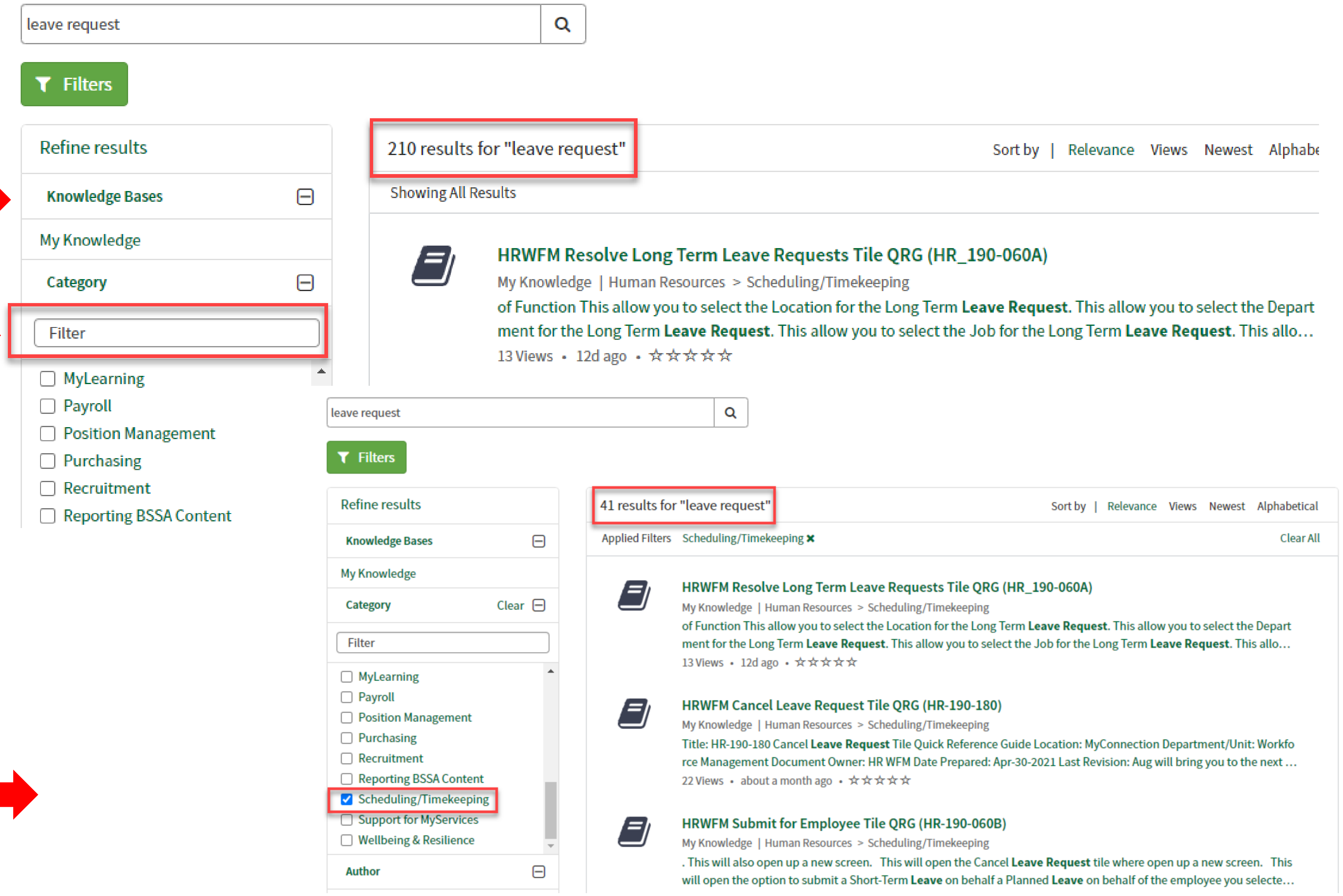
MyKnowledge Library

- Once you enter a keyword you can provide further filters.
- Click on ‘Knowledge Bases.’
- Then Click on the ‘Category’ that you want to filter by.
- This will help refine and focus your results.

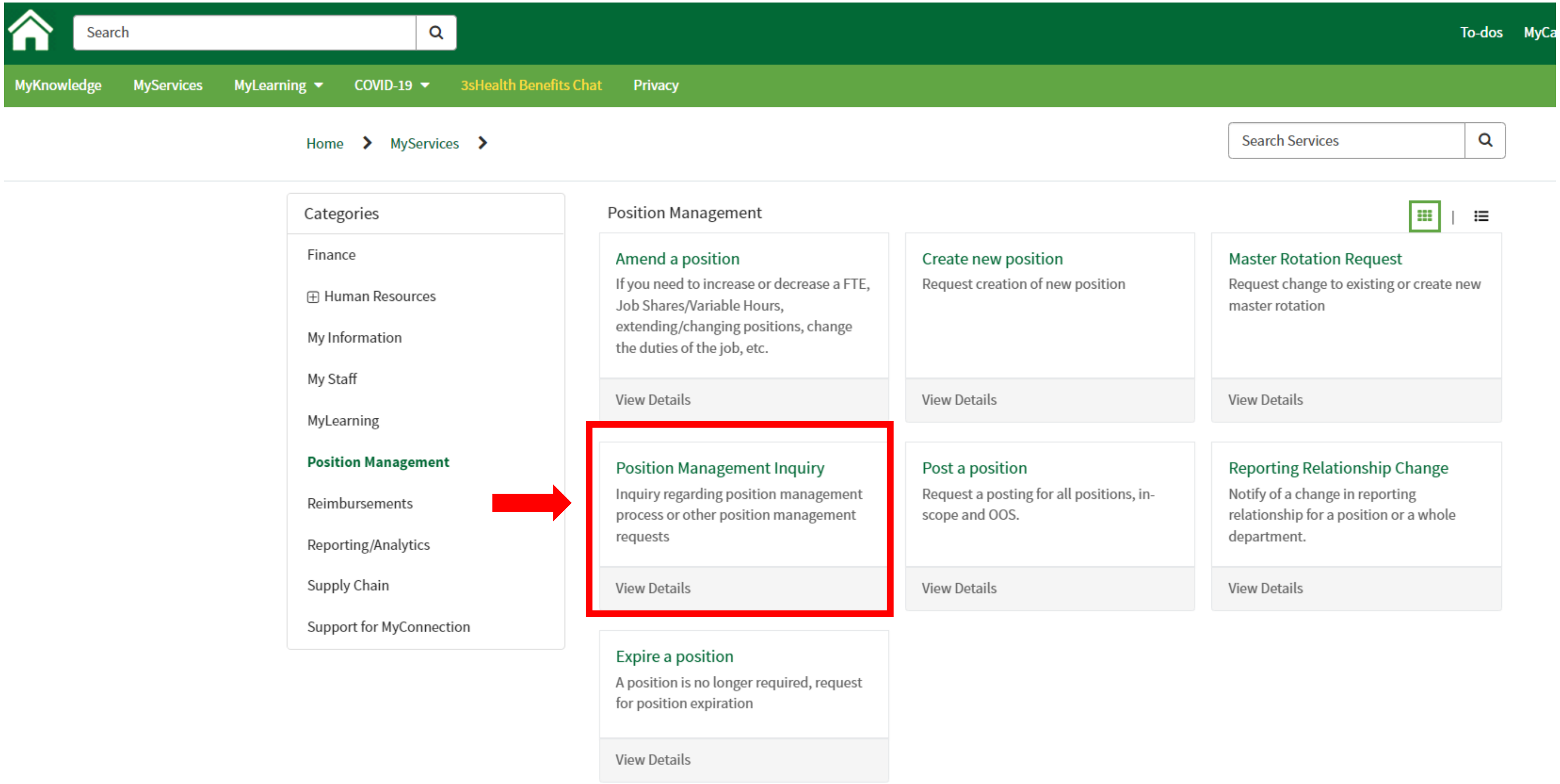
1.

2.

3.



MyConnection ‘Tiles’



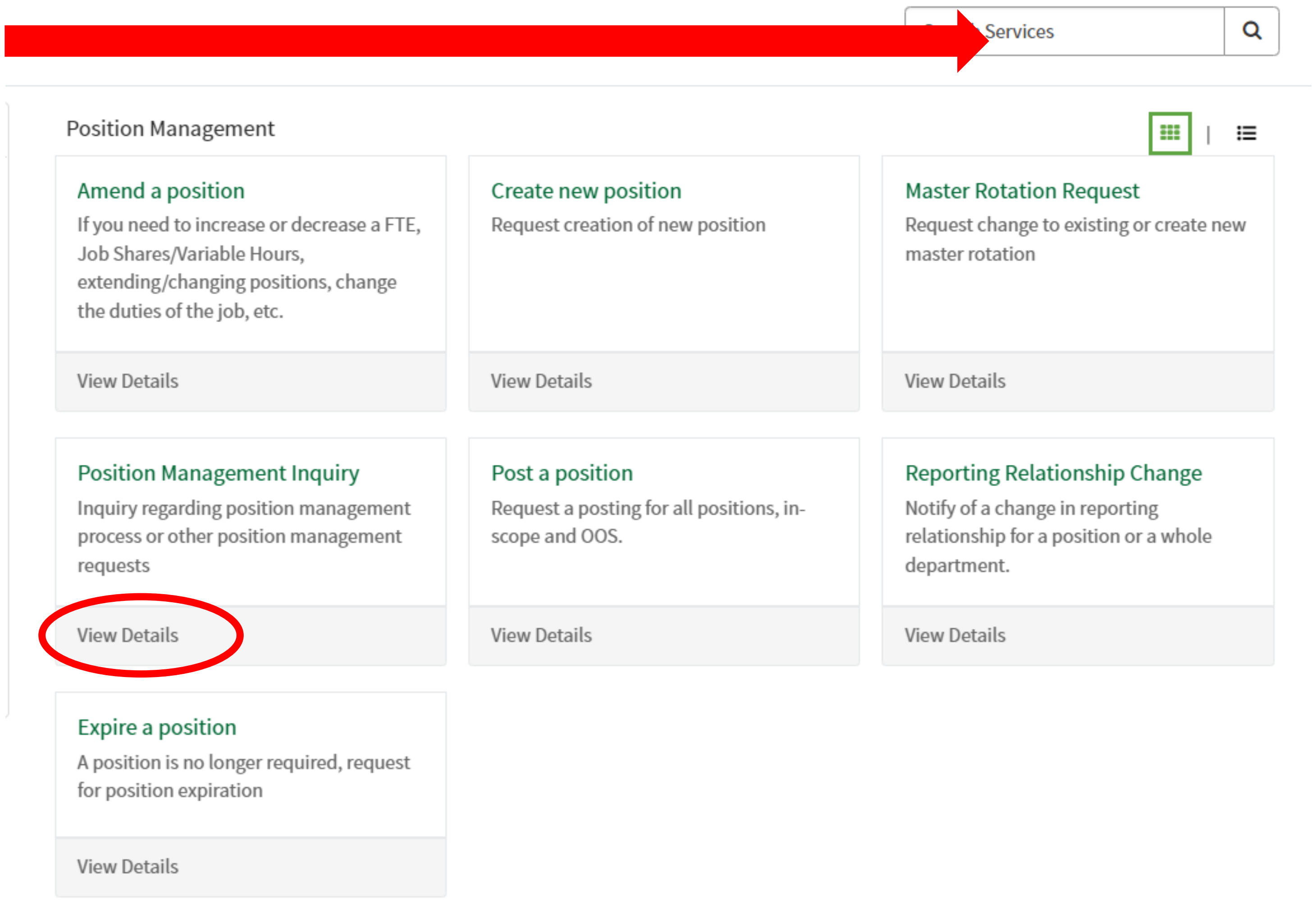
On the category pages, there are square boxes or ‘tiles’ that when opened lead you to the information you require.

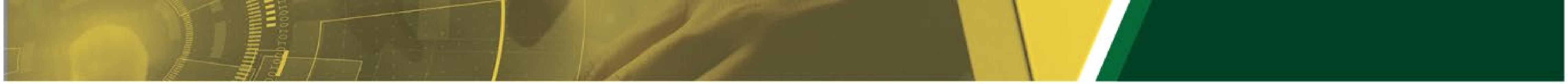
Position Management (Saskatchewan Health Authority)

The Position Management has tiles to perform the following tasks:

- Amend a Position
- Create a New Position
- Master Rotation Request
- Position Management Inquiry
- Post a Position
- Reporting Relationship Change
- Expire a Position

- To continue through a process click on 'View Details'

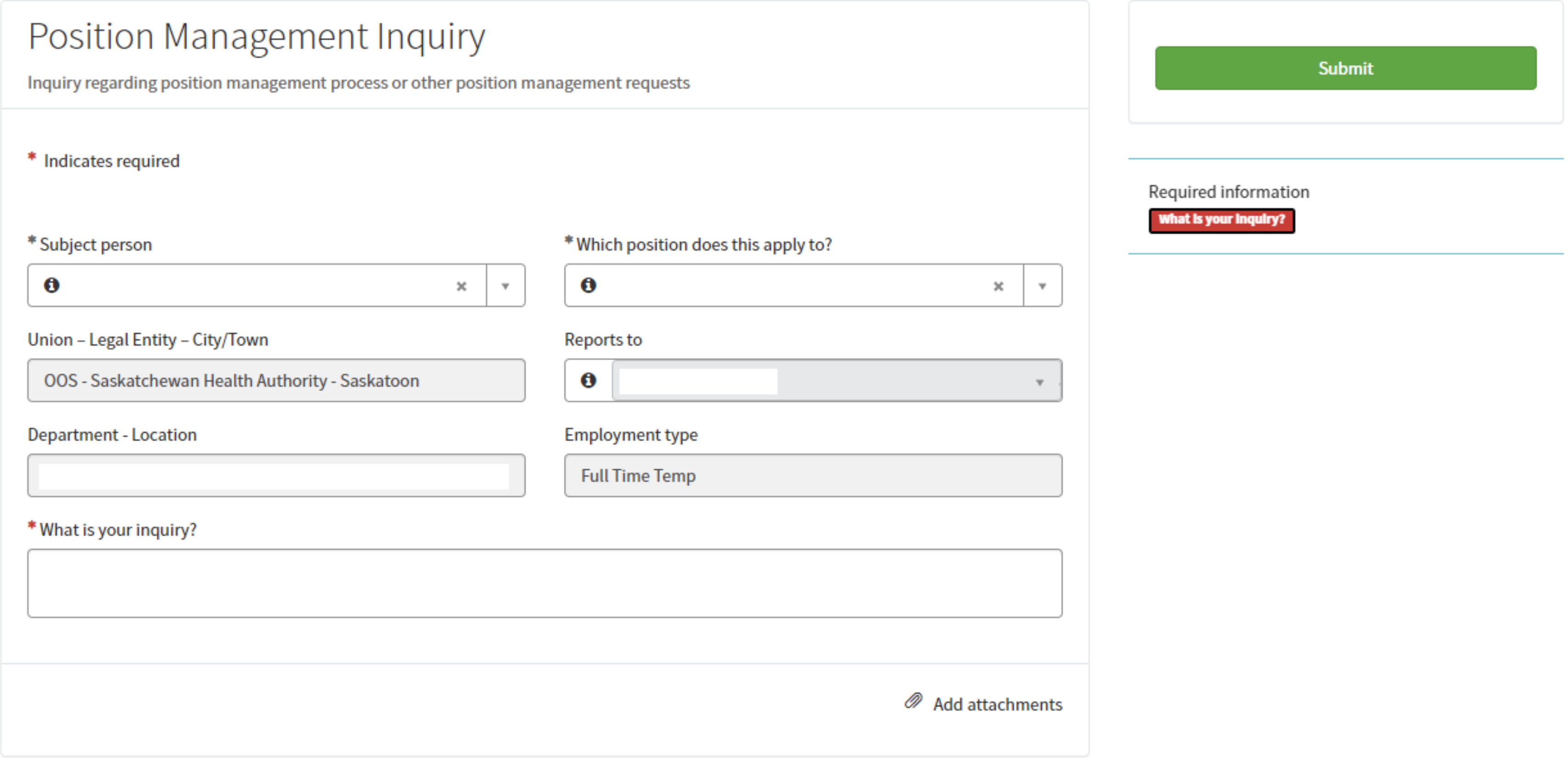




View Details/Submitting an Inquiry

Using the “Position Management Inquiry” tile as an example:

- Clicking on ‘View Details’ will open a new page where you can then submit an inquiry about a particular position.
- Complete all fields with an asterisk.
- Supporting FAQs are provided



Case Notifications

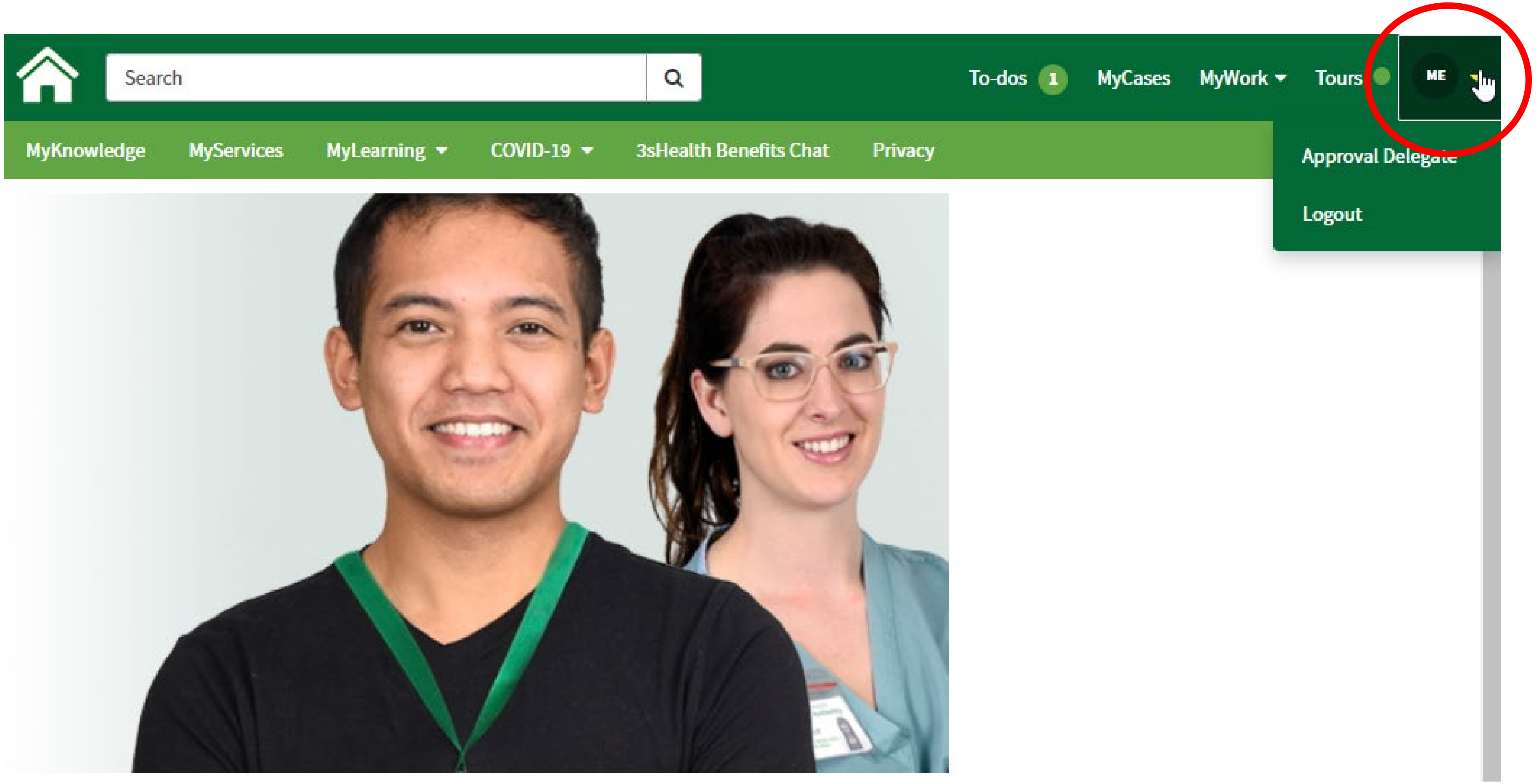
- When an inquiry is submitted, this opens what is known as a ‘case.’
- The case is where all information related to the inquiry will be retained, regardless of whether input may required from different areas or participants in order to resolve the case.
- The individual submitting the inquiry is able to conveniently reference their case to obtain all the information related their inquiry in one place.
- The system automatically routes notifications to Managers for their review.

Adding Delegates

- There are three different delegate statuses that need to be individually set-up including:

Category 1: MyConnection	Category 2: Signing Authority	Category 3: Scheduling
• Position Management • Mileage/Phone Claims • Northern Travel • Professional Fees	• Approving expenses • Expense claims • Purchase requisitions • Non-PO invoices • Contracts • etc.	• Time verification • Leave approval • etc.

Category 1: MyConnection Delegate



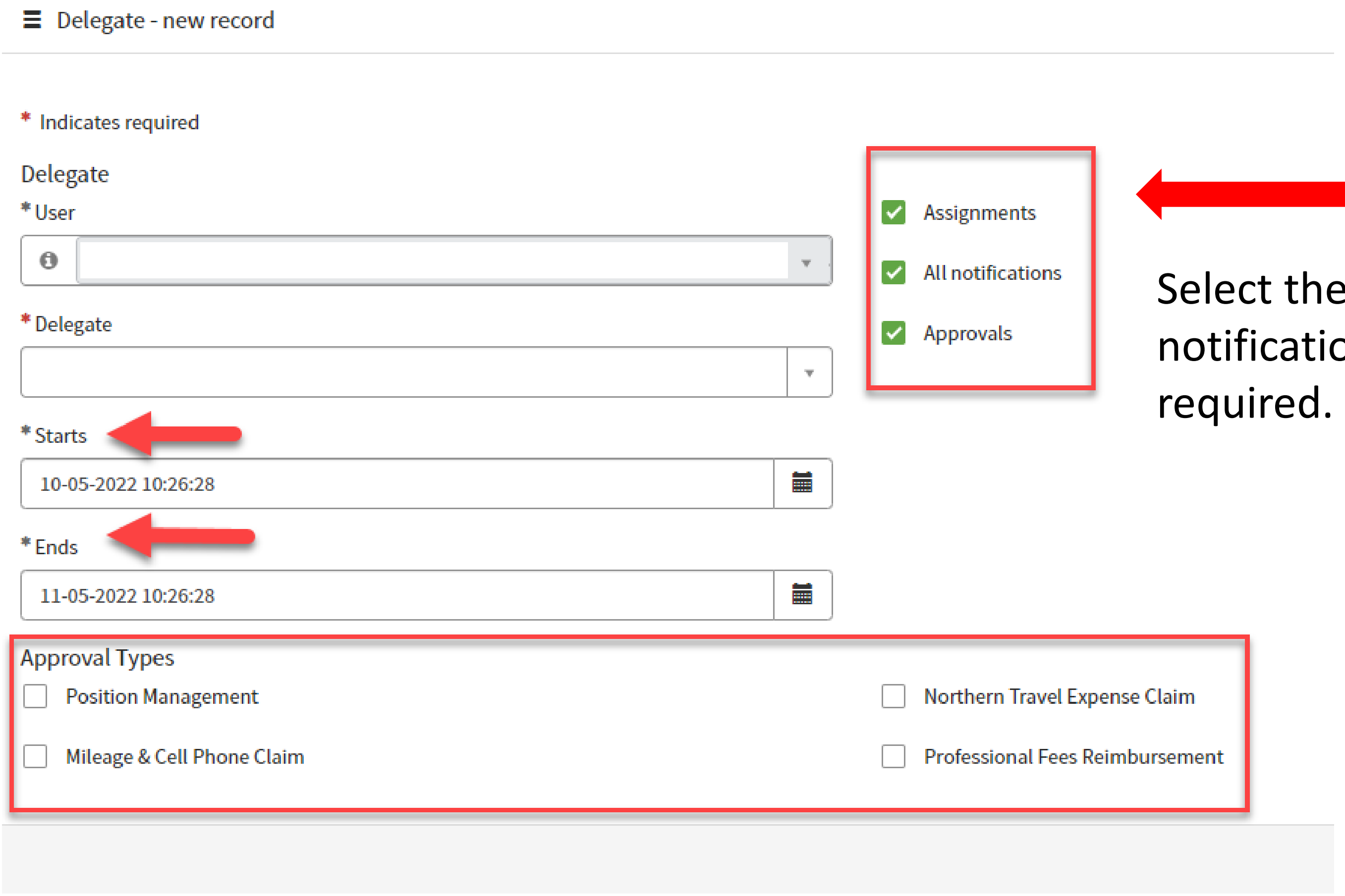
To Assign a Delegate:

- Click on the arrow beside in the top right hand corner beside your initials.
- The dropdown will include “Approval Delegate”
- Select this menu option.
- This will open a new screen.

Category 1: MyConnection Delegate

Establish a delegate for:

- Position Management
- Mileage & Cell Phone Claims
- Northern Travel Expense Claims
- Professional Fees Reimbursement

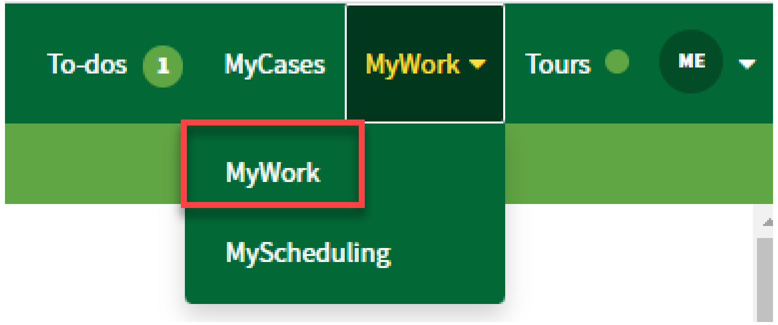


Select the notifications required.

Select the approval required.

Category 2: Signing Authority Delegation

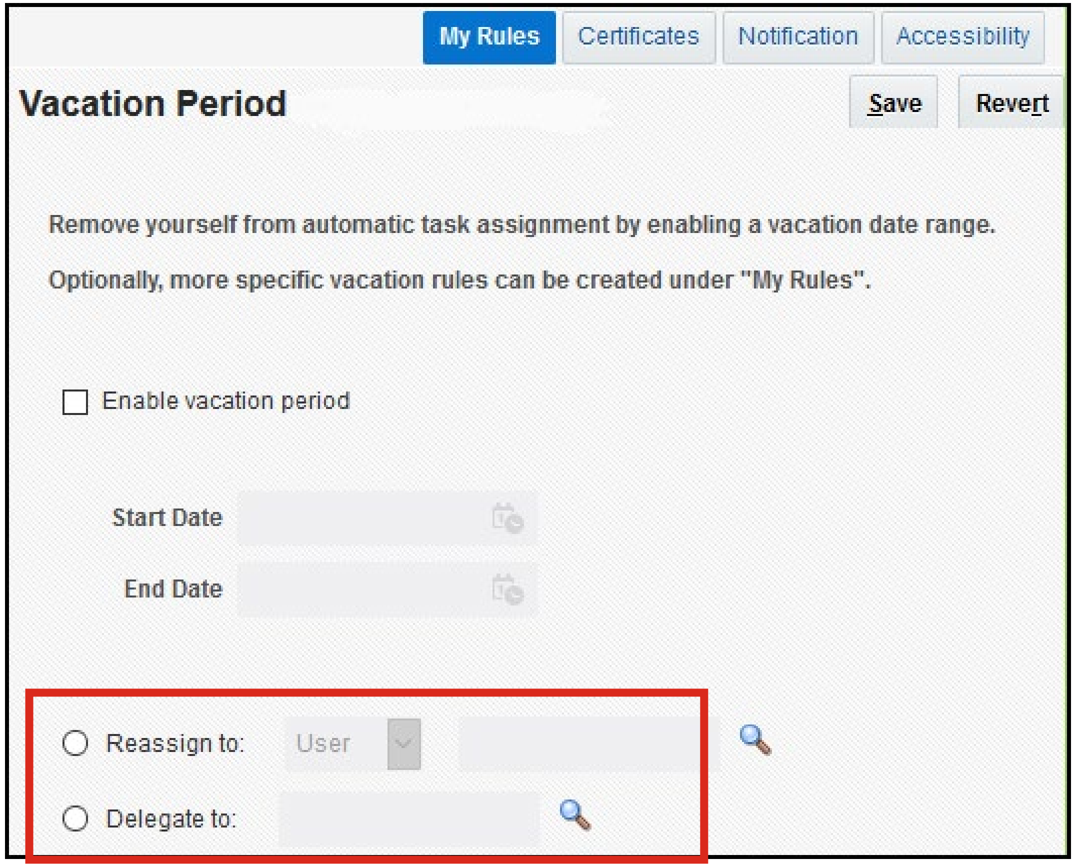
- Leaders are able to delegate their signing authority to a peer (same level), i.e. Manager to Manager, Director to Director, for any planned absences
  - Delegation occurs within the system
    - Use the ‘Delegate To’ option found in My Rules
      - This is accessed through the MyWork tab on MyConnection.



Please Note: Signing authority can no longer be delegated to a direct report.

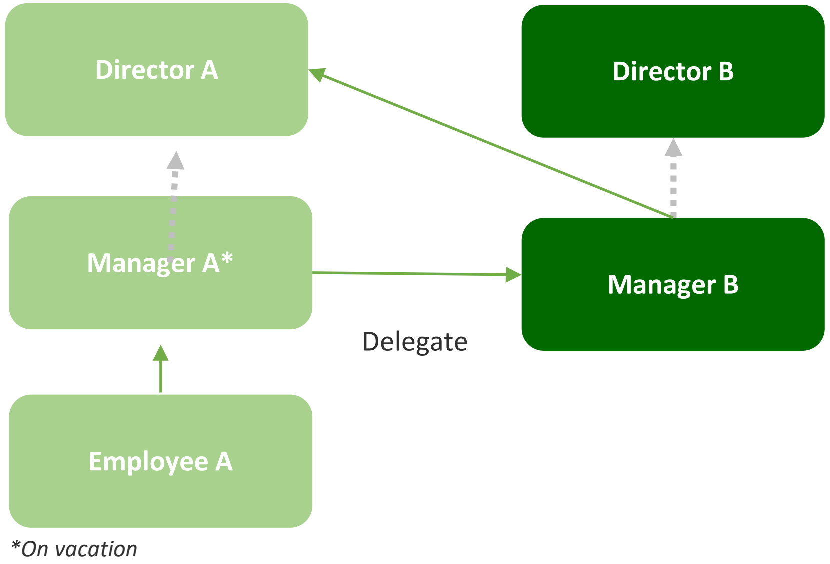
Vacation Rules: How to set-up a delegate for vacation leave

- Under ‘My Rules’ there is a function called ‘Vacation Period’ that is used to provide another individual with delegated authority.
- A manager who can approve transactions (e.g. invoices, expenses, and requisitions) can enable Vacation Period for a specified date range while away. Enabling the Vacation Period allows you to choose to **re-assign** or **delegate**
- Any employee can be chosen in the system to re-assign/delegate to, even those without signing authority
- Once enabled, this rule will apply to any automated tasks that require action (e.g. approval of expense report, invoice, or requisition, invoice holds resolution, etc.)



Vacation Rules: Delegate Option (Recommended)

- Delegation allows the employee to choose someone to act on his/her behalf. This original approval hierarchy is not impacted. "Delegate" is the recommended option to ensure that multi-level approvals remain within the same hierarchy.
- **Example**: Manager A is on vacation, and "delegates" approval tasks to Manager B. Employee A submits a Requisition/Expense Report/Non-PO Invoice that would typically go to Manager A and then Director A for approval. The transaction goes to Manager B, and then back to Director A for approval.



Delegation allows a return to the original hierarchy

Vacation Rules: Re-assign and Delegate Notifications

- **Delegate:** The employee who has been selected as the delegate will receive a "delegated" notification below that can be actioned for approval (example below for an expense report)

- Employees who enable vacation rules can find delegated notifications in their worklist. These can be viewed when the employee returns to review any delegation activities that occurred in their absence

Category 3: Scheduling Delegate

- Scheduling delegates are able to perform tasks on behalf of a manager such as:
  - Approve/Deny Leaves
  - Validate time worked and premiums
  - Fill shifts
- Scheduling delegate access can be requested PRIOR to AIMS implementation.
  - If you require delegate support for AIMS implementation, please follow submit the requests utilizing the interim process noted in this presentation.
  - After AIMS implementation, a MyConnection tile will be available to request access.

Scheduling Delegate

INTERIM – SCHEDULING DELEGATE ACCESS REQUEST FORM

DELEGATE ACCESS LEVELS – DETAILS

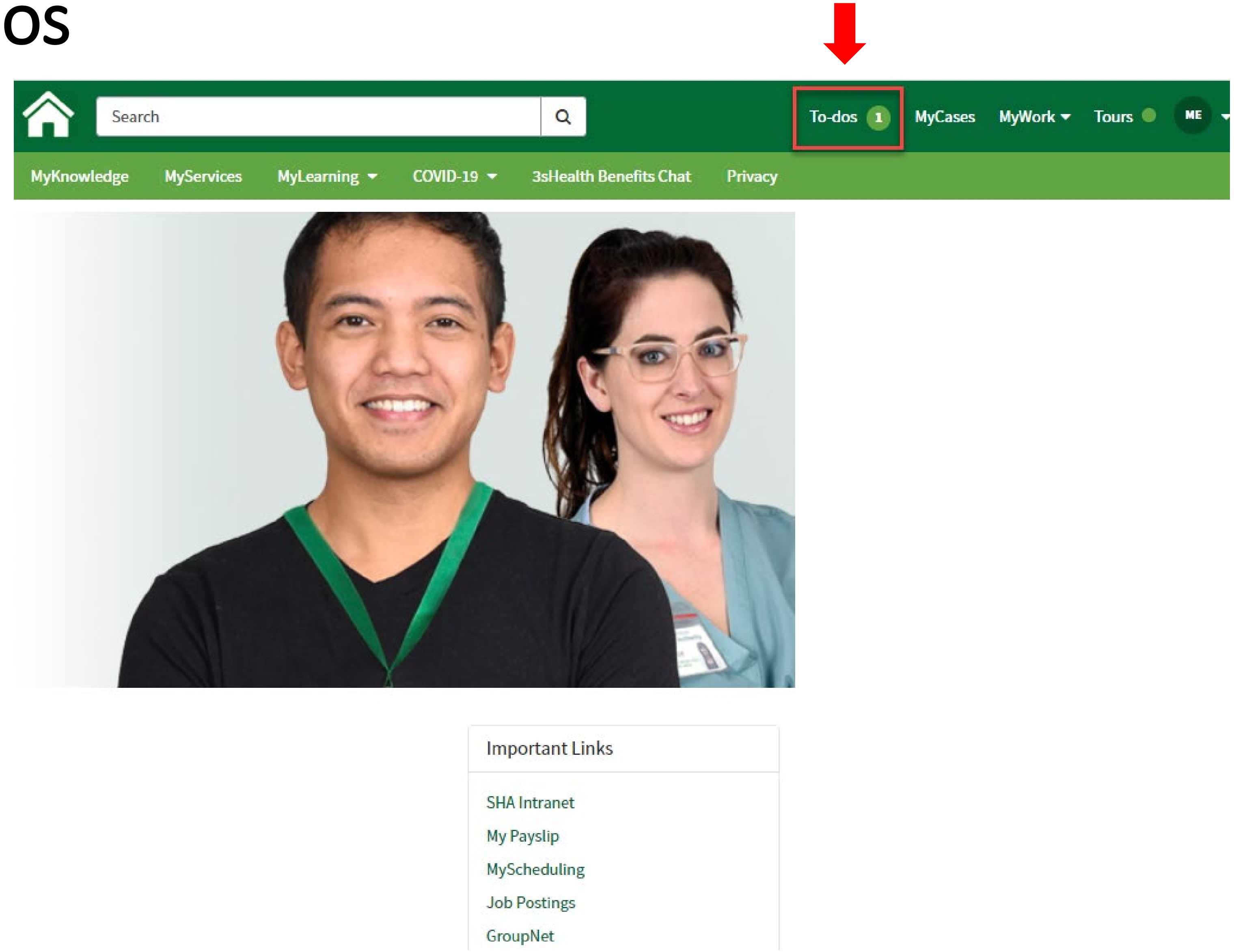
SCHEDULER DESIGNATES	MANAGER DESIGNATE
User will have access to view Unit Schedules with the ability to: ➢ Replace shifts ➢ Submit requests on behalf of an employee ➢ Viewing Unit schedules with authority over (Appropriate for Charge Nurses, Head Cooks, Unit Clerks, etc.)	User will have access to the Manager Dashboard with the ability to: ➢ Approve and/or deny request (leaves, historical edits etc.) ➢ Approve and/or deny time card validation ➢ Replace shifts (applicable to Unit Scheduling – Non-central)

HR Staff Scheduling (Central)	*Unit Scheduling (Non – central)*
Scheduling completed by a central team	Scheduling completed by a role within the department/unit

- Scheduling Delegate request form can be found on the AIMS Manager Toolkit or MyConnection.
- This form will allow you to request access for delegates PRIOR to AIMS implementation.
- Ensure you are requesting appropriate delegate access for the employee.
- Submit completed form through MyConnection > MyServices > Support for MyConnection > Support type - Other

Approvals and To-Dos

- Tasks that must be completed by an individual will be displayed on the MyConnection Homepage under ‘To-Dos’.
- The number beside the title indicates the number of tasks that are required to be actioned.
- Clicking on the To-Dos button will take you to ‘My To-Dos’ which will provide additional information on tasks.



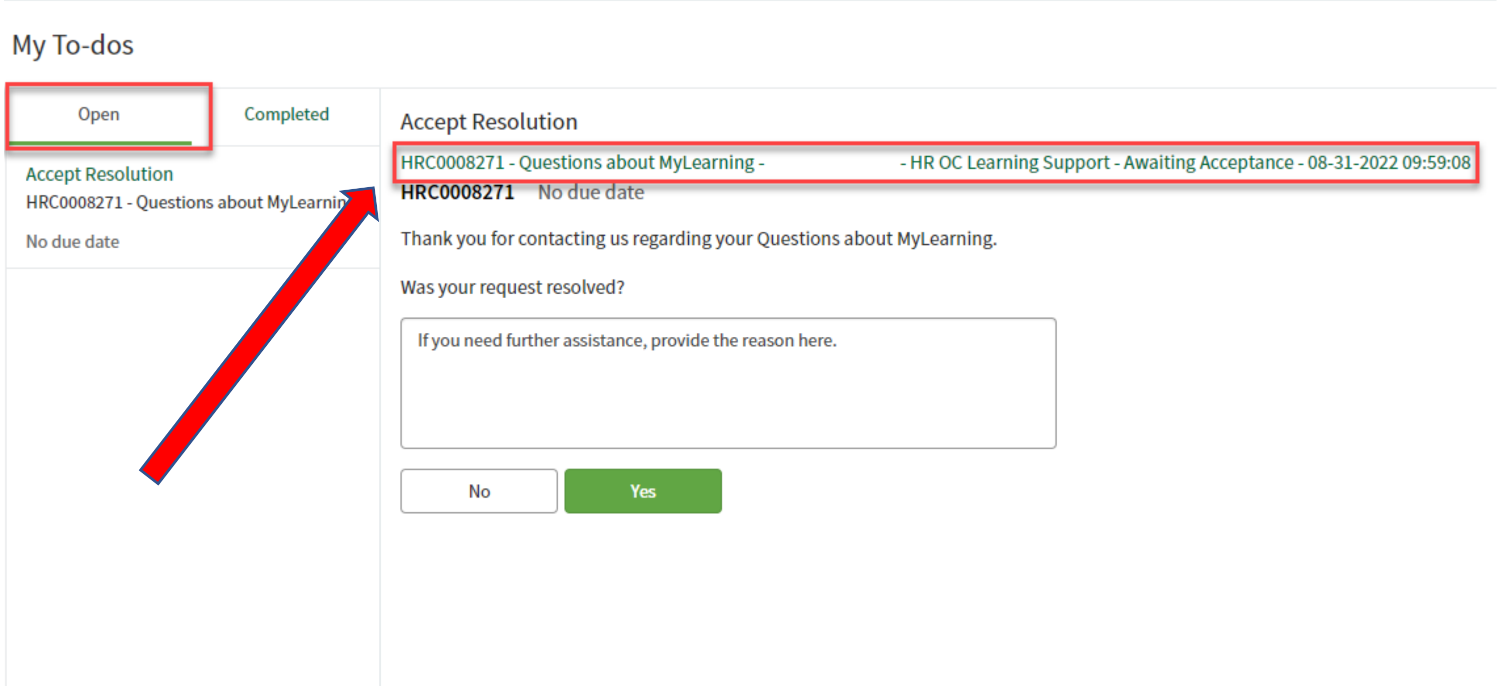
My To-Dos

- This screen will show all your open To-dos and actions required.
- You are also able to review your completed To-dos.

Example:

This MyConnection inquiry has been resolved. You can now either:

- Accept the resolution, or
- Reject it if your inquiry was not completely addressed.



NOTE – Clicking on the ‘HRC’ Number will provide additional information on the case.

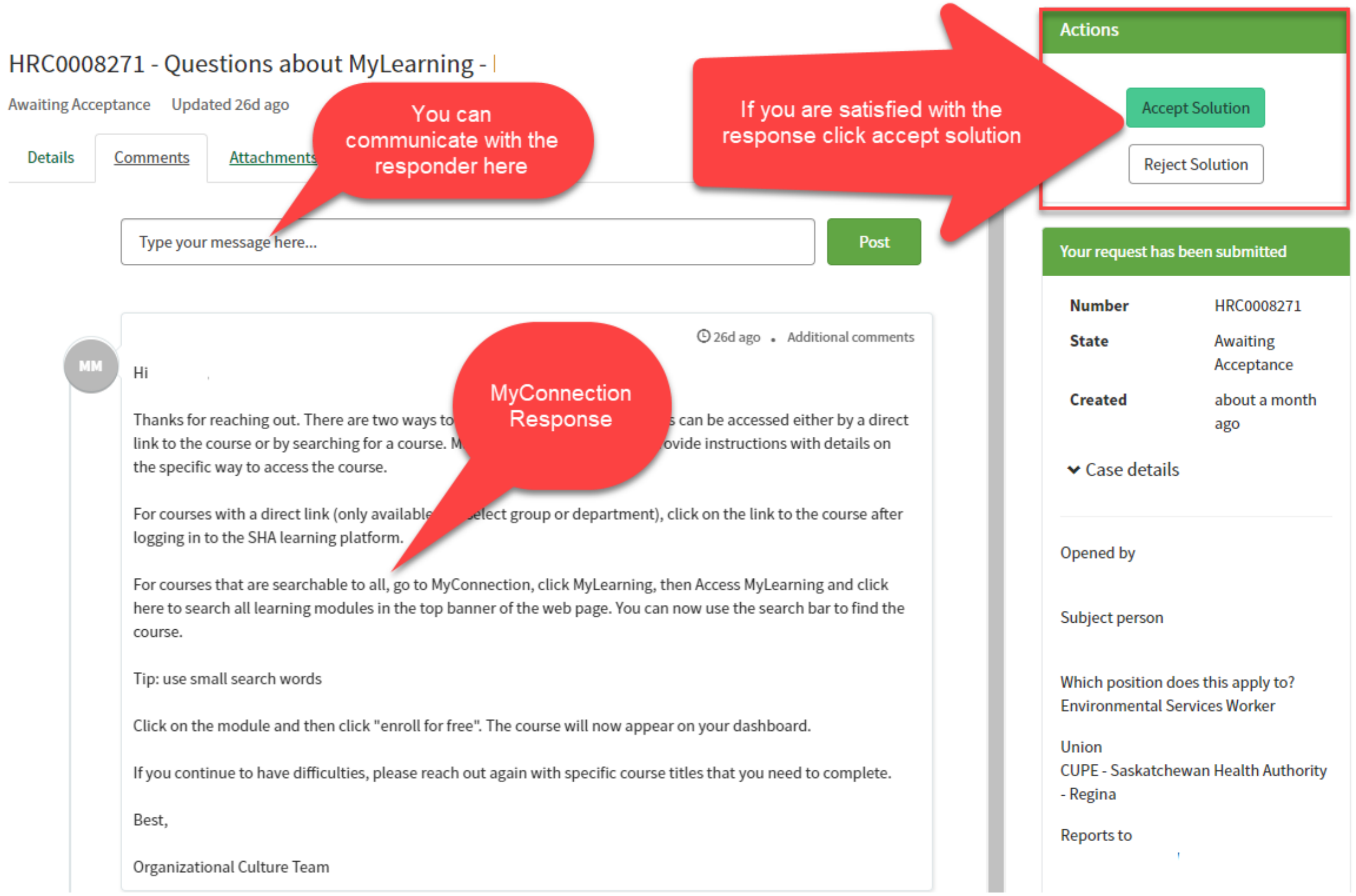
Navigating a Case

Clicking on the HRC number provides more information on the Case Status:

Ready – means it's ready for someone to pick up and start working on the case.

Work In Progress – means someone has picked up the case and has started working on it.

Suspended – Look in comments for why the case has been suspended. It could include waiting for details from the inquirer OR requesting support from another group within HR. The case is waiting a reply or more information before the it can proceed. Fulfillers are required to leave a comment as to why it is suspended.



Implementation Timeline

Employee Accessing Scheduling Functionality including Validating their time	
Group A – October 26, 2022	**Group B – October 27, 2022**
• All former Saskatoon Health Region employees • All SHA Out-of-Scope employees using timecards • 3sHealth • eHealth • Santa Maria Senior Citizens	• All former Regina Qu’Appelle Health Region employees • All former Heartland Health Region employees • All former Five Hills Health Region employees • All former Cypress Health Region employees • All former Province Place employees • All former Kelsey Trail Health Region employees • All former Keewatin Health Region employees • All former Mamawetan Health Region employees • All former Prairie North Health Region employees • All former Sun Country Health Region employees • All former Prince Albert Parkland Health Region employees • All former Sunrise Health Region employees • All St. Joseph’s Hospital (Estevan) employees • Employees of all non-SHA/non-affiliate legal employers

Implementation Timeline continued

- October 30, 2022 – All HR functionality is available
- November 1, 2022 – Finance functionality is available
- November 7, 2022 – Contracting, Procurement and Supply Management

Pre-Implementation Duties

Understand

- Supports within MyConnection
- Delegation process (not available until after AIMS is implemented

Reminder

- A password reset will be required the first day employees enter MyConnection after implementation:
  - Encourage employees to go to Gateway Online to confirm that their contact information is correct including an email prior to implementation.

Additional Supports

- Know where to go to for answers: MyConnection and the AIMS Manager's Toolkit and the AIMS Manager's Checklist (https://www.aimsproject.ca/aims/manager-toolkit)
- Questions can also be submitted through MyConnection.
- Attend future Action Items for Leaders sessions.

Questions