



# AIMS Action Items for Leaders

Session 7:

Day in the Life of a Scheduler

October 13 , 2022

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

## 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](http://www.saskhealthauthority.ca/trc)

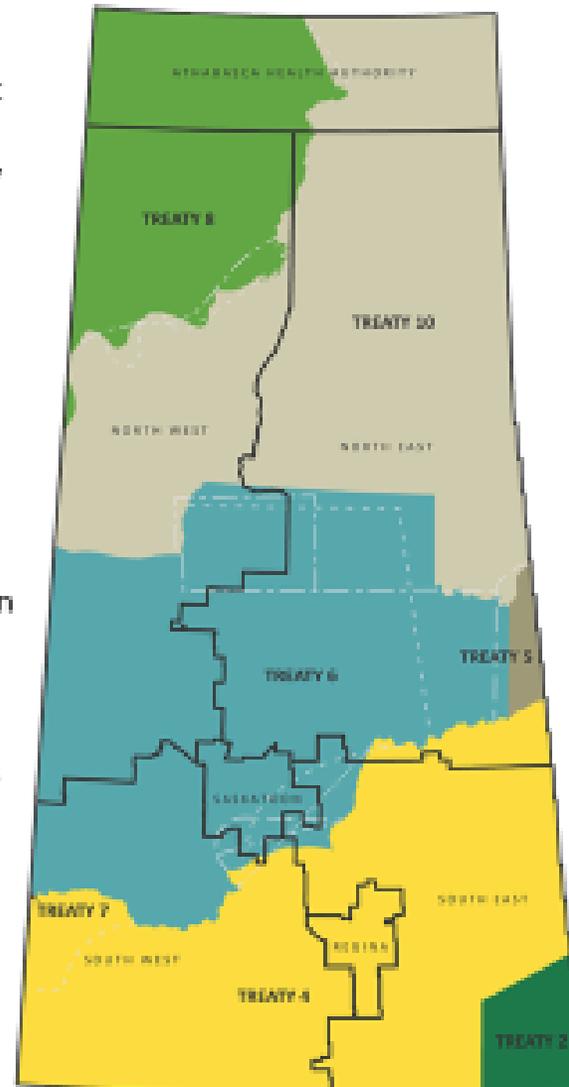


Saskatchewan  
Health Authority

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

- 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.

# Important Tools found in the [AIMS Manager's Toolkit](#)

## Job Posting Exception Form

**Saskatchewan Health Authority**

From October 10-30 the ability to post positions will be restricted. For positions that are approved for posting during the restriction period, start dates between October 23-29 cannot be supported. Position start dates must be October 30 or later.

**Form to Request Exception during the Posting Restriction Period**

Date submitted: \_\_\_\_\_

Portfolio: \_\_\_\_\_

Hiring Manager: \_\_\_\_\_ Portfolio Director: \_\_\_\_\_

Can this posting be delayed until October 30 or later? Yes  No

If yes, you do not need to complete this form, please submit through the posting platform for your area and it will be posted once AIMS goes live.

Please confirm the following criteria to qualify for exception during the posting restriction period (please note all three criteria must be met to be eligible and considered):

Patient/client facing

Position is necessary to keep services/facilities open

Provide explanation: \_\_\_\_\_

## AIMS Scheduling Security Access Form

**AIMSproject.ca INTERIM - SCHEDULING SECURITY ACCESS REQUEST FORM**

**INSTRUCTIONS:**

- A Manager or Supervisor must complete this form to request access to the Scheduling Learning Modules for their employee(s).
- Carefully review the "Security Profiles" below and assess the access need(s) of the employee(s).
- Indicate the access profile being requested for the employee by checking the box next to the profile of choice.
- Submit this form through MyConnection (KS-TBE)

**Part 1: EMPLOYEE INFORMATION\*\***

New Request  Change Request

Click here to enter text. Date: \_\_\_\_\_

Employee Name (Last, first, middle initial)\*\*: \_\_\_\_\_ Employee Number: \_\_\_\_\_

Click here to enter text. Employee Title: \_\_\_\_\_

Click here to enter text. Primary phone number: \_\_\_\_\_

Reason for access request or change: Click here to enter text.

**Part 2: SYSTEM ACCESS**

Please indicate the profile for which you are requesting access.

Security Profile: \_\_\_\_\_

**Part 3: APPROVAL**

**ADDITIONAL DETAILS - SECURITY PROFILES**

| SCHEDULER DESIGNATES  | SCHEDULER  | HR Staff Scheduling Unit MANAGER/DESIGNATE                          | NON HR Staff Scheduling Unit MANAGER/DESIGNATE                      |
|---|--|---|---|
| User will have access to view Unit Schedules with the ability to: | User will have access to the Scheduling Dashboard with the ability to: | User will have access to the Manager Dashboard with the ability to: | User will have access to the Manager Dashboard with the ability to: |
| - Replace shifts  | - Book on shifts   | - Manage requests from employees (approving)                        | - Manage requests from employees (approving)                        |
| - Call-out additional shifts                                      | - Call-out additional shifts   | - Fill open shifts  | - Fill open shifts  |
| - Approvals for Charge Nurses, Unit Clerks, etc.)                 | - View and edit Unit Schedules   | - View Unit Schedules   | - View Unit Schedules   |
|   | - View and edit flow requirements                                      | - Book on shifts  | - Book on shifts  |
|   | - Request personnel management   | - Fill open shifts  | - Fill open shifts  |
|   | - View shifts  | - View needs of shifts and response                                 | - View needs of shifts and response                                 |
|   | - Submit requests on behalf of an employee                             | - Submit requests on behalf of an employee                          | - Submit requests on behalf of an employee                          |
|   | - Complete employee availability reports                               | - Complete employee availability reports                            | - Complete employee availability reports                            |

## AIMS Manager's Checklist

**Action Items for Leaders** **AIMS Manager Checklist**

**INSTRUCTIONS:**

- Use this checklist to identify and highlight tasks that are required to be completed pre- and post-implementation for AIMS. Please consult MyConnection or SSK Leaders Resources for additional information regarding these tasks.
- \*Resource column provides hyperlinks to demos, work standards and other educational materials to aid the successful completion of the tasks.

|                              | DONE                     | TASK   | DEADLINE        | RESOURCES*                                       |
|------------------------------|--------------------------|--|-----------------|--|
| <b>BEFORE IMPLEMENTATION</b> | <input type="checkbox"/> | Remind employees only two bank accounts will be transferred to AIMS (remove any additional bank accounts beyond two from Gateway Online) | Oct. 7, 2022    |  |
|                              | <input type="checkbox"/> | Last day to submit job postings in current posting systems)  | Oct. 7, 2022    | <a href="#">Job Posting Restriction</a>          |
|                              | <input type="checkbox"/> | Employee Movement Restriction Begins   | Oct. 18, 2022   | <a href="#">Implementation Restriction</a>       |
|                              | <input type="checkbox"/> | Complete both Manager and Employee Training in MyConnection  | By Oct 19, 2022 | <a href="#">MyConnection Instructional Video</a> |
|                              | <input type="checkbox"/> | Approve/Deny vacation requests and enter them into legacy scheduling system (only applicable to ESP and VIP areas)                       | Oct 22, 2022    |  |

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## AIMS Scheduling Delegate Request Form (New)

**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:  | User will have access to the Manager Dashboard with the ability to:   |
| <ul style="list-style-type: none"> <li>Replace shifts</li> <li>Submit requests on behalf of an employee</li> <li>Viewing Unit Schedules with authority over</li> </ul> | <ul style="list-style-type: none"> <li>Approve and/or deny request (leaves, historical edits etc.)</li> <li>Approve and/or deny time card validation</li> <li>Replace shifts (applicable to Unit Scheduling - Non-central)</li> </ul> |
| <b>HR Staff Scheduling (Central)</b>   | <b>Unit Scheduling (Non - central)</b>  |
| Scheduling completed by a central team   | Scheduling completed by a role within the department/unit   |

(Appropriate for Charge Nurses, Head Cooks, Unit Clerks, etc.)



## 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

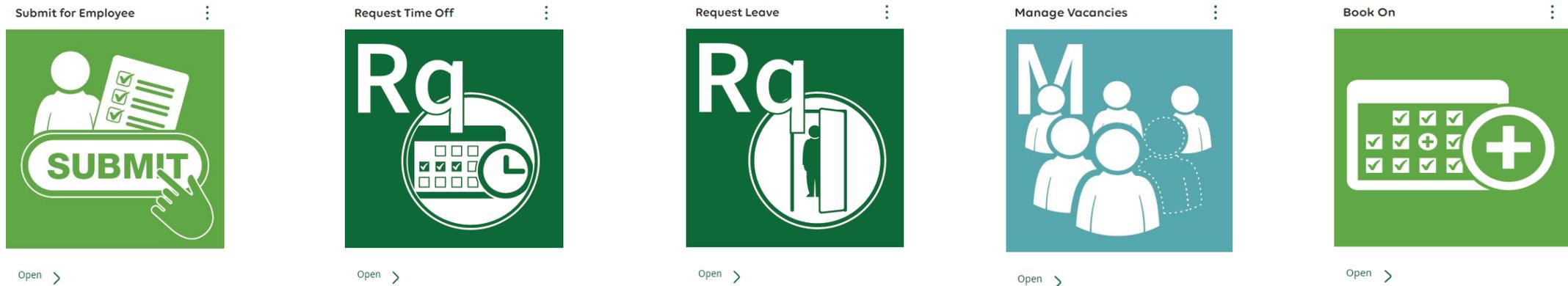
## Leader Responsibilities

### New Processes

- Replacing an “Open Shift”
- Viewing Guidelines
- Swapping Occupations for replacement
- Editing Start and/or End time of shifts for replacement
- Removing Shift if not needing to be replaced
- Editing Employee Schedule

### Pre-Implementation Duties

# How Do Shifts Become Open?



- Manager/Delegate can submit a request on behalf of their employees
- Employees can submit request (Time-off, leave) using the scheduling tiles
  - Vacation (Paid, Unpaid) etc.
  - Short-term leave
  - Long-term leave
- Scheduler/Delegate can create a “new” shift (Workload Increase)
- Manage Vacancies

# How to Replace Open Shifts

As shifts become “Open”

- Scheduler/Manager would see this information on their Dashboard
- Review Guidelines to determine if she needs to be filled
- If shift does **not** need to be replaced, Scheduler would remove the shift
- If shift needs replacement, Scheduler would call this shift out using the Call List
  - If Scheduler has more than 1 shift to fill, they would be using the Call List by Employee

Call List



Call List by Employee



# Demonstration

## Replacing Staff

- Submit for Employee (KB0012859)
- Scheduler Dashboard (KB0012345)
- Manage open shifts (KB0012716)
- View Guidelines
- Call in List (KB0012819)

## Changing Occupations/Start & End time

- Manage open shift (Relief not needed)
- Book on (create a new shift/new occupation)
- Call List

## Editing Employee Schedule

- Manager unit schedule
- Schedule Editor

# MyConnection

[myconnection.skhealth.ca](http://myconnection.skhealth.ca)

# Questions

