# shiftwizard by HealthStream<sup>™</sup>

# Staff Quick Reference Guide

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# Staff Quick Reference Guide

Welcome to ShiftWizard! You will receive an email from ShiftWizard with your Username and Password once staff are loaded into the system. You may then go to the website for your facility and log in to your account. If in the future you need assistance retrieving your Username or Password, you can request it on the login page by clicking Forgot your User name/Password. Please follow the below steps to setup your account.

#### I. Log in to your ShiftWizard Account

📀 shiftwizard			
Login f	for ShiftWizard	Health Sy	vstem
	Username email@hospitalname.com		
	Password	<b>1</b> ~	
	LOGIN		
X	Forgot your User Name/Pa	ssword?	16
1	<u>New Users Register H</u> Request Support	ere	

#### II. Enroll in Universal Login

Upon logging into in ShiftWizard you will be prompted to set up the universal login.

#### Step 1 – Request Pin

Enter your email address and phone number. Press the "Request Pin" button.

Please be advised that once you have completed the universal login process, the email address you use will become your new



Login/User ID – You must use your hospital/company email

	Universal Log	gin Enrollment	
1 Request PIN	2 Enter PIN Number	3 Password & Security	4 Upload Image (Optiona
Step	o 1 of 3: Universal Logi	n Enrollment - Reque	est PIN
	Welcome, Claudia Smith	Not you? Click here to logout	
To reset passwo	Welcome, Claudia Smith	If <u>Not you? Click here to logoust</u> aber below to receive a PIN code s	so you can proceed.
To reset passwo Username*	Welcome, Claudia Smith	I <sup>1</sup> <u>Not you? Click here to losout</u>	so you can proceed.
To reset passwo Username*	Welcome, Claudia Smith ord, please provide your mobile nun claudia@nomail.com	I <i>Mot sou? Cleik here to lessed</i>	so you can proceed.
To reset passwo Username* Send m Send m	Welcone, <b>Claudia Smith</b> ord, please provide your mobile nun claudia@nomail.com e Text e email	I <u>Not real-Cleichter in Jesour</u>	so you can proceed.
To reset passwo Username <sup>®</sup> Send m Send m	Welcone, <b>Claudia Smith</b> ord, please provide your mobile num <u>Claudia@nomail.com</u> e mail	I <u>det seu? Cleit here in Jesour</u>	io you can proceed.

#### Step 2 – Enter Pin

Enter the PIN code sent to the mobile device specified in the previous step.

-		
Enter PIN Number	3 Password & Security	4 Upload Image (Optiona
3: Universal Login E	nrollment - Enter PI	N Number
r the PIN number that was sent to	your phone. Once entered, click	"Next". Click
rious" if you need to return to the	e previous screen to request a ne	w PIN.
	-	
*		
	Enter PIN Number  3: Universal Login Ei r the PIN number that was sent to vious <sup>2</sup> if you need to return to the kondatinenti23(#shiftwitzard.com	Enter PIN Number Password & Security 3: Universal Login Enrollment - Enter PII rthe PIN number that was sent to your phone. Once entered, click wous" if you need to return to the previous screen to request a ne tendalmente23@hthattant.com

Step 3 – Password & Security

Enter a password and confirm.

Please note: this new password will be the same password used for both the website and the mobile app. Password requirements are as follows: Must be at least 7 characters in length, must contain one of each: lower case letter, upper case letter, special character from this list (@\$!%\*?&), number 0-9



	Univ	versal Login En	rollment	
Request PIN	2 Enter PIN No	umber P	3 assword & Security	4 Upload Image (Optional
St	ep 3 of 3: Universal	Login Enrollm	ent - Password	& Security
	Your new passi	word must meet the fol	lowing requirements:	
		the second process of the second seco		
There must b     Your passwor     You cannot re	e at least 1 Number(s) in your p d must be 7 characters long suse your previous password	assword		
There must b     Your passwor     You cannot re  Jsername*	e at least 1 Number(a) in your p d must be 7 characters long ruse your previous password stausfie@romail.com	Assword Phone Ni	umber* 254285005	
There must b     Your password     You cannot re  Jsername*  Password*	e at least 1 Number(s) in your p d must be 7 characters long uuse your previous password sheefin@nomail.com	Phone No Confirm	umber* 254285005 Password*	
There must b     Your passwor     You cannot re  Jsername*  Password*  Tirst Question*	e at least 1 Number(s) in your p d must be 7 characters long uses your previous pessword classified remail rem	Phone Ni Confirm First Ans	umber* 2542856085 Password* wer*	•

Step 4 – Upload Image (optional)

To upload an image browse to select the file to upload and click the "Finish" button. (This option may be disabled based on your organizations settings)

If you choose not to upload an image, simply click the "Finish" button.

#### III. Review your Profile Information

Once logged-in, please update your contact information by clicking on the Circle with your initials then clicking View/Edit Account under your name detail heading.



Then click on the Employee Details tab. Please review and update the following information.





<u>Name</u>: Enter your name as it appears on your paycheck, capitalizing the first letters only.

Address: Enter your address.

<u>Cell Phone</u>: Enter a number to receive texts. Text Messaging: Enable.

Home Phone: Enter a phone number to receive calls. This can be the same number as your cell.

<u>E-mail</u>: Enter an email you monitor. Badge ID: Enter your employee number.

Birthdate: Use the pop-up calendar to choose your birthdate. Click on the year to change.

Education Level: optional

Notes: A field visible to you and your manager.

After making updates to your Employee Details, scroll down and select the green Save button.

#### IV. Navigation within ShiftWizard

To navigate to different pages within ShiftWizard please use the purple menu bar at the top of your screen. Simply click on the tab to see the different options and select what you want to view. If you have access to more than one department, you can change your view by using the purple drop-down on the far right





#### V. Notifications

Different notifications will appear by clicking on the bell icon at the top right of your screen. Here you will see notifications for items expiring, messages and shift swap notifications. Click on any of these notifications to view.

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#### VI. Viewing your Calendar

To view your calendar, click on the Purple Tab My Calendar. Shifts will appear in different colors depending on whether there is an approved schedule for the month you are viewing. Shifts that you have been approved to work are noted as green boxes on the calendar. The box will include the name of the shift as well as the role, times, and department you are expected to work. Other color indicators for calendar shifts are described below:

**GREEN**- approved shifts

**RED**- Needs or understaffed shifts that are available to work (click on them to request)

YELLOW- shifts that you have requested that are not approved yet

**BLUE**- open shifts during self-scheduling (click on them to request)

\* If you do not see the shifts that you expect to see, please ask your manager. The schedule may be closed for balancing prior to approval.

#### VII. Requesting Vacation Days

Click on the Purple Tab My Calendar. Using the arrows in the top left, navigate to the correct month for your vacation request.





Click the Green Plus Sign on the correct day.

Ο

In the pop-up box that appears, choose the PTO Request icon, fill in the needed information, and click Save.



#### VIII. Completing Self-Scheduling

Log into your ShiftWizard account, you will view a screen with blue shifts (open shifts) indicating the shift type, location, and hours of the shift.

🕞 Today 🕹 🎯			March, 2019			
Monday	Tuesday	Wednesday	Thursday	Friday	Securday	Sunday
25 C D1 (9N) - 0/1 SW North Nursing (MSICU) 06:30 - 11:30	D1 (3N) - 8/1 SW North Nursing (MSICU) 96/39 - 11:00	27 G N1 (5N) - 0/1 SW North Nursing (MSICU) 22:30 - 03:00	28 C 7A (5N) - 7/9 SW North Nursing (MSICU) 06:30 - 19:00	March 1 O N1 (8N) - 0/1 SW North Nursing (MSICU) 22:30 - 03:00	2 01 (0N) - 0/1 SW North Nursing (MS2CU) 06:30 - 11:30	5 C1 (84) - 8/1 SW North Nursing (MS3CU) 96:39 - 11:09
	N1 (KN) + 6/1 SW North Narsing (MS3CU) 22:30 - 03:00		N1 (KN) - 8/1 SW North Nursing (MSICU) 22:89 - 01:99		79 (RN) + 6/8 SW North Nursing (MSICU) 18:80 - 07:90	79 (84) - 5/8 SW North Nursing (MS3CU) 18:30 - 07:00
N1 (9N) + 0/1 SW Nerth Nursing (MSICL0 22:50 - 03:50					N1 (RN) - 6/1 Sill North Nursing (MSICU) 22:50 - 03:90	N1 (BN) - 6/1 SW North Nursing (MSICU) 22:30 - 03:00
٤ ٥	5 0	6 0	7 0	8 00	9 0	10 0
	D1 (8N) - 8/1 SW North Nursing (MS3CU) 06(30 - 11)00	N1 (RN) + 6/1 SW North Nursing (MSICU) 22:30 - 63:00	74 (8N) SW North Numing (MSICU) 06:30 - 15:00	2A (8N) - 8/9 SW North Nursing (MSICU) 86(30 - 1900		D1 (8N) - 6/1 SW North Nursing (MSICU) 06(:)8 - 11:00
	N1 (RN) - 6/1 SW North Nursing (MSICU) 22:30 - 03:00		N1 (RN) - 0/1 SW North Nursing (MSICU) 22:30 - 03:00	N1 (HN) - 0/1 SW North Nursing (MSICU) 22:30 - 05:00	79 (850) + 6/8 Sax North Nursing (MSICU) 18:30 - 07:00	
					N1 (8N) - 5/1 SW North Nursing (MSICL) 22.50 - 03.00	79 (RN) + 5/8 SW North Nursing (MS3CU) 18/30 - 07/00
						N1 (8N) - 6/1 SW North Nursing (MSICU) 22:30 - 03:00
11 O	12 0	13 00	14 0	15 0	16 0	17 0
78 (86) - 7/9 SW North Nursing (MS2CU) 06:30 - 19:00	7A (0N) - 6/9 SW North Nursing (MSICU) 06(30 - 19(00	N1 (8N) + 6/1 SW North Nursing (MSICU) 22:30 + 83:00	7A (EN) + 8/9 SW North Nursing (MSICU) 06:30 - 19:80	N1 (8N) - 6/1 SW North Nursing (MS3CU) 22:30 - 03:00	01 (8N) - 0/1 SW North Nursing (MSICU) 06:30 - 11:00	
01 (HN) - 0/1 SW North Nursing (MSICU) 06:30 - 11:30	D1 (RN) - 5/1 SW North Nursing (MS3CU) 96:30 - 11:00		Nrt (RN) + 0/1 SW North Nursing (MSICU) 22:30 - 03:00		79 (RN) - 6/8 5W North Nursing (MSICU) 18:30 - 07:90	61 (RN) - 6/1 SW North Nursing (MSICU) 14:30 - 19:50

To select the shift you want, simply click on the shift you wish to work.

			3	
2/5/2010	Shift	Shift Time	Name	
hift Date: 3/5/2019	7A	06:30 - 19:00	Linda A	
hift Time: 06:30 -	7A	06:30 - 19:00	Melanie A	
11:00	7A	06:30 - 19:00	Meredith B	
Shift 4	7A	06:30 - 19:00	Chardae C	
Hours:	7A	06:30 - 19:00	Lindsay C	
Hours Left for Self Schedule	7A	06:30 - 19:00	Teresa C	
Weekly: 24	7A	06:30 - 19:00	Rylie D	
Daily: 16				



The pop up will appear indicating the position, shift date/time/hours. The screen will also display your co-workers who are working that day.

Your selected shift will now turn yellow.

Mentay				Wednesday		Thursday				Saturday			
31	0	January 1	00	2	0	3	0	4	0	5	0	6	1
		7A(99) 5W North Naming (MSIDJ) 9630 - 1930						74/0111 559 North Naming (MSICU) 06/30-19:00				7A (IPU) SW North Naming (MGCU) 00235 - 19:00	
	0		0	,	20	19	0	11	0	u		13	
74.(85) 5W horth Nursing (NSICU) 0520 - 1308		7x.084 SW North Nursing (MSEU) 06:30 - 13:00						2A(RN) SW North Narsing (MSECU) 0630-1500					
14	0	15		16	0	17	0	18	0	19	0	20	
				7A (98) 7W Horth Naming (NSICI) 9830 - 5800		7A (01) GW North Nanting (MSIDJ) 0630-1800	ł	7A(09) SW Neets Names (MSICU) 0630-1900				7A (201) SW North Familing (MDCU) 06/35 - 19 (6 Hilled anomore: 2,500 point) bonus for this shift Paints 250	
21	20	22	0	23	0	24	0	25	0	26	0	27	
		74.94() 59 North Nursing (MSICU) 9520 - 1500		74(84) SW Kerth Nursing (MSICU) 0620-1800		7A.(R4) SW North Nursing (MERCU) 0525-1800							
28	0	29	0	30	0	а	0	February 1	Po	2	0	3	
		01 (10) 59 North Naming (MS10)/ 94-20-11:09								D1 (MA) SW North Narling (MDCU) 0638-1100		19 (99) SW North Naming (MGCU) 19:35-07:00	

Once the schedule has been approved, the selected shift will turn green.

\*\* To remove yourself from this shift, simply click the same shift again. A pop up will appear on the screen asking if you are sure you want to remove yourself from the shift. You will be removed from that shift, and the shift will turn blue again. \*\*

#### IX. Requesting Needs Shifts

Once the schedule is approved, the "needs" shifts will be identified in red.



Choose the day, position, and shift you wish to sign up for and click on the shift.

The shift details page will appear. Simply select request shift to work the indicated "needs" shift.

Data Industry Name	
and the second s	
A BAR-1918 Color B	
Time 14.30- 24. 04.30-1948 (million 8	
24. 06.00-1918 Laure®	_
944 4 34 9430-1938 Soran 0	
7A 06.01-19.00 Emipt	
28. 98.30-19.00 Cauda H	
29 NOR-0700 Laurent	



The shift will then turn yellow indicating the shift has been requested, but not yet approved.

Once the manager has approved the shift, it will appear in green on your calendar.

#### X. Requesting Schedule Changes via the Shift Swap tool

Requesting shift swaps in ShiftWizard is easy! Log in to view your calendar and select the shift you wish to swap. The staff shift details page will appear.

My Caler	nder Shif	t Details for SW Nort	h Nursing : MSICU		
Position:	RN		Coworker	S	
Ch 16 D	2/16/2010	Shift	Shift Time	Name	
Shift Date:	2/10/2019	7A	06:30 - 19:00	Jessica B	
Shift Time:	18:30 -	7A	06:30 - 19:00	Laura B	
	07:00	7A	06:30 - 19:00	Cayla D	
Shift	12	7A	06:30 - 19:00	Julie B D	
Hours:		7A	06:30 - 19:00	Madison D	
		7A	06:30 - 19:00	Claudia H	
		7A	06:30 - 19:00	Melanie H	
The 'Shift Sw in trade. Shift S Note:	wap' option posts y wap 💿 Give Shift	your shift to the Shift S	wap boards, allowing your team Shift Swap With	member to offer you one o	of their sl

You have four options for requesting a shift swap.

The 'Shi in trade.	t Swap' option posts your shift to the Shift Swap boards, allowing your team member to offer you one of their shift
🖲 Sh	ft Swap 💿 Give Shift 🔯 Give Shift To 👘 Shift Swap With
Note:	A
~	Submit X Cancel

The first two options post your shift publicly.

Shift Swap: Able to post the shift publicly so other staff members may propose a trade.

Give Shift: Allows you to publicly give the shift without other staff members having to trade.

\*\* Please note, you are still responsible for the shift until another staff member has taken it and manager has given approval. \*\*

The second two options allow you to select a specific staff member to shift swap with.

<u>Gift Shift To</u>: Allows you to select a specific staff member to give the shift to. Make notes if needed regarding the context of this shift swap.

Shift Swap With: Allows you to choose the staff member and select shift you wish to trade.



Once you have selected your option of choice, the shift swap icon will appear on your calendar. It will change color to signify the status of your swap.



Once you have submitted your shift swap request, the other staff member will log in and a pop up will appear notifying the staff member that someone has request a shift swap.

Click on the shift swap icon under the notifications bell in the top right corner to access the shift swap center.

Once there, select the other posted shifts tab. Here you will see a list of shifts for you to select.



Once you select approve, the swift swap icon will appear on your calendar and the request will be sent to the manager. Once manager has approved, the shift swap icon will turn green indicating the shift swap is live and updated.



#### XI. Request Assistance from Support

Many of the functions in ShiftWizard are clearly demonstrated in short informational videos.

You can access these from the purple tab Help-Learning Center.



If you need individual assistance, please submit a support ticket. Navigate to the purple tab Help – Request Support. It can also be accessed from the login page under Request Support.

Complete all fields and click Submit Request. Your facility will also have a designated ShiftWizard System Administrator that will help answer questions and offer assistance.

×

Your Name *	
Location *	SW South Endoscopy
Department *	Endo
Customer *	ShiftWizard Health System
Email *	support@myshiftwizard.com
Phone	555-555-5555
Preferred Contact Method	Email
everity	Normal
ıbject *	Tell us what we can help you with. Please add any to the details section below
etails	If you ran out of room above, feel free to tell us more in here.