



Staffing and Scheduling Supervisor Quick Reference

Open Schedule Screen

The schedule screen opens in a separate window from API Healthcare. This allows users to switch between the two.

1. Click **Actions > Scheduling > Schedule**.
2. Enter appropriate criteria.
3. Click **Open Schedule**.

Request Reports

1. Click **Reports > Scheduling**.
2. Open appropriate reports folder
3. Enter report parameters.
4. Click **Request Report**.

Handling Employee Schedule Requests

Supervisors may approve different types of Requests.

- Transaction (Calendars)
- Requests
- Unavailability

To handle via details screen:

1. Open the Schedule screen.
2. Display the Balancing Grid.
3. Click the Requests tab.
4. Check the records you want to work with.
5. If desired, view details or enter comments.
 - a. Double click employee request to open details window.
 - b. May enter Reviewer Comments here.
6. From either the Request Tab or details window, click Approve, Deny, Delete, or Pending Review.



You may complete multiple requests at one time.

Print Schedule

The schedule prints as you see it on the schedule screen. If there is a filter applied to display only RNs, that is what will print.

1. Open the Schedule Screen.
2. Click **Print** from Schedule drop down menu.
3. Click **Print** icon.
(Upper left corner of print preview window.)

To modify page settings and layout options:

1. Click **Printing Preference**.
2. Make desired changes.
3. Click **Close**.

Rotating Schedules

1. Click the Employee section.
2. Search for the desired employee.
3. In the left pane, Employee Sections, click Rotating Schedules and then click Add.
4. Enter the appropriate data in on the General screen and click Save.
5. Click Rotation (left pane > Employee Rotating Schedule section).
 - a. Select the days to be scheduled on the calendar and then click Add Activity.
 - b. Enter the appropriate Position, Profile, and Activity Codes.
 - c. Click Save.

Create Bookmarks

My Bookmarks card on the Home page displays all currently configured Bookmarks. These are shortcuts to often-used screens within the system.

The Bookmarks option is also displayed in the left pane of many screens. Click on the bookmark hyperlink to move to the page listed.



Default Bookmarks are configured at the system level, but each user can customize the bookmarks that display. Bookmarks can be added or removed in one of the following ways:

When a screen is open that has a bookmark available, the existing bookmarks are displayed in the left pane.

1. Click on the **Add** button to add the current screen to the bookmark list.
2. When a page is open that has a bookmark that is no longer wanted on the list,
3. Click on the **Delete** button

Report Favorites List

Quickly access the reports that are generated most often.

Add a report to the *Report Favorites* list

From the **Reports** section, open the report by clicking on the folder to the left of the report name.

1. In the Report Favorites box
2. Click on the **Add** button.



My Favorites

Customize the color coding of the *Action* buttons and/or text and set most-used action buttons

1. Select *Preferences* section
2. *My Preferences* card
3. *Employee Section* screen
4. [Actions](#) section.

To filter the qualified Staff List

1. Click the desired **Profile Group** summary cell and then click the appropriate **Profile** row.
2. If the Roster tab is selected, the employees already scheduled in this profile appear. Click the **Qualified Staff** tab.
3. Click **Filter**.
The filter options menu appears.
4. Click the Employee section.
5. Search for the desired employee.
6. In the left pane, Employee Sections, click Rotating Schedules and then click Add.
7. Enter the appropriate data in on the General screen and click Save.
8. Click Rotation (left pane > Employee Rotating Schedule section).
 - a. Select the days to be scheduled on the calendar and then click Add Activity.
 - b. Enter the appropriate Position, Profile, and Activity Codes.
 - c. Click Save.