



Purpose

Short Message Service (SMS) Quick Fill is a mobile solution to enable managers to fill open shifts quickly with the right staff.

The Schedule Planner widget accomplishes all the most common and fundamental functions of scheduling. It offers multiple views, powerful editing capabilities from the toolbar and context menus to make your work faster and easier.

Use the Staffing Assistant/Call List to find the most appropriate employee to work an open shift, or replace an employee who can no longer work a shift.

For extra shifts (Voluntary OT), the Schedules Rules, Availability and Job Transfer Sets determine who will be presented regardless of the level you start at.

With SMS, employees use their mobile devices to accept or refuse the shift offered. Schedulers can use Quick Fill to assign the shifts by best match order and notifies the employees and managers (reports to). Schedulers track and audit calls and employee responses.

This guide assumes Open Shifts have been generated, Workload is updated, and Staffing Assistant has presented a list of candidates.



BEST Match Strategy

The scheduler sends a request and the most qualified employee who accepts the shift within a specified period of time is awarded the shift.

Sorting

- VOT Date Sort
- Seniority Date
- Weekly Scheduled Hours

Qualifiers

- Job Transfer Set or Primary Job
- No Overlap
- Availability
- Does not break Schedule Rules (Total Hours per day etc.)
- Skills and Certs



Employee Requirements

People Editor

Bermudez, Manuel Toby | 1 of 3 | 871236

History | Licenses

Workforce Scheduler

Workforce Attendance

Workforce Leave

Suite Interaction Licenses

Workforce Manager

- Workforce Mobile Manager
- Workforce Tablet Manager
- Workforce Tablet Analytics

Workforce Employee

Workforce Mobile Employee

Close

Business Phone: 18607043060 SMS

Mobile Phone: 18609787081 SMS

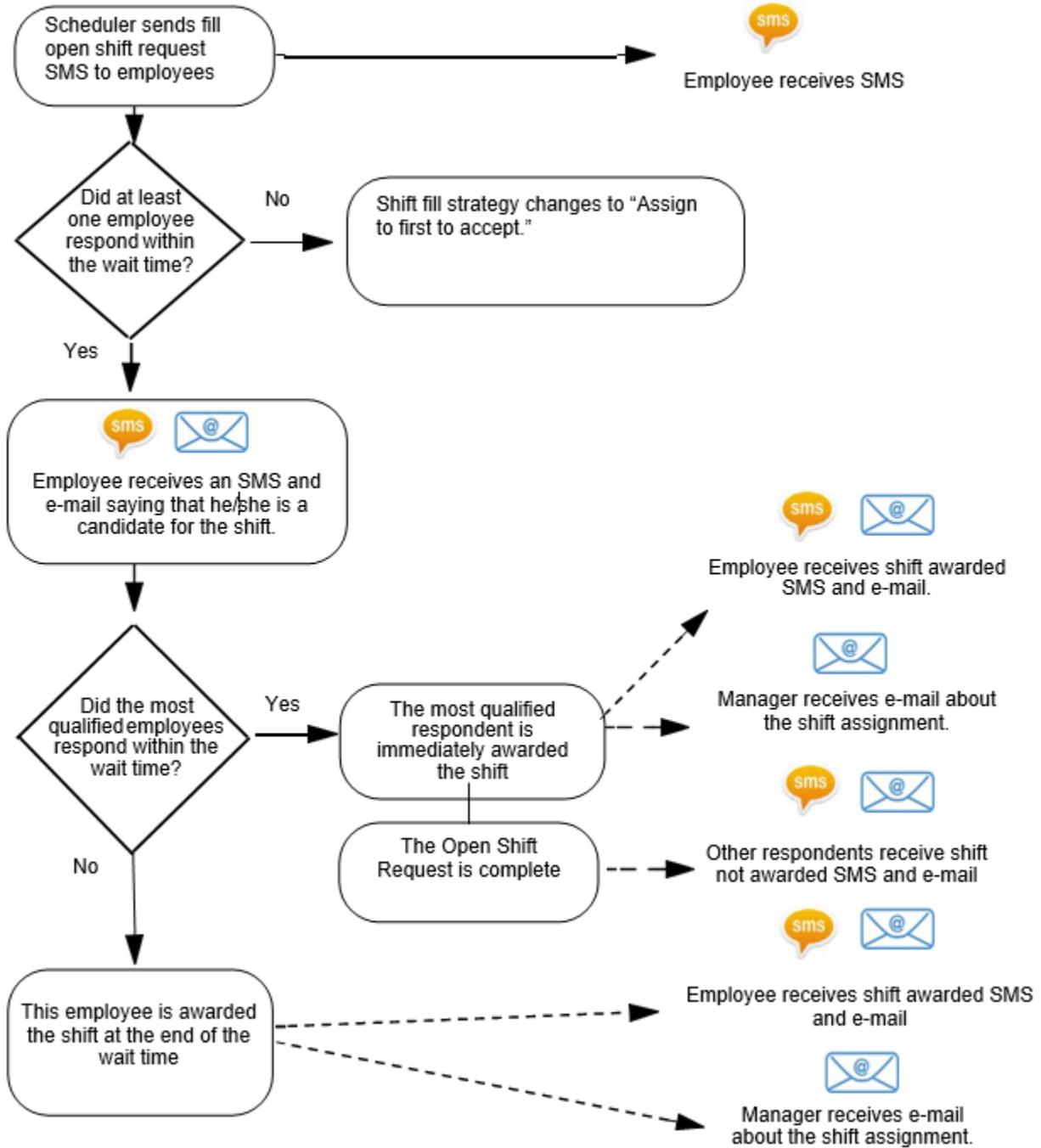
Email: doit.core.emailtest@ct.gov

Mobile Contact

Licenses – Scheduler and Mobile Employee
Mobile Number from Peoplesoft Core
E-mail Address if desire as communication
Mobile Contact- Must be checked



Offer to All, Assign by Match Order





Staffing Assistant/Call List with SMS Quick Fill

	Steps to SMS Quick Fill	Description
1	<p>From the Home Page, click the Plus “+” next to the My Information Tab. Next select <i>Manage My Department</i></p>	
2	<p>From the Related items list, click Scheduler Planner TRX. <i>This version is specifically for presenting employees outside of the target area to fill openings.</i></p> <p>When using this planner, you will get a larger list of employees on the schedule. This happens because the Job Transfer Set controls the list. When you want to view a normal Primary Job list, go to Scheduler Planner instead of the Scheduler Planner TRX</p>	



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<p>3</p>	<p>In the Location Show drop-down list, select a department from the Organization Map which will display employees for you to view. In the screen shot used a Location Query that contains all Caroline or Solnit site.</p>																																																								
<p>4</p>	<p>In the Time Period drop down list, select a specific schedule period. Or Select the Start and End Dates. Click OK. Click Apply.</p>																																																								
<p>5</p>	<p>Select the Staffing Assistant Tab.</p> <p>Select an Open Shift from the Staffing Assistant or the schedule Each row for a location contains the last name, first name, and job (in the unit)</p>	<table border="1"> <thead> <tr> <th>No.</th> <th>Outcome</th> <th>Contacted On</th> <th>Name</th> <th>Schedule Hours</th> <th>P...</th> <th>Worker Type</th> <th>Location</th> <th>Job</th> <th>Seniority... For Shift</th> <th>VOT Date</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Select</td> <td>-</td> <td>Bowen, Jacquelin M</td> <td>0.00</td> <td>10 ...</td> <td>Full Time</td> <td>...dy/Maple/Maple/.</td> <td>CSW</td> <td>6/15/2001</td> <td></td> </tr> <tr> <td>2</td> <td>Select</td> <td>-</td> <td>Bermudez, Manuel To...</td> <td>0.00</td> <td>10 ...</td> <td>Full Time</td> <td>...ustody/Oak/Oak/.</td> <td>CSW</td> <td>9/15/2003</td> <td></td> </tr> <tr> <td>3</td> <td>Select</td> <td>-</td> <td>Bonfiglio, Denise M</td> <td>0.00</td> <td>10 ...</td> <td>Full Time</td> <td>...dy/Maple/Maple/.</td> <td>CSW</td> <td>8/26/2008</td> <td></td> </tr> <tr> <td>4</td> <td>Select</td> <td>-</td> <td>McQueen, Khari</td> <td>0.00</td> <td>10 ...</td> <td>Full Time</td> <td>...y/Spruce/Spruce/.</td> <td>CSW</td> <td>4/02/2013</td> <td></td> </tr> </tbody> </table>	No.	Outcome	Contacted On	Name	Schedule Hours	P...	Worker Type	Location	Job	Seniority... For Shift	VOT Date	1	Select	-	Bowen, Jacquelin M	0.00	10 ...	Full Time	...dy/Maple/Maple/.	CSW	6/15/2001		2	Select	-	Bermudez, Manuel To...	0.00	10 ...	Full Time	...ustody/Oak/Oak/.	CSW	9/15/2003		3	Select	-	Bonfiglio, Denise M	0.00	10 ...	Full Time	...dy/Maple/Maple/.	CSW	8/26/2008		4	Select	-	McQueen, Khari	0.00	10 ...	Full Time	...y/Spruce/Spruce/.	CSW	4/02/2013	
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6 Select 1-DCF Solnit VOT Primary or Trx Procedure Set.

Click **Load**. The table displays qualified and available employees in the order of best match.

Select the employee and add a pay code in the same cell as the shift

Rule Violations Daily Coverage Staffing Assistant											
		Tue 4/14 7:00 am - 3:30 pm .../Maple/Maple/CSW			Solnit North Custody M...		Edit		1-DCF Solnit VOT Primar...		
No.	Outcome	Contacted On	Name	Schedule Hours	P...	Worker Type	Location	Job	Seniority... For Shift	VOT Date	
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7 Click the Contact Button after selecting employees for the pool.

Under *How To Assign The Open Shifts* Select *Offer to All, Assign by Match Order*

Enter the Wait Time (min = 1 minute). Offers shifts to all selected employees at once. If the most qualified employee accepts the shift, it is awarded immediately. Otherwise, all responses are pooled and the shift is awarded to the most qualified responder upon wait time expiration. Click **Send**.

Contact

CSW CSW

- 7:00AM [4:00]: Regular /DCF-DCF91000/Solnit N/Custody/Maple/Maple/CSW
- 11:00AM [0:30]: Break
- 11:30AM [4:00]: Regular /DCF-DCF91000/Solnit N/Custody/Maple/Maple/CSW

Name	ID	SMS
Bowen, Jacquelin M	972454	<input checked="" type="radio"/>
Bonfiglio, Denise M	68915	<input type="radio"/>
McQueen, Khari	138840	<input type="radio"/>

Parameters

Open shifts to assign: 2

How To Assign: Offer to All, Assign by Match Order

Wait Time (minutes): 8

Comment: VOT

SMS Content: 2 Open Shift(s) at .../Custody/Maple/Maple/CSW from 7:00am to 3:30pm on Tue, 4/14.

31/113 characters left

Cancel Send

Notice SMS column has two Employees greyed out because no mobile number is provided

Contact Confirmation

✓ Open shift request has been sent to 1 employees.

OK



8 How employees respond to shift offers

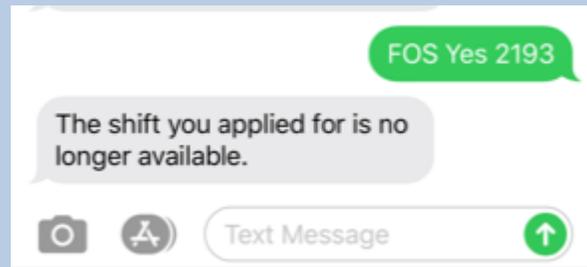
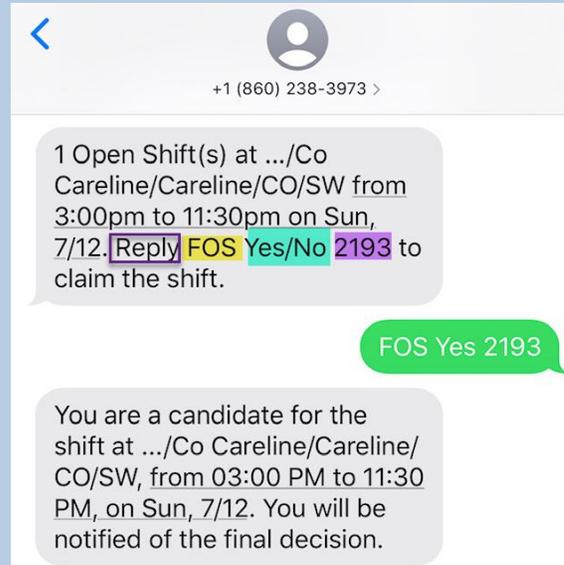
If the employee responds timely using a valid format you will either immediately be awarded or just become a candidate.

If the employee responds late (i.e. 20 minutes later), a text will be sent that the shift is no longer available

Employees respond to the SMS message that they receive from schedulers in the following way:

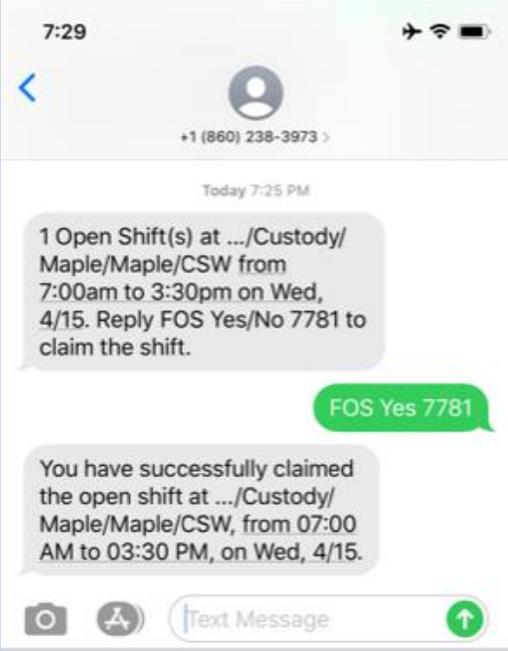
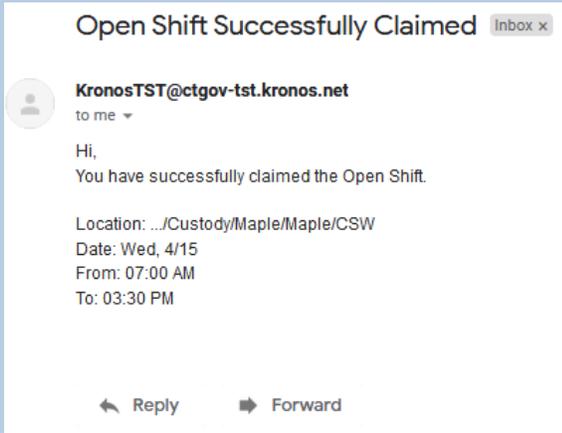
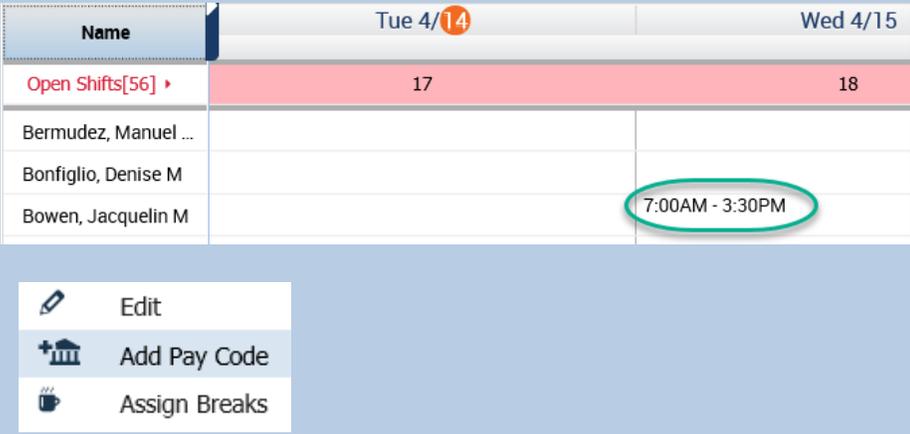
Read the SMS message on their mobile devices.

The message describes the shift, and provides a short code (personal identification number, or PIN).





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<p>9</p>	<p>How employees are notified that they successfully Claimed the shift</p> <p>Note: Managers will never receive SMS notifications. All notifications to managers sent via e-mail.</p>	<p>Employees respond to the SMS message that they receive from schedulers in the following way:</p>  															
<p>10</p>	<p>Add a Pay Code "Voluntary Overtime" in the same cell as the shift.</p> <p>Ensure the Override Shift option is unchecked.</p> <p>Click "Apply"</p>	 <table border="1" data-bbox="472 1094 1382 1339"> <thead> <tr> <th>Name</th> <th>Tue 4/14</th> <th>Wed 4/15</th> </tr> </thead> <tbody> <tr> <td>Open Shifts[56] ▶</td> <td>17</td> <td>18</td> </tr> <tr> <td>Bermudez, Manuel ...</td> <td></td> <td></td> </tr> <tr> <td>Bonfiglio, Denise M</td> <td></td> <td></td> </tr> <tr> <td>Bowen, Jacquelin M</td> <td></td> <td>7:00AM - 3:30PM</td> </tr> </tbody> </table>	Name	Tue 4/14	Wed 4/15	Open Shifts[56] ▶	17	18	Bermudez, Manuel ...			Bonfiglio, Denise M			Bowen, Jacquelin M		7:00AM - 3:30PM
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Add Pay Code

Assigned to
Bowen, Jacquelin M

Effective Date:* 4/15/2020

Pay Code:* **Voluntary Overtime**

Amount (HH:mm):* Full sched day

Override Accrual Days:

Create Open Shift

Override Shift

Whole Shift Partial Shift

Unavailable Start Time: 7:00AM

Unavailable Amount (HH:mm): 24:00

Start Time:* 7:00AM

Repeat for: 1 days

Transfer Job:

Transfer Labor Level:

Comments (0) [Add Comment](#)

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Donfiglio, Denise M		
Bowen, Jacquelin M		7:00AM - 3:30PM Voluntary Overtime [8:00]



<p>11</p>	<p>Response to employee(s) that DO NOT get shifts</p>											
<p>12</p>	<p>Contact Tracking displays audit information for SMS Quick Fill messages that have been sent.</p>	<table border="1"> <thead> <tr> <th>No.</th> <th>Contact Date and Time</th> <th>Task</th> <th>Status</th> <th>Shift</th> </tr> </thead> <tbody> <tr> <td></td> <td>4/14/2020 7:25 PM</td> <td>Fill Open Shift</td> <td>Completed</td> <td>4/15/2020 [7:00AM - 3:30PM]</td> </tr> </tbody> </table>	No.	Contact Date and Time	Task	Status	Shift		4/14/2020 7:25 PM	Fill Open Shift	Completed	4/15/2020 [7:00AM - 3:30PM]
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		<p>Contact Audit</p> <p>Audit for: Fill Open Shift Status: Completed</p> <p>Details Shift date: 7/12/2020 [3:00PM - 11:30PM] Shift segments: [3:00PM-7:00PM] Regular: ./DCF-DCF91000/Co Careline/Careline/CO/SW, [7:00PM-7:30PM] Break: , [7:30PM-11:30PM] Regular: ./DCF-DCF91000/Co Careline/Careline/CO/SW, Comment: None SMS Content: 1 Open Shift(s) at .../Co Careline/Careline/CO/SW from 3:00pm to 11:30pm on Sun, 7/12.</p> <table border="1"> <thead> <tr> <th>Match Order</th> <th>Employee</th> <th>Contact Type</th> <th>Contact Details</th> <th>Sent On</th> <th>Replied On</th> <th>Reply Status</th> <th>Outcome</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Banta, Lourdes H</td> <td>SMS</td> <td></td> <td>7/11/2020 12:18P...</td> <td>7/11/2020 12:19P...</td> <td>Accepted</td> <td>Shift Assigned</td> </tr> <tr> <td>2</td> <td>Bannon, Elisa J</td> <td>SMS</td> <td></td> <td>7/11/2020 12:18P...</td> <td>7/11/2020 12:18P...</td> <td>Accepted</td> <td>N/A</td> </tr> </tbody> </table> <p>Print OK</p>	Match Order	Employee	Contact Type	Contact Details	Sent On	Replied On	Reply Status	Outcome	1	Banta, Lourdes H	SMS		7/11/2020 12:18P...	7/11/2020 12:19P...	Accepted	Shift Assigned	2	Bannon, Elisa J	SMS		7/11/2020 12:18P...	7/11/2020 12:18P...	Accepted	N/A
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<p>13</p>	<p>SMS Quick Fill provides the following reports: Quick Fill Details Report SMS Quick Fill Usage Summary Report</p>	<p>The Quick Fill Details report is a standard scheduling report that shows details and status information for every open shift request that was sent during a selected time frame and for selected locations.</p> <p>The SMS Quick Fill Usage Report shows how many SMS text messages have been sent and received through SMS Quick Fill for time periods that schedulers specify.</p> <p>The usage count provided by the SMS Quick Fill Usage Summary report can be used to manually compare against the total number of messages purchased. To do this, Schedulers will need to know how many Message Blocks were purchased and whether they purchased SMS Quick Fill Standard (500 messages/block) or SMS Quick Fill Light (185 message/block).</p> <p>Multiply the number of blocks purchased by the number of messages per block to calculate the total number of messages purchased, then use this number to compare against the Usage Count provided by the report. If usage levels are approaching the total messages purchased, additional Message Blocks can be purchased by contacting the Kronos Sales Representative.</p> <p>This report should most often be run with a range of dates that covers a full SMS Quick Fill Contract year by a corporate administrator</p>																								