
mySchedule Manager Guide - Annual Vacation - Applying on Behalf of Employees

Introduction

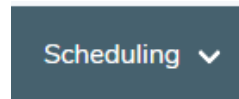
The Annual Vacation module on mySchedule allows managers to enter or modify requests on behalf of employees, allowing managers to accommodate employees who cannot enter their own requests, or to update with alternate choices when an employee's preferences cannot be approved.

Advantages:

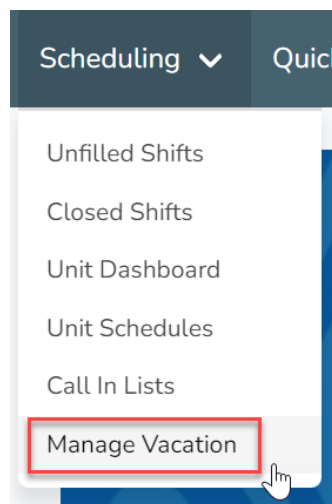
- Managers can add or modify requests in **Active** and **Closed** rounds
 - For **Available** rounds, managers can only modify requests submitted in advance by employees
-

Access the Annual Vacation Module

1. Login to myschedule.northernhealth.ca with your Northern Health user account.
2. Select the **Scheduling** menu item located in the top left of the screen:



3. Select **Manage Vacation**:



Group and Round Selection

1. On the **Manage Vacation Groups** page, select **Process** beside the vacation group containing the employee whose application you will be entering:

Manage Vacation Groups

Disclaimer: Must be logged in as a Manager in order to edit a vacation group.

Name	Current Round	Employee Submissions ¹		
421 - UHN PACU DC1j (20000-DC1 Nurse)	N/A	0	Process	Edit Group
423 - GTW HK & Laundry HKCb (10001-Cleaner)	N/A	0	Process	Edit Group
IMU Unit Clerks	N/A	0	Process	Edit Group
002 - CO HR-Staffing Coordinator E762 (52079-Coord,Trng & Dvlpmt-Stfng Sv...	Round 2	1	View	Edit Group
631 - BVH Nursing DC1j (20000-DC1 Nurse)	N/A	0	View	Edit Group
421 - UHN OR DC1j (20000-DC1 Nurse)	N/A	3	Process	Edit Group
131 - FSH ICU DC1j (20000-DC1 Nurse)	N/A	8	Process	Edit Group

2. On the Round Selection page, select **Process** to access a Closed round, or **View** to access an active round.

Round 1 **CLOSED**
ready for processing

OPEN 09:47 AM PDT Aug 22, 2019 -
 CLOSE 01:10 PM PDT Aug 22, 2019

Process

Round 2 **ACTIVE**
open for submissions

OPEN 09:47 AM PDT Aug 22, 2019 -
 CLOSE 09:47 AM PDT Sep 5, 2019

Submissions Ready
2

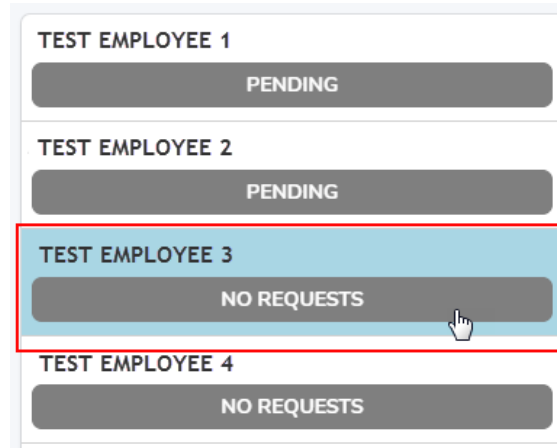
Most Senior Unsubmitted
PAUL BUNYON

Total Submissions
2/4

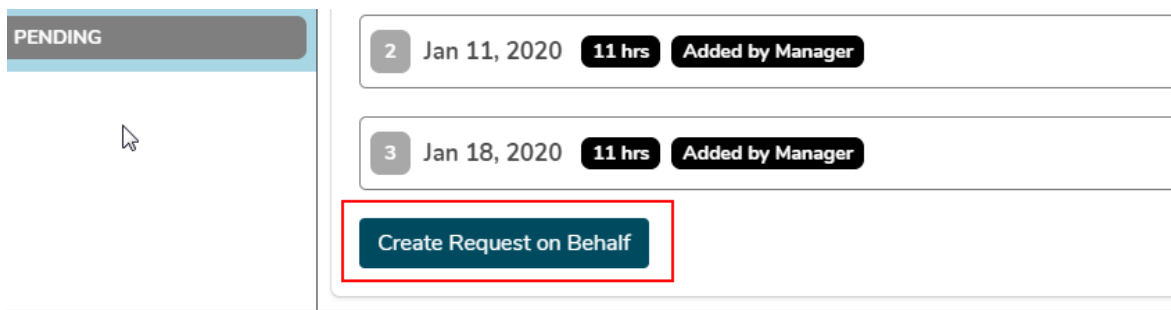
View

Selecting the Employee

1. On the processing page, select the employee name from the left-hand side of the screen:



2. In the processing section, select the **Create Request on Behalf** button to open the employee calendar:



Creating Vacation Requests

The calendar will display the same information visible to the employee, with a bar indicating that you are acting on behalf of that employee:

You are acting on behalf of **TEST EMPLOYEE** [Return to Processing](#)

The Employee Create Request page is displayed, where you can manage the employee's list of vacation requests for the current round.

- A. Employee & Round Information**
- B. Calendar & Creating Requests**
- C. Review and Reorder Ranked List**

002 - CO HR-Staffing Coordinator E762 (52079-Coord,Trng & Dvlpmt-Stfng Svc) A

Vacation Group Eligibility ⓘ: Jan 1 - Dec 31, 2021

Round 3 OPEN

Open	Sep 22nd 2020, 10:51 AM
Close	Sep 23rd 2020, 10:51 AM

JOHN SMITH
Union NON CONTRACT | Seniority 1 / 1

Vacation Bank	2021 Vacation	Pending ⓘ	Approved	Available
Estimated Entitled Vacation	165.000	0.000	0.000	165.000
Supplemental Vacation	0.000	0.000	0.000	0.000

<

January 2021

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Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	Jan 1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	Feb 1	2	3	4	5	6

Jan 21, 2021
830 - Day Shift

08:30 - 16:30 PST 7.5 hrs

Quota 0 / 1 ●

Create Vacation Request

Start Date
January 21, 2021

End Date
January 21, 2021

Add Request

Ranked Requests

Drag and drop to sort.

1 Jan 18 - 29, 2021
Delete
=

✓ Vacation Hrs Available
✓ Quota ●
Unsaved

2 Jan 19, 2021
Delete
=

✓ Vacation Hrs Available
✓ Quota ●
Unsaved

3 Jan 11 - 15, 2021
Delete
=

✓ Vacation Hrs Available
✓ Quota ●
Unsaved

Figure 1

A. Employee & Round Information

At the top of the Employee Create Request page (see Figure 1), you will see information regarding the current round, such as vacation group, round, and the employee's calendar eligibility within the vacation group. Relevant employee information is also displayed, including employee seniority ranking, union, and vacation banks & balances.

421 - UHN APAU DC1j (20000-DC1 Nurse)
Vacation Group Eligibility ⓘ: Jan 1 - Dec 31, 2020

Round 2 OPEN

Open	Aug 19th 2019, 17:30 PM
Close	Aug 22nd 2019, 17:00 PM

JOHN KRASINSKI
Union NURSES | Seniority 2 / 4

Vacation Bank	Opening	Pending ⓘ	Approved	Available
Estimated Entitled Vacation	262.500	121.000	0.000	141.500
Supplemental Vacation	0.000	0.000	0.000	0.000

B. Calendar & Creating Requests

In the middle section of this page (see Figure 1), the calendar displays a variety of information to help you easily create informed annual vacation requests.

May 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	May 1	2
2/2	1/2	1/2				
3	4	5	6	7	8	9
0/2	0/2	0/2	0/2			
10	11	12	13	14	15	16
		0/2	0/2	0/2		
17	18	19	20	21	22	23
		1/2	1/2	0/2	0/2	
24	25	26	27	28	29	30
			0/2	0/2	0/2	0/2
31	Jun 1	2	3	4	5	6
			0/2	0/2	0/2	0/2

May 12, 2020
D - Day Shift
07:00 - 19:00 PDT 11 hrs
Quota 0 / 2

Create Vacation Request

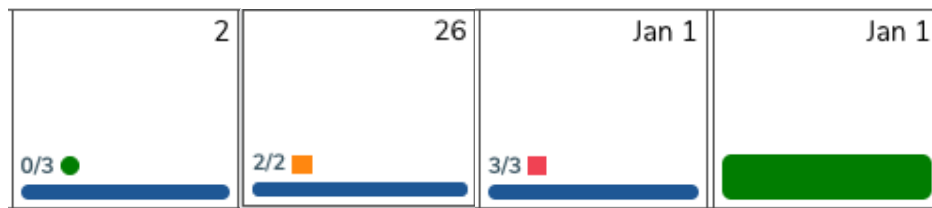
Start Date
May 12, 2020

End Date
May 12, 2020

Add Request

Figure 2

On the monthly calendar view, each day displays a variety of information:



- A **scheduled shift** is represented by a horizontal blue line.
- An **approved request for this employee** is represented by a horizontal green bar.
- The current **quota** is displayed as a total along with a colored likelihood indicator.
 - Each vacation group is assigned a quota. A quota is the maximum number of employees who can be approved for vacation per calendar day.
 - In the example above, 0/3 (or 0 out of 3) is displayed. The “0” is how many employees have been approved for vacation on this day, and the 3 is the quota, indicating how many total employees can be approved for vacation on this day
 - **Green** quotas (circle icon) are fully available for applications
 - **Yellow** quotas (triangle icon) are filled with pending requests from more senior staff
 - **Red** quotas (square icon) are filled with approved or scheduled requests.
 - Applications can be submitted for shifts with any quota colour and status, but are most likely to be approved for green quotas
- **Holidays and special dates** (such as Pay Day) will be represented by blue icons in the top corners of each cell. Note there are no holidays or special dates shown in the examples above.

When you select a date from the calendar (see Figure 2), the right panel in the calendar will populate with more detailed information:

I. How to Add a Vacation Request

1. Select the start date in the calendar (see Figure 2). The right panel on the calendar will populate with information
2. In the right panel, click on the **End Date** option. A small calendar will pop up. Within that small calendar, select the end date of the vacation request.

May 12, 2020
D - Day Shift
07:00 - 19:00 PDT 11 hrs
Quota 0 / 2

Create Vacation Request

Start Date
May 12, 2020

End Date
May 12, 2020

May 2020

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

3. Click the **Add Request** button:

May 12 - 13, 2020
2 Shifts 22 hrs

Create Vacation Request

Start Date
May 12, 2020

End Date
May 13, 2020

Add Request

4. An overlay will appear summarizing this vacation request.

New Vacation Request ×

Requested Dates: May 12 - 13, 2020

Likelihood Summary

Quota ●
 Vacation Hrs Available i

Shift Details

Date	Shift	Hours	Quota i
May 12, 2020	07:00 - 19:00 PDT	11.000	1 / 2 ●
May 13, 2020	19:00 - 07:00 PDT	11.000	1 / 2 ●
2 DAYS	2 SHIFTS	22.000	

Vacation Banks

Bank Type	Available (hrs)	Requested (hrs)	Remaining (hrs)
Estimated Entitlement	262.500	22.000	240.500
Supplemental Vacation	0.000	0.000	0.000
	262.500	22.000	240.500

Use Supplemental Vacation 0.00 hrs
ADD VACATION REQUEST

This overlay summarizes the following information related to the vacation request:

- **Requested Dates:** this is the date range selected for a vacation request.
- **Likelihood Summary:** criteria which highlights if the vacation request has any conflicts regarding daily quota or available vacation hours.
- **Shift Details:** a detailed view of the vacation request, broken down by individual dates.
- **Vacation Banks:** a summary of the employee's vacation banks and their adjusted balances if you decide to add this vacation request.
- **Supplemental Vacation:** If the employee wishes to use supplemental vacation hours towards their vacation request, click on the checkbox and indicate how many hours they wish to use.

5. Click the **Add Vacation Request** button to add this request to the list of preferences.

C. Review and Submit the Ranked List

The bottom section of the Employee Create Request page (see Figure 2), displays the ranked list of vacation requests in order of preference.

Ranked Requests

Drag and drop to sort. Delete All Requests

1	Jul 10 - 24, 2020	Delete	=
	<input checked="" type="checkbox"/> Vacation Hrs Available <input checked="" type="checkbox"/> Quota ● <input type="button" value="Pending"/>		
2	May 1 - 15, 2020	Delete	=
	<input checked="" type="checkbox"/> Vacation Hrs Available <input checked="" type="checkbox"/> Quota ● <input type="button" value="Pending"/>		
3	Jul 1 - 18, 2020	Delete	=
	<input checked="" type="checkbox"/> Vacation Hrs Available <input checked="" type="checkbox"/> Quota ● <input type="button" value="Pending"/>		
4	Jul 7 - 28, 2020	Delete	=
	<input checked="" type="checkbox"/> Vacation Hrs Available <input checked="" type="checkbox"/> Quota ● <input type="button" value="Pending"/>		
5	Apr 17 - 30, 2020	Delete	=
	<input checked="" type="checkbox"/> Vacation Hrs Available <input checked="" type="checkbox"/> Quota ■ <input type="button" value="Pending"/>		

900 ↕

If you haven't entered at least three preferences, or if you haven't saved your changes, you will see messages in red or orange:

Ranked Requests

Drag and drop to sort. Delete All Requests

1	Jul 7 - 28, 2020	Delete	=
	<input checked="" type="checkbox"/> Vacation Hrs Available <input checked="" type="checkbox"/> Quota ● <input type="button" value="Pending"/>		
2	Apr 17 - 30, 2020	Delete	=
	<input checked="" type="checkbox"/> Vacation Hrs Available <input checked="" type="checkbox"/> Quota ■ <input type="button" value="Pending"/>		

900 ↕

Warning You have unsaved changes. Finish editing and resubmit to save your changes.

Error A minimum of three (3) vacations requests are required. Please edit your ranked list and resubmit.

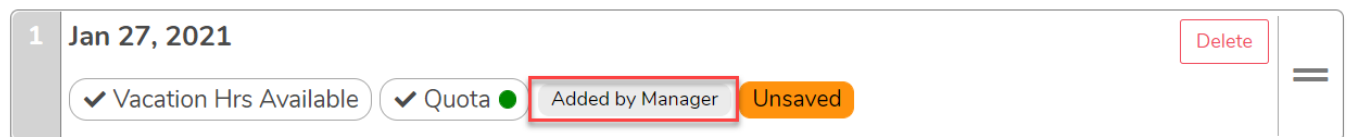
SUBMIT VACATION REQUESTS

I. Review the Ranked List

Each vacation request in the Ranked Requests section (see Figure 2), display the following information:

- **Requested Dates:** this is the date range selected for a vacation request
- **Likelihood Summary:** criteria which highlights if the vacation request has any conflicts regarding daily quota or available vacation hours
- **Status:** the status indicates the state of the request
 - **Pending:** waiting for a manager to process the requests
 - **Approved:** this request has been approved by a manager
 - **Not Approved:** the manager has approved one of the other preferences in this round
 - **Denied:** the manager has denied all preferences for this round

Requests entered on behalf of an employee by a manager will include an Added by Manager indicator:



The screenshot shows a single vacation request card. On the left, it is numbered '1' and dated 'Jan 27, 2021'. Below the date are three status indicators: '✓ Vacation Hrs Available', '✓ Quota' with a green dot, and 'Added by Manager' which is highlighted with a red box. To the right of these indicators is an orange 'Unsaved' button. In the top right corner of the card is a red 'Delete' button. A hamburger menu icon is visible on the far right.

II. Manage the Ranked List

- **Re-order:** You can rearrange the order of the vacation requests by using drag & drop on each requests. After each rearrangement, the numbered list should update to reflect the new order, and you will see a notification in yellow that you have unsaved changes. You need to submit the employee's vacation requests to save the changes.
- **Delete:** You can delete a request by clicking on the "Delete" button on each vacation request.
- **Edit:** If you wish to edit a vacation request, delete the request and re-add a new request with your changes.
- **Minimum:** A minimum of 3 vacation requests are required per round
- **Maximum:** A maximum of 20 vacation request are permitted per round.

III. Submit the Ranked List

In order to submit the employee's list of vacation requests, click on the "Submit Vacation Requests" button. If you wish to save any changes to the list of ranked vacation requests, click on the "Submit Vacation Requests" button. Once this is completed, the employee will receive an email confirming that the request has been submitted on their behalf.

SUBMIT VACATION REQUESTS

D. Warnings

There are two types of warnings in which a vacation request may trigger.

Exceeded Quota: The vacation request exceeds the daily quota



1 Jun 19 - Jul 8, 2019 Delete

⚠️ ✓ Vacation Hrs Available ⚠️ Quota ● Pending

Exceeded Vacation Hours: The vacation request contains more hours than the amount available in the employee's vacation bank.



4 Mar 12 - Jun 28, 2019 Delete

⚠️ ✓ Vacation Hrs Available ✓ Quota ●

You may still submit a vacation request that contains a warning, you are required to include a comment as part of the submission process. This is usually intended to help guide the manager decision when employees apply on their behalf – please enter any notes you may require (or any text in order to meet the comment requirement) and you will be able to submit the requests.

After Submitting the Request

1. Now that the request has been entered, select **Return to Processing** to return to the previous page.

You are acting on behalf of TEST EMPLOYEE 3.

[Return to Processing](#)

2. If you are entering this request in a **Closed** round, you can now process the request from this screen.