
mySchedule Manager Guide - Annual Vacation - Setting Unit Quotas

Introduction

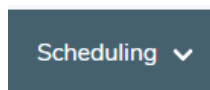
The Annual Vacation module on mySchedule uses a quota system that will help indicate how many employees can be awarded vacation on each calendar day. This helps employees to enter requests that are more likely to be approved, and provides context to managers when processing requests.

Notes:

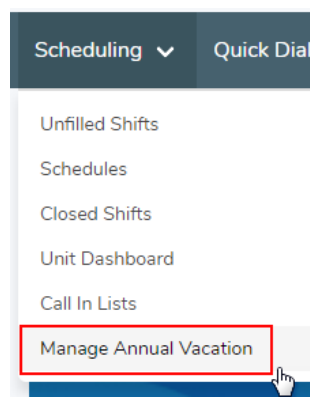
- Quotas for each vacation group will be set to **one (1)** by default
 - Customized vacation groups imported from previous years will have quotas reset to one (1) for all days and must be re-entered
 - Quotas can be set for all rounds before the first round begins
 - Managers can update quotas for time ranges or individual days
 - Quotas cannot be set for different types of shift within each day (eg. one night shift and one day shift for each calendar day)
 - Once the first round begins, quotas can be modified, but the changes will not take effect until the start of the next round.
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Access the Quota menu

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 Annual Vacation**



4. On the **Manage Vacation Groups** page, select **Edit Group** for the group you intend to edit:

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

Name	Current Round	Employee Submissions ⓘ		
421 - UHN PACU DC1j (20000-DC1 Nurse)	N/A	0	Process	Edit Group
423 - GTW HK & Laundry HKCb (10001-Cleaner)	Round 1	0	Process	Edit Group

5. On the **Edit Vacation Group** page, scroll to the bottom to find the Quota section, and select **Edit Quota**:

Quota

Quota is the maximum vacation amount which can be granted within a vacation group.

Edit Quota

6. There are three different options for editing the quota, which may be useful in different situations:
- **Set Daily Range** – this allows you to apply the same quota every day for a specific range of time. This option may be useful for units with similar staffing levels on weekdays and weekends.
 - **Set Weekly Range** – this allows you to apply a pattern with different quotas for different days of the week. This option may be useful for units with lower staffing levels on weekends.
 - **Individual Days** – this allows you to modify quotas for specific days. This option may be useful for areas with lower staffing levels on statutory holidays, or with irregular staffing levels.

Editing Quota – Set Daily Range

1. To set a daily range quota, enter the number you want to apply in the **Set Quota** field:

Set Daily Range

Set Quota from: to:

2. Select a start date using the calendar in the from field, and an end date using the calendar in the to field:

Set Daily Range

Set Quota from: to:

Set Weekly Range

Sun	Mon	Tu
<input type="text"/>	<input type="text"/>	<input type="text"/>

Calendar for January 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. Select **Apply** to apply this quota to the selected date range:

Set Daily Range

Set Quota from: to:

4. Check the quota display below to confirm that the quota has updated:

<input type="button" value="Save"/>							
Week	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Jan 1 - 4, 2020	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>
Jan 5 - 11, 2020	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>
Jan 12 - 18, 2020	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>
Jan 19 - 25, 2020	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>
Jan 26 - Feb 1, 2020	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="1"/>
Feb 2 - 8, 2020	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>

5. Select the **Save** button to save your changes:

<input type="button" value="Save"/>							
Week	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Jan 1 - 4, 2020	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>
Jan 5 - 11, 2020	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>
Jan 12 - 18, 2020	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>
Jan 19 - 25, 2020	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>
Jan 26 - Feb 1, 2020	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="3"/>	<input type="text" value="1"/>
Feb 2 - 8, 2020	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="1"/>

Editing Quota – Set Weekly Range

1. To set a weekly range quota, enter the number you want to apply for each day in the **Set Quota** fields:

Set Weekly Range

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Set Quota	1	2	2	2	2	2	1

2. Select a week start date and a week end date from the drop-down menus

from week start: ▼

to week end: ▼

- Sat, Jan 04, 2020
- Sat, Jan 11, 2020
- Sat, Jan 18, 2020
- Sat, Jan 25, 2020
- Sat, Feb 01, 2020
- Sat, Feb 08, 2020
- Sat, Feb 15, 2020

3. Select **Apply** to apply this quota to the selected date range

from week start: ▼

to week end: ▼

4. Check the quota display below to confirm that the quota has updated:

Save							
Week	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Jan 1 - 4, 2020	1	1	1	2	2	2	1
Jan 5 - 11, 2020	1	2	2	2	2	2	1
Jan 12 - 18, 2020	1	2	2	2	2	2	1
Jan 19 - 25, 2020	1	2	2	2	2	2	1
Jan 26 - Feb 1, 2020	1	2	2	2	2	2	1
Feb 2 - 8, 2020	1	1	1	1	1	1	1

5. Select the **Save** button to save your changes:

Save							
Week	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Jan 1 - 4, 2020	1	1	1	2	2	2	1
Jan 5 - 11, 2020	1	2	2	2	2	2	1
Jan 12 - 18, 2020	1	2	2	2	2	2	1
Jan 19 - 25, 2020	1	2	2	2	2	2	1
Jan 26 - Feb 1, 2020	1	2	2	2	2	2	1
Feb 2 - 8, 2020	1	1	1	1	1	1	1

Editing Quota – Individual Days

1. To edit the quota for an individual day, scroll down to the current quota display:

Save							
Week	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Jan 1 - 4, 2020	1	1	1	3	3	3	3
Jan 5 - 11, 2020	3	3	3	3	3	3	3
Jan 12 - 18, 2020	3	3	3	3	3	3	3

2. Delete the existing quota for that date, and enter the new quota:

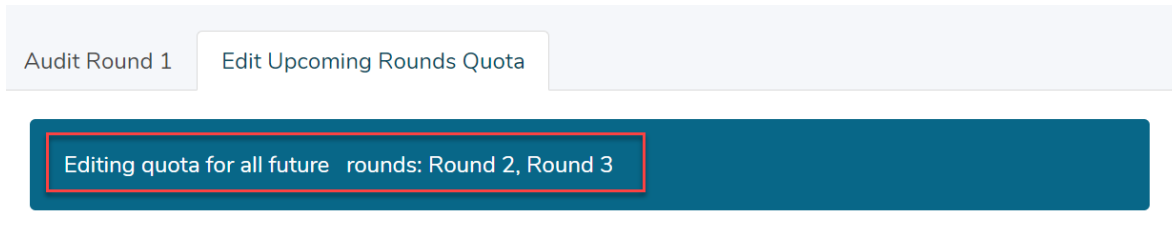
Save							
Week	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Jan 1 - 4, 2020	1	1	1	1	3	3	3
Jan 5 - 11, 2020	3	3	3	3	3	3	3
Jan 12 - 18, 2020	3	3	3	3	3	3	3

3. Select the **Save** button to save your changes

Save							
Week	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Jan 1 - 4, 2020	1	1	1	1	3	3	3
Jan 5 - 11, 2020	3	3	3	3	3	3	3
Jan 12 - 18, 2020	3	3	3	3	3	3	3

Quota Changes During the Vacation Process/Auditing Past Rounds

1. Once a round becomes active and open for employee applications, the quota can no longer be edited. However, the quota for future rounds can still be edited using the same tools. An information bar will clarify which rounds are currently open for editing:



2. To view the quotas used in open or past rounds, select the corresponding Audit Round tab for the round in question. These tabs will appear throughout the process each time a new round opens for applications:

