
mySchedule Manager Guide - How to Add Managerial Delegate Access to Units

Introduction

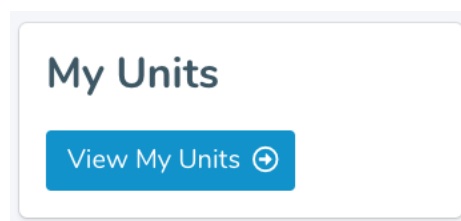
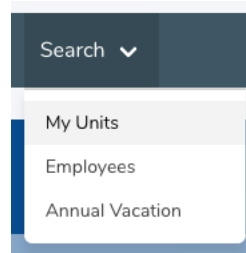
mySchedule now allows managers to provide delegate access to manager tools for their units in mySchedule. This document will explain how this system works, and the processes involved for adding or removing delegate access.

General Information

1. Delegates can be added permanently, or for specific date ranges.
2. Delegates will be added to the default EARL settings for your unit, but not to any customized notification rules that are in place. After you add a delegate, you may want to review your notification settings to add the new delegate to receive notifications.
3. Access is granted for the delegate's position, so you should not need to re-enter this information if your delegate leaves their position and is replaced by a new employee. **IMPORTANT** – all employees assigned to the delegate's position number will be provided access.
4. If you need additional assistance with delegation in mySchedule, please contact mySchedule support at mySchedule@northernhealth.ca.

Instructions – Accessing the Delegate Feature

1. To access the Delegate feature, select **My Units** from the mySchedule home page or the **Search** menu.



- On the **My Units** page, select the **Unit Details** button for the unit you want to add delegates to.

Units

You have signing authority on the following 4 units.

| Facility | Unit | Unit Details | Notification Rules |
|---|----------------------------|--------------|--------------------|
| 131 - FSH Fort St. John Hospital | 131 - FSH Food Services | | |
| 132 - PEV Peace Villa | 132 - PEV Food Services | | |
| 424 - PIC Parkside Intermediate Care Home | 424 - PIC RC PG HK/Laundry | | |
| Admin Facility | Admin Department | | |

- On the **Unit Details** page, select the **Manager Delegation** tab.

Unit Employees **Manager Delegation**

Set Managerial Delegation For This Unit

- This will display the delegation settings in the **Set Managerial Delegation For This Unit** section.

Set Managerial Delegation For This Unit

Delegates*

All employees whose PCN matches the specified employee will be selected. These employees will be given manager permissions in this department.

Active*

Expiry

Leave this blank to specify that these delegates' positions will not expire automatically.

Instructions – Adding Delegates

- In the **Delegates** field, enter the name of the employee you want to add delegate access for.

- a. mySchedule will provide potential selections based on partial entries – regardless of whether you are entering the first or last name of the employee.
- b. Names will list the employee Position Control Number (PCN), name, and employee number in the format **PCN 1234: EMPLOYEE NAME (EMPLOYEE NUMBER)** to help identify the specific person you want to add as a delegate:

Delegates*

Employee name

PCN 113: JANE DOE (00000)

2. To provide permanent access to the unit for this position, set the start date of access in the **Active** field, and Expiry date fields as blank, and select **Save**.

Active*

August 2019

| 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 |

JANET GIBSON (37303)

Active*

August 23, 2019

Expiry

Leave this blank to specify that these delegates' positions will not expire automatically.

Save

3. To provide temporary access to the unit for this position, set the start date of access in the **Active** field, and an end date in the Expiry field, and select **Save**.
4. If the delegate has been successfully added, blue confirmation messages will appear at the top of the screen

Delegation for PCN 303 in "131 - FSH Food Services" added.

Updated expiry of delegate access for JANE DOE (00000). Expiry is now indefinite.

Added new managerial delegation to JANE DOE (00000).

The delegation details will also appear in the **Managerial Delegations At This Unit** section at the bottom of the page.

Managerial Delegations At This Unit

| Delegates | Based on PCN | Active Time | Active |
|------------------|--------------|-----------------------------------|--|
| JANE DOE (00000) | 16778 | Jan 02 2019, 23:00 - No Expiry | ✓ Deactivate |

Delegates – These are the employees with delegate access – if a position has multiple occupants, you may see multiple names listed here

Based on PCN – This is the position number that has been delegated access, which remains persistent even if the occupant of that position changes over time

Active Time – This indicates the start and end times of delegate access – No Expiry means access is indefinite

Active – This indicates whether the delegate is active (green checkmark), or inactive (red X)

Deactivate Button – This is used to deactivate delegate access, and will only appear if the delegate is currently active

Instructions – Removing Delegates

1. Past, current and future delegate records are listed in the **Managerial Delegations At This Unit** section.
2. Delegates with an expiry date will be removed from the access list automatically.
3. To manually remove an active delegate, select the **Deactivate** button – a blue confirmation message will appear at the top of the page.

| | | | |
|------------------|-------|-----------------------------------|--|
| JANE DOE (00000) | 18319 | Dec 07 2018, 00:00 - No Expiry | ✓ Deactivate |
|------------------|-------|-----------------------------------|--|

Deactivated delegate access for JANE DOE (00000) under PCN 16778

The delegation record will update with the date and time the delegate was removed:

| | | | |
|------------------|-------|--|---|
| JANE DOE (00000) | 16778 | Jan 02 2019, 23:00 - Aug 16 2019, 12:54 | ✘ |
|------------------|-------|--|---|