



STAFF QUICK REFERENCE GUIDE

Welcome to ShiftWizard, the scheduling software that allows you to see your schedule, request time off and send messages from anywhere, anytime!

Welcome to ShiftWizard! You will receive an email from ShiftWizard with your Username and Password once staff are loaded into the system. You may then go to the website for your facility and log in to your account. If in the future you need assistance retrieving your Username or Password, you can request it on the login page by clicking [Forgot your User name/Password](#). Please follow the below steps to setup your account.

I. Log in to your ShiftWizard Account

The image shows the ShiftWizard Health System login page. It has a purple background with a white login box in the center. The box contains fields for Username (with example email@hospitalname.com) and Password (with masked characters). Below the fields is a green LOGIN button. At the bottom of the box are links for 'Forgot your User Name/Password?' and 'New Users Register Here Request Support'.

II. Enroll in Universal Login

Upon logging into in ShiftWizard you will be prompted to set up the universal login.

Step 1 – Request Pin

Enter your email address and phone number. Press the “Request Pin” button.

Please be advised that once you have completed the universal login process, the email address you use will become your new

Login/User ID – *You must use your hospital/company email*

The image shows the 'Reset Password' window with the 'Universal Login Enrollment' section. It has a progress bar with four steps: 1. Request PIN, 2. Enter PIN Number, 3. Password & Security, and 4. Upload Image (Optional). Step 1 is active. The main content area says 'Step 1 of 3: Universal Login Enrollment - Request PIN' and 'Welcome, Test Lastname! Not you? Click here to logout'. It instructs the user to provide their mobile number to receive a PIN code. There are input fields for Username (example: elarenn@yahoo.com) and Phone Number (example: +1 123 456 7890). A checkbox 'I already have a PIN' is present. A green 'Request Pin' button is at the bottom.

Step 2 – Enter Pin

Enter the PIN code sent to the mobile device specified in the previous step.

The image shows the 'Universal Login Enrollment' section, Step 2 of 3: Enter PIN Number. The progress bar shows Step 2 is active. The main content area says 'Step 2 of 3: Universal Login Enrollment - Enter PIN Number' and instructs the user to enter the PIN number sent to their phone. It includes a 'Previous' button and a 'Next' button. There are input fields for Username (example: kendallmorrison25@shiftwizard.com), Phone Number (example: +1 123 456 7890), and PIN Number (example: 123456).



Step 3 – Password & Security

Enter a password and confirm.

Please note: this new password will be the same password used for both the website and the mobile app. Password requirements are as follows: Must be at least 6 characters in length, must contain one of each: lower case letter, upper case letter, special character from this list (@\$!%*?&), number 0-9

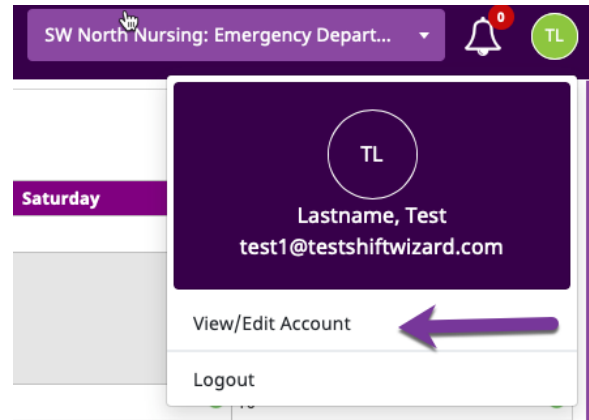
Step 4 – Upload Image (optional)

To upload an image browse to select the file to upload and click the “Finish” button. *(This option may be disabled based on your organizations settings)*

If you choose not to upload an image, simply click the “Finish” button.

III. Review your Profile Information

Once logged-in, please update your contact information by clicking on the Circle with your initials then clicking View/Edit Account under your name detail heading.



Then click on the **Employee Details** tab. Please review and update the following information.



Name: Enter your name as it appears on your paycheck, capitalizing the first letters only.

Address: Enter your address.

Cell Phone: Enter a number to receive texts.

Text Messaging: Enable.

Home Phone: Enter a phone number to receive calls. This can be the same number as your cell.

E-mail: Enter an email you monitor.

Badge ID: Enter your employee number.

Birthdate: Use the pop-up calendar to choose your birthdate. Click on the year to change.

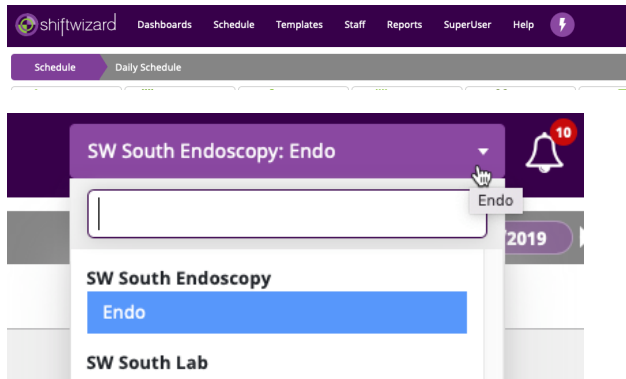
Education Level: optional

Notes: A field visible to you and your manager.

After making updates to your Employee Details, scroll down and select the green **Save** button.

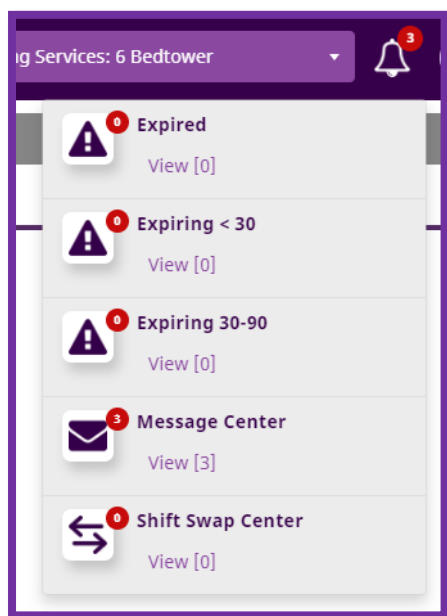
IV. Navigation within ShiftWizard

To navigate to different pages within ShiftWizard please use the purple menu bar at the top of your screen. Simply click on the tab to see the different options and select what you want to view. If you have access to more than one department, you can change your view by using the purple drop-down on the far right



V. Notifications

Different notifications will appear by clicking on the bell icon at the top right of your screen. Here you will see notifications for items expiring, messages and shift swap notifications. Click on any of these notifications to view.



VI. Viewing your Calendar

To view your calendar, click on the Purple Tab **My Calendar**. Shifts will appear in different colors depending on whether there is an approved schedule for the month you are viewing. Shifts that you have been approved to work are noted as **green boxes** on the calendar. The box will include the name of the shift as well as the role, times, and department you are expected to work. Other color indicators for calendar shifts are described below:

GREEN- approved shifts

RED- Needs or understaffed shifts that are available to work (click on them to request)

YELLOW- shifts that you have requested that are not approved yet

BLUE- open shifts during self-scheduling (click on them to request)

*** If you do not see the shifts that you expect to see, please ask your manager. The schedule may be closed for balancing prior to approval.**

VII. Requesting Vacation Days

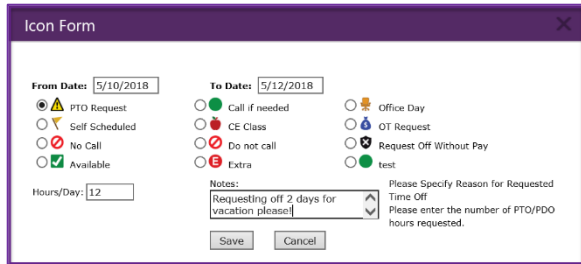
Click on the Purple Tab **My Calendar**. Using the arrows in the top left, navigate to the correct month for your vacation request.



Click the **Green Plus Sign** on the correct day.



In the pop-up box that appears, choose the PTO Request icon, fill in the needed information, and click Save.



Icon Form

From Date: 5/10/2018 To Date: 5/12/2018

☒ PTO Request
☐ Self Scheduled
☐ No Call
☒ Available

Hours/Day: 12

☐ Call if needed
☐ CE Class
☐ Do not call
☐ Extra

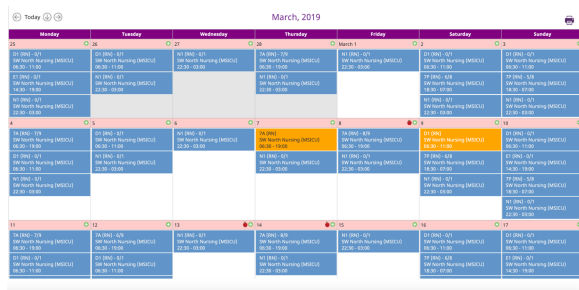
☐ Office Day
☐ OT Request
☐ Request Off Without Pay
☐ test

Notes: Requesting off 2 days for vacation please

Save Cancel

VIII. Completing Self-Scheduling

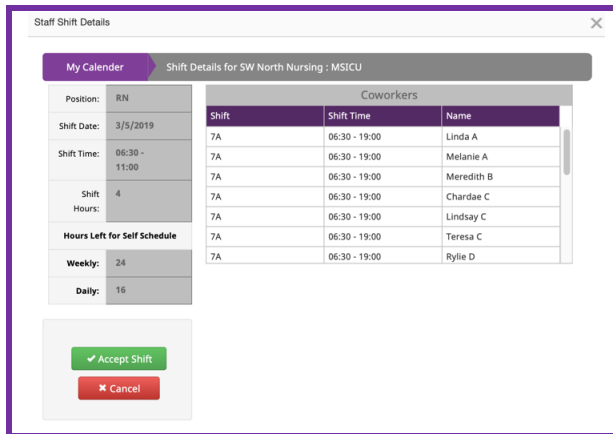
Log into your ShiftWizard account, you will view a screen with **blue** shifts (open shifts) indicating the shift type, location, and hours of the shift.



March, 2019

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
01 (P) 06:30 - 19:00 SW North Nursing (MSICU) 16.00 - 17.00	02 (P) 06:30 - 19:00 SW North Nursing (MSICU) 16.00 - 17.00	03 (P) 06:30 - 19:00 SW North Nursing (MSICU) 16.00 - 17.00	04 (P) 06:30 - 19:00 SW North Nursing (MSICU) 16.00 - 17.00	05 (P) 06:30 - 19:00 SW North Nursing (MSICU) 16.00 - 17.00	06 (P) 06:30 - 19:00 SW North Nursing (MSICU) 16.00 - 17.00	07 (P) 06:30 - 19:00 SW North Nursing (MSICU) 16.00 - 17.00
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To select the shift you want, simply click on the shift you wish to work.



Staff Shift Details

My Calendar Shift Details for SW North Nursing - MSICU

Position: RN

Shift Date: 3/5/2019

Shift Time: 06:30 - 11:00

Shift Hours: 4

Hours Left for Self Schedule

Weekly: 24

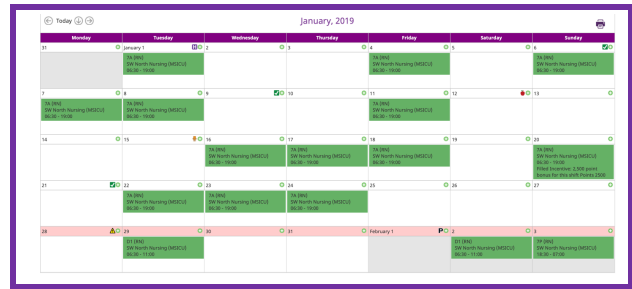
Daily: 16

Accept Shift Cancel

Shift	Shift Time	Name
7A	06:30 - 19:00	Linda A
7A	06:30 - 19:00	Melanie A
7A	06:30 - 19:00	Meredith B
7A	06:30 - 19:00	Chardae C
7A	06:30 - 19:00	Lindsay C
7A	06:30 - 19:00	Teresa C
7A	06:30 - 19:00	Rylie D

The pop up will appear indicating the position, shift date/time/hours. The screen will also display your co-workers who are working that day.

Your selected shift will now turn **yellow**.



January, 2019

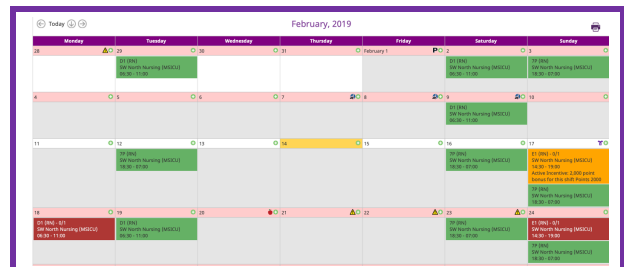
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Once the schedule has been approved, the selected shift will turn **green**.

** To remove yourself from this shift, simply click the same shift again. A pop up will appear on the screen asking if you are sure you want to remove yourself from the shift. You will be removed from that shift, and the shift will turn blue again. **

IX. Requesting Needs Shifts

Once the schedule is approved, the “needs” shifts will be identified in **red**.

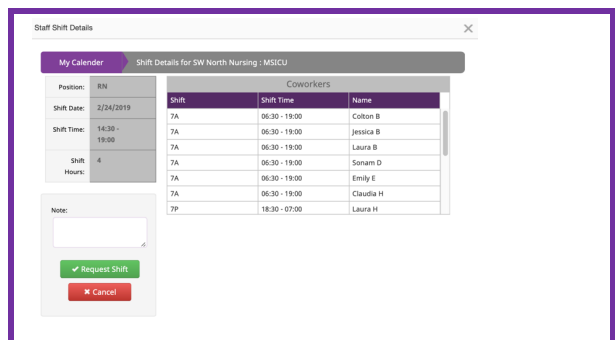


February, 2019

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
01 (P) 06:30 - 19:00 SW North Nursing (MSICU) 16.00 - 17.00	02 (P) 06:30 - 19:00 SW North Nursing (MSICU) 16.00 - 17.00	03 (P) 06:30 - 19:00 SW North Nursing (MSICU) 16.00 - 17.00	04 (P) 06:30 - 19:00 SW North Nursing (MSICU) 16.00 - 17.00	05 (P) 06:30 - 19:00 SW North Nursing (MSICU) 16.00 - 17.00	06 (P) 06:30 - 19:00 SW North Nursing (MSICU) 16.00 - 17.00	07 (P) 06:30 - 19:00 SW North Nursing (MSICU) 16.00 - 17.00
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Choose the day, position, and shift you wish to sign up for and click on the shift.

The shift details page will appear. Simply select request shift to work the indicated “needs” shift.



Staff Shift Details

My Calendar Shift Details for SW North Nursing - MSICU

Position: RN

Shift Date: 2/24/2019

Shift Time: 14:30 - 19:00

Shift Hours: 4

Note:

Request Shift Cancel

Shift	Shift Time	Name
7A	06:30 - 19:00	Cotton B
7A	06:30 - 19:00	Jessica B
7A	06:30 - 19:00	Laura B
7A	06:30 - 19:00	Sonam D
7A	06:30 - 19:00	Emily E
7A	06:30 - 19:00	Claudia H
7P	18:30 - 07:00	Laura H



The shift will then turn **yellow** indicating the shift has been requested, but not yet approved.

Once the manager has approved the shift, it will appear in **green** on your calendar.

X. Requesting Schedule Changes via the Shift Swap tool

Requesting shift swaps in ShiftWizard is easy! Log in to view your calendar and select the shift you wish to swap. The staff shift details page will appear.

You have four options for requesting a shift swap.

The first two options post your shift publicly.

Shift Swap: Able to post the shift publicly so other staff members may propose a trade.

Give Shift: Allows you to publicly give the shift without other staff members having to trade.

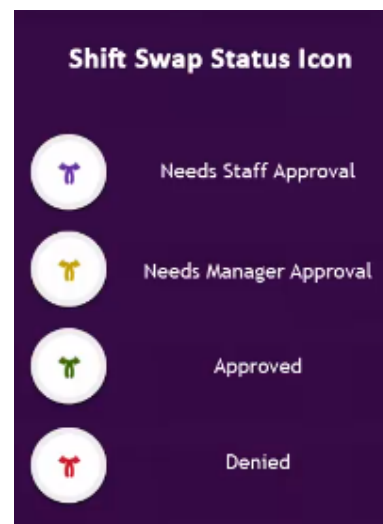
**** Please note, you are still responsible for the shift until another staff member has taken it and manager has given approval. ****

The second two options allow you to select a specific staff member to shift swap with.

Gift Shift To: Allows you to select a specific staff member to give the shift to. Make notes if needed regarding the context of this shift swap.

Shift Swap With: Allows you to choose the staff member and select shift you wish to trade.

Once you have selected your option of choice, the shift swap icon will appear on your calendar. It will change color to signify the status of your swap.



Once you have submitted your shift swap request, the other staff member will log in and a pop up will appear notifying the staff member that someone has request a shift swap.

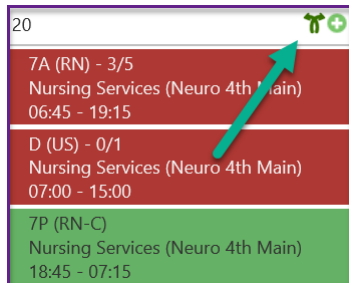
Click on the shift swap icon under the notifications bell in the top right corner to access the shift swap center.

Once there, select the other posted shifts tab. Here you will see a list of shifts for you to select.

Active	Posting Name	Shift Hours	Shift Date	Posting Shift	Posting Member	Notes	Trading Shift	Trading Shift Date	Type
View	Wendy S	12	2/16/2019	12	MS		-		Swap
View	Melanie B	12	2/16/2019	12	MS		-		Swap
View	Jayla A	4	2/16/2019	12	MS		-		Swap
View	Charlene C	12	2/16/2019	12	MS		-		Swap



Once you select approve, the swift swap icon will appear on your calendar and the request will be sent to the manager. Once manager has approved, the shift swap icon will turn green indicating the shift swap is live and updated.



XI. Request Assistance from Support

Many of the functions in ShiftWizard are clearly demonstrated in short informational videos. You can access these from the purple tab **Help-Learning Center**.

If you need individual assistance, please submit a support ticket. Navigate to the purple tab **Help – Request Support**. It can also be accessed from the login page under **Request Support**. Complete all fields and click **Submit Request**. Your facility will also have a designated ShiftWizard System Administrator that will help answer questions and offer assistance.

Support Request

Your Name *

Location *

Department *

Customer *

Email *

Phone

Preferred Contact Method

Severity

Subject *

Details

SW South Endoscopy

Endo

ShiftWizard Health System

support@myshiftwizard.com

555-555-5555

Email

Normal

Tell us what we can help you with. Please add any to the details section below

If you ran out of room above, feel free to tell us more in here.

Submit Request