

# ShiftMatch Canada Manager Guide

1 — Last update: 2017/05/31

ShiftMatch

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# Getting Started

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[Accessing ShiftMatch >>](#)

## Welcome to ShiftMatch!

All users access the ShiftMatch system accessible with internet access via the [Login Page](#) with their Username and Password.

## How To Use This Online Manual

This Guide provides a detailed Help Manual, organized by topics based on the tabs you see on the ShiftMatch website.

Click on the **Manager Guide** link on any page in ShiftMatch to access this Manual.

To search for a particular topic, type the keyword(s) in the **Search** box at the top of the page.

## Configuration Requirements

You must use one of these browser versions or higher to access ShiftMatch:

- Microsoft Internet Explorer v. 8.0
- Firefox 2.0
- Chrome 10.0
- Safari 3.0

ShiftMatch generally releases new software updates on a quarterly basis (four times each year) which may require a browser upgrade. Check back here for the latest requirements.

**Next Topic:** [Accessing ShiftMatch >>](#)

# Accessing ShiftMatch

ShiftMatch << [Getting Started](#) | [Navigating ShiftMatch](#) >>

## Login

Login requires a Username and Password, initially provided by Management.

1. Enter your **Username** and initial **Password**.
2. Click the “Sign In” button.



The first time you login, you will be asked to change your password for security reasons. Passwords should contain at least one capital letter and be at least 6 characters long.

5/11/2017

Please sign in

Username	<input type="text" value="Your username"/>
Password	<input type="password" value="Password"/>
<input type="checkbox"/> Remember me	
<input type="button" value="Sign in"/>	
<a href="#">Forgotten your password?</a>	



Both your Username and Password are CaSe sensitive so be sure your caps lock is not on.

- If you make a mistake, a red warning box will appear informing you either your Username or Password is incorrect.
- After 3 unsuccessful login attempts, the system locks you out for 10 minutes.
- After 30 minutes of inactivity on the site, the system automatically logs you out.

- If you select the Remember Me box (when available) – the ShiftMatch system will remember your Username and Password for that session.

## Forgot Password

If you forget your password, you can click on the **Forgotten your password?** link under the “Sign In” button on the Login page.

1. Enter your **Username** or your **Email Address**.
2. You will be provided the option of viewing the Password Hint or Resetting Your Password.
3. If you choose to reset, click the “Reset My Password” button.
4. An email will be sent to you with instructions on how to reset your password.

# Forgot password

**Payroll**

**OR**

**Email**

**Password Hint**

Passwo

**Login**

john

**Active?**

true

Show password hint

Reset my password



If you experience any problems resetting your password, please contact your Administrator.

**Next Topic:** [Navigating ShiftMatch >>](#)

# Navigating ShiftMatch

[<< Accessing ShiftMatch](#) | [ShiftMatch and FillShift and Cascom >>](#)

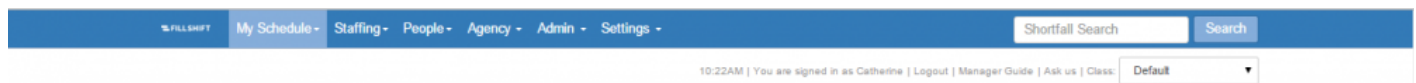
## Navigating the System



Not all Users have access to all tabs detailed in this Manual.  
Please contact Management to address any access issues.

The tabs near the top of the ShiftMatch website take you to each specific section to which you have access:

### My Schedule



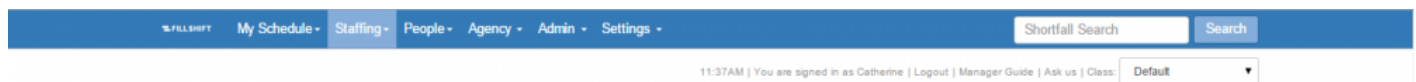
The [My Schedule](#) tab is the core transactional area of ShiftMatch for workers.

Workers automatically land on the **My Schedule** tab after login.

There are five pages, each with specific functions:

- [Schedule](#) – place Availability, accept shifts and view the current schedule.
- [Details](#) – update and verify contact details and work information.
- [Locations](#) – monitor the locations (such as places / buildings / departments and/or floors) available to work.
- [Change Password](#) – change ShiftMatch password.
- [News](#) – a digital bulletin board where Management can post news for all workers to view.

### Staffing



The [Staffing](#) tab is the core transactional area of ShiftMatch for Schedulers or Managers.

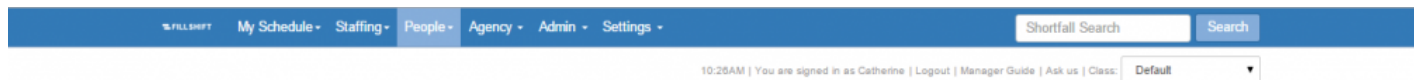
Managers automatically land on the **Staffing** tab after login.

This is where you can view weekly scheduling needs at each location, add requests for work when additional staff are necessary, and review work requests filled by outside agencies.

Depending upon individual permissions, the Staffing tab has up to eight pages:

- [Schedule](#) – an overview of each location including filled and unfolded shortfalls
- [Unfilled](#) – a view of all Unfilled shortfalls with the ability to edit or escalate
- [Agency](#) – a view of all shortfalls filled by Agency workers. With the right permissions, you may replace the Agency worker with internal resources.
- [Manager News](#) – a digital bulletin board where information can be posted solely for the view of Managers
- [Pre-Shift Balance](#) – a view of filled Shortfalls, allowing reallocation to new Locations, if appropriate
- [Verification](#) – to verify the actual times worked, once each Shortfall is completed by the worker
- [Exceptions](#) – to split time worked in a Shortfall between more than one Cost Centre
- [External Payroll](#) – to allocate appropriate language if data is to be exported to external payroll

## People



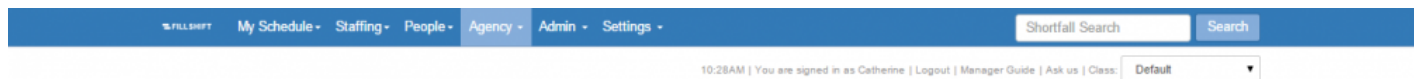
The [People](#) tab contains information on all Users of ShiftMatch.

Here you can add new Users, search for specific Users and find out why a User didn't match a shift.

Depending upon individual permissions, the People tab has up to five pages:

- [User Search](#) – search for Users based on definable parameters and view/edit their profile, Schedule or messages
- [Add User](#) – to add a new User to ShiftMatch
- [Why Not?](#) – to search why a particular User may not match a particular Shortfall
- [Broadcast](#) – to send Broadcast texts to Users
- [Bulk User Upload](#) – to upload multiple Users at one time

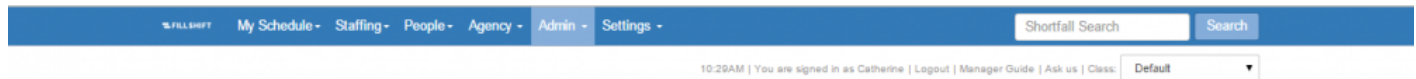
## Agency



The [Agency](#) tab is where you can view

- [Unfilled Agency Shortfalls](#) – a list of Shortfalls that have been opened to Agency(ies)
- [Agency News](#) – a digital bulletin board where information can be posted solely for the view of Agency Users

## Admin

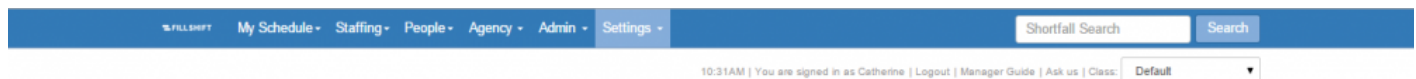


The [Admin](#) tab provides access to basic administrative functions.

Depending upon individual permissions, the Admin tab has up to six pages:

- [Reports](#) – to generate Reports
- [Cancellations](#) – to view a list of cancelled Shortfalls
- [Content](#) – to view and edit the language included in all correspondence (email, text etc) to Users
- [Bulk Shortfall Upload](#) – to upload to ShiftMatch bulk Shortfalls
- [File Upload](#) – when files are uploaded here, they may be accessed to place into the “News” pages
- [Invoice Reconciliation](#) – used to input Agency invoice details and reconcile against Agency Shortfalls filled in ShiftMatch

## Settings



The [Settings](#) tab is where you can further customize the ShiftMatch System.

Depending upon individual permissions, the Settings tab has up to nine pages:

- [Locations](#) – an overview of the locations mapped to the ShiftMatch system
- [Roles](#) – to view and edit details related to Roles assigned to Users. Roles determine a User’s access to the ShiftMatch system
- [Pools](#) – to view and edit Pools used to further classify workers
- [Classes](#) – to view and edit Classes established in the ShiftMatch system. Classes separate different User groups
- [Grading Classes](#) – to view and edit the assignment of Grades into Classes
- [Skill Grouping](#) – to view and edit the Skills and how they are grouped for view
- [Agency Edit](#) – to view and edit the established Agencies in the ShiftMatch system
- [External Payroll Mapping](#) – to view and edit how ShiftMatch Grades map back to external payroll systems
- [Return Text](#) – to view and edit the content of notifications sent from the ShiftMatch system

**Next Topic:** [ShiftMatch and FillShift and Cascom >>](#)

# ShiftMatch and FillShift and Cascom

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[<< Navigating ShiftMatch](#) | [My Schedule Tab Overview >>](#)

Our software has been called Cascom and FillShift and is now broadly known as “**ShiftMatch**”.

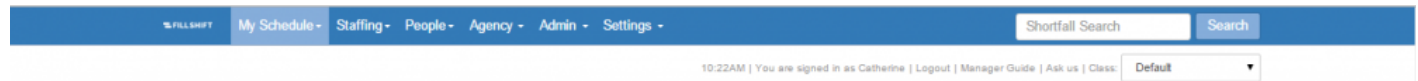
The name change occurred in the middle of 2017 and so any screenshots or references saved before that may have old references.

**Next Topic:** [My Schedule Tab Overview >>](#)

# My Schedule Tab Overview

[<< ShiftMatch and FillShift and Cascom](#) | [My Schedule FAQs >>](#)

## My Schedule



The My Schedule tab is the core transactional area of ShiftMatch for workers.

Here you will find five pages, each with specific functions:

- [Schedule](#) – place offers to work, accept shifts and view your current schedule.
- [Details](#) – update and verify your contact details and work information.
- [Locations](#) – monitor the locations (such as places / buildings / departments and/or floors) you are available to work.
- [Change Password](#) – change your ShiftMatch password.
- [News](#) – a digital bulletin board where Management can post information for all workers to view.

**Next Topic:** [My Schedule FAQs >>](#)

# My Schedule FAQs

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[<< My Schedule Tab Overview](#) | [My Schedule: Schedule >>](#)

## FAQs for the My Schedule Tab

**Q: What happens after I place an offer to work?**

A: The ShiftMatch system will match your preferences and offers to available shifts. If your submitted offer is matched to an available shift, ShiftMatch will send you a Text and/or email with the details of the available shift. To accept the shift, simply reply to the Text with the designated code. If you do not want the shift, ignore the text and ShiftMatch will automatically move on to the next available candidate.

**Q: How do I confirm my shifts?**

A: Once you accept the shift, it will be closed and you will receive a confirmation Text and/or email. You can also see your schedule online in the My Schedule section.

**Q: Can I modify or delete my availability?**

A: YES. Login into ShiftMatch, click on “My Schedule” and then click on the [red flag] availability that you’d like to amend. Please note that accepted shifts can only be deleted by contacting your manager.

**Q: Will ShiftMatch handle “pre-booked” shifts?**

A: YES. Your manager has the ability to pre-book you to upcoming shifts. You will be notified of a confirmed shift and be able to see the pre-booked shift online in the My Schedule section.

**Q: Can I specify preferences rather than just a selection of locations?**

A: ShiftMatch matches the preferences of staff to available shifts on a SHIFT BY SHIFT basis. If you were to have offers in for two different locations, for example, and you were the best match for both shifts, you would receive two shift offers from which to choose.

**Q: The skills listed on the My Skills page are incorrect – how do I change these?**

A: Contact Management to discuss and amend your skills.

**Next Topic:** [My Schedule: Schedule >>](#)

# My Schedule: Schedule

[<< My Schedule FAQs](#) | [Place Availability to Work >>](#)

## My Schedule

The screenshot displays the 'My Schedule' page in the ShiftMatch application. The top navigation bar is blue and contains the following tabs: 'My Schedule', 'Staffing', 'People', 'Agency', 'Admin', and 'Settings'. To the right of these tabs is a 'Shortfall Search' input field with a 'Search' button. Below the navigation bar, the page title 'Schedule' is displayed. A breadcrumb trail shows 'Home / My Schedule / Schedule'. The main content area features a calendar for the period 'Sun 29 Mar - Sat 11 Apr'. The calendar grid has columns for each day of the week, labeled from 'SUN 29' to 'SAT 11'. To the right of the calendar is a blue 'Add Availability' button. Below the calendar are two buttons: 'Show Open Schedule' and 'Post it Note'. At the bottom of the main content area, there is a section titled 'Work Schedule for Sun 29 Mar - Sat 11 Apr' with a blue 'Add Availability' button. The footer contains links for 'Feedback', 'About', 'Manager Guide', 'Terms and Conditions', 'Privacy Policy', and '© 2015 FitShift'.

The My Schedule tab is where you make offers, accept shifts and manage your work schedule. Key activities include:

- [Placing Availability](#)
- [Placing Availability Via Text](#)
- [Editing Availability](#)
- [Accepting Shifts Via Text](#)
- [Accepting Shifts Via Open Schedule](#)
- [Auto Accepting Shifts](#)
- [Leaving Post-It Notes](#)

**Next Topic:** [Place Availability to Work >>](#)

# Place Availability to Work

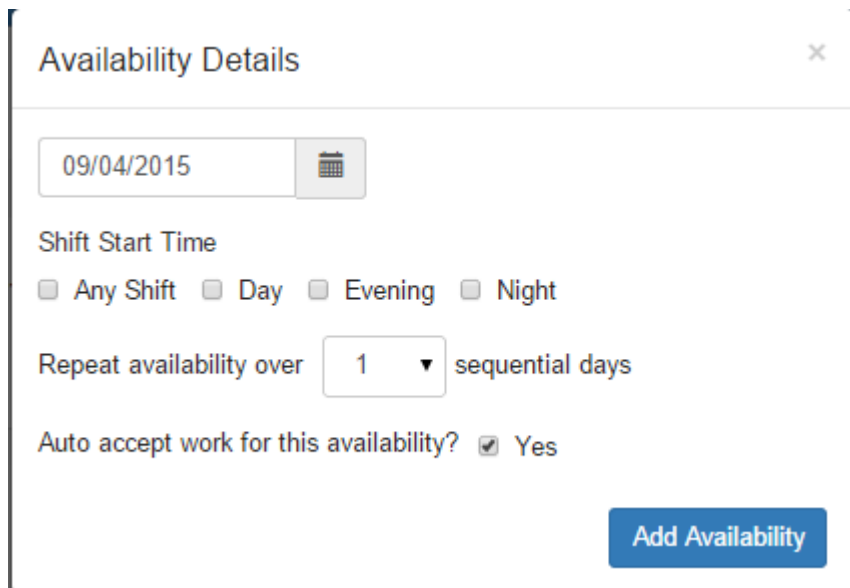
[<< My Schedule: Schedule](#) | [Place Availability Via Text >>](#)

## Placing Availability to Work (an “Offer”)

The **Schedule** page on the **My Schedule** tab is where you can indicate your availability to work. Your offers are then used by ShiftMatch to match you to any shifts available that meet your work offer specifications and for which you are qualified.

To place availability to work:

1. Click on the specific date you would like to work.  
[A screen entitled **Availability Details** will then appear.]



The screenshot shows a modal window titled "Availability Details" with a close button (X) in the top right corner. Inside the modal, there is a date input field showing "09/04/2015" with a calendar icon to its right. Below this is the "Shift Start Time" section with four radio button options: "Any Shift", "Day", "Evening", and "Night". Underneath is a section for "Repeat availability over" with a dropdown menu set to "1" and the text "sequential days". At the bottom left, there is a checkbox labeled "Auto accept work for this availability?" which is checked, followed by the word "Yes". A blue button labeled "Add Availability" is located at the bottom right of the modal.

1. Complete the **Availability Details** screen by selecting which shift you are able to work.  
[To repeat the same availability for multiple days, choose the appropriate number of days from the dropdown menu next to the “Repeat availability over x sequential days” function on the Availability Details screen.]
2. Click the “Add Availability” button.

- ✿ You can also place an offer to work by clicking on the “Add Availability” option above your schedule.

Add Availability

- ! If you click the “Yes” box next to the **Auto Accept** box on the Availability Details screen, you will not have the option to accept or decline a matching shift. Instead, you will be automatically placed in any shift that matches your offer to work. You will then receive a text message confirming the details of the auto-accepted shift.

Once you submit availability to work, the availability will appear as a red availability “flag” on your schedule.

Details of the availabilities are located underneath your schedule in My Availabilities including the date of the work offer and the corresponding shift assignment selected. You may change the availability as described in the [Edit Availabilities](#) section.

Full Shift

My Schedule

03:00PM | You are signed in as Helen | Logout | User Guide

### Schedule

Home / My Schedule / Schedule

Help

Your Availability has been successfully inserted.

Older

Sun 29 Mar - Sat 11 Apr

Next

Add Availability

SUN 29	MON 30	TUE 31	WED 01	THU 02	FRI 03	SAT 04	SUN 05	MON 06	TUE 07	WED 08	THU 09	FRI 10	SAT 11
			ANY										

Show Open Schedule

Post it Note

- ✿ Please note, depending on how your employer uses ShiftMatch, you may receive requests to work for just your offers, or for times you did not make an offer to work.

**Next Topic:** [Place Availability Via Text >>](#)

# Place Availability Via Text

[<< Place Availability to Work](#) | [Edit Availability >>](#)

## Using Text Messaging to Place a Work Availability

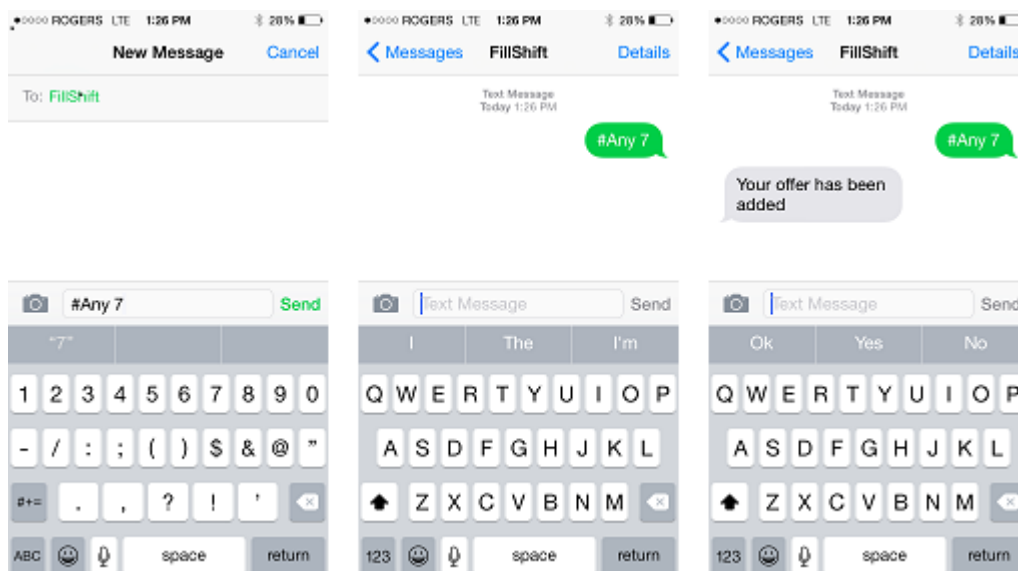
If you are unable to visit the ShiftMatch website, you can also place availability to work by sending a Text to ShiftMatch.

This way, even if you're in a movie theatre and you wish to find work for the next day, you can make yourself available as follows:

1. Prepare a Text to the ShiftMatch system phone number.
2. Type the pound sign (#) and the shift desired.
3. Add a space and type the number of the specific day of the month you wish to make the offer (NB: if you enter 14, it will register availability for the next 14th in the calendar).
4. Click "Send".

You will then receive a confirmation Text that your offer to work has been added for that specific day and shift.

Below, we show how to register availability for any shift on the next 7th in the calendar:



Note that you are only able to make offers for the upcoming 30 days via Text.

The next time you visit your My Schedule page, you will notice the offer has been added.

W/ELLSHIFT

My Schedule ▾

03:15PM | You are signed in as Helen | Logout | User Guide

### Schedule

Home / My Schedule / Schedule Help

← Older

Sun 29 Mar - Sat 11 Apr

Next →

Add Availability

SUN 29	MON 30	TUE 31	WED 01	THU 02	FRI 03	SAT 04	SUN 05	MON 06	TUE 07	WED 08	THU 09	FRI 10	SAT 11
			ANY 13:00						ANY				

Show Open Schedule

Post it Note

**Next Topic:** [Edit Availability >>](#)

# Edit Availability

[<< Place Availability Via Text](#) | [Accept Shift Via Text >>](#)



## Editing Availability to Work

You can edit your availability by updating or deleting it – at any time.

You may not edit a booked shift, you will need to contact your manager to make any changes to a booked shift.

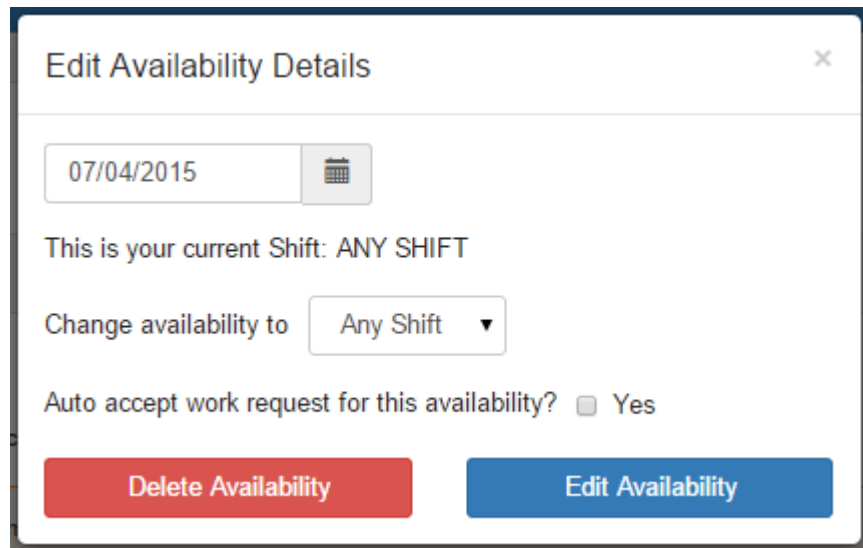
To edit your availability:

1. Click on the **Edit** link under My Availabilities.

My Availability			
Date 	Shift 	Auto Accept	Edit
Wed 1 Apr 2015	Any	<input checked="" type="radio"/>	<a href="#">Edit</a>
Tue 7 Apr 2015	Any	<input checked="" type="radio"/>	<a href="#">Edit</a>

[A screen called **Edit Availability Details** will then appear.]

1. Modify the **Edit Availability Details** screen (you can change the time you are available, check or uncheck auto accept etc).



The screenshot shows a modal window titled "Edit Availability Details" with a close button (X) in the top right corner. Inside the modal, there is a date input field showing "07/04/2015" with a calendar icon to its right. Below the date, it says "This is your current Shift: ANY SHIFT". Underneath, there is a label "Change availability to" followed by a dropdown menu currently set to "Any Shift". Below the dropdown, there is a checkbox labeled "Auto accept work request for this availability?" which is currently unchecked, with the word "Yes" next to it. At the bottom of the modal, there are two buttons: a red button labeled "Delete Availability" and a blue button labeled "Edit Availability".

1. Click the "Edit Availability" button.
2. If you wish to delete the offer, click instead the "Delete Availability" button.

\* You can also edit your work offer by clicking on the red flag that appears on your schedule.

! You can only edit availability – those that have not been accepted and appear as red flags. If you are scheduled for a shift, contact your manager directly to change your work schedule.

**Next Topic:** [Accept Shift Via Text >>](#)

# Accept Shift Via Text

---

[<< Edit Availability](#) | [Accept Shift Via Open Schedule >>](#)

## Accepting or Declining Work Offers Via Text

Most users provide a cell phone number in their [Details](#) to receive and accept open shifts.

If you have provided a cellphone number, ShiftMatch will send you a text message when an available shift matches your availability, skills and grade etc.

The shift request typically describes the date, time and location of the available shift.

You can accept the shift or simply ignore (decline) the text.

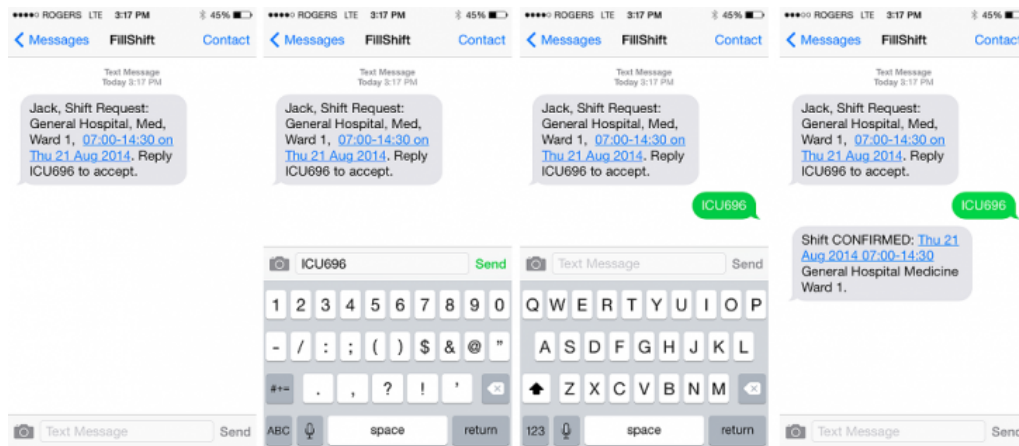
If you do not want the shift, simply do not reply to the text.

ShiftMatch will move on to the next available candidate for the shift.

To accept the shift:

1. Type in the unique code you received (eg: "ICU696 in the example below)
2. Send the reply text.

You will then receive a follow-up text notification from ShiftMatch that you have been confirmed for that shift.



If you reach your text messaging limit on your cell phone, no shift requests or confirmations will be delivered until you are able to receive your Texts.

We recommend that you regularly clear your texts to ensure uninterrupted service.

To decline the shift:

1. Ignore the text.
2. Do nothing.

! ShiftMatch uses unique ID numbers to automate the matching process. It is important you **ONLY SEND THE UNIQUE CODE** when you reply to a work request. The code is not CaPs sensitive. Anything else entered in your message (additional words, numbers, characters, etc.) will nullify the code and result in an error, preventing you from taking the available shift.

\* Are you receiving numerous shift requests matching two or more of your various offers at the same time? You can accept multiple requests with just one reply. Simply enter the first shift request ID, enter a space or a period, enter the next shift request ID, enter another space or period, and continue until all desired ID's have been entered.

! Once you are scheduled for a shift, you cannot change it through ShiftMatch. Please contact your Manager to make any changes or cancellations.

Once you have accepted a shift, it will show in green and as “Confirmed” in the shift details on your My Schedule page.

Full Shift

My Schedule

03:25PM | You are signed in as Helen | Logout | User Guide

### Schedule

Home / My Schedule / Schedule

Help

That shortfall has been added to your schedule.

Older

Sun 29 Mar - Sat 11 Apr

Next

Add Availability

SUN 29	MON 30	TUE 31	WED 01	THU 02	FRI 03	SAT 04	SUN 05	MON 06	TUE 07	WED 08	THU 09	FRI 10	SAT 11
			13:00						ANY				

Show Open Schedule

Post It Note

Work Schedule for Sun 29 Mar - Sat 11 Apr

Confirmed Shortfalls

Date	Shift	Location	Shortfall ID	Linked Shortfall	Add to Calendar
Wed 1 Apr 2015	13:00 - 21:00	Home / General Hospital / Maternity	IDD244		

My Availability

Date	Shift	Auto Accept	Edit
Tue 7 Apr 2015	Any		Edit

Add Availability

**Next Topic:** [Accept Shift Via Open Schedule >>](#)

# Accept Shift Via Open Schedule

[<< Accept Shift Via Text](#) | [Auto Accept Shift >>](#)

## Accepting Shift Via Show Open Schedule

The **Show Open Schedule** feature on the **Schedule** page allows you to view all possible shift assignments that have been posted by Management and you could work, if available.

You may not have been notified of some of these shifts if you haven't used [Place Availability to Work](#) for the specific day and time.

To view available shifts on the Open Schedule:

Click on the **Show Open Schedule** button feature located directly below the right-hand side of your schedule.

Schedule

03:25PM | You are signed in as Helen | Logout | User Guide

Home / My Schedule / Schedule

• That shortfall has been added to your schedule.

← Older Sun 29 Mar - Sat 11 Apr Next → Add Availability

SUN 29	MON 30	TUE 31	WED 01	THU 02	FRI 03	SAT 04	SUN 05	MON 06	TUE 07	WED 08	THU 09	FRI 10	SAT 11
			13:00						ANY				

Show Open Schedule Post It Note

Now, details of the Shortfalls currently available can be found in blue on the calendar and are listed below the “Open Schedule” section under your expanded schedule.

← Older Sun 29 Mar - Sat 11 Apr Next → Add Availability

SUN 29	MON 30	TUE 31	WED 01	THU 02	FRI 03	SAT 04	SUN 05	MON 06	TUE 07	WED 08	THU 09	FRI 10	SAT 11
			13:00						ANY				08:00

Hide Open Schedule Post it Note

Work Schedule for Sun 29 Mar - Sat 11 Apr

[Open Schedule](#) ←

Date	Shift	Location	Shortfall ID	Linked Shortfall	Accept
Sat 11 Apr 2015	08:00 - 16:00	Home / General Hospital / Emergency	IDD249		<a href="#">Accept</a>

✿ In the Open Schedule view, you can click on the blue link for a quick view of the shift, or find the full shift details below in the Open Schedule section.

You can accept a shift by clicking on the **Accept** option in the “Open Schedule” section.

Once you accept the shift, a green confirmation flag will appear in your schedule indicating you accepted the shift. The accepted shift will also appear in the list of “Confirmed” shifts.

You will also received a Text confirmation of the shift

\*\*\*\*\* ROGERS 3G 3:39 PM 51%

< Messages FillShift Contact

Text Message  
Today 3:39 PM

Shift [Sat 11 Apr 2015](#)  
[08:00 - 16:00](#)  
CONFIRMED. General  
Hospital Emergency .

Text Message Send

Q W E R T Y U I O P  
A S D F G H J K L  
↑ Z X C V B N M ↵  
. ? 1 2 3 space return

To close the Open Schedule view, click on “Hide Open Schedule” located below your schedule.

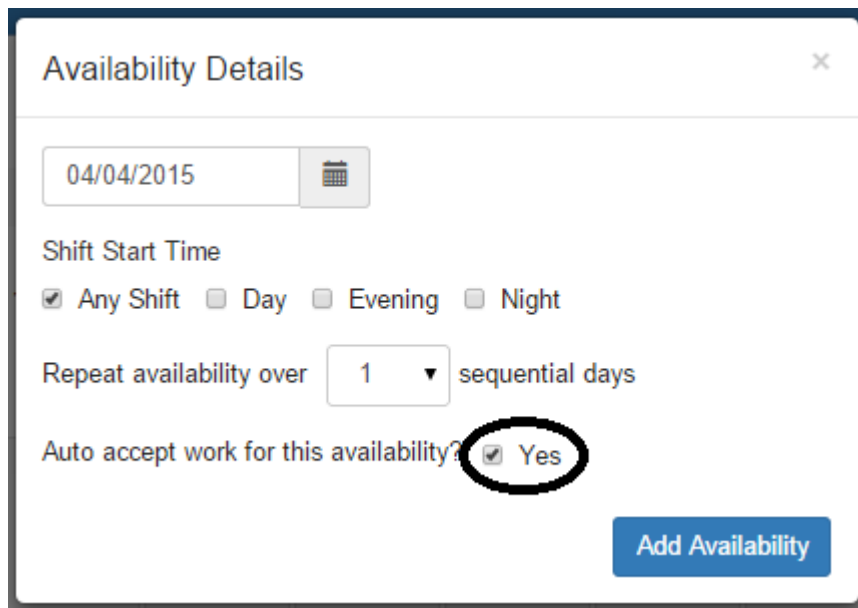
**Next Topic:** [Auto Accept Shift >>](#)

# Auto Accept Shift

[<< Accept Shift Via Open Schedule](#) | [Leave Post-It Note >>](#)

## h2. Auto Accepting Shifts

If you know that you will accept any work request that matches your offer to work, you can save time by checking the box next to **Auto Accept work for this availability** feature when you initially [Place your Availability to Work](#).



The screenshot shows a modal window titled "Availability Details" with a close button (X) in the top right corner. Inside the modal, there is a date input field showing "04/04/2015" with a calendar icon to its right. Below this is the "Shift Start Time" section with three radio buttons: "Any Shift" (checked), "Day", "Evening", and "Night". Underneath is a section for "Repeat availability over" with a dropdown menu set to "1" and the text "sequential days". At the bottom of the form is the question "Auto accept work for this availability?" followed by a checked checkbox and the word "Yes". This checkbox and the word "Yes" are circled in black. A blue button labeled "Add Availability" is located at the bottom right of the modal.

By checking **Auto Accept**, you will no longer receive a shift request message that requires you to respond and accept the shift.

That step is eliminated.

Instead, when a shift request matches your offer to work you will simply receive a confirmation text that confirms you for the shift and contains the relevant shift details.

**Next Topic:** [Leave Post-It Note >>](#)

# Leave Post-It Note

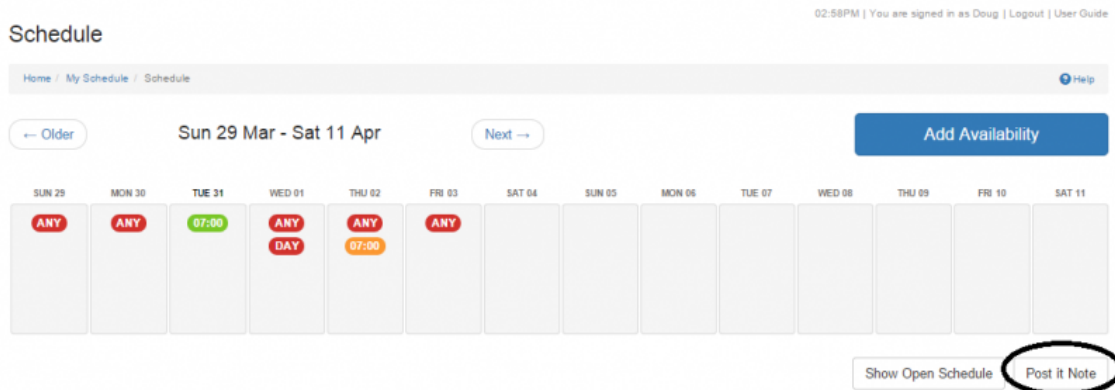
[<< Auto Accept Shift](#) | [My Schedule: Details – Editing Your ShiftMatch Profile >>](#)

## Post-It Notes

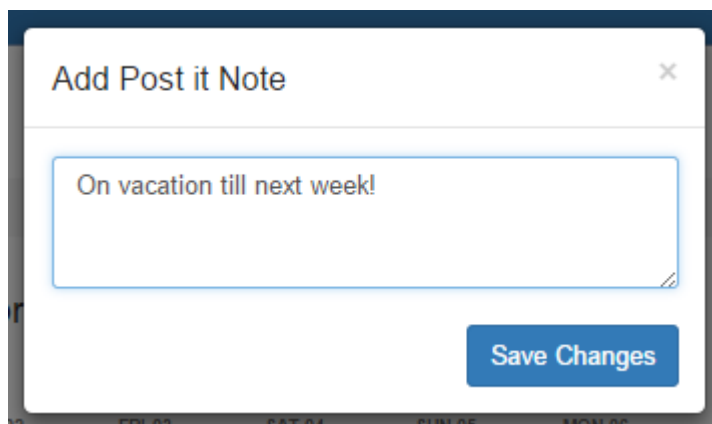
The **Post-It Note** option on the **Schedule** page allows you to leave a note for your managers, schedulers or administrators regarding your schedule availability. You can remind others of your upcoming vacation dates, temporary scheduling conflicts, or additional scheduling information.

To leave a Post-It Note:

Click on **Post-It Note**.



Type in your message.



Click **Save Changes**.

Your note will appear to your schedulers until you change or delete it.

Schedule Note: On vacation till next week!

03:05PM | You are signed in as Doug | Logout | User Guide

Home / My Schedule / Schedule Help

• That post it note has been updated. ×

← Older Sun 29 Mar - Sat 11 Apr Next → Add Availability

SUN 29	MON 30	TUE 31	WED 01	THU 02	FRI 03	SAT 04	SUN 05	MON 06	TUE 07	WED 08	THU 09	FRI 10	SAT 11
ANY	ANY	07:00	ANY DAY	ANY 07:00	ANY								

Show Open Schedule Post it Note

**Next Topic:** [My Schedule: Details – Editing Your ShiftMatch Profile >>](#)

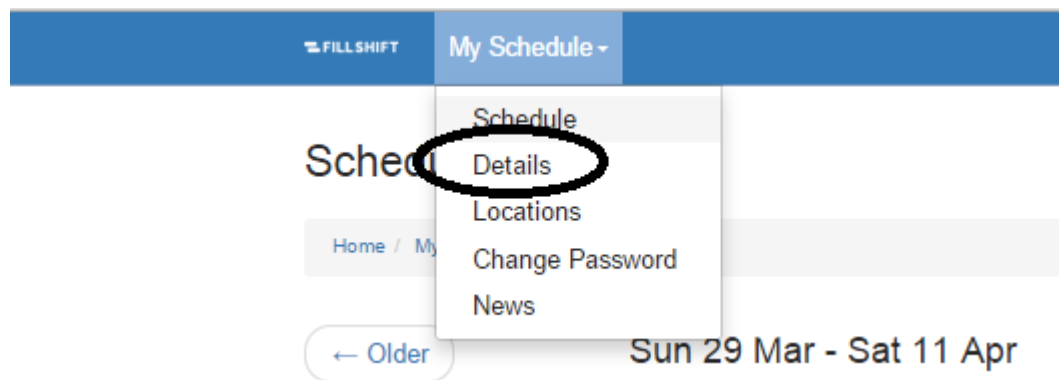
# My Schedule: Details – Editing Your ShiftMatch Profile

---

[<< Leave Post-It Note](#) | [My Schedule: Locations – Setting Work Preferences >>](#)

## My Details

The **Details** page on the **My Schedule** tab contains your ShiftMatch Profile.



This information is used to match you to open shifts, and is used by the ShiftMatch system to contact you for shift work requests.

Your initial profile will be set up for you by your employer.

04:56PM | You are signed in as Fred | Logout | User Guide

## Check Your Details

[Home](#) / [My Schedule](#) / [Check Your Details](#)[Help](#)

### Professional Details

Name	Fred Bloggs
Username	Fred
Registration	Rego #3
Grading	RN2 - RN 2nd Year
Skills	General, Aged Care, Bariatric, Dementia, Geriatric, Intubation, Maternity, Mental Health, Midwifery, Recovery, RN-Flexible Sigmoidoscopy, RN-Surgical First Assist, Tracheostomy
Emp Type	Casual
Max Messages	-- Unlimited Messages -- ▼
Do Not Disturb	<input type="checkbox"/> Check to turn on and block all non requested Text

### Personal Details

Cell	<input type="text" value="Cell"/>
Email	<input type="text" value="fredbloggs280@gmail.com"/>
Address 1	<input type="text" value="123 Workout Street"/>
Address 2	<input type="text" value="Address 2"/>
City	<input type="text" value="Toronto"/>
Province	<input type="text" value="ON"/>
Postal Code	<input type="text" value="m1m1m1"/>

[Update Details](#)

You should:

- Confirm the details of your Profile for accuracy.
- Add any additional information to allow ShiftMatch to work best for you.
- Update your contact information with your employer as appropriate.
- Contact your employer if your Skills, Grades or Employment Type should be updated.



To ensure you receive timely communications and work requests, make sure your cellphone number and email address are always up-to-date.

Most fields on the **Details** page you can update yourself. Those that are grayed out and can only be updated by managers. Please notify your manager of any mistakes in or changes needed to your ShiftMatch Profile.

Checking the **Do Not Disturb** box will block any shift requests on days where you have not placed availability. This is a handy feature if you plan a vacation etc.

**Max Messages** will limit your Text shift requests per day to the number selected.

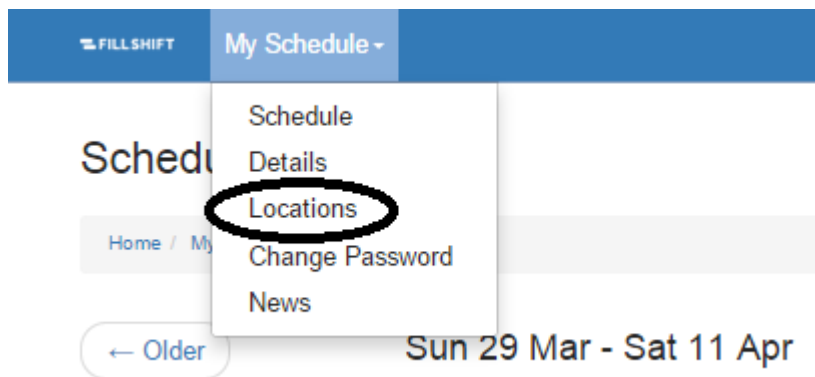
**Next Topic:** [My Schedule: Locations – Setting Work Preferences >>](#)

# My Schedule: Locations – Setting Work Preferences

[<< My Schedule: Details – Editing Your ShiftMatch Profile](#) | [My Schedule: Change Password >>](#)

## Locations

The **Locations** page on the **My Schedule** tab is where you specify the ShiftMatch Locations in which you desire to work.



To specify the Locations you are available:

1. Select the checkbox next to each location you wish to work.
2. Click the **“Update Locations”** button.

\* NOTE: The more Locations you select, the greater the chance of having shifts assigned to you.  
If a Location is not selected, no shift offers from that Location will be sent to you.  
This also means that if you choose to not select any Locations, you will not receive any shift offers.

[%ELLSHIFT](#) [My Schedule -](#)

03:32PM | You are signed in as Fred | [Logout](#) | [User Guide](#)

## My Locations

[Home](#) / [My Schedule](#) / [My Locations](#) [Help](#)

Choose where you want to work below

General Hospital	Select all Site sub-locations	Information
<input type="checkbox"/> Emergency		
<input checked="" type="checkbox"/> Maternity		
<input checked="" type="checkbox"/> Cardiology		

Update Locations

! If your ShiftMatch access allows you to uncheck a Location and clicked the Update Locations button, you will no longer see that Location in the Open Schedule or be eligible for those shift requests.

**Next Topic:** [My Schedule: Change Password >>](#)

# My Schedule: Change Password

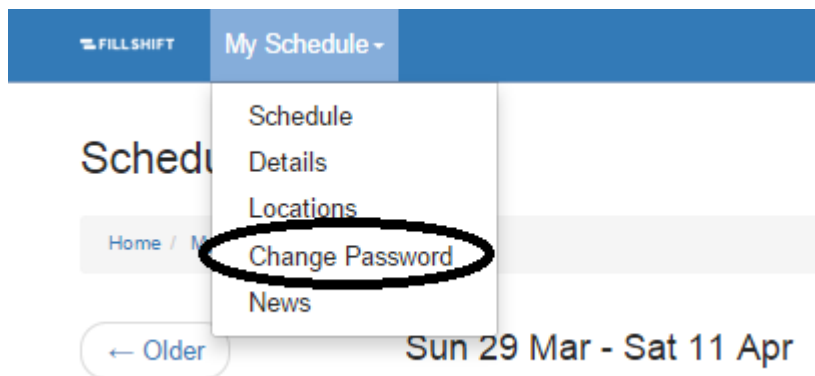
[<< My Schedule: Locations – Setting Work Preferences](#) | [My Schedule: News >>](#)

## Change Password

Your initial profile for ShiftMatch has been set up for you by your employer.

! When you first login to ShiftMatch, use the Username and default Password credentials provided to you.  
Once you have successfully logged in the first time, you will be required to change your Password.

You can change your password anytime on the **Change Password** page on the **My Schedule** tab:



1. Type in your **Old Password**.
2. Type in your desired **New Password**.
3. Confirm your **New Password** by retyping it.
4. Provide a **Password Hint**.
5. Click the "Update Details" button.

[%FULLSHIFT](#) [My Schedule -](#)

03:37PM | You are signed in as Fred | [Logout](#) | [User Guide](#)

## Change Password

[Home](#) / [My Schedule](#) / [Change Password](#) [Help](#)

Old Password	<input type="password"/>
New Password	<input type="password"/>
Confirmation Password	<input type="password"/>
Forgot Password Hint	<input type="text" value="Favourite Movie?"/>

Update Details

\* Remember: Passwords are cAsE sensitive, must contain at least one capital letter, and need to be at least 6 characters long.

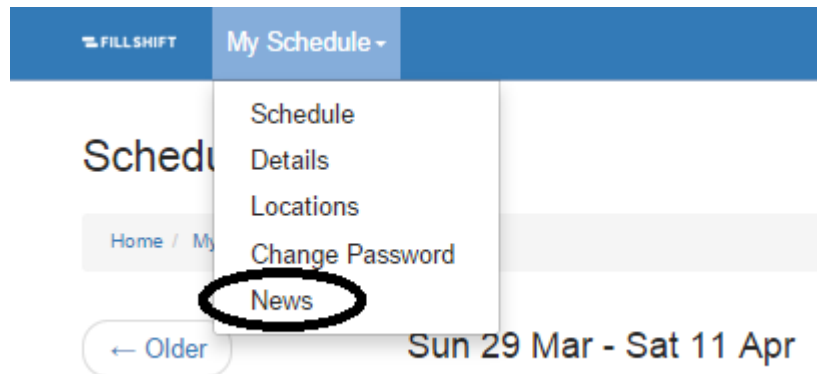
If you don't remember your Password, contact your manager or recover your Password by clicking the **Forgotten your Password?** link at ShiftMatch Login page.

**Next Topic:** [My Schedule: News >>](#)

# My Schedule: News

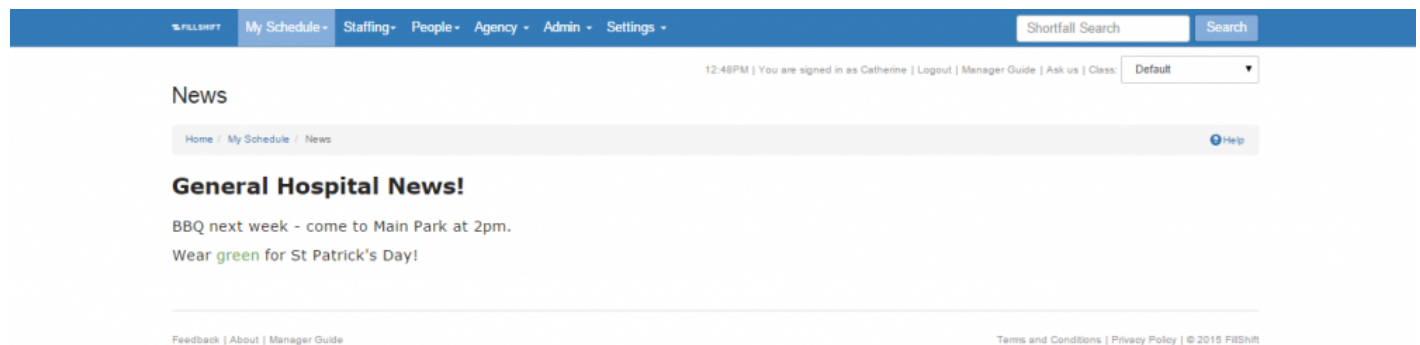
[<< My Schedule: Change Password](#) | [Staffing Tab Overview >>](#)

## News



The **News** page contains the latest company announcements and other pertinent work information and is updated regularly by Management.

Check the **News** page for for timely communication, company reminders and employer news.



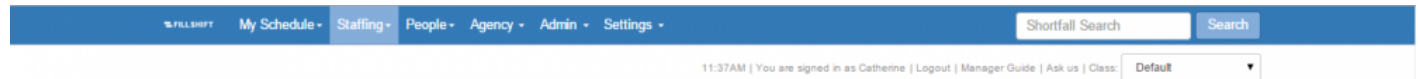
**Next Topic:** [Staffing Tab Overview >>](#)

# Staffing Tab Overview

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[<< My Schedule: News](#) | [Staffing: Schedule >>](#)

## Staffing



Managers automatically land on the **Staffing** tab after logging in with their username and password. This is where you can view weekly scheduling needs at each location, add requests for work when additional staff are necessary, and review work requests filled by outside agencies.

Depending upon individual permissions, the Staffing tab has up to eight pages:

- [Schedule](#)
- [Unfilled](#)
- [Agency](#)
- [Manager News](#)
- [Pre-Shift Balance](#)
- [Verification](#)
- [Exceptions](#)
- [External Payroll](#)

11:30AM | You are signed in as Catherine | Logout | Manager Guide | Ask us | Class: Default

Home / Staffing / Schedule

Filter Existing Shortfall

Home

Unfilled Filled

General Hospital

Choose a Division

Sun 29 Mar 2015 - Sat 11 Apr 2015

General Hospital / Emergency

SUN 29	MON 30	TUE 31	WED 01	THU 02	FRI 03	SAT 04	SUN 05	MON 06	TUE 07	WED 08	THU 09	FRI 10	SAT 11
EMERGENCY													
1/1	1/1	1/1	1/1	1/1	1/1	-	1/1	-	-	2/2	1/0	-	1/1
MATERNITY													
-	-	-	1/1	-	-	1/1	-	-	-	-	-	2/1	-
CARDIOLOGY													
-	-	-	1/1	-	-	-	-	1/1	2/2	1/0	-	-	-

General Hospital / Emergency Wed 01 Apr

Add New Shortfall

Next Topic: [Staffing: Schedule >>](#)

# Staffing: Schedule

[<< Staffing Tab Overview](#) | [Schedule View >>](#)

## Schedule

The **Schedule** page on the **Staffing** tab provides you with a weekly overview of staffing needs – available for each individual location.

The screenshot shows the ShiftMatch interface for the 'Schedule' page. At the top, there's a navigation bar with tabs: 'FILL SHIFT', 'My Schedule', 'Staffing', 'People', 'Agency', 'Admin', and 'Settings'. The 'Staffing' tab is active. To the right of the navigation bar is a 'Shortfall Search' box with a 'Search' button. Below the navigation bar, the page title 'Schedule' is displayed. A breadcrumb trail shows 'Home / Staffing / Schedule'. Below the breadcrumb, there's a 'Filter Existing Shortfalls' section with dropdown menus for 'Home', 'General Hospital', and 'Choose a Division'. There are also checkboxes for 'Unfilled', 'Filled', and 'Deadline Passed'. A date range selector shows 'Sun 29 Mar 2015 - Sat 11 Apr 201'. The main content area displays a weekly grid for 'General Hospital / Emergency' from Sunday 29 to Saturday 11. The grid shows staffing needs for three departments: EMERGENCY, MATERNITY, and CARDIOLOGY. Each cell in the grid contains a number representing the staffing need, with some cells highlighted in green (e.g., 1/1, 2/2, 1/0) and others in orange (e.g., 2/1). At the bottom of the grid, there's a button labeled 'Add New Shortfall'.

When a shift requires additional staff, you create a request for work – or a “**Shortfall**” – on the schedule. The Shortfall specifies the shift location, time and any specialized requirements needed by individuals to work the shift.

These Shortfall details allow ShiftMatch to find the best match for the open shift. With appropriate permissions, you can:

- [Add a Shortfall](#)
- [Edit a Shortfall](#)
- [Delete or Reinitialize a Shortfall](#)
- [Pre-Book a Shortfall](#)
- [Escalate a Shortfall](#)

**Next Topic:** [Schedule View >>](#)

# Schedule View

[<< Staffing: Schedule](#) [Add a Shortfall >>](#)

## Schedule View

The staffing schedule calendar is color coded for easy recognition of potential staffing problems.

When you add a new Shortfall, the date of the Shortfall will be shaded:

**orange** indicates that the day has **UNFILLED OPEN SHIFTS**.

Once all available shifts have been filled, the date will be shaded:

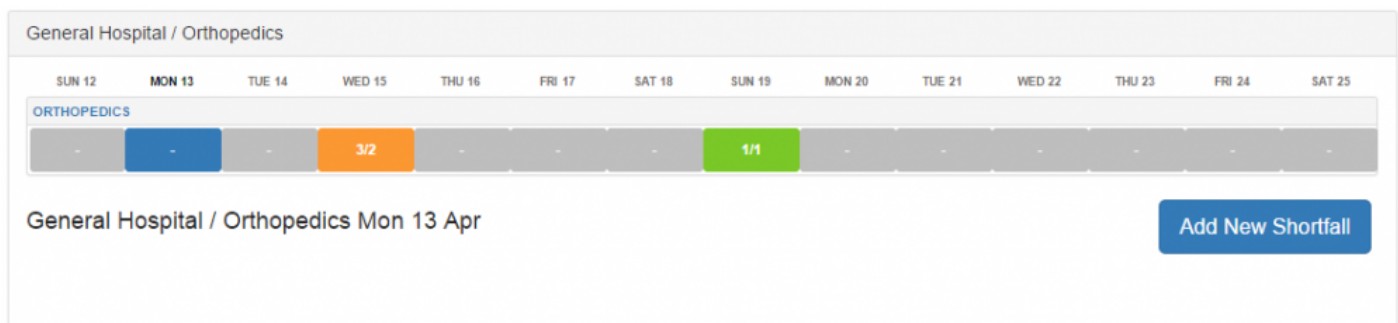
**green** indicates that the day has **ALL OPEN SHIFTS FILLED**.

A day will be **blue** if it is today or the day you have chosen.

! Two numbers will also appear on the date:  
i) the first number indicates the total number of open shifts for that day and  
ii) the second number indicates the number of shifts that have been successfully filled.

In the example below showing **3/2** in orange, there were **3 total shifts posted** and **2 of those shifts have been filled**.

In the example below showing **1/1** in green, there was **1 total shift posted** and **that shift has been filled**.



A summary of **Filled** and **Unfilled** Shortfalls appears below the calendar.

Click on the Shortfall ID to [View the Complete Shortfall](#) information or to [Edit a Shortfall](#).

Click on the **History** page link to explore an [Audit Trail](#) of the Shortfall transactions.

Click on the [Why Not](#) question mark link to explore why a particular individual was not matched to the Shortfall.

[Add a Shortfall >>](#)

# Add a Shortfall

[<< Schedule View](#) | [Add a Shortfall: Shortfall Details Tab >>](#)

## Adding A Shortfall

Anytime you have a work request to fill, you need to **Add A Shortfall** in the ShiftMatch System.

To Add A Shortfall:

1. Select the correct **Location** for the Shortfall.
2. Click on the specific **Date** you would like to add the Shortfall.
3. Click the “Add New Shortfall” button located below the calendar.

Add New Shortfall

4. A screen entitled **Add A New Shortfall** will then appear with up to four subsections you need to complete to specify the User you are looking for.
  - [Shortfall Details](#)
  - [User Requirements](#)
  - [Agency](#)
  - [Add Multiple Shortfalls across the Schedule Period](#)

The screenshot shows the 'Add A New Shortfall' page in the ShiftMatch system. At the top is a navigation bar with links: FULLSHIFT, My Schedule, Staffing (active), People, Agency, Admin, and Settings. There is a 'Shortfall Search' field and a 'Search' button. Below the navigation bar, the page title 'Add A New Shortfall' is displayed. A breadcrumb trail shows: Home / Staffing / Schedule / Add A New Shortfall. A help icon is also present. The main content area shows a calendar view for 'Mon Apr 6: General Hospital / Emergency'. Navigation buttons for 'Yesterday' and 'Tomorrow' are visible. Below the calendar, there are four tabs: 'Shortfall Details' (active), 'User Requirements', 'Agency', and 'Add Multiple Shortfalls across the Schedule Period'. At the bottom, there is a text input field 'How many matches will I get?', an 'Admin Force Insert' button, and an 'Add New Shortfall' button.

5. Click the “Add Shortfall” button.

The Shortfall will now appear on the staffing schedule calendar.



A **Rapidbook** is a shift with a pre-defined start time and end time, set skills and grades. When you select a Rapidbook option, the pre-inserted data is automatically filled in. You may be amend any or all pre-set details after the Rapidbook is chosen.

**Next Topic:** [Add a Shortfall: Shortfall Details Tab >>](#)

# Add a Shortfall: Shortfall Details Tab

---

[<< Add a Shortfall](#) | [Add a Shortfall : User Requirements Tab >>](#)

## Shortfall Details

The **Shortfall Details** tab allows you to define the appropriate information relevant to this Shortfall.

The requirements include:

- The ability to choose a [Rapidbook](#) or leave blank and simply nominate the Shortfall **Start Time** and **End Time**
- the minimum and maximum [Grade](#) desired for the Shortfall
- the **Reason** the Shortfall is required (useful later when assessing data re Shortfall occurrences)
- [Prebook](#) (if applicable) – manually placing a User in the Shortfall
- the **Maximum** number of **Messages** that ShiftMatch should send to fill this Shortfall
- if ShiftMatch should **use only people with availabilities** to fill this Shortfall or not
- any **Notes** relevant to the shift – these may then show on the work request or confirmation texts sent to workers
- **Duplicate Shortfall** – used to place 1 or multiple Shortfalls for this location and on this day and time
- **Notification Deadline** (the time in advance of the shift that Management should be notified if it is not filled)



If you check the box to **Set the deadline from the shortfall end**, the notification email from ShiftMatch will be triggered at the time the deadline is reached in comparison to the end of the Shortfall, rather than the beginning of the Shortfall.

Shortfall Details	
Load Rapidbook	Select a Saved Shortfall
Start - End Time	14:45 14:45
Min - Max Grades	Grade Grade
Reason Shortfall Required	Vacancy
Prebook User	
Maximum Messages	5 <input checked="" type="checkbox"/> Only use people with availabilities
Notes	Notes are added each time you save
Duplicate Shortfall	1
Additional Text	Maximum 30 characters
Notification Deadline	1 hour <input type="checkbox"/> Set the deadline from the shortfall end

## Shift Reminder

ShiftMatch can be automated to send a reminder Text to staff before their work assignments.



Contact your ShiftMatch account manager to discuss or activate the Shift Reminder feature.

If added, a Reminder Hours tab will be added to the Shortfall Details window (see below for an example).

Friday Jul 29: Lakeview / Emergency

Linked Shortfall Details IDW290

Linked Id

4

Start - End Time

11:30

21:30

Min - Max Grade

Reg Practical Nurs

RN 2nd Year

Location Level 4

☒ Any Room

☐ Clinic

Reason Shortfall Required

Vacancy

Prebook User

Predictive search ...

Up to How Many Messages

5

☒ Only use people with availabilities

0 messages sent.

Reminder Hours

0.0

Move to New Location

New location

Notes

Notes are added each time you save

Additional Text

Maximum 30 characters

Notification Deadline

15 minutes

☐ Set the deadline from the shortfall end

## External Reference

An External Reference field may be added to the Shortfall Details window and renamed appropriate to your workplace (eg: PO Number, Shift Code, Job Code etc)

Shortfall Details reports may also be filtered using this External Reference



Please contact your ShiftMatch account manager to discuss External Reference.

## Requested Grade

If appropriate, a Requested Grade tab may be added to the Shortfall Details window.

This provides an additional level of reporting on Grade performance for shortfall – ie; what was requested v

supplied.

This is just a reporting function, adding a Requested Grade will not prioritize that Grade above another.



Please contact your ShiftMatch account manager to discuss Requested Grade.

Shortfall Details			
Load Rapidbook	<div>Select a Rapidbook</div>		
Start - End Time	<div>08:00</div>	<div>🕒</div>	<div>08:00</div>
Min - Max Grade	<div>Choose a Grade</div>	<div>Choose a Grade</div>	<div>Choose a Grade</div>
Requested Grade	<div>Choose a Grade</div>		

**Next Topic:** [Add a Shortfall : User Requirements Tab >>](#)

# Add a Shortfall : User Requirements Tab

[<< Add a Shortfall: Shortfall Details Tab](#) | [Add a Shortfall: Agency >>](#)

## User Requirements

**User Requirements** are necessary to define the attributes required by the User(s) who will match the Shortfall.

The four items included here are:

- [Ratings](#), if applicable
- [Employment Type](#)
- [Skills](#) required

(NB: in order for a Shortfall to match a User, ALL skills checked off on this screen will need to be held by that User)

- [Pools](#), if applicable

The screenshot shows the 'User Requirements' form with the following fields and options:

- Minimum Rating:** A dropdown menu set to 'Level 1 \*'.
- Employment Type:** Radio buttons for ☒ Casual, ☐ Full Time, and ☐ Part Time.
- Skills Required:** A list of skills with checkboxes: ☒ General, Banking, Education, Fitness, Medicine, Production, Emergency, Surgical, Aged Care, Maternity, and Psych.
- Pools:** Radio buttons for ☐ A Team, ☒ Default, ☐ Late Night Preferred, and ☐ Weekend Only.

**Next Topic:** [Add a Shortfall: Agency >>](#)

# Add a Shortfall: Agency

[<< Add a Shortfall : User Requirements Tab](#) | [Add Multiple Shortfalls or Linked Shortfalls >>](#)

## Agency

To enter a Shortfall and make it immediately available to Agencies:

1. Click on **Add New Shortfall**
2. Enter in all the relevant details for the Shortfall in [Shortfall Details](#) tab
3. Enter in all the relevant details for the Shortfall in [User Requirements](#) tab
4. Enter in all the relevant details for the Shortfall in [Add Multiple Shortfalls across the Schedule Period](#) tab
5. Click on the **Agency** tab and check the box here next to: **Immediately open to all agencies**

If the Agency worker's name is known, the data may be completed here.

Agency

Open to All Agencies

☐ Immediately open to all agencies

Externally Filled By

No Agency

External Staff Name




Staff Name

External Staff Grade

External Grade

The Shortfall will now be released to the Agency(ies) via the protocols established within ShiftMatch.

On the **Staffing > Schedule** page, if you click on the Shortfall and it is still Unfilled, it will show, as below, with a check mark under the **Agency** column.

Unfilled										
Shortfall ID ¶	Shift ¶	Dept ¶	TXT ¶	History	Grading ¶	Agency ¶	Updated ¶	Why Not?	Admin Edit	Delete
IDE411	16:00 - 22:00		0		RN1-RN2		16/04/2015 10:01		<a href="#">Edit</a>	<a href="#">Delete</a>

**Next Topic:** [Add Multiple Shortfalls or Linked Shortfalls >>](#)

# Add Multiple Shortfalls or Linked Shortfalls

---

[<< Add a Shortfall: Agency](#) | [Add a Rapidbook Shortfall via Text >>](#)

## Add Multiple Shortfalls across the Schedule Period

To add a Shortfall across multiple days or periods, do the following:

1. Click on **Add New Shortfall**
2. Enter in all the relevant details for the Shortfall in [Shortfall Details](#) tab
3. Enter in all the relevant details for the Shortfall in [User Requirements](#) tab
4. Enter in all the relevant details, if any, for the Shortfall in [External](#) tab
5. Click on the **Add Multiple Shortfalls across the Schedule Period** tab and change the 0s to the number of Shortfalls to be added in each day.
6. Change the start and end times in the time boxes below each day if you require a different start and end times than entered in the shortfall above. If no differing start time is required leave the boxes below each day as the default.

In the example below, we are adding a Shortfall with the same parameters once to each of Saturday 23th, Sunday 24th and Tuesday 26th, all with differing start times.

CASCOM
My Roster
Staffing
People
Agency
Admin
Settings
User
Shortfall Search
Search

Shortfall Details
User Requirements
External

Add multiple Shortfalls across the Roster period

Load Rapidbook
AM (880AM)

Enter the number of shortfalls per day

MON 18	TUE 19	WED 20	THU 21	FRI 22	SAT 23	SUN 24	MON 25	TUE 26	WED 27	THU 28	FRI 29	SAT 30	SUN 31
0	0	0	0	0	1	1	0	1	0	0	0	0	0
10:45	10:45	10:45	10:45	10:45	07:00	07:30	10:45	09:00	10:45	10:45	10:45	10:45	10:45
10:45	10:45	10:45	10:45	10:45	15:30	16:00	10:45	17:00	10:45	10:45	10:45	10:45	10:45

☐ Link these shortfalls together (only applicable to single shortfall days) - users will accept the entire block of linked shortfalls

Repeat these shortfalls over multiple roster periods
1 roster period

How many matches will I get?
Admin Force Insert
Add New Shortfall



You can repeat the same two-week pattern for multiple periods by typing in the desired number of two-week repetitions in **Repeat these shortfalls over multiple schedule periods**.

Click on the “Add New Shortfall” button at the bottom of the page.  
The Shortfall(s) will now appear on the staffing schedule calendar.

## Linked Shifts

If you need to link multiple shifts together such that you require that they should all be accepted by one person, follow the Add Multiple Shortfalls procedure (above), check the **Link these shortfalls together** checkbox.

If a User matches with one of the shifts, they are offered all the Linked Shifts and, if they accept, will be accepting all the Linked Shifts at once.

By default, if times of one of the unfilled Linked Shifts is changed, ShiftMatch will unlink the shifts. There will be a pop up window warning with a Cancel or Continue option before this occurs.



Please contact your ShiftMatch account manager if you wish to default to maintaining links, even if changing Linked Shift times.

**Next Topic:** [Add a Rapidbook Shortfall via Text >>](#)

# Add a Rapidbook Shortfall via Text

[<< Add Multiple Shortfalls or Linked Shortfalls](#) | [Add a Split Shortfall >>](#)

## Add a Rapidbook Shortfall via Text

To add a Shortfall via Text you will need to know the Rapidbook Shortfall Code. To find it:

1. Click on **Settings** > **Locations** and choose the relevant Level 3 Location
2. Click **Edit** and then the **Location Rapidbooks** tab
3. The existing Rapidbooks are listed with their codes, see below where the relevant code is “30473AMCC”

10:20AM | You are signed in as Catherine | Logout | Manager Guide | Ask us | Class: Default

Location Edit : Emergency

Canadian Demo Home / Settings / Locations / Location Edit : Emergency

General Location Settings

Additional Location Settings

Location Rapidbooks

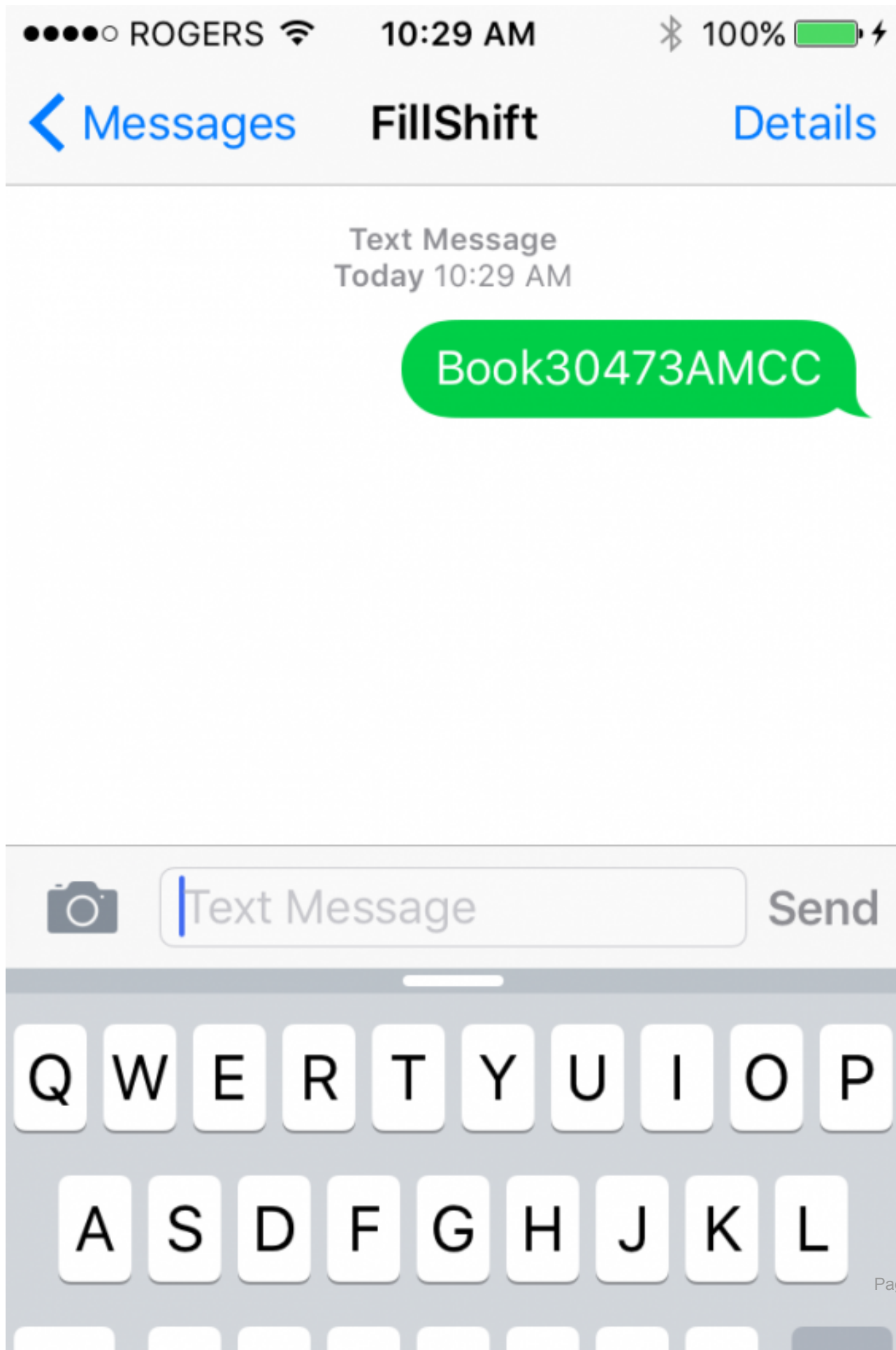
Current Rapidbooks are listed below for the location Emergency.

Description ID	Text Shortfall Code ID	Edit	Delete
AMCC	30473AMCC	<a href="#">Edit</a>	<a href="#">Delete</a>
FT Morning	30473FT Morning	<a href="#">Edit</a>	<a href="#">Delete</a>
PM CC	30473PM CC	<a href="#">Edit</a>	<a href="#">Delete</a>

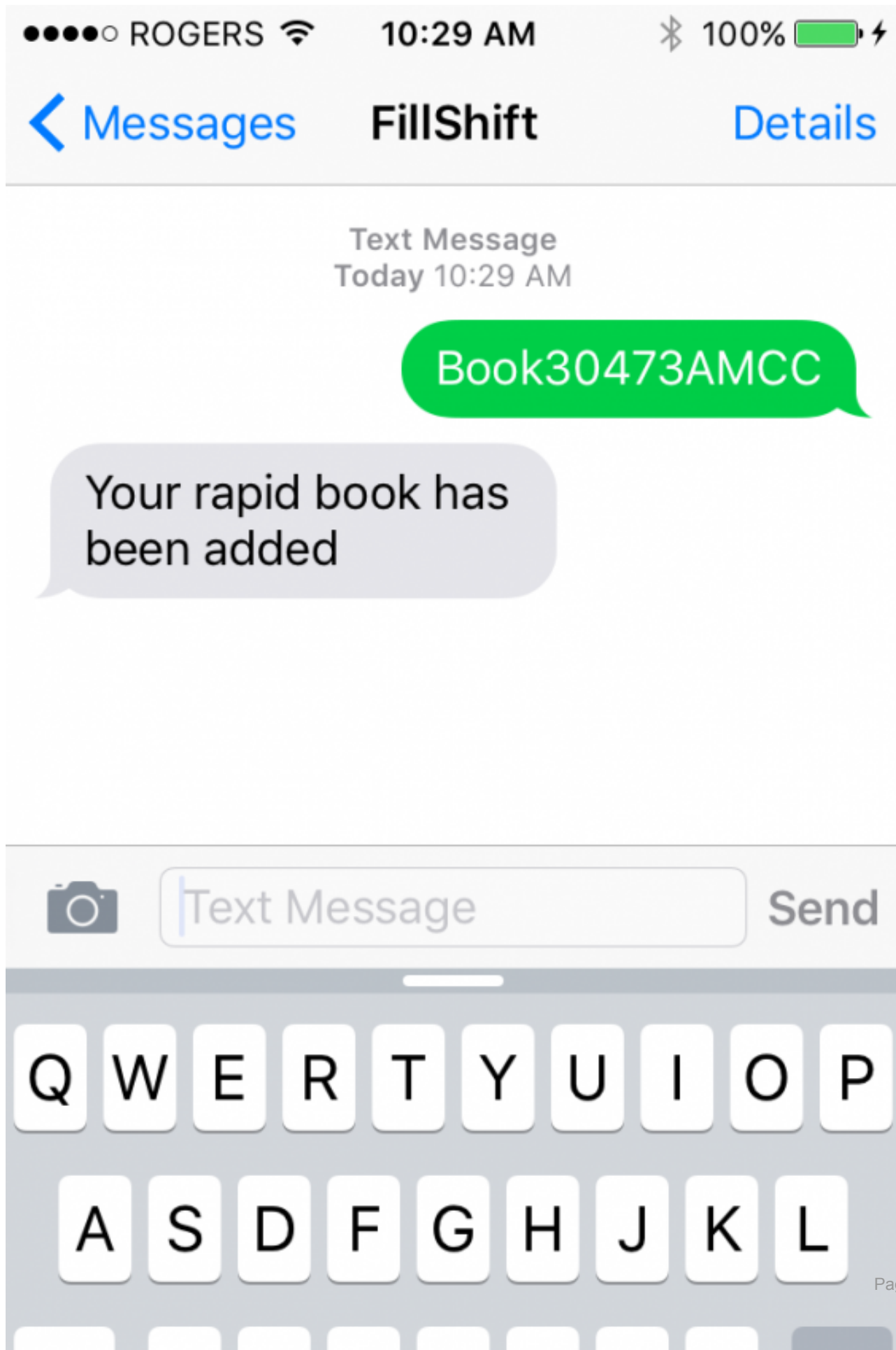
[Create a new Rapidbook](#)

[Update Location](#)

Text to ShiftMatch “Book[RapidbookCode]”, in this example “Book30473AMCC”



If successful, ShiftMatch will text back confirmation of success



**Next Topic:** [Add a Split Shortfall >>](#)

# Add a Split Shortfall

---

[<< Add a Rapidbook Shortfall via Text](#) | [Add a Split Shortfall: Shortfall Details Tab >>](#)

## Adding A Split Shortfall

A Split Shortfall refers to two separate but connected work periods on the same day.

*For example*, in a childcare environment, staff may be required to work 7.30am-9am for the before school period and then 3.30pm-6pm for the after school period.

Alternately, aged care providers may be required to attend a client's house at 8.30am-11am to feed and clean at breakfast and again at 4pm-7pm to handle medications and dinner.



If your workplace requires the ability to place and fill Split Shortfalls, you will need to notify your ShiftMatch Administrator to enable the activation of the appropriate tabs within the system.

Once activated, to Add A Split Shortfall:

1. Select the correct **Location** for the Shortfalls.
2. Click on the specific **Date** you would like to add the Shortfalls.
3. Click the “**Add New Shortfall**” button located below the calendar.

Add New Shortfall

4. A screen entitled **Add A New Shortfall** will then appear with up to four subsections you need to complete to specify the User you are looking for.
  - [Shortfall Details](#)
  - [User Requirements](#)
  - [Agency](#)
  - [Add Multiple Shortfalls across the Schedule Period](#)

02:58PM | You are signed in as Catherine | Logout | Manager Guide | Ask us | Class: Default

## Add A New Shortfall

Home / Staffing / Schedule / Add A New Shortfall

← Yesterday Mon Apr 6: General Hospital / Emergency Tomorrow →

Shortfall Details
User Requirements
Agency
Add Multiple Shortfalls across the Schedule Period

How many matches will I get? Admin Force Insert Add New Shortfall

5. Click the “Add Shortfall” button.

The Shortfalls will now appear on the staffing schedule calendar.

✿ A **Rapidbook** is a shift with a pre-defined start time and end time, set skills and grades. Rapidbooks may be established for Split Shortfall parameters. When you select a [Rapidbook](#) option, the pre-inserted data is automatically filled in. You may be amend any or all pre-set details after the Rapidbook is chosen.

! Split Shortfalls are connecting shifts on one day only. Split Shortfalls may not be Linked across multiple days.

**Next Topic:** [Add a Split Shortfall: Shortfall Details Tab >>](#)

# Add a Split Shortfall: Shortfall Details Tab

---

[<< Add a Split Shortfall](#) | [Edit a Split Shortfall >>](#)

## Shortfall Details (with Split Shortfall enabled)



Split Shortfalls will be offered as a “block” to appropriate staff. If they accept one of the Split Shortfalls, they are accepting both sides.  
Staff need to place **ANY** availability to match to Split Shortfalls.

The **Shortfall Details** tab allows you to define the appropriate information relevant to this Shortfall.

The requirements include:

- The ability to choose a [Rapidbook](#) or leave blank. Rapidbooks can be established to pre-fill Split Shortfall parameters
- To nominate the first part of the Split Shortfall **Start Time** and **End Time**
- When **Split Shortfall** functionality is enabled, **Start – End Time:Split Shortfall** will also show. Add in here the time parameters for the second part of the Split Shortfall
- the minimum and maximum [Grade](#) desired for the Shortfall
- the **Reason** the Shortfall is required (useful later when assessing data re Shortfall occurrences)
- [Prebook](#) (if applicable) – manually placing a User in the Shortfall
- the **Maximum** number of **Messages** that ShiftMatch should send to fill this Shortfall
- if ShiftMatch should **use only people with availabilities** to fill this Shortfall or not
- any **Notes** relevant to the shift – these may then show on the work request or confirmation texts sent to workers
- **Duplicate Shortfall** – used to place 1 or multiple Shortfalls for this location and on this day and time
- **Notification Deadline** (the time in advance of the shift that Management should be notified if it is not filled)

Shortfall Details

Load Rapidbook

Select a Rapidbook

Start - End Time

08:00

11:00

Start - End Time: Split Shortfall

14:00

18:00

Min - Max Grade

Teacher

Teacher

Unit

☐ Any Unit
 ☐ Infant
 ☐ Toddler
 ☒ PreSchool

Reason Shortfall Required

Sick

Prebook User

Predictive search ...

Maximum Messages

5

☒ Only use people with availabilities

Duplicate Shortfall

1

Notes

Notes are added each time you save

Additional Text

Maximum 30 characters

Notification Deadline

1 hour

☐ Set the deadline from the shortfall end

Job Code

Job Code Identifier



If both sides of a connected Split Shift cannot be filled by one person, they can be separated and offered as unconnected Shifts. See [Edit Split Shortfall](#)

**Next Topic:** [Edit a Split Shortfall >>](#)

# Edit a Split Shortfall

[<< Add a Split Shortfall: Shortfall Details Tab](#) | [View and Edit Shortfall >>](#)

## Edit a Split Shortfall



Connected Split Shifts are annotated by a **paperclip** icon. Click on the icon to see the Split Shortfall ID number.

Connected Shifts will have the same Split Shortfall ID number.

To edit an Unfilled Split Shift, click the **Edit** button on the appropriate Shift.

Unfilled										
Delete	Shortfall ID	Shift	Grade	Unit	TXT	History	Agency	Updated	Why Not?	Admin Edit
	IDW553	08:00 - 11:00	Teacher-Teacher	PreSchool	0			20/10/2016 11:35		
										<b>Edit</b>
	IDW554	14:00 - 18:00	Teacher-Teacher	PreSchool	0			20/10/2016 11:35		
										<b>Edit</b>
										<b>Delete</b>

Once the edited Shift is open, you will be able to edit the details as normal.

Additionally, you will see a **Maintain Link** checkbox which will give you the option to disconnect the two Split Shifts, if appropriate.

Split Shortfall Details IDW553

Split Id	62
Maintain Link	<input checked="" type="checkbox"/> Checking this box allows this Shortfall to stay linked
Start - End Time	08:00 11:00
Min - Max Grade	Teacher Teacher
Location Level 4	<input type="radio"/> Any Unit <input type="radio"/> Infant <input type="radio"/> Toddler <input checked="" type="radio"/> PreSchool
Reason Shortfall Required	Sick
Prebook User	Predictive search ...
Up to How Many Messages	5 <input checked="" type="checkbox"/> Only use people with availabilities 0 messages sent.
Move to New Location	New location

If Split Shifts are disconnected, ShiftMatch will match and offer these Shifts to staff as independent work units.

! Once disconnected, Split Shifts **cannot** be re-linked.

**Next Topic:** [View and Edit Shortfall >>](#)

# View and Edit Shortfall

---

[<< Edit a Split Shortfall](#) | [View and Edit Unfilled Shortfall >>](#)

## View and Edit Shortfall

To view a Shortfall, click on the day or the Shortfall and the Shortfall ID link under the “Filled” or “Unfilled” list.

Alternately, click on the blue **Edit** button next to the Shortfall.

[View and Edit Unfilled Shortfall](#)

[View and Edit Filled Shortfall](#)

**Next Topic:** [View and Edit Unfilled Shortfall >>](#)

# View and Edit Unfilled Shortfall

[<< View and Edit Shortfall](#) | [View and Edit Filled Shortfall >>](#)

## View and Edit Unfilled Shortfall

To view an Unfilled Shortfall, click on the day or the Shortfall and the Shortfall ID link under the “Unfilled” list.

Alternately, click on the blue **Edit** button next to the Shortfall.

The screenshot shows the 'Schedule' page in the ShiftMatch Canada Manager Guide. The top navigation bar includes links for 'My Schedule', 'Staffing', 'People', 'Agency', 'Admin', and 'Settings'. A 'Shortfall Search' bar is also present. The main content area is titled 'Schedule' and shows a calendar view for the period from Sun 29 Mar 2015 to Sat 11 Apr 20. The calendar is filtered for 'General Hospital' and 'Emergency'. Below the calendar, there is a table of 'Unfilled' shortfalls. The table has columns for Shortfall ID, Shift, Dept, TXT, History, Grading, Agency, Updated, Why Not?, Admin Edit, and Delete. A sample row shows Shortfall ID 100251, Shift 08:00 - 18:00, Dept 1, and a status of 'Unfilled'. There are 'Add New Shortfall' buttons at the bottom of the calendar and table sections.

This will open up the detail of the entire Shortfall parameters, sample below, which may be amended and re-saved by clicking **Update Shortfall**

My Shift - My Schedule - **Staffing** - People - Agency - Admin - Settings

Shortfall Search Search

Shortfall Details ID0251

Start - End Time

08:00 16:00

Min - Max Grades

Reg Practical Nu Nurse Practitioner

Reason Shortfall Required

Sick

Prebook User

Up to How Many Messages

5

☒ Only use people with availabilities

1 messages sent.

Move to New Location

New location

Additional Information

Notes are added each time you save. Ticking checkbox deletes a note. Maxlength of 250 characters

☐ Harry sick : Harriet Manager 27/03/2015 14:37

Additional Text

Maximum 30 characters

Notification Deadline

15 minutes

☐ Set the deadline from the shortfall end

User Requirements

Agency

How many matches will I get?

Admin Force Update Update Shortfall

Any changes will automatically be updated within ShiftMatch search parameters and in all information viewable by staff.

**Next Topic:** [View and Edit Filled Shortfall >>](#)

# View and Edit Filled Shortfall

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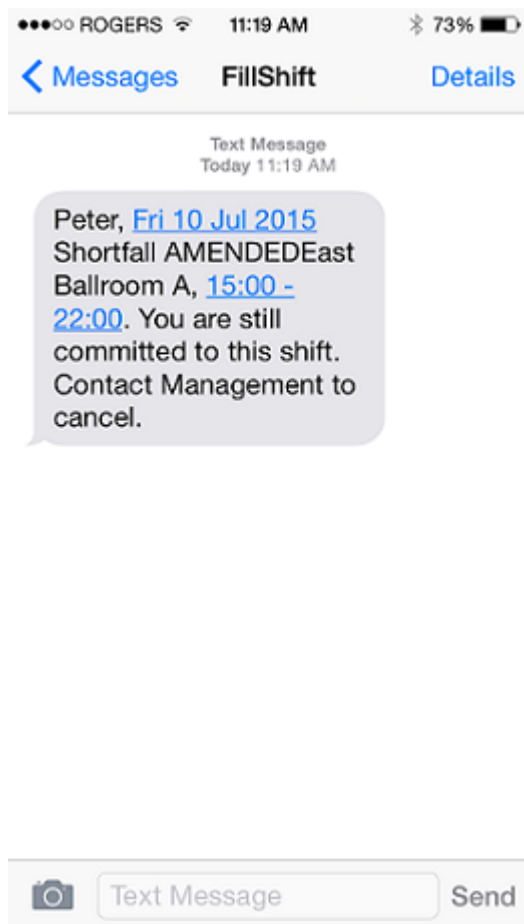
[<< View and Edit Unfilled Shortfall](#) | [Delete or Reinitialize a Shortfall >>](#)

## View and Edit Filled Shortfall

To view a Filled Shortfall, click on the day or the Shortfall and the Shortfall ID link under the “Filled” list. Alternately, click on the blue **Edit** button next to the Shortfall.

## Change Parameters of the Filled Shortfall

If a Shortfalls details change (eg: start time or location etc), and you update the information within ShiftMatch, ShiftMatch will then automatically send a text and/or email (if both contact details are updated in Details) to the worker with the new information.



The green tab on the worker's My Schedule will also be updated with the new information.

The worker is still committed to the Shortfall.

If the worker now cannot work due to the change, they must contact Management to have you cancel them out of the Shortfall.

See [Delete or Reinitialize a Shortfall](#)

**Next Topic:** [Delete or Reinitialize a Shortfall >>](#)

# Delete or Reinitialize a Shortfall

[<< View and Edit Filled Shortfall](#) | [Prebook or Manual Match >>](#)



Not all Users have the necessary access to **Delete** or **Reinitialize** a Shortfall. If you do not see the delete options detailed below, you will need to escalate the issue to Management.

## Deleting or Reinitializing A Shortfall



**Delete** = Removes both the User and the Shortfall.

**Reinitialize** = Removes the current User assigned to work the Shortfall, but keeps the Shortfall itself.

The Shortfall will now appear on the scheduling calendar as unfilled, and ShiftMatch will begin the search process again.

## Deleting An Unfilled Shortfall

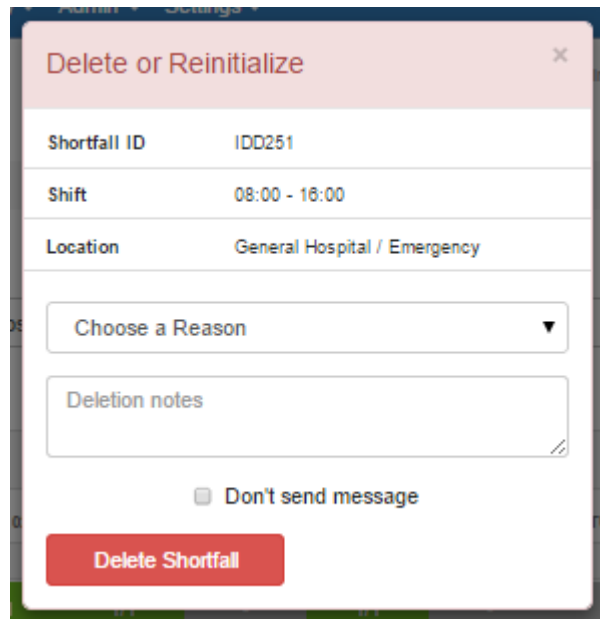
To Delete an Unfilled Shortfall:

1. On the scheduling calendar, click on the date of the shift Shortfall you want to delete.  
[A list of all **Daily Shortfall Details** will appear below the calendar.]
2. Find the Shortfall you would like to delete, and click on the specific **Delete** button next to that Shortfall assignment.

### Unfilled

Shortfall ID	Shift	Dept	TXT	History	Grading	Agency	Updated	Why Not?	Admin Edit	Delete
IDD251	08:00 - 16:00		1		RPN-NP		27/03/2015 14:37		<a href="#">Edit</a>	<a href="#">Delete</a>

3. Complete the information to **Delete** the Shortfall, including:
  - the reason for the deletion
  - relevant notes or other pertinent information
  - whether to send a message re the now deleted shift (if applicable)



The screenshot shows a modal window titled "Delete or Reinitialize" with a close button (X) in the top right corner. The form contains the following fields and controls:

- Shortfall ID:** IDD251
- Shift:** 08:00 - 16:00
- Location:** General Hospital / Emergency
- Choose a Reason:** A dropdown menu.
- Deletion notes:** A text area for additional notes.
- ☐ **Don't send message**
- Delete Shortfall:** A red button at the bottom.

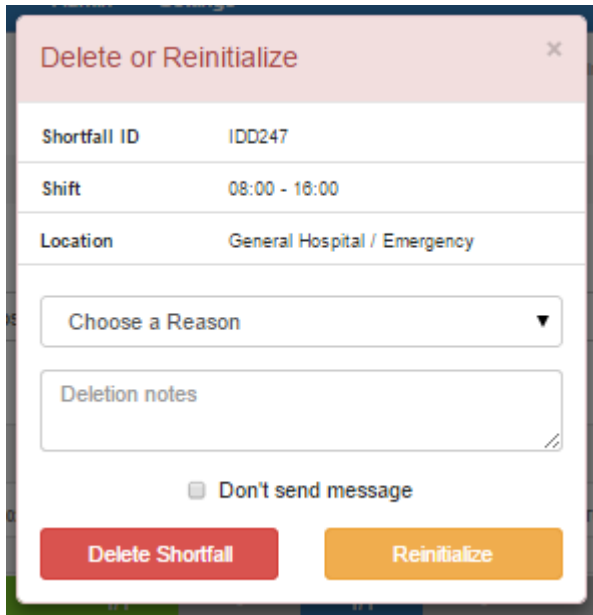
4. Click the "Delete Shortfall" button at the bottom of the page.

The Shortfall is now deleted, and will no longer be seen on the staffing schedule calendar.

## Deleting or Reinitializing a Filled Shortfall

- \* **Delete** = Removes both the User and the Shortfall.  
**Reinitialize** = Removes the current User assigned to work the Shortfall, but keeps the Shortfall itself.  
The Shortfall will now appear on the scheduling calendar as unfilled, and ShiftMatch will begin the search process again.

1. On the scheduling calendar, click on the date of the Shortfall you want to delete or reinitialize.  
[A list of all **Daily Shortfall Details** will appear below the calendar.]
2. Find the Shortfall you would like to delete or reinitialize, and click on the specific **Delete** button of that Shortfall assignment.



3. Complete the information to **Delete or Re-Initialize** the Shortfall, including:
  - the reason for the deletion
  - relevant notes or other pertinent information
  - whether to send a message to the person scheduled to work the now deleted shift (if applicable)
4. Click the “Delete Shortfall” or “Reinitialize” button at the bottom of the page.

If you clicked **Delete Shortfall**, the Shortfall is now deleted, and will no longer be seen on the staffing schedule calendar.

If you clicked **Reinitialize**, the User has been removed from the Shortfall and ShiftMatch will re-start the process of matching another user and filling the Shortfall.

## Deleting or Reinitializing Multiple Shortfalls



**Delete** = Removes both the User and the Shortfall.

**Reinitialize** = Removes the current User assigned to work the Shortfall, but keeps the Shortfall itself.

The Shortfall will now appear on the scheduling calendar as unfilled, and ShiftMatch will begin the search process again.

1. On the Schedule page, check the appropriate boxes to the left of the Shortfalls you would like to delete

2. A yellow box will appear below and provide options related to the Deletion or Reinitialization of the Shortfalls.
3. Complete the box with your choices and click the appropriate **Delete** or **Reinitialize** button

**Unfilled**

Delete	Shortfall ID	Shift	Grade	Division	Dept	Worktype	Skill	TXT	History	Agency	Order Pos	Updated	Why Not?	Admin Edit	Delete
<input checked="" type="checkbox"/>	LYA933	06:00 - 10:00	Teacher-Teacher	MBS				0				05/08/2016 04:36		<a href="#">Edit</a>	<a href="#">Delete</a>
<input checked="" type="checkbox"/>	LYA934	15:00 - 19:00	Teacher-Teacher	MBS				0				05/08/2016 04:36		<a href="#">Edit</a>	<a href="#">Delete</a>

[Add New Shortfall](#)

**Delete or re-initialize**

Please fill in all the fields so that we can delete multiple shortfalls.

**Don't Send Message** ☐

**Penalty** ☐

**Deletion Reason** Choose a Reason ▼

**Sms Message**

Cancellation Information

[Delete](#)
[Re-Initialize](#)

**Next Topic:** [Prebook or Manual Match >>](#)

# Prebook or Manual Match

[<< Delete or Reinitialize a Shortfall](#) | [Shift Swap >>](#)

## Prebooking A Shortfall – also known as Manual Match

You may wish to select a specific person to fill a Shortfall.

The process of filling a Shortfall with a designated User in ShiftMatch is known as a **Prebook**.

To Prebook a Shortfall:

1. On the scheduling calendar, click on the date of the Shortfall you would like to Prebook.  
[A list of all **Daily Shortfall Details** will appear below the calendar under **Unfilled** sub-heading.]
2. Find the Shortfall you would like to pre-book and click on the specific **ID** or **Edit** button of that Shortfall assignment.
3. Next to **Prebook User**, type the name of the person you wish to fill the shift and a list of matching Users will be generated.

Thursday Apr 9: General Hospital / Emergency

Shortfall Details IDD251

Start - End Time

08:00 16:00

Min - Max Grades

Reg Practical Nu Nurse Practioner

Reason Shortfall Required

Sick

Prebook User

Frank

Up to How Many Messages

5

☒ Only use people with availabilities

1 messages sent.

Move to New Location

New location

Additional Information

Notes are added each time you save. Ticking checkbox deletes a note. Maxlength of 250 characters

☐ Harry sick : Harriet Manager 27/03/2015 14:37

Additional Text

Maximum 30 characters

Notification Deadline

15 minutes

☐ Set the deadline from the shortfall end

4. Select the specific person you wish to fill the shift.

- Click the “Update Shortfall” button near the bottom of the page.

If there is any conflict with the person selected in the Prebook User search (such as the individual is already scheduled to work or is not qualified for the shift), a red error box will display the reason that person cannot fill the Shortfall.

- The employment type does not match the shortfall requirements.
- The user has excluded this location and cannot work in that area.

The Shortfall – and the person you selected to fill it – will now be reflected in the staffing schedule calendar and a confirmation text will be sent to the User.

✿ You can also Prebook someone when you **Add A New Shortfall** by following the **Prebook User** instructions from above.

## Prebook Multiple Shortfalls

To Prebook (or place a specific User in multiple shifts at once):

- Click on **Add New Shortfall**.
- Complete the Shortfall Details, including the name of the Prebook User.
- Complete the **User Requirements**, **Agency** (if applicable) and then click on to open the **Multiple Shortfalls across the Schedule Period** tab.
- Add in 1 on each date you want to add the Shortfall filled by the Prebook User

The screenshot shows the 'Add Multiple Shortfalls across the Schedule Period' form. At the top, there's a navigation bar with tabs: My Schedule, Staffing, People, Agency, Admin, and Settings. Below this, there's a 'Shortfall Search' field and a 'Search' button. The form itself has a header 'Add Multiple Shortfalls across the Schedule Period'. Underneath, there's a 'Load Rapidbook' section with a dropdown menu 'Select a Saved Shortfall'. Below that, there's a section 'Enter the number of shortfalls per day' with a row of input boxes for each day of the week: SUN 29, MON 30, TUE 31, WED 01, THU 02, FRI 03, SAT 04, SUN 05, MON 06, TUE 07, WED 08, THU 09, FRI 10, SAT 11. The values in the boxes are: 0, 0, 0, 0, 0, 0, 1, 1, 1, 0, 0, 0, 0, 0. Below the input boxes, there's a checkbox 'Link these shortfalls together (only applicable to single shortfall days) - users will accept the entire block of linked shortfalls'. At the bottom, there's a section 'Repeat these shortfalls over multiple schedule periods' with a dropdown menu '1 schedule period'. At the very bottom, there's a button 'How many matches will I get?' and two buttons: 'Admin Force Insert' and 'Add New Shortfall'.

- Click the “Add New Shortfall” button.

The Shortfalls will now appear on the User's calendar, as well as the regular staffing schedule calendar and the global calendar.

**Next Topic:** [Shift Swap >>](#)

# Shift Swap

[<< Prebook or Manual Match](#) | [Escalate A Shortfall >>](#)

## Shift Swap

When two users agree to swap shifts, use the following steps to make the adjustments in ShiftMatch. There are alternate ways to move staff for this purpose, depending on your requirements, please ask your ShiftMatch Administrator.

In the example below,

- Harry is committed to a 7am shift in Emergency
  - Helena is committed to a 3.30pm shift in Oncology
- Both workers have agreed to swap shifts.

The screenshot shows the ShiftMatch interface with the 'Staffing' tab selected. The top navigation bar includes links for 'FILL SHIFT', 'My Schedule', 'Staffing', 'People', 'Agency', 'Admin', 'Settings', and 'Uber'. A 'Shortfall Search' box is also present.

Under 'Filter Existing Shortfalls', there are dropdown menus for 'General Hospital', 'Lakeview', and 'Choose a Division'. Below these are checkboxes for 'Unfilled', 'Filled', and 'Deadline Passed'. A date range selector shows 'Sun 6 Dec 2015 - Sat 19 Dec 2015'.

Navigation buttons include '← Last Week', '← Yesterday', 'Tuesday December 15', 'Tomorrow →', and 'Next Week →'. An 'Add New Shortfall' button is also visible.

The main calendar view is titled 'Lakeview / Emergency' and shows a grid of shifts from Sunday, December 6th to Saturday, December 19th. The current date, Monday, December 14th, is highlighted. The grid shows a shortfall of 1/1 in the Emergency department on Monday, December 14th. Other departments shown include Medical Services, Diagnostic & Respiratory, and Oncology.

### Step 1 – Amend the Shifts

Please complete for *each* of the shifts to be swapped:

- Click on the Shift to be swapped
- Click the “Edit” button to open **Edit a Shortfall** page
- Change the “Up to How Many Messages” cell to “0”
- Change the “Notify the User” checkbox to a check for “Don’t Send Message”
- Click “Update Shortfall”

Perform the same task for the other shift to be swapped.

03:50PM | You are signed in as C

## Edit A Shortfall

[Canadian Demo Home](#) / [Staffing](#) / [Schedule](#)

### Tuesday Dec 15: Lakeview / Emergency

**Shortfall Details IDU445**

Start - End Time	07:00	⌚	14:00	⌚	
Min - Max Grade	Reg Practical Nu ▼		RN 2nd Year ▼		
Location Level 4	<input checked="" type="radio"/> Any Dept <input type="radio"/> Clinic				
Reason Shortfall Required	Vacancy ▼				
Prebook User	Harry				
Up to How Many Messages	<div style="border: 2px solid black; border-radius: 50%; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center; margin: 0 auto;">0</div>		<input checked="" type="checkbox"/> Only use people with availabilities		
Notify the User			<input checked="" type="checkbox"/> Don't Send Message		

### Step 2 – Remove the Users

Please complete for *each* of the shifts to be swapped:

- Click on the Shift to be swapped
- Click the “Delete” button to open **Delete or Reinitialize** pop-up
- Choose the Reason “Shift Swap”
- Add notes (eg: Helen and Harry swap shifts Dec 15)
- Click “Don’t Send Message”

- Click “Reinitialize”  
Perform the same task for the other shift to be swapped.

Both shifts will still show on the Schedule but will now be Unfilled.

**!** ShiftMatch will not attempt to find other Users for the shift because the “Up to How Many Message” was set to “0” in Step 1.

#### Filter Existing Shortfalls

General Hospital ▼ Lakeview ▼ Choose a Division ▼

☐ Unfilled ☐ Filled ☐ Deadline Passed

Sun 6 Dec 2015 - Sat 19 Dec 20' ▼

← Last Week ← Yesterday Tuesday December 15 Tomorrow → Next Week →

[Add New Shortfall](#)

Lakeview / Emergency													
SUN 06	MON 07	TUE 08	WED 09	THU 10	FRI 11	SAT 12	SUN 13	MON 14	TUE 15	WED 16	THU 17	FRI 18	SAT 19
<b>EMERGENCY</b>													
-	-	-	-	-	-	-	-	-	1/0	-	-	-	-
<b>MEDICAL SERVICES</b>													
-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>DIAGNOSTIC &amp; RESPIRATORY</b>													
-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>ONCOLOGY</b>													
-	-	-	-	-	-	-	-	-	1/0	-	-	-	-

### Step 3 – Swap the Users

Please complete for *each* of the shifts to be swapped:

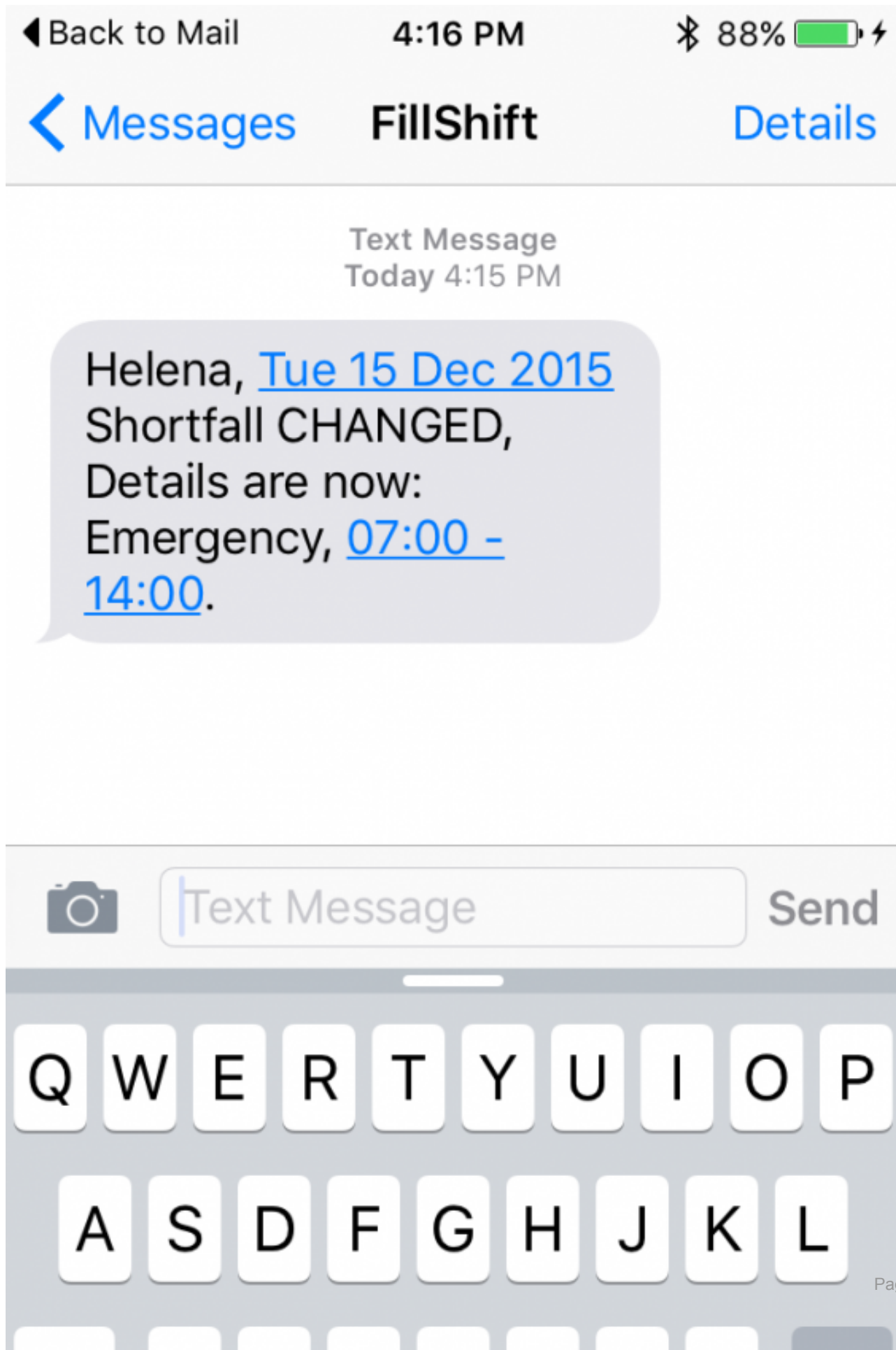
- Click on the now empty Shift
- Click the “Edit” button to open **Edit a Shortfall** page
- Add in the new correct User in the “Prebook User” tab
- Click “Update Shortfall”  
Perform the same task for the other shift to be swapped.

Tuesday Dec 15: Lakeview / Oncology

Shortfall Details IDU449	
Start - End Time	<div>15:30</div> <div>23:30</div>
Min - Max Grade	<div>RN 1st Year</div> <div>RN 2nd Year</div>
Location Level 4	<div><input checked="" type="radio"/> Any Dept</div> <div><input type="radio"/> Chemo Ward</div> <div><input type="radio"/> Radiation</div>
Reason Shortfall Required	<div>Vacancy</div>
Prebook User	<div>Harry</div>

#### Step 4 – ShiftMatch sends notification

Users will each automatically get a confirmation text with the new details





# Escalate A Shortfall

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[<< Shift Swap](#) | [Auto Escalation of a Shortfall >>](#)

## Manually Escalating A Shortfall

If a Shortfall remains unfilled as its deadline approaches, you may want to increase the pool of candidates for that Shortfall by broadening the parameters under which it can be filled.

This process is termed **Escalation**.

To Escalate a Shortfall:

1. On the scheduling calendar, click on the date of the Shortfall you would like to escalate.  
[A list of all **Unfilled** Shortfalls will appear below the calendar.]
2. Find the Shortfall you would like to escalate, and click on the specific **Shortfall ID** or **Edit** button of that Shortfall.
3. Change one or multiple variables listed to widen the pool of candidates.

For example, you can **Escalate** a shift by:

- broadening the range of [Grades](#) to which the shift is offered  
[change the **Minimum Grade** and/or the **Maximum Grade**]
- reducing the [Skills](#) required for the shift  
[change the **Skills Required**]
- reducing the [Rating](#) required, if applicable  
[change the **Minimum Rating**]
- increasing the number of work request messages sent  
[change **Up to How Many Messages**]
- using all available candidates, not just those individuals who registered their availability  
[uncheck the **Only use people with availabilities** box]
- broadening the range of [Employment Types](#)  
[change the **Employment Type** or click additional boxes to include more **Employment Types**]

4. Click the “Update Shortfall” button.

ShiftMatch will now restart the Shortfall filling process with the larger pool of candidates.



How many matches will I get?

At any time, you may click on the button and ShiftMatch can tell you how many Users will match the set parameters.

**Next Topic:** [Auto Escalation of a Shortfall >>](#)

# Auto Escalation of a Shortfall

---

[<< Escalate A Shortfall](#) | [Open or Escalate a Shortfall to Agency\(ies\)](#) >>

## Auto Escalation of a Shortfall

If Management finds that some Shortfalls constantly require the same manual manipulation to widen parameters to ensure shifts are filled, they may wish to automate the process.

This can be set behind the scenes and escalate according to Management-set parameters and timing to ensure each Shortfall is filled.

Contact your ShiftMatch Administrator to establish Auto Escalation parameters.

### Setting when auto escalation begins:

Examples include:

- **#10** – Timing % between creation and deadline – a single global setting (multiple % points can be set)

Establishing a time to start escalation, as determined between the time of creation of each shift and the deadline on the shift.

Eg: If we set the escalation moment at 50% and shifts are created at midnight with an 8am deadline, for every shift that is not filled at 4am, the system will start auto-escalating.

- **#20** – Timing % between creation and deadline – using the settings for each location

Same as above but specific to each location, rather than across all locations.

- **#30** – Minutes before deadline (multiple points can be set)

Eg: 20 mins, then 15 mins, then 2 mins)

Rather than setting a % between creation and deadline, set a hard number of minutes to start escalation.

Eg: A shift is created and has an 8am deadline. If we set 120 minutes here, the auto-escalation will begin at 6am.

- **#40** – Minutes after creation (care needs to be taken with this as it could supersede other settings)

A hard number of minutes starting from the time of creation.

Eg: a shift is created at midnight and if we set 120 minutes here, auto-escalation will commence at 2am.

- **#50** – At specific forward-planning date/time-points

Time and date specific moments set in advance to start escalation.

Eg: Shifts for future weeks are created in a forward-planning process in this week.

Managers can nominate to start auto-escalation for any unfilled shifts on a specific day and time in between.

## Actions which auto escalate

Examples include:

- **#15** – resend

Resends the “Staff Offer Request” to all people already contacted

- **#1** – resend urgent

Resends “Resend Urgent” return text to all people already contacted

- **#2** – resend critical

Resends “Resend Critical” return text to all people already contacted

- **#3** – open grading

Expands the range of gradings asked for up and down (as defined for each grade)

- **#4** – increase max messages

Adds a global increment to the Max Messages field

- **#5** – open offers only

Unticks “Only use people with offers” box so workers who haven’t posted availability will be matched and contacted

- **#6** – refer to agency

Refers the shift to Agency as per normal processing rules

- **#7** – refer pt and ft

Refers the shift to BOTH Part-time and Full-time staff

- **#8** – refer pt

Refers the shift to Part-time workers

- **#9** – refer to ft

Refers the shift to Full-time workers

- **#10** – refer to casual

Refers the shift to Casual workers

- **#11** – refer to pools

Opens the shift up to ALL pools

## Examples of Auto Escalations

1. Shifts for the week of August 11-17 are created in a forward-planning process by management and input to ShiftMatch in the week of July 21.

They set up the Shortfalls to go only to Part Time workers; THEN

They set a July 28 9am date/time at which they will refer to Full Time users; THEN

They set an August 4 9am date/time at which they will refer to Agencies.

As a result, the following will occur:

- On July 21, any Part-Time users with the appropriate grades, skills, locations and availability will be contacted to work the shifts; THEN

- On July 28, any and all unfilled shifts would be referred to any Full-Time users with the appropriate grades, skills, locations and availability; THEN
- On August 4, any and all unfilled shifts would be referred to an Agency (or Agencies, as established by management) to fill with staff holding the appropriate grades, skills and locations.

2. Management inputs a shift at noon today with a deadline tomorrow at noon and a start time of 2pm tomorrow for any Part Time user.

They set a 50% of create-time<>deadline at which time they will uncheck offers-only; THEN

They set a 75% of create-time<>deadline at which time they will refer to Full Time users; THEN

They set 60 min before deadline at which time they will refer to Agency.

As a result, the following will occur:

- At noon today, the shift will go out to any Part Time user with the appropriate grades, skills, locations and availability
- At midnight [ie: after 50% of time has passed between creation and deadline], if the shift is unfilled, it will go out to any Part Time user with the appropriate grades, skills, locations (even if they have not entered availability for that time)
- At 6am [ie: after 75% of time has passed between creation and deadline], if the shift is still unfilled, it will go out to any Full Time user with the appropriate grades, skills and locations.
- At 11am [ie: 60 min before deadline], if the shift is still unfilled, it will be referred to Agency.

**Next Topic:** [Open or Escalate a Shortfall to Agency\(ies\) >>](#)

# Open or Escalate a Shortfall to Agency(ies)

[<< Auto Escalation of a Shortfall](#) | [Rapidbooks >>](#)

## To Open or Escalate a Shortfall to Agency(ies)

To enter a Shortfall and immediately open it up to an Agency or Agencies via the protocols established within ShiftMatch, see [Add a Shortfall > Agency](#).

To escalate a Shortfall to Agency(ies), it may be done in multiple ways:

### 1. Edit Shortfall

- View the Shortfall in the **Unfilled** list at the bottom of the **Staffing > Schedule** page  
Note there is an “x” marked under the **Agency** column

Unfilled										
Shortfall ID ¶	Shift ¶	Dept ¶	TXT ¶	History	Grading ¶	Agency ¶	Updated ¶	Why Not?	Admin Edit	Delete
ID536	16:00 - 22:00		0		RN1-RN2		16/04/2015 10:18		<a href="#">Edit</a>	<a href="#">Delete</a>

- click on the **Edit** button to open the Shortfall
- click on the **Agency** tab
- check the box next to **Immediately open to all agencies**
- click on “Update Shortfall”

Shortfall Details IDE536

User Requirements

Agency

Open to All Agencies
☒ Immediately open to all agencies

Externally Filled By
No Agency

External Staff Name
Staff Name

External Staff Grade
External Grade

How many matches will I get?

Admin Force Update

Update Shortfall

## 2. Open Employment Type via Unfilled Shortfalls

- Click on **Staffing > Unfilled** and view the list of Unfilled Shortfalls
- Next to the Shortfall you would like to open to Agency, check off the box under **Agency**
- Click “Update Shortfalls”

Full Shift
My Schedule
Staffing
People
Agency
Admin
Settings

Shortfall Search
Search

10:24AM | You are signed in as Catherine | Logout | Manager Guide | Ask us | Class: Default

Unfilled Shortfalls

Home / Staffing / Unfilled Shortfalls

Filter results




Start
End
Day
Evening
Night
Results per page 10

Choose Skill
Choose Location
Filter

Agency	Casual	Part Time	Full Time	ID	Day	Shift	Deadline	Location	Grade	Reason	Messages	History	Why?
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	IDE536	16/04/2015	16:00 - 22:00	16/04/2015 15:45	Toronto General / Emergency	RN1 - RN2	Vacancy	0		

## 3. You may establish protocols within ShiftMatch, to [Auto Escalate](#) Shortfalls.

Once a Shortfall has been opened to Agency, the green check mark will appear under the **Agency** column in the **Unfilled** list.

Unfilled										
Shortfall ID ¶	Shift ¶	Dept ¶	TXT ¶	History	Grading ¶	Agency ¶	Updated ¶	Why Not?	Admin Edit	Delete
IDE411	16:00 - 22:00		0		RN1-RN2		16/04/2015 10:01		<a href="#">Edit</a>	<a href="#">Delete</a>

If an Agency worked has been placed in a Shortfall and you would like to replace them with internal staff, see [Replace Agency Worker](#).

**Next Topic:** [Rapidbooks >>](#)

# Rapidbooks

---

[<< Open or Escalate a Shortfall to Agency\(ies\) | History or Audit Trail >>](#)

## Rapidbooks

A **Rapidbook** is a Shortfall set with a pre-defined start time and end time, skills and grades etc. If you have Shortfalls which are repeated often, you may wish to make use of the Rapidbook function.

When adding a Shortfall and by selecting a Rapidbook option, the pre-inserted data is automatically completed in the Shortfall.

You may amend any or all pre-set details after the Rapidbook is chosen.

Rapidbooks are set under the Settings > Locations section.

See [Set Rapidbooks](#)

**Next Topic:** [History or Audit Trail >>](#)

# History or Audit Trail

[<< Rapidbooks](#) | [Staffing: Unfilled – Monitoring Unfilled Shifts >>](#)

## History or Audit Trail

All transactions within ShiftMatch are tracked and recorded.

To access an Audit Trail of a Shortfall, click on the **History** link next to the relevant Shortfall.

Filled										
Shortfall ID	Shift	Dept	TXT	History	User	Agency	Updated	Filled Via	Admin Edit	Delete
IDE396	07:00 - 14:00		2		Helen Nurse (RN1) PerDie/Cas		08/04/2015 11:06	User Sms	<a href="#">Edit</a>	<a href="#">Delete</a>
IDE401	07:00 - 14:00		0		David Stuart (Mgr) FT		09/04/2015 10:56	User Web	<a href="#">Edit</a>	<a href="#">Delete</a>

The History link will open a page, detailing the transactions that occurred in relation to the relevant Shortfall. An example below:

Shortfall History - Created 08/04/2015 11:05:19					
Pkid ↑	Description ↑	User ↑	Pull Text ↑	Date ↑	Logged User ↑
24505893	new shortfall	No User	0	Wed 08/04/2015 11:05:19	Heather Manager
24505894	text: shortfall availability/work work request - message: 1 : s5490396 u149635 a0	Helen Nurse	0	Wed 08/04/2015 11:05:23	N/A
24505895	text: shortfall availability/work work request - message: 2 : s5490396 u149633 a0	Harry Demo	0	Wed 08/04/2015 11:05:29	N/A
24505897	filled shortfall	Helen Nurse	561	Wed 08/04/2015 11:06:31	N/A
24505898	text: shortfall user accept via text : s5490396 u149635 a0	Helen Nurse	561	Wed 08/04/2015 11:06:31	N/A
24505899	email: shortfall user accept via text : s5490396 u149635 a0	Helen Nurse	561	Wed 08/04/2015 11:06:31	N/A
24505900	email: shortfall filled : s5490396 u149635 a0	Helen Nurse	561	Wed 08/04/2015 11:06:31	N/A
24505901	text reply by user	Helen Nurse	561	Wed 08/04/2015 11:06:31	N/A
24505906	text reply by user	Harry Demo	563	Wed 08/04/2015 11:06:50	N/A
24505907	pulltext: response : p563	Harry Demo	563	Wed 08/04/2015 11:06:50	N/A

**Next Topic:** [Staffing: Unfilled – Monitoring Unfilled Shifts >>](#)

# Staffing: Unfilled – Monitoring Unfilled Shifts

[<< History or Audit Trail](#) | [Staffing: Agency – Monitoring Agency Use >>](#)

## Unfilled

The **Unfilled** page on the **Staffing** tab provides you with an overview of all unfilled Shortfalls. This allows you to search, monitor, edit and escalate an unfilled Shortfall as needed.

Unfilled Shortfalls

Filter results

Start

Choose Skill

Choose Location

Day ☐ Evening ☐ Night ☐

Results per page 10

Filter

Agency IT	Casual IT	Part Time IT	Full Time IT	ID IT	Day IT	Shift IT	Deadline IT	Location IT	Grade IT	Reason IT	Messages IT	History	Why?
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ID0319	10/04/2015	08:00 - 16:00	10/04/2015 07:45	Toronto Rehabilitation Institute / Lyndhurst Centre	RPN - NP	Vacancy	0		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ID0320	11/04/2015	08:00 - 16:00	11/04/2015 07:45	Toronto Rehabilitation Institute / Lyndhurst Centre	RPN - NP	Vacancy	0		

Check the boxes to automatically refer selected unfilled shortfalls.

Update Shortfalls

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## Search And Monitor Unfilled Shifts

To view unfilled shifts:

1. Type in the **Start Date** and **End Date** (or click on the calendar icon for a calendar view) of the unfilled shifts you wish to review.
2. If desired, further narrow your search by selecting the specifics of the shift Shortfall:
  - choose **Skill**
  - choose **Location**
  - click **Day Evening** or **Night** checkboxes (or the appropriate terms as nominated by your organization)
  - Click on the "Filter" button.

A detailed list of all unfilled shifts that match your search criteria will appear below.

The list allows you to easily view:

- [Employment Type](#) (eg: **Casual**, **Part Time**, **Full Time**, **Agency**) selected for the Shortfall
- specific Shortfall **ID** link (click to open, view and edit Shortfall)
- date (**Day**) of the Shortfall
- **Shift** start and end time of Shortfall
- **Deadline** for filling the Shortfall
- shift [Location](#)
- minimum and maximum grade ([Grade](#)) selected for the Shortfall
- **Reason** for the Shortfall
- number of work request text **Messages** sent
- click on [History](#) for a timestamped audit trail of the Shortfall
- [Why?](#) allows you to search a specific Username to find out why that person did not match the Shortfall

## Edit And Escalate Unfilled Shifts

The Edit and Escalation procedures follow those described in the [Escalation](#) and [Auto Escalation](#) section:

1. Find the Shortfall you would like to edit or escalate, and click on the specific **ID** or **Edit** button of that Shortfall assignment.
2. Change the details of the Shortfall as necessary.
3. Click the “Update Shortfall” button near the bottom of the page.

The updated Shortfall details will now be reflected in the staffing schedule calendar, and ShiftMatch will restart the Shortfall filling process if required.

## Escalation Shortcut – Employment Status

The most common method used to **Escalate A Shortfall** is changing the [Employment Type](#) allowed. This opens up the Shortfall to a wider candidate pool internally (casual, part-time and/or full-time) or externally (eg: an outside agency).

The Unfilled page offers you a quick shortcut to Escalate a Shortfall based on Employment Type only.

To Escalate A Shortfall by quickly expanding the Employment Type:

1. Locate the unfilled Shortfall you wish to escalate.

2. Check the corresponding Employment Type box(es) you would like to include (eg: **Casual**, **Part Time**, **Full Time** or **Agency**) in a new candidate search.

[You are unable to select the Employment Type used in the current search – which shows as a green checked box]

Unfilled Shortfalls

Home / Staffing / Unfilled Shortfalls

Filter results

Start  End  ☐ Day ☐ Evening ☐ Night

Choose Skill  Choose Location

Results per page 10

Agency IT	Casual IT	Part Time IT	Full Time IT	ID IT	Day IT	Shift IT	Deadline IT	Location IT	Grade IT	Reason IT	Messages IT	History	Why?
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	IDD319	10/04/2015	08:00 - 16:00	10/04/2015 07:45	Toronto Rehabilitation Institute / Lyndhurst Centre	RPN - NP	Vacancy	0		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	IDD320	11/04/2015	08:00 - 16:00	11/04/2015 07:45	Toronto Rehabilitation Institute / Lyndhurst Centre	RPN - NP	Vacancy	0		

Check the boxes to automatically refer selected unfilled shortfalls.

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3. Click the “Update Shortfall” button near the bottom of the page.

ShiftMatch will now restart the Shortfall filling process based on the additional Employment Type(s) selected.

**!** Selecting **Agency** indicates you are referring the Shortfall to an outside Agency to fill.

**Next Topic:** [Staffing: Agency – Monitoring Agency Use >>](#)

# Staffing: Agency – Monitoring Agency Use

[<< Staffing: Unfilled – Monitoring Unfilled Shifts](#) | [Staffing: Replace an Agency Worker >>](#)

## Agency

The **Agency** page on the **Staffing** tab allows you to view all shifts filled by outside agencies.

## View Agency Shifts

To view Agency-filled shifts:

1. Type in the **Start Date** and **End Date** (or click on calendar icon for a calendar view) of the shift(s) you wish to review.
2. If desired, further narrow your search by selecting the specifics of the shift(s):
  - **Skill** required
  - Shortfall **Location**
  - Click on the “Filter” button.

A detailed list of all Agency-filled shifts that match your search criteria will appear below.

The list allows you to easily view the:

- **Agency** used to fill the shift Shortfall
- individual assigned from the Agency for the shift (**User**)

- specific Shortfall **ID**
- **Date** of the shift Shortfall
- **Deadline** for filling the Shortfall
- Shortfall **Location**
- Shortfall start and end time (**Shift**)
- Minimum and maximum **Grade** selected for the Shortfall
- **Reason** for the Shortfall
- **Replace** button will allow you to remove the Agency worker if a better staffing solution has become available.



Agencies that you choose to use for referrals are registered in ShiftMatch with a designated login.

This allows them to

- (a) receive email notifications when shifts are referred to them and
- (b) allocate appropriate staff based on the skills, grades and other requirements specified in the shift Shortfall details.

**Next Topic:** [Staffing: Replace an Agency Worker >>](#)

# Staffing: Replace an Agency Worker

---

[<< Staffing: Agency – Monitoring Agency Use](#) | [Staffing: Manager News – Managers Digital Bulletin Board](#)  
[>>](#)

## Replace Agency Worker with Internal Staff



Not all Users have the necessary access to **Replace an Agency Filled Shift**.  
If you do not see the **Replace** button, you will need to escalate the issue to Management.

You can determine whether there are internal staff suitable for an Agency-allocated shift, and if so, place them into that Shortfall, by using the **Replace** option:

1. Under **Staffing > Agency**, find the Shortfall in question, and click **Replace** button.  
[A new screen entitled **All possible replacements** will then appear with a list of all possible internal replacements.]
2. Select which User you wish to place into the Shortfall, and click **Replace** button next to their details.  
[A new screen entitled **Edit A Shortfall** will appear, with the individual you selected listed in the **Prebook User** option.]
3. Click the “**Admin Force Update**” button (an override not available to all Users) near the bottom of the page.

Your selection for the shift will be updated in the Shortfall details that appear in the staffing schedule calendar.

ShiftMatch will email the Agency and inform them of the cancelled shift.

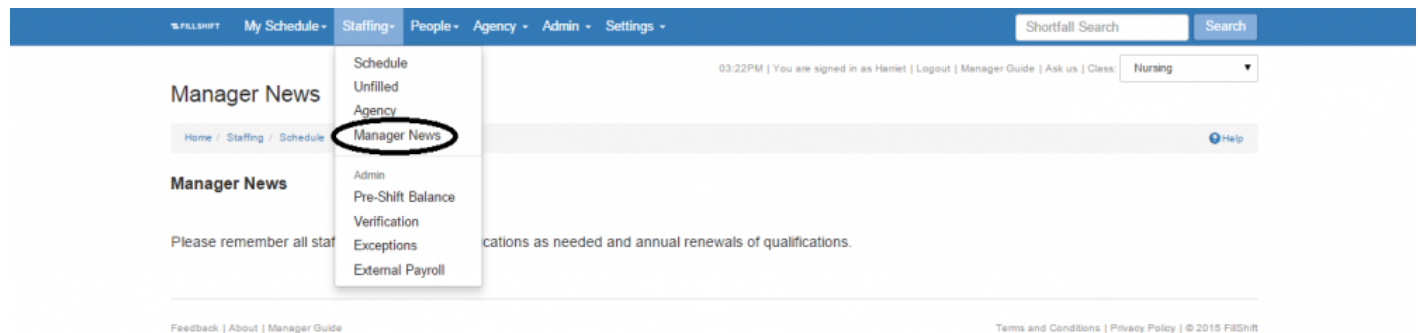
ShiftMatch will also text the User who is now filling the Shortfall to confirm the details.

**Next Topic:** [Staffing: Manager News – Managers Digital Bulletin Board >>](#)

# Staffing: Manager News – Managers Digital Bulletin Board

[<< Staffing: Replace an Agency Worker](#) | [Staffing: Pre-Shift Balance – Adjusting Staffing Needs >>](#)

## Manager News



The **Manager News** page contains the latest company announcements and other pertinent work information.

It may not be viewed by all Users, only those provided Manager access by Management.

**Next Topic:** [Staffing: Pre-Shift Balance – Adjusting Staffing Needs >>](#)

# Staffing: Pre-Shift Balance – Adjusting Staffing Needs

[<< Staffing: Manager News – Managers Digital Bulletin Board](#) | [Staffing: Verification – Confirming Time Worked >>](#)

## Pre-Shift Balance

The **Pre-Shift Balance** page on the **Staffing** tab allows you to view filled shift Shortfalls (by [Level 2 Location](#)) before they are actually worked – providing the opportunity to move workers between locations if necessary to accommodate staffing needs.

! Not all Users have the necessary access to use **Pre-Shift Balance** for reallocation. If you do not see the **Pre-Shift Balance** under the **Staffing** tab, you will need to escalate the issue to Management.

03:43PM | You are signed in as Hamlet | Logout | Manager Guide | Ask us | Class: Nursing

Pre-Shift Balance

Home / Staffing / Pre-Shift Balance

Filter results

Sat 4 Apr 2015

Base / UHN / Toronto

Lyndhurst Centre : 1 Shortfalls

Name	Shortfall ID	Shift	Lyndhurst Centre	Bickle Centre	Lakeside Centre	Rumsey Centre	University Centre
Harry Demo (RN1 Casual) Lyndhurst Centre	IDD327	08:00 - 16:00	*				

Update Pre-Shift Balance

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## View Pre-Shift Balance

1. Select the **Date** of the shift you wish to view (up to five days out is viewable).
2. Select the **Location** of the Shortfall.
3. Select the Shortfall time group.

4. Click on **Filter** button.

The results of your search will appear below.

The list allows you to easily view by Location:

- **Name** of the individuals assigned to work in that particular location  
Clicking on a specific name link will take you to that individual's User **Schedule** page.
- **Shortfall ID** that they are filling
- **Shortfall** start and end times
- the assigned **Location** for the individual (shown as a filled circle below the corresponding Location)

## Reassign Staff

To reassign an individual from one Location to another:

1. Locate the individual you would like to reassign.
2. Select the **new Location** you would like to assign the individual, and click on the circle under the corresponding new Location.  
Only one Location is permitted, so the new Location you select will become the only one with a filled circle.
3. Click the "**Update Pre-Shift Balance**" button near the bottom of the page.

The reassignments will now be reflected in the staffing schedule calendar.



To view your reassignment changes on the staffing schedule calendar, make sure you've selected the correct corresponding Location on the calendar.

**Next Topic:** [Staffing: Verification – Confirming Time Worked >>](#)

# Staffing: Verification – Confirming Time Worked

[<< Staffing: Pre-Shift Balance – Adjusting Staffing Needs](#) | [Staffing: Exceptions – Splitting A Shift Worked](#) >>

## Verification

The **Verification** page on the **Staffing** tab allows you to manually confirm a User's actual Shortfall time worked.

Shift Verification

Home / Staffing / Shift Verification

Filter results

31/03/2015

All Worktypes

Schedule  
Unfilled  
Agency  
Manager News  
Admin  
Pre-Shift Balance  
**Verification**  
Exceptions  
External Payroll

Day Evening Night Show All (including validated)

General Hospital

Filter

ID	Grade	Name	Location	Cost Center	Date	Start Time	End Time	Hours	Allowance	Outcome
IDC768	RN2	Fred Bloggs	Cardiology	Cardiology	01/04/2015	08:00	16:00	8.0	<input type="checkbox"/> Meal <input type="checkbox"/> No Meal <input type="checkbox"/> Break-15 <input type="checkbox"/> Break-30	-- Choose Outcome --
IDD241	RN1	Harry Demo	Emergency	Emergency	31/03/2015	08:00	16:00	8.0	<input type="checkbox"/> Meal <input type="checkbox"/> No Meal <input type="checkbox"/> Break-15 <input type="checkbox"/> Break-30	-- Choose Outcome --

You can:

- change the [Cost Centre](#) associated with the shift
- change the **Start Time** or **End Time** of the shift
- account for any meal and/or break **Allowance**
- verify the **Outcome** of the shift
- split costs for a Shortfall to more than one **Cost Centre** via the [Exception](#) process

## View Shortfalls Worked

To view a list of Shortfalls worked:

1. Type in the **Start Date** and **End Date** (or click on the calendar icon for a calendar view) of the Shortfall worked.
2. Select the **Worktype** (aka [Employment Type](#)) or leave as **All Worktypes**.
3. Select the **Location**.
4. Select the time grouping or click on **Show All**
5. Click on the “Filter” button.

A detailed list of all Shortfalls worked that match your search criteria will appear below.

## Verify (Or Edit) A Shift

To edit and/or verify a Shortfall worked:

1. Locate the specific shift you would like to edit or verify.  
[Clicking on the **ID** link will provide you with a detailed summary of the Shortfall.]
2. Change the details of the shift as necessary:
  - the [Cost Center](#) you want associated with the Shortfall
  - the **Start Time** and/or **End Time** actually worked
  - check the box for any meals or breaks taken by the worker
  - Verify the Shortfall under **Outcome**:
    - Shortfall worked as stated = **OK**
    - worker did not show up for the Shortfall = **no show = NS**
    - worker **left early** = **LE**
    - worker arrived to Shortfall late = **late start = LS**
    - worker **worked late** = **WL**
  - Click the “Confirm User” button near the bottom of the page.

The updated Shortfall details will now be reflected in the staffing schedule calendar, and logged in the ShiftMatch System for reporting purposes.



You must select a specific **Outcome** in order for the shift to be verified and updated .

## Split Shortfall between 2 Cost Centres

If you need to split a Shortfall between two departments, select “**EXCEPTION**” under **Cost Centre**. Change the Outcome to **OK** and click the “Confirm User” button.

The screenshot shows the 'Shift Verification' page in the ShiftMatch application. The top navigation bar includes links for 'My Schedule', 'Staffing', 'People', 'Agency', 'Admin', and 'Settings'. A 'Shortfall Search' bar is also present. The page title is 'Shift Verification'. Below the title, there are filters for 'Filter results' and 'Filter'. The 'Filter results' section includes date pickers for '01/04/2015' and '01/04/2015', and checkboxes for 'Day', 'Evening', 'Night', and 'Show All (including validated)'. The 'Filter' section includes dropdowns for 'All Worktypes' and 'General Hospital', and a 'Filter' button. The main table displays shift data with columns: ID, Grade, Name, Location, Cost Center, Date, Start Time, End Time, Hours, Allowance, and Outcome. The first row shows a shift for 'IDC768' (Grade RN2, Name Fred Bloggs, Location Cardiology) with 'Cost Center' set to 'EXCEPTION', 'Date' 01/04/2015, 'Start Time' 08:00, 'End Time' 16:00, 'Hours' 8.0, and 'Outcome' set to 'OK'. The 'Allowance' section has checkboxes for 'Meal', 'No Meal', 'Break-15', and 'Break-30'.

ID	Grade	Name	Location	Cost Center	Date	Start Time	End Time	Hours	Allowance	Outcome
IDC768	RN2	Fred Bloggs	Cardiology	EXCEPTION	01/04/2015	08:00	16:00	8.0	<input type="checkbox"/> Meal <input type="checkbox"/> No Meal <input type="checkbox"/> Break-15 <input type="checkbox"/> Break-30	OK

Go to the [Exceptions](#) page and complete the details of the split shift.

**Next Topic:** [Staffing: Exceptions – Splitting A Shift Worked >>](#)

# Staffing: Exceptions – Splitting A Shift Worked

[<< Staffing: Verification – Confirming Time Worked](#) | [Staffing: External Payroll >>](#)

## Exceptions

The **Exceptions** page on the **Staffing** tab allows you to split a shift worked between two separate locations and/or cost centers.



In order for a Shortfall to appear on the **Exceptions** page, you must first under Staffing > [Verification](#)

a) confirm the shift split on the **Verification** page by selecting “**EXCEPTION**” for the **Cost Center**.

b) choose **OK** for Outcome; and

c) click on **Confirm User** button

The screenshot shows the ShiftMatch Manager Guide interface. The top navigation bar includes links for My Schedule, Staffing, People, Agency, Admin, and Settings. The Staffing tab is active, and a dropdown menu is open, showing options like Schedule, Unfilled, Agency, Manager News, Admin, Pre-Shift Balance, Verification, **Exceptions** (highlighted with a red circle), and External Payroll. The main content area displays a table of Shortfalls. The first row shows a Shortfall ID of IDC768, Shift ID 08:00 - 08:00, User ID Fred Bloggs, Excepted Date 02/04/2015 20:17, and Excepted By Catherine Stuart.

To split a Shortfall worked:

1. Locate the specific Shortfall you wish to split.
2. Click on the **Shortfall ID** link for that Shortfall.  
[A new screen entitled **User Verification** will then appear.]
3. Select the appropriate **Work Centre 1** and **Cost Center 1**, filling in the corresponding **Work Hours 1** allocated to each.  
Repeat the process for **Work Location 2** and **Cost Center 2**.
4. Click the “Save Changes” button near the bottom of the page.

Full Shift

My Schedule

Staffing

People

Agency

Admin

Settings

Shortfall Search

Search

04:21PM | You are signed in as Catherine | Logout | Manager Guide | Ask us | Class: Default

### User Verification

Home / Staffing / User Allocation Exceptions / User Verification

Help

Location	Base / Home / General Hospital / Cardiology
Day	Wed Apr 01 00:00:00 UTC 2015
Name	Fred Bloggs
Shift	08:00 - 16:00
Work Centre 1	General Hospital / Emergency
Work Hours 1	4
Cost Centre 1	General Hospital / Emergency
Cost Centre 1	4
Work Centre 2	General Hospital / Maternity
Work Hours 2	4
Cost Centre 2	General Hospital / Maternity
Cost Centre 2	4

Save Changes

The updated details of the split shift will now be logged in the ShiftMatch System for reporting.  
For more, please see [Cost Centres](#)

**Next Topic:** [Staffing: External Payroll >>](#)

# Staffing: External Payroll

---

[<< Staffing: Exceptions – Splitting A Shift Worked](#) | [People Tab Overview >>](#)

## External Payroll Page



External Payroll Mapping is currently only used for Kronos linked systems.

**External Payroll** allows you to provide information in the mapping of ShiftMatch Locations and Grades for payroll API.

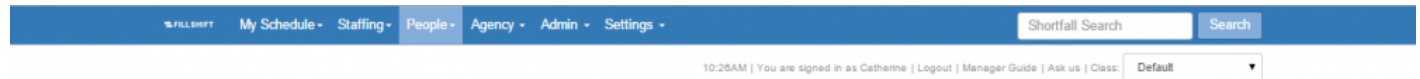
**Nest Topic:** [People Tab Overview >>](#)

# People Tab Overview

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[<< Staffing: External Payroll](#) | [People: User Search – View User Details >>](#)

## People



The **People** tab contains information on all Users of ShiftMatch.

Here you can add new Users, communicate with Users, search for specific Users and find out why a User didn't match a Shortfall.

Depending upon individual permissions, the People tab has up to six pages:

- [User Search](#)
- [Add User](#)
- [Why Not?](#)
- [Archived User](#)
- [Bulk User Upload](#)
- [Broadcast](#)

**Next Topic:** [People: User Search – View User Details >>](#)

# People: User Search – View User Details

[<< People Tab Overview](#) | [Edit User Profile >>](#)

## User Search

The **User Search** on the **People** tab provides a list of all Users of the ShiftMatch System. Users are listed alphabetically by last name.

**User List**

Home / People / User List

Filter results

Name or Username  ☒ Current Users ☐ Only Active ☐ Archive Results per page 10

Min Grade Max Grade Worktype Skill Location **Filter**

Username ID	Grade ID	Active ID	Lastname, Firstname ID	Worktype ID	Text Export	Message Export	Schedule	Broadcast
Adele	NP	✓	Agency, Adele	CAN_Agency1				
Richard	Agent	✓	Benson, Richard	Casual				
Fred	RN2	✓	Bloggs, Fred	Casual				
Gord	Mgr	✓	Bollen, Gord	Full Time				
Robert	Teacher	✓	Dawson, Robert	Full Time				
Harry	RN1	✓	Demo, Harry	Casual				
Doug	Agent	✓	Denton, Doug	Casual				
James	AsstMgr	✓	Dillon, James	Full Time				
Fanny	Mgr	✓	Fitness, Fanny	Full Time				

To search for a specific User or Users:

- Select the appropriate variable(s) you wish to search:
  - name (type in a first or last name in the **Search** box)
  - minimum (**Min**) [Grade](#)
  - maximum (**Max**) **Grade**
  - Worktype** (aka [Employment Type](#))
  - [Skill](#)
  - [Location](#)

- Click the “Filter” button.

**!** You must select at least one variable for your User search.

A detailed list of all Users that match your search criteria will appear below.

04:33PM | You are signed in as Catherine | Logout | Manager Guide | Ask us | Class: Default

## User List

Home / People / User List [Help](#)

Filter results

Name or Username  ☒ Current Users ☐ Only Active ☐ Archive Results per page 10

Min Grade  Max Grade  Worktype  Skill  General Hospital  [Filter](#)

Username ID	Grade ID	Active ID	Lastname, Firstname ID	Worktype ID	Text Export	Message Export	Schedule	Broadcast
Adele	NP		Agency, Adele	CAN_Agency1				
Fred	RN2		Bloggs, Fred	Casual				
Alan	RN2		Jones, Alan	CAN_Agency1				
Frank	RN1		Smith, Frank	Casual				
kitty	Mgr		Stuart, Catherine	Full Time				

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

The list allows you to easily view or edit a User's:

- **Username**
- **Grade**
- work status (**Active** or Inactive)
- full name (**Lastname, Firstname**)
- **Worktype**
- **Text Export** – when clicked, generates a .CSV report detailing all Text messages from and to the User
- **Message Export** – when clicked, generates a .CSV report detailing all Messages from and to the User
- **Schedule** – click to view the User's Schedule page
- **Broadcast** – click to generate a pop up window used to send a specific Text message to this User

**Next Topic:** [Edit User Profile >>](#)

# Edit User Profile

[<< People: User Search – View User Details](#) | [Export User Texts >>](#)

## Editing A User Profile

From the **People** tab and the **User Search** page, you can edit a specific User's Profile:

\* For a detailed description of each User Profile variable, refer to the [People: Add User](#) section.

1. Click on the **Username** link of the individual you would like to edit.

**User List**

Home / People / User List

Filter results

Name or Username  ☒ Current Users ☐ Only Active ☐ Archive Results per page 10

Min Grade  Max Grade  Worktype  Skill  Location

Username	Grade	Active	Lastname, Firstname	Worktype	Text Export	Message Export	Schedule	Broadcast
<a href="#">Adele</a>	NP	<input checked="" type="checkbox"/>	Agency, Adele	CAN_Agency1	<input type="button" value="Export"/>	<input type="button" value="Export"/>	<input type="button" value="Schedule"/>	<input type="button" value="Broadcast"/>
<a href="#">Richard</a>	Agent	<input checked="" type="checkbox"/>	Benson, Richard	Casual	<input type="button" value="Export"/>	<input type="button" value="Export"/>	<input type="button" value="Schedule"/>	<input type="button" value="Broadcast"/>
<a href="#">Fred</a>	RN2	<input checked="" type="checkbox"/>	Bloggs, Fred	Casual	<input type="button" value="Export"/>	<input type="button" value="Export"/>	<input type="button" value="Schedule"/>	<input type="button" value="Broadcast"/>
<a href="#">Gord</a>	Mgr	<input checked="" type="checkbox"/>	Bollen, Gord	Full Time	<input type="button" value="Export"/>	<input type="button" value="Export"/>	<input type="button" value="Schedule"/>	<input type="button" value="Broadcast"/>
<a href="#">Robert</a>	Teacher	<input checked="" type="checkbox"/>	Dawson, Robert	Full Time	<input type="button" value="Export"/>	<input type="button" value="Export"/>	<input type="button" value="Schedule"/>	<input type="button" value="Broadcast"/>
<a href="#">Harry</a>	RN1	<input checked="" type="checkbox"/>	Demo, Harry	Casual	<input type="button" value="Export"/>	<input type="button" value="Export"/>	<input type="button" value="Schedule"/>	<input type="button" value="Broadcast"/>
<a href="#">Doug</a>	Agent	<input checked="" type="checkbox"/>	Denton, Doug	Casual	<input type="button" value="Export"/>	<input type="button" value="Export"/>	<input type="button" value="Schedule"/>	<input type="button" value="Broadcast"/>
<a href="#">James</a>	AsstMgr	<input checked="" type="checkbox"/>	Dillon, James	Full Time	<input type="button" value="Export"/>	<input type="button" value="Export"/>	<input type="button" value="Schedule"/>	<input type="button" value="Broadcast"/>
<a href="#">Fanny</a>	Mgr	<input checked="" type="checkbox"/>	Fitness, Fanny	Full Time	<input type="button" value="Export"/>	<input type="button" value="Export"/>	<input type="button" value="Schedule"/>	<input type="button" value="Broadcast"/>

2. You may update **Login Details** including
  - username
  - password
  - password hint
3. You may update **Personal Details** including
  - cell phone number

- email address
- first name
- last name
- address

4. You may update **Professional Details** including

- active user (uncheck this box to make the User inactive) or [archived](#)
- maximum hours allowed to work per pay period
- [grade](#)
- [employment type](#)
- [class](#)
- [role](#)
- [rating](#)
- access to Dept ([level 4](#)) Location
- auto accept on as a default
- relevant notes
- [pools](#)



Optional tabs include **Date of Hire** and **Date of Termination**.

Please speak to your ShiftMatch account manager if you wish to activate these tabs in the User profiles.



If you are adding a **Date of Hire** or **Date of Termination** and you wish to add a date a material amount of time in the past (eg: 10 years or more), click on the calendar widget and double click on the date. It will enable you to skip forward or backwards by up to 10 years at a time.

5. You may update [Governance](#) details including

- renewal date
- governance date triggers

6. You may update [Locations](#)

- indicate by checking the box next to Locations the User can work

7. You may update [Skills](#)

- indicate by checking the box next to Skills the User has

8. Click the “Save Changes” button.

The updated User Profile will now be reflected in the ShiftMatch System.

**Next Topic:** [Export User Texts >>](#)

# Export User Texts

[<< Edit User Profile](#) | [Export User Messages >>](#)

## Exporting User Texts

From the **User Search** page on the **People** tab, you can export a CSV file detailing all text messages the ShiftMatch System sent to a User and any Texts the User sent back:

1. Locate the name of the User.
2. Click on the **Text Export** link that corresponds to the User.

The screenshot shows the ShiftMatch User List interface. At the top, there's a navigation bar with tabs like 'My Schedule', 'Staffing', 'People', 'Agency', 'Admin', and 'Settings'. The 'People' tab is active. Below the navigation bar, there's a 'User List' section with a search bar and filters. A dropdown menu is open under 'People', showing options like 'User Search', 'Add User', 'Why Not?', 'Broadcast', and 'Bulk User Upload'. The 'User Search' option is circled. Below the search bar, there's a table of users. The table has columns: Username, Grade, Active, Lastname, Firstname, Worktype, Text Export, Message Export, Schedule, and Broadcast. The 'Text Export' column is circled, and the link for user 'Adele' is highlighted.

Username	Grade	Active	Lastname, Firstname	Worktype	Text Export	Message Export	Schedule	Broadcast
Adele	NP	✓	Agency, Adele	CAN_Agency1	<a href="#">Text Export</a>	<a href="#">Message Export</a>	<a href="#">Schedule</a>	<a href="#">Broadcast</a>
Richard	Agent	✓	Benson, Richard	Casual	<a href="#">Text Export</a>	<a href="#">Message Export</a>	<a href="#">Schedule</a>	<a href="#">Broadcast</a>
Fred	RN2	✓	Bloggs, Fred	Casual	<a href="#">Text Export</a>	<a href="#">Message Export</a>	<a href="#">Schedule</a>	<a href="#">Broadcast</a>
Gord	Mgr	✓	Botten, Gord	Full Time	<a href="#">Text Export</a>	<a href="#">Message Export</a>	<a href="#">Schedule</a>	<a href="#">Broadcast</a>
Robert	Teacher	✓	Dawson, Robert	Full Time	<a href="#">Text Export</a>	<a href="#">Message Export</a>	<a href="#">Schedule</a>	<a href="#">Broadcast</a>
Harry	RN1	✓	Demo, Harry	Casual	<a href="#">Text Export</a>	<a href="#">Message Export</a>	<a href="#">Schedule</a>	<a href="#">Broadcast</a>
Doug	Agent	✓	Denton, Doug	Casual	<a href="#">Text Export</a>	<a href="#">Message Export</a>	<a href="#">Schedule</a>	<a href="#">Broadcast</a>
James	AsstMgr	✓	Dillon, James	Full Time	<a href="#">Text Export</a>	<a href="#">Message Export</a>	<a href="#">Schedule</a>	<a href="#">Broadcast</a>
Fanny	Mgr	✓	Fitness, Fanny	Full Time	<a href="#">Text Export</a>	<a href="#">Message Export</a>	<a href="#">Schedule</a>	<a href="#">Broadcast</a>

ShiftMatch will then generate a .CSV file of that User's texts, which you will be prompted to save to your device.

**Next Topic:** [Export User Messages >>](#)

# Export User Messages

[<< Export User Texts](#) | [View User Schedule and Enter Availability >>](#)

## Exporting User Messages

From the **User Search** page on the **People** tab, you can export a CSV file detailing all messages (text and email) the ShiftMatch System sent to a User and any messages the User sent back:

1. Locate the name of the User.
2. Click on the **Message Export** link that corresponds to the User.

The screenshot shows the ShiftMatch interface. At the top, there's a navigation bar with tabs: My Schedule, Staffing, People, Agency, Admin, and Settings. The 'People' tab is active. Below the navigation bar, there's a 'User List' section. A dropdown menu is open under 'People', showing options: User Search (circled), Add User, Why Not?, Broadcast, and Bulk User Upload. Below this, there's a 'Filter results' section with a search bar and various filters (Current Users, Only Active, Archive, Min Grade, Max Grade, Worktype, Skill, Location). The main table lists users with columns: Username, Grade, Active, Lastname, Firstname, Worktype, Text Export, Message Export, Schedule, and Broadcast. The 'Message Export' column for user 'Adele' is circled.

Username	Grade	Active	Lastname, Firstname	Worktype	Text Export	Message Export	Schedule	Broadcast
Adele	NP	✓	Agency, Adele	CAN_Agency1	✗	✗	✗	✗
Richard	Agent	✓	Benson, Richard	Casual	✗	✗	✗	✗
Fred	RN2	✓	Bloggs, Fred	Casual	✗	✗	✗	✗
Gord	Mgr	✓	Botten, Gord	Full Time	✗	✗	✗	✗
Robert	Teacher	✓	Dawson, Robert	Full Time	✗	✗	✗	✗
Harry	RN1	✓	Demo, Harry	Casual	✗	✗	✗	✗
Doug	Agent	✓	Denton, Doug	Casual	✗	✗	✗	✗
James	AsstMgr	✓	Dillon, James	Full Time	✗	✗	✗	✗
Fanny	Mgr	✓	Fitness, Fanny	Full Time	✗	✗	✗	✗

ShiftMatch will then generate a .CSV file of that User's text and email messages, which you will be prompted to save to your device.

**Next Topic:** [View User Schedule and Enter Availability >>](#)

# View User Schedule and Enter Availability

[<< Export User Messages](#) | [Send User A Manual Text Message >>](#)

## Viewing User Schedules And Entering User Availability

From the **People** tab click on the **User Search** page to see a list of Users.

### View User Schedule

To view a User's current schedule:

1. Locate the name of the User.
2. Click on the **Schedule** link (under the **Schedule** column) that corresponds to the User.

The screenshot shows the ShiftMatch interface. At the top, there's a navigation bar with tabs: My Schedule, Staffing, People, Agency, Admin, and Settings. The 'People' tab is active. Below the navigation bar, there's a 'User List' section. A dropdown menu is open under the 'People' tab, showing options: User Search, Add User, Why Not?, Broadcast, and Bulk User Upload. The 'User Search' option is circled. Below the dropdown, there's a 'Filter results' section with a search bar and various filters like Min Grade, Max Grade, Worktype, Skill, and Location. The 'User List' table has columns: Username, Grade, Active, Lastname, Firstname, Worktype, Text Export, Message Export, Schedule, and Broadcast. The 'Schedule' column for the user 'Harry' is circled.

Username	Grade	Active	Lastname, Firstname	Worktype	Text Export	Message Export	Schedule	Broadcast
Adele	NP	✓	Agency, Adele	CAN_Agency1				
Richard	Agent	✓	Benson, Richard	Casual				
Fred	RN2	✓	Bloggs, Fred	Casual				
Gord	Mgr	✓	Bollen, Gord	Full Time				
Robert	Teacher	✓	Dawson, Robert	Full Time				
Harry	RN1	✓	Demo, Harry	Casual				
Doug	Agent	✓	Denton, Doug	Casual				
James	AsstMgr	✓	Dillon, James	Full Time				
Fanny	Mgr	✓	Fitness, Fanny	Full Time				

The User's schedule – with all current shift Shortfall assignments and any unfilled offers to work – will then appear in calendar form on a new page.

Scroll to the bottom of this page to see the User's basic profile information, including:

- full name
- username

- cell phone number
- [employment type](#)
- [skills](#)
- [Do Not Disturb](#) status
- chosen work [locations](#)
- date of last worked
- hours worked in this pay period

## Enter User Availability

With the User's schedule open, you can now enter a availability for that User:

1. Select the day you wish to add a new work availability for the User.
2. Click the day or **Add Availability** button (located in the top right corner).  
[A pop up screen entitled **Availability Details** will then appear.]
3. Complete the **Availability Details** screen by selecting the appropriate information.
4. Click the "Add Availability" button.

The [red flag] availability will now appear on the User's schedule.



To edit or delete a current work [red flag] availability for a User, click on that particular flag from the calendar and complete the corresponding "Edit Availability Details" dialogue screen.

**Next Topic:** [Send User A Manual Text Message >>](#)

# Send User A Manual Text Message

[<< View User Schedule and Enter Availability](#) | [Archived Users >>](#)

## Sending Users A Manual Text Message

From the **People** tab and the **User Search** page, you can manually send a Text to a User:

1. Locate the name of the User.
2. Click on the **Broadcast** link (under the **Broadcast** column) that corresponds to the User.

**User List**

Home / People / User List

Filter results

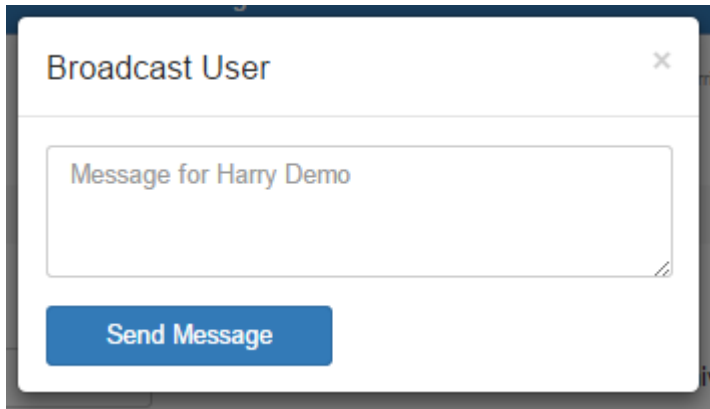
Name or Username  ☒ Current Users ☐ Only Active ☐ Archive Results per page 10

Min Grade  Max Grade  Worktype  Skill  Location

Username	Grade	Active	Lastname, Firstname	Worktype	Text Export	Message Export	Schedule	Broadcast
Adele	NP	<input checked="" type="checkbox"/>	Agency, Adele	CAN_Agency1	<input type="button" value="Text"/>	<input type="button" value="Message"/>	<input type="button" value="Schedule"/>	<input type="button" value="Broadcast"/>
Richard	Agent	<input checked="" type="checkbox"/>	Benson, Richard	Casual	<input type="button" value="Text"/>	<input type="button" value="Message"/>	<input type="button" value="Schedule"/>	<input type="button" value="Broadcast"/>
Fred	RN2	<input checked="" type="checkbox"/>	Bloggs, Fred	Casual	<input type="button" value="Text"/>	<input type="button" value="Message"/>	<input type="button" value="Schedule"/>	<input type="button" value="Broadcast"/>
Gord	Mgr	<input checked="" type="checkbox"/>	Bollen, Gord	Full Time	<input type="button" value="Text"/>	<input type="button" value="Message"/>	<input type="button" value="Schedule"/>	<input type="button" value="Broadcast"/>
Robert	Teacher	<input checked="" type="checkbox"/>	Dawson, Robert	Full Time	<input type="button" value="Text"/>	<input type="button" value="Message"/>	<input type="button" value="Schedule"/>	<input type="button" value="Broadcast"/>
Harry	RN1	<input checked="" type="checkbox"/>	Demo, Harry	Casual	<input type="button" value="Text"/>	<input type="button" value="Message"/>	<input type="button" value="Schedule"/>	<input type="button" value="Broadcast"/>
Doug	Agent	<input checked="" type="checkbox"/>	Denton, Doug	Casual	<input type="button" value="Text"/>	<input type="button" value="Message"/>	<input type="button" value="Schedule"/>	<input type="button" value="Broadcast"/>
James	AsstMgr	<input checked="" type="checkbox"/>	Dillon, James	Full Time	<input type="button" value="Text"/>	<input type="button" value="Message"/>	<input type="button" value="Schedule"/>	<input type="button" value="Broadcast"/>
Fanny	Mgr	<input checked="" type="checkbox"/>	Fitness, Fanny	Full Time	<input type="button" value="Text"/>	<input type="button" value="Message"/>	<input type="button" value="Schedule"/>	<input type="button" value="Broadcast"/>

A dialogue box entitled **Broadcast User** will then appear.

3. Type your desired message in the message box provided.



4. Click the "Send Message" button.

Your Text will now be sent to that User.

**Next Topic:** [Archived Users >>](#)

# Archived Users

[<< Send User A Manual Text Message](#) | [Reset a User's Password >>](#)

## Archived User

After 12 weeks of inactivity, ShiftMatch automatically archives a User. You can retrieve and restore archived Users, if necessary.


To restore a User:

1. Locate the individual you wish to restore by
  - choosing from the list generated under **People > User Search**
  - checking the **Archive** button
  - clicking the “Filter” button

The screenshot shows the ShiftMatch web application interface. At the top is a navigation bar with links: My Schedule, Staffing, People, Agency, Admin, and Settings. A 'Shortfall Search' box and a 'Search' button are on the right. Below the navigation bar, the page title is 'User List'. A breadcrumb trail shows 'Home / People / User List'. There is a 'Filter results' section with a search box for 'Name or Username' and radio buttons for 'Current Users', 'Only Active', and 'Archive' (which is selected). A 'Results per page' dropdown is set to '10'. A 'Filter' button is present. Below this is an 'Archive List' table with columns: Username, Grade, Lastname, Firstname, Worktype, Cell, and Restore. Two users are listed: John (RN2, Citizen, John) and Mike (RN2, Hartz, Mike). Each user has a 'Restore User' button next to them. At the bottom, there is an alphabetical index bar from A to Z.

Username	Grade	Lastname, Firstname	Worktype	Cell	Restore
John	RN2	Citizen, John			<a href="#">Restore User</a>
mike	RN2	Hartz, Mike			<a href="#">Restore User</a>

2. Click the corresponding **Restore User** button next to that individual.  
[The relevant User Details will appear and may need updating.]
3. Click the “Save Changes” button near the bottom of the page.  
The User will now be restored in the ShiftMatch System.
4. You will still need to update the User's profile as “Active” on the User's **Professional Details** page if you want ShiftMatch to include the User in the shift Shortfall matching process.

 My Schedule • Staffing • **People •** Agency • Admin • Settings •

Shortfall Search

01:51PM | You are signed in as Catherine | Logout | Manager Guide | Ask us | Class: Default ▼

## Archive User Retrieval

Home / People / Archive User Retrieval Help

Login Details Personal Details Professional Details Governance Locations Skills

### Professional Details

Enter user attributes and classification details here.

Active

Last Change 01/01/2015 14:01

**Next Topic:** [Reset a User's Password >>](#)

# Reset a User's Password

[<< Archived Users](#) | [People: Add User >>](#)

## Reset a User's Password

If a User is unable to login to ShiftMatch, you may reset their password for them.

- Go to **People > User Search** and choose the link to the **User** that you would like to reset.
- Under the **Login Details** tab, type the temporary password in the Password and Confirm Password boxes and include a Password Hint.
- Click on "Save Changes".



Remember: Passwords are CaSe sensitive, must contain at least one capital letter and need to be at least 6 characters long.

The screenshot shows the ShiftMatch web application interface. At the top is a navigation bar with links: My Schedule, Staffing, People, Agency, Admin, and Settings. A search bar labeled 'Shortfall Search' is on the right. Below the navigation bar, the user 'Richard Benson' is selected. A breadcrumb trail shows 'Home / People / User List / Richard Benson'. A 'Help' icon is in the top right. Below the breadcrumb is a tabbed interface with 'Login Details' selected. Under 'Login Details', a message states: 'Passwords should always contain upper and lower case letter as well as numbers to ensure maximum security.' There are four input fields: 'Username' (containing 'Richard'), 'Password' (masked with asterisks), 'Confirm Password' (masked with asterisks), and 'Password Hint' (containing 'Password Hint'). A blue 'Save Changes' button is at the bottom.

Provide the temporary password to the User and encourage them to go to **My Schedule > Change Password** immediately after login and reset their own unique password and hint.

**Next Topic:** [People: Add User >>](#)

# People: Add User

User << [Reset a User's Password](#) | [People: Why Not? – Understanding Non Matches](#) >>

## Add User

✿ To upload multiple Users at one time, please see [Bulk User Upload](#) for more information.

On the **People** tab, the **Add User** page is where you add new Users to the ShiftMatch System.

The screenshot shows the 'Add New User' page in the ShiftMatch system. The top navigation bar includes 'My Schedule', 'Staffing', 'People', 'Agency', 'Admin', and 'Settings'. The 'People' tab is active, and a dropdown menu is open, showing options: 'User Search', 'Add User' (circled), 'Why Not?', 'Broadcast', and 'Bulk User Upload'. The main content area is titled 'Add New User' and has a breadcrumb trail: 'Home / People / User List / Add New User'. Below the breadcrumb are tabs for 'Login Details', 'Personal Details', 'Professional Details', 'Governance', 'Locations', and 'Skills'. The 'Login Details' section is active and contains a note: 'Passwords should always contain upper and lower case letter as well as numbers to ensure maximum security.' It includes four input fields: 'Username', 'Password', 'Confirm Password', and 'Password Hint'. A 'Save Changes' button is located below these fields. At the bottom of the page, there is a footer with 'Feedback | About | Manager Guide' on the left and 'Terms and Conditions | Privacy Policy | © 2015 FShift' on the right.

To add a new User:

1. Complete the User's **Login Details**, including:
  - **Username** – the name the person will use to login to the ShiftMatch System, generally based on a pre-defined naming convention
  - **Password** – the password the User will need to login to the ShiftMatch System. Entered twice.
  - **Password Hint** – the hint that will be emailed to the User for a forgotten password
2. Complete the User's **Personal Details**, including:

- **Cell** phone number – while not mandatory, the User's cell phone is the **primary source of communication** from ShiftMatch
- **Email** address – while not mandatory, the User's email is the secondary source of ShiftMatch communication **after** the User's cell phone
- **First Name** and **Last Name**
- **Address**

3. Complete the User's **Professional Details** including:

- **Active** – determines whether the User is active in the ShiftMatch System (after 12 weeks as inactive, the User moves to the archives)
- **Date of Hire/Date of Termination** Can now be added to a profile. Contact your ShiftMatch representative to have this function turned on.
- **Experience Allowance** (if applicable) – set only with the use of shift rate; determines extra pay rate. Rarely used.
- **Limit Hours** – sets the maximum number of hours the User can work per pay period. Set at **0** if no limit required
- **Grading** – the job grade associated to the User; the key variable in matching a User to a shift Shortfall
- **Employment Type** – the User's employment type (eg: typically Full Time, Part Time or Casual)
- **Class** – the class associated to the User; used to further differentiate worker classification
- **Role Type** – the ShiftMatch role associated to the User; determines which ShiftMatch access and functions are available to the User
- **Rating** – a variable that may further differentiate worker classification (if not used, leave at Level 1)
- **Additional Text** – notes you want associated with the User
- **Show Dept Location** – whether or not you want the User to see Dept ([Level 4](#)) Locations
- **Default Auto Accept to be on** – if checked, the User will no longer receive a shift request message that requires a response.  
Instead, when a shift request matches the User's availability, they will simply receive a confirmation text that confirms the relevant details.
- **Pools** – the pool(s) associated to the User; used to further differentiate worker classification

4. Complete the User's **Governance Details** including, for example:

- **Registration #** – the User's professional registration number, if applicable
- **Renewal** – the renewal date for a specific certification (the date will trigger renewal reminders and ultimately suspend the User from the ShiftMatch System once expired).



Governance is fully customized by Management but you must contact your ShiftMatch Administrator to make changes or add Governance rules.

5. Complete the User's **Locations** including:

- **Locations** – the locations the User can work (if the location is unchecked, the User will not see the location in the My Locations section – effectively preventing any Shortfall requests and matches)

The list of Locations is pre-set by Management, see **Settings** > [Locations](#) for more.

6. Complete the User's **Skills** including:

- **Skill** – specific industry skill(s) held by the User

The list of Skills is pre-set by Management, see **Settings** > [Skill Grouping](#) for more.

Click the “Save Changes” button at the bottom of the page.

The new User will now be added to the ShiftMatch System.

**Next Topic:** [People: Why Not? – Understanding Non Matches >>](#)

# People: Why Not? – Understanding Non Matches

[<< People: Add User](#) | [People: Broadcast – Sending Mass Texts To User Groups](#) >>

## Why Not?

On the **People** tab, the **Why Not?** page allows you to determine why an individual User was not matched for a specific Shortfall.

The screenshot shows the ShiftMatch interface. At the top, there's a navigation bar with tabs: My Schedule, Staffing, People, Agency, Admin, and Settings. The 'People' tab is active. A dropdown menu is open under 'People', showing options: User Search, Add User, Why Not? (circled), Broadcast, and Bulk User Upload. Below the menu, a red error message box says: "The Username and Shortfall Id must not be empty." The main content area is titled "Why does a user not match?" and contains a form with two input fields: "Username" and "Shortfall ID". Below these fields is a blue button labeled "Why Not?". At the bottom of the page, there are links for Feedback, About, Manager Guide, Terms and Conditions, Privacy Policy, and a copyright notice for 2015 FillShift.

To use the Why Not? function:

1. Enter the **Username** of the individual User in question.
2. Enter the **Shortfall ID** in question.
3. Click the “Why Not” button.

ShiftMatch will then display the reason(s) why the User did not match the shift Shortfall.

WFLSHFT

My Schedule ▾ Staffing ▾ People ▾ Agency ▾ Admin ▾ Settings ▾

Shortfall Search

Search

10:54AM | You are signed in as Catherine | Logout | Manager Guide | Ask us | Class: Default ▾

## Why does a user not match?

Home / People / Why Not? / Why does a user not match? [Help](#)

Enter in the details below for a list of possible reasons why a User has not been matched to a Shortfall.

Details

Username	Harry
Shortfall ID	IDC802

Why Not?

Why not reasons

- 1) The user locations are not a match.
- 2) The user has no availability which match the day or shift type.
- 3) You cannot update a shortfall where the deadline has passed.
- 4) You cannot update a shortfall in the past.
- 5) shortfalls cannot be accepted whilst others shortfalls are still being worked.
- 6) The user has excluded this location and cannot work in that area.



Want a shortcut to the **Why Not?** function on other pages and searches?  
Simply click on any **Why** link provided and complete your search from there.

**Next Topic:** [People: Broadcast – Sending Mass Texts To User Groups >>](#)

# People: Broadcast – Sending Mass Texts To User Groups

[<< People: Why Not? – Understanding Non Matches](#) | [People: Bulk User Upload – Adding Bulk Information](#)  
[>>](#)

## Broadcast

\* Please be aware that text volume is a factor in the cost of ShiftMatch.  
 Using the Broadcast function may incur costs for your employer

The **People** tab through the **Broadcast** page allows you to send mass texts to groups of Users.

**Broadcast New**

Home / People / Broadcast / Broadcast New

Enter your broadcast message here, then filter the intended target users using the form below. The following page will confirm your intended targets before broadcasting your message via TXT. #firstname# will be replaced with a users first name.

Your message, maximum 254 characters

**Broadcast basic User filters**

Shortfall ID

☐ Include Users with Do Not Disturb on

☐ Include Inactive Users

Which Employee Type? ▼

Which Grading? ▼

Which Role? ▼

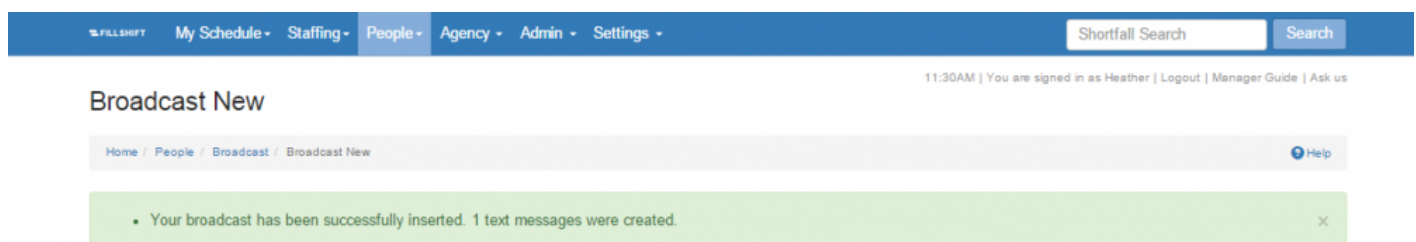
Broadcast based on Skills

Broadcast based on Locations

**Submit Broadcast**

To send a broadcast text:

1. Enter the message in the box at the top right of the page, maximum 254 characters.  
If you include the code **#firstname#**, each User's first name will show in their copy of the text message.
2. Select the **basic User filters** you wish to include.  
Among your options for User selection include any combination of:
  - Specific Users identified by their **Usernames** (comma separated for multiples)
  - Users associated with a specific **Shortfall ID**
  - check boxes if you would like to **include Users with Do Not Disturb on** and **Include Inactive Users**
  - Users with a specific **Employee Type**. Check multiple boxes to reach multiple Employee Types (eg: Part Time and Full Time)
  - Users with a specific **Role**
  - Users with a specific **Grade**
  - Users with specific **Skills**
  - Users that work in a specific **Location**
3. Click the "Submit Broadcast" button.  
A new screen entitled **Broadcast View** will appear.
4. Verify the information on the **Broadcast View** screen:
  - the names of the Users
  - the total number of Users who will receive the text (**Total Matches**)
  - the contents of the **Message**
5. If you are not satisfied with the results of the **Broadcast View** screen, click the "Change Broadcast Requirements" button and repeat steps 1-4.
6. Once you are satisfied with the **Broadcast View** screen, click the "Submit Requirements" button.
7. If successful, a green banner will show at the top of the screen with the details of the texts sent.



Your text will now be sent to all Users that match the selection criteria.



Broadcast texts do not allow the receiving User to reply.

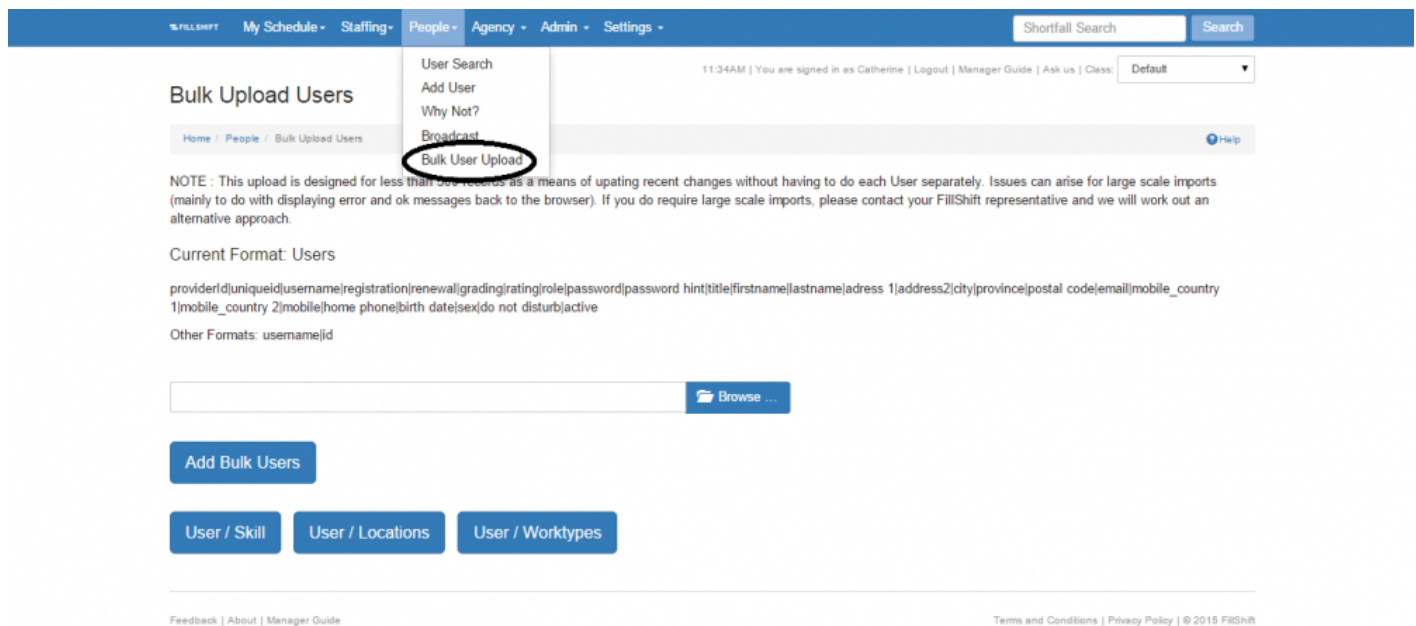
**Next Topic:** [People: Bulk User Upload – Adding Bulk Information >>](#)

# People: Bulk User Upload – Adding Bulk Information

[<< People: Broadcast – Sending Mass Texts To User Groups](#) | [Agency Tab Overview >>](#)

## Bulk User Upload

When activated by ShiftMatch, the **Bulk User Upload** page on the **People** tab allows you to add multiple Users in bulk.



The Bulk User Upload function is designed for less than 500 records.  
All files must follow the current default format.

Contact ShiftMatch for more information.

If you need to deal with large scale imports, ShiftMatch will assist you.

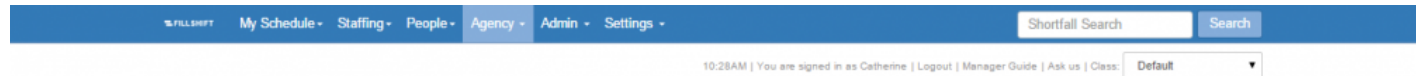
**Next Topic:** [Agency Tab Overview >>](#)

# Agency Tab Overview

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[<< People: Bulk User Upload – Adding Bulk Information](#) | [Agency: Agency User Request >>](#)

## Agency Tab



The **Agency** tab is where you can view:

1. [Unfilled Agency Shortfalls](#)
2. [Agency News](#)

Adding or editing Agencies is done with the right permission via **Settings** > [Agency Edit](#)

**Next Topic:** [Agency: Agency User Request >>](#)

# Agency: Agency User Request

[<< Agency Tab Overview](#) | [Agency: News >>](#)

## Agency User Request

This is the page that an Agency Scheduler would be directed to when they log in to ShiftMatch. It shows all Shortfalls opened to the Agency and allows them to fill them.

The screenshot shows the 'Unfilled Agency Shortfalls' page in ShiftMatch. The navigation bar at the top includes 'My Schedule', 'Staffing', 'People', 'Agency', 'Admin', and 'Settings'. The 'Agency' dropdown menu is open, highlighting 'Agency User Request'. The main content area has a breadcrumb trail: 'Home / Agency / Agency Shortfall / Unfilled Agency Shortfalls'. Below this is a 'Filter results' section with a 'Start' date of 17/04/2015, 'Choose Skill' and 'Choose Location' dropdowns, and a 'Results per page' of 10. A 'Filter' button is present. The table below lists three shortfalls:

Shortfall ID	Link ID	Date	Deadline	Location	Shift	Grade	Skills	Edit
IDE334		10/04/2015	10/04/2015 17:45	Credit Valley : Cardiology	18:00 - 02:00	RPN - NP	General - Recovery	<a href="#">Place</a>
IDE342		11/04/2015	11/04/2015 05:00	Western Hospital : 1A Critical Care Unit	07:00 - 14:00	RPN - RN2	General - Bariatric - RN-Flexible Sigmoidoscopy	<a href="#">Place</a>
IDD320		11/04/2015	11/04/2015 07:45	Toronto Rehabilitation Institute : Lyndhurst Centre	08:00 - 16:00	RPN - NP	General	<a href="#">Place</a>

At the bottom of the page, there are links for 'Feedback', 'About', 'Manager Guide', 'Terms and Conditions', 'Privacy Policy', and a copyright notice for 2015 FMSHift.

The Agency Manager can click on the **Place** button next to the appropriate Shortfall and choose a User to fill it.



If you are **NOT** an Agency Scheduler but view this page, you may be able to see and choose **ALL** Users when you click the "Place" button.  
**Care must be taken to avoid misplacement of Users.**

**Next Topic:** [Agency: News >>](#)

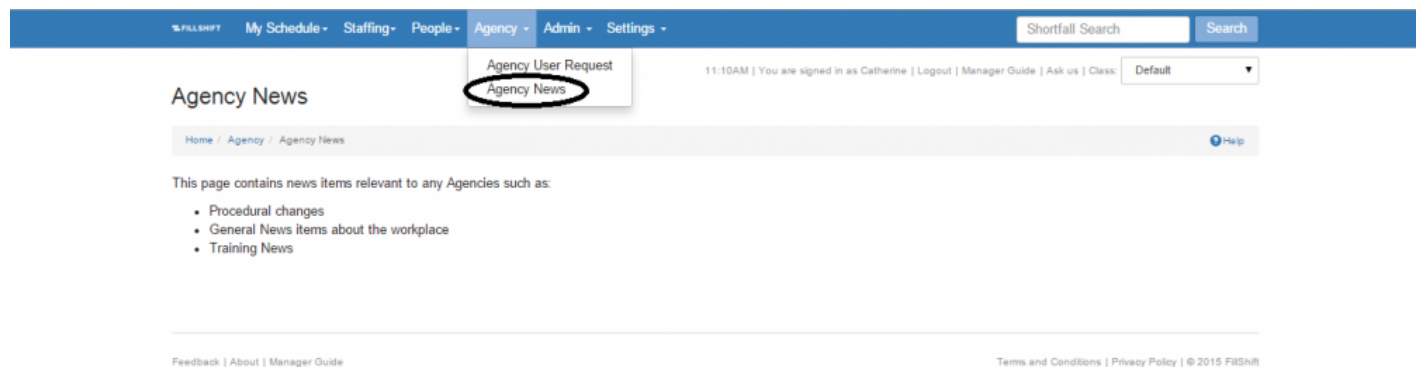
# Agency: News

[<< Agency: Agency User Request](#) | [Admin Tab Overview >>](#)

## Agency News

The **Agency News** page can contain the latest company announcements and other pertinent work information relevant to Agencies.

It may not be viewed by all Users, only those Agencies provided access by Management.



Agency Managers can check the **Agency News** page for for timely communication, company reminders and employer news.

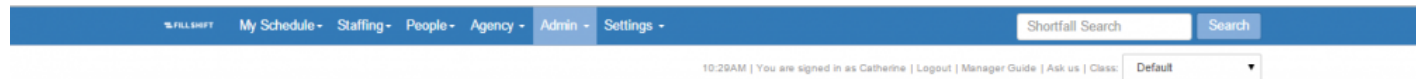
**Next Topic:** [Admin Tab Overview >>](#)

# Admin Tab Overview

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[<< Agency: News](#) | [Admin: Reports >>](#)

## Admin



The **Admin** tab provides access to basic administrative functions.

Depending upon individual permissions, the Admin tab has up to six pages:

- [Reports](#)
- [Cancellations](#)
- [Content](#)
- [Bulk Shortfall Upload](#)
- [File Upload](#)
- [Invoice Reconciliation](#)

**Next Topic:** [Admin: Reports >>](#)

# Admin: Reports

---

[<< Admin Tab Overview](#) | [Admin: Cancellations – Viewing Deleted Shifts >>](#)

## Reports



It is only possible for you to generate a report with data up to 6 weeks in the past. Please contact your ShiftMatch Administrator if you need access to older data.

The **Admin** tab and the **Reports** page allows you to generate template reports on such areas as staffing, User details, Shortfalls, shift offers and cancellations.

Among report formats available are CSV, PDF and pivot table.

To generate a report:

1. Type in the **Start Date** and **End Date** (or click on the calendar icon for a calendar view) of the dates you wish to include in the report.
2. If you wish to limit the scope of the Report by **Location**, choose the appropriate Location in the dropdown menu. Additionally, if the External Reference tab is used, there may be an option to limit the scope of the report to a specific External Reference (eg: Job Code, Shift ID etc).
3. Click on the corresponding “PDF” or “CSV” button of the report format desired:

ShiftMatch will then generate the selected report in your chosen format.



The most commonly used report is **Shortfall Details**.



Shortfall Details CSV report may be generated as an XML feed for use with third party systems such as data warehouses, Google Sheets, accounting systems etc. Contact your ShiftMatch account manager to discuss this feature.

## Pivot Table Report

You can generate two reports in an excel pivot table format: Shortfall Details and User Details.

1. Under **Admin > Reports** click on “**Pivot Reporting Excel Download**” link. It will generate an XL spreadsheet entitled **shift\_details(#).xls**
2. Open this spreadsheet and if you haven't already done so, you will need to enable the macros in XL
3. Go back **Admin > Reports** page, indicate the relevant **date range**, generate both the **Shortfall Details** and **User Details** reports and save them in a location that can be accessed
4. Return to the **shift\_details(#).xls** spreadsheet and click on the “\*Get Shift Data” button
5. Locate the **Shortfall Details** report and click on it
6. Return to the **shift\_details(#).xls** spreadsheet and click on the “\*Get Staff Data” button
7. Locate the **User Details** report and click on it

The **shift\_details(#).xls** spreadsheet will now be populated with data for your assessment and manipulation.

**Next Topic:** [Admin: Cancellations – Viewing Deleted Shifts >>](#)

# Admin: Cancellations – Viewing Deleted Shifts

[<< Admin: Reports](#) | [Admin: Content – Editing News and Announcements >>](#)

## Cancellations

You can view a list of all deleted shifts on the **Cancellations** page under the **Admin** tab.

Pkid	Location	Shift	Day	User	Type	Reason	Penalty	History	Date Deleted	Deleted By
ICV688	Hannibal Season III / Main Unit / Construction	07:00	26/11/2014				false		24/11/2014 19:24:19	Paulette Steward
ICV692	Hannibal Season III / Main Unit / Construction	07:00	25/11/2014				false		25/11/2014 19:15:31	Paulette Steward
ICV693	Hannibal Season III / Main Unit / Construction	07:00	25/11/2014				false		25/11/2014 19:15:35	Paulette Steward
ICW720	Hannibal Season III / Main Unit / Construction	07:00	26/11/2014				false		25/11/2014 19:16:57	Paulette Steward
ICX400	Toronto Western / Geriatric / Geriatric Mental Health	07:00	05/12/2014	Harry Demo	(Provider) Re-initialize	By Worker	false		04/12/2014 20:31:00	Harriet Manager
ICX489	Brampton / Agnes Taylor Public School / Kindergarten	08:00	18/12/2014	Thomas Teacher	(Provider) Delete	Entered in Error	false		15/12/2014 17:58:37	Timothy Principal

To view deleted shifts:

1. To Filter the results

- Type in the **Start Date** and **End Date** (or click on the calendar icon for a calendar view) of the dates you wish to include.
- Include the **Location** or leave blank
- Include the **Shortfall ID** or leave blank
- Include the **Username** or leave blank

Click on the “Filter” button.

2. A detailed list of all deleted shifts that match your search criteria will appear below.

The list allows you to easily view:

- **Shortfall ID**
- **Location**
- **Shift** – Shortfall start time
- **Day** of the Shortfall
- **User** – the individual assigned to work the shift (if applicable)
- **Type** of cancellation
- **Reason** for the cancellation
- If a **Penalty** was applied for the cancellation
- **History** – a timestamped audit trail of the shift Shortfall
- **Date Deleted** – the date and time of the cancellation
- **Deleted By** – the name of the User who deleted the shift

**Next Topic:** [Admin: Content – Editing News and Announcements >>](#)

# Admin: Content – Editing News and Announcements

[<< Admin: Cancellations – Viewing Deleted Shifts](#) | [Admin: Bulk Shortfall Upload – Adding Bulk Shortfalls](#) >>

## Content

Depending on permissions, the **Content** page on the **Admin** tab allows you to edit company news, announcements and other information found on the News tab.

The screenshot shows the ShiftMatch Admin interface. The top navigation bar includes links for My Schedule, Staffing, People, Agency, Admin, and Settings. The Admin menu is open, showing options like Reports, Cancellations, Content (highlighted), Bulk Shortfall Upload, File Upload, and Invoice Reconciliation. The main content area is titled 'Content List' and shows a table of content pages. The table has columns for Page ID, Description ID, and Edit. The pages listed are About Us, Manager News, News, Permittee News, Privacy, Ratings, and Terms and Conditions. Each page has an Edit button next to it.

Page ID	Description ID	Edit
About Us	Appears when "About" link at bottom of page is clicked.	<a href="#">Edit</a>
Manager News	News that only Manager Grades can see	<a href="#">Edit</a>
News	News viewable by Staff	<a href="#">Edit</a>
Permittee News	News that only Agency Admin users can see	<a href="#">Edit</a>
Privacy	Viewable when "Privacy Policy" link at bottom of page is clicked.	<a href="#">Edit</a>
Ratings	A description of the Staff Rating criteria (if used).	<a href="#">Edit</a>
Terms and Conditions	Viewable when "Terms & Conditions" link at bottom of page is clicked.	<a href="#">Edit</a>

To edit content:

1. Click on the **Page** link and/or click on the relevant **Edit** button.
2. Make your desired content changes.

The screenshot shows the ShiftMatch web application interface. At the top is a blue navigation bar with links: My Schedule, Staffing, People, Agency, Admin, and Settings. To the right of these links is a 'Shortfall Search' input field with a 'Search' button. Below the navigation bar, the page title 'Manager News' is displayed. A breadcrumb trail shows 'Home / Admin / Content List / Manager News'. The main editing area has a rich text editor toolbar with icons for bold, italic, underline, text color, background color, bulleted list, numbered list, link, and unlink. The text area contains the heading 'Manager News' and the paragraph 'Please remember all staff to update CPR qualifications as needed and annual renewals of qualifications.' Below the text area are two buttons: 'Save' and 'View All File Uploads'. At the bottom of the page, there is a footer with links for 'Feedback | About | Manager Guide' and 'Terms and Conditions | Privacy Policy | © 2015 FitShift'.

3. Click on the “Save” button.

The changes will now be reflected in the corresponding pages on the relevant page.

**Next Topic:** [Admin: Bulk Shortfall Upload – Adding Bulk Shortfalls >>](#)

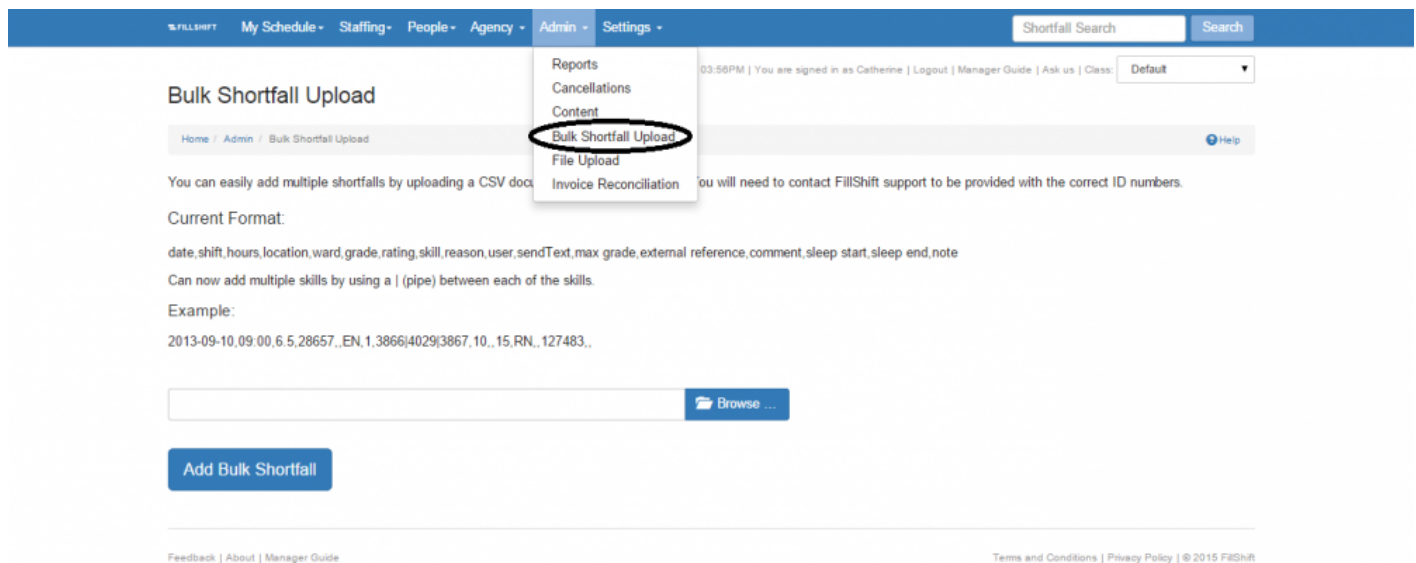
# Admin: Bulk Shortfall Upload – Adding Bulk Shortfalls

[<< Admin: Content – Editing News and Announcements](#) | [Admin: File Upload >>](#)

## Bulk Shortfall Upload

When activated by ShiftMatch, the **Bulk Shortfall Upload** page on the **Admin** tab allows you to upload multiple Shortfalls, filled or vacant, in bulk.

The file must follow the current default format and be formatted as a .txt file.



This function should be used with caution and you should contact your ShiftMatch Administrator if you wish to utilize it.

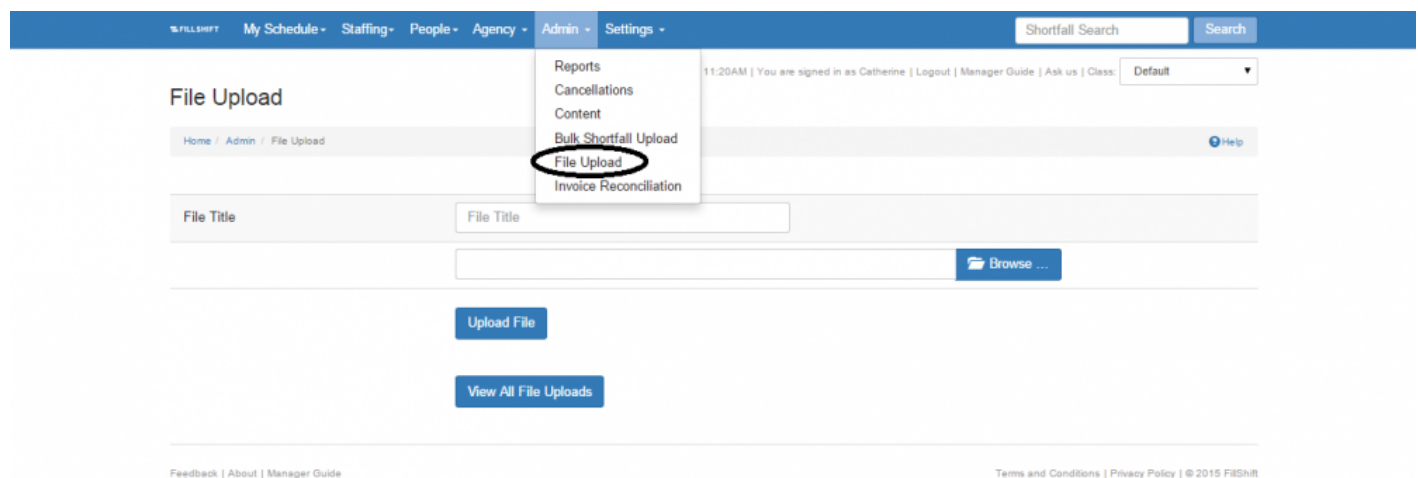
**Next Topic:** [Admin: File Upload >>](#)

# Admin: File Upload

[<< Admin: Bulk Shortfall Upload – Adding Bulk Shortfalls](#) | [Admin: Invoice Reconciliation >>](#)

## Admin: File Upload

To attach documents to any of the **News** pages, the files are uploaded to ShiftMatch here. You may access all uploaded files when you amend the content page under **Admin > Content**



The screenshot shows the ShiftMatch web application interface. At the top is a blue navigation bar with links: %FULLSHIFT, My Schedule, Staffing, People, Agency, Admin, and Settings. On the right of the bar is a 'Shortfall Search' input field and a 'Search' button. Below the navigation bar, the page title 'File Upload' is displayed. A breadcrumb trail shows 'Home / Admin / File Upload'. A dropdown menu is open under the 'Admin' link, showing options: Reports, Cancellations, Content, Bulk Shortfall Upload, File Upload (which is circled in red), and Invoice Reconciliation. The main content area has a 'File Title' input field, a 'Browse ...' button, an 'Upload File' button, and a 'View All File Uploads' button. At the bottom, there is a footer with links for Feedback, About, and Manager Guide, and a copyright notice for 2015 ShiftMatch.

1. To upload the file, click **Browse** and locate the file
2. Click on “Upload File” button

To view all uploaded files, click on the “View All File Uploads” button.

**Next Topic:** [Admin: Invoice Reconciliation >>](#)

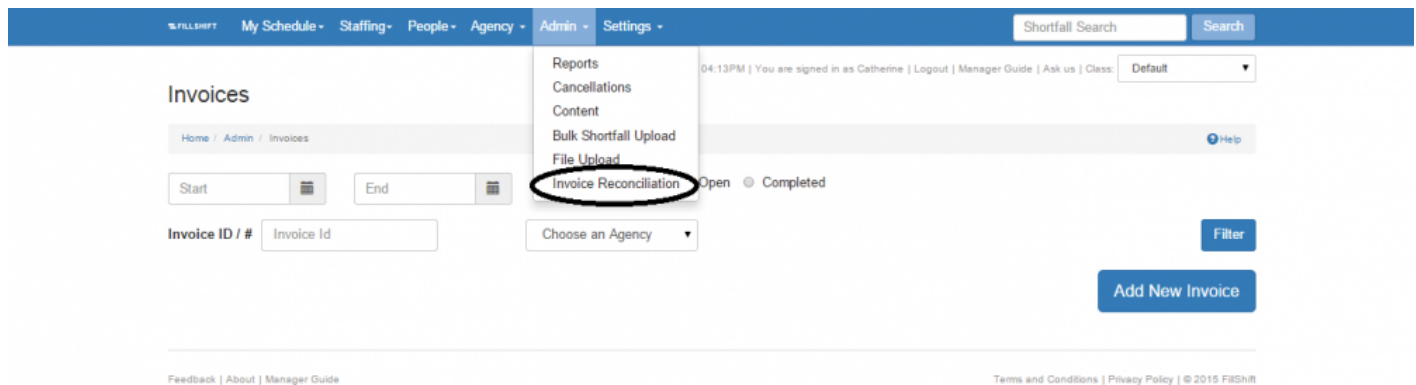
# Admin: Invoice Reconciliation

[<< Admin: File Upload](#) | [Settings Tab Overview >>](#)

## Invoice Reconciliation

Under the **Admin** tab and the **Invoice Reconciliation** page, you can input invoices issued from Agencies for Shifts filled by those Agencies.

You will then be able to reconcile Shortfalls directed to the Agency via ShiftMatch with the items listed by the Agency on their invoice.



1. To add a new invoice from an Agency, click on **Add New Invoice**
2. Choose the correct **Agency** from the dropdown menu
3. Add in the details of the **Invoice Number**, **Invoice Date** and **Invoice Amount**
4. Click “Add New Invoice” button
5. Nominate the **From Date** and **To Date** relevant to the invoice
6. Click on “Import Shortfalls” button
7. Any matching Shortfalls filled by the nominated Agency will be listed and may be reconciled against the invoice.

FILESHIFT

My Schedule • Staffing • People • Agency • Admin • Settings •

Shortfall Search

Search

02:37PM | You are signed in as Catherine | Logout | Manager Guide | Ask us | Class: Default

## Edit an Invoice

Home / Admin / Invoices / Edit an Invoice

02/03/2015 24/04/2015 ☐ Access Archived Shortfalls Import Shortfalls

Agency Name : CAN\_Agency1

Invoice Number: 565  
Invoice Date: 13/04/2015  
Init Amount: \$400.00  
Reconciled Amount: \$0.00

Adele Agency

Date IT	Location IT	Cost Centre IT	Name IT	Start IT	End IT	Hours IT	Agency Fee IT	Invoice Number IT
15/04/2015	Orthopedics -		Jones, Alan	07:00	15:00	7.25	\$ 0.0	-- Release --
Init Amount:							\$ 400.0	
Total:							\$0.00	

Comments

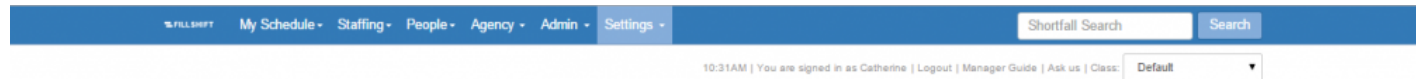
Delete Invoice Complete Invoice Save Invoice

**Next Topic:** [Settings Tab Overview >>](#)

# Settings Tab Overview

[<< Admin: Invoice Reconciliation](#) | [Settings: Locations >>](#)

## Settings



! Not all Users have the necessary access view or change the **Settings**. If you need to but do not see the options detailed in this section when you login to ShiftMatch, you will need to escalate the issue to Management.

The **Settings** tab is where you can further customize the ShiftMatch System.

Depending upon individual permissions, the Settings tab has up to nine pages:

- [Locations](#)
- [Roles](#)
- [Pools](#)
- [Classes](#)
- [Grading Classes](#)
- [Skill Grouping](#)
- [Agency Edit](#)
- [External Payroll Mapping](#)
- [Return Text](#)

**Next Topic:** [Settings: Locations >>](#)

# Settings: Locations

[<< Settings Tab Overview](#) | [Location: Create a Rapidbook >>](#)

## Locations

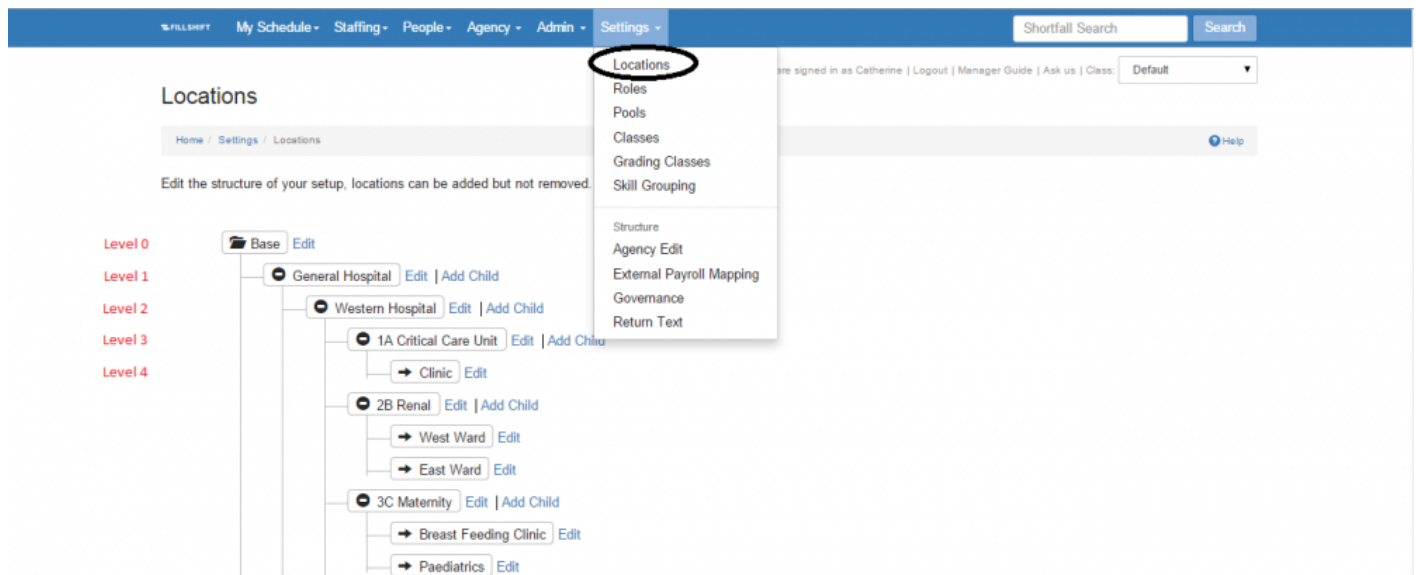
The **Locations** page on the **Settings** tab provides an overview of the locations mapped to the ShiftMatch System.

The process of installation of ShiftMatch will include appropriate configuration of the Locations by ShiftMatch in consultation with Management.

! Due to system mapping and database configuration associations, please consult with ShiftMatch before making any changes.

! Any changes made to the **Locations** page alters system mapping and can break the ShiftMatch System logic and should be made with **EXTREME CAUTION**

The Locations can extend down from Level 0 to Level 4 – see the red notes below to indicate each of Level in this example.



**Next Topic:** [Location: Create a Rapidbook >>](#)

# Location: Create a Rapidbook

[<< Settings: Locations](#) | [Location: Preferred Pools >>](#)

## Create a Rapidbook

A **Rapidbook** may be added to establish regular Shortfall profiles to be recorded and used as templates. Rapidbooks are established and connected to Locations at the 3rd Level, see example below:

The screenshot shows the 'Locations' page in the ShiftMatch interface. The page has a blue header with navigation links: 'My Schedule', 'Staffing', 'People', 'Agency', 'Admin', and 'Settings'. A search bar is also present. The main content area is titled 'Locations' and includes a breadcrumb trail: 'Home / Settings / Locations'. Below the title, there is a message: 'Edit the structure of your setup, locations can be added but not removed.' The locations are organized into a hierarchical tree structure. On the left, levels are listed: Level 0, Level 1, Level 2, Level 3, and Level 4. The tree structure is as follows: Level 0: Base (Edit); Level 1: General Hospital (Edit | Add Child); Level 2: Western Hospital (Edit | Add Child); Level 3: 1A Critical Care Unit (Edit | Add Child), Clinic (Edit); Level 4: 2B Renal (Edit | Add Child), West Ward (Edit), East Ward (Edit). A red circle highlights the 'Edit' link for '1A Critical Care Unit', and a red arrow points to it with the text 'Add Rapidbook at this Level'.

To create a Rapidbook, click on the Edit link next to the appropriate Level 3 Location.

The “Location Edit” page will open and you can click on the **Location Rapidbooks** link to view, edit, delete and add Rapidbooks for that Location.

[FILLSHIFT](#)
[My Schedule](#)
[Staffing](#)
[People](#)
[Agency](#)
[Admin](#)
[Settings](#)

Shortfall Search

04:53PM | You are signed in as Catherine | Logout | Manager Guide | Ask us | Class: Default ▾

## Location Edit : 1A Critical Care Unit

[Home](#) / 
 [Settings](#) / 
 [Locations](#) / 
 Location Edit : 1A Critical Care Unit
 Help

General Location Settings

Additional Location Settings

**Location Rapidbooks**  

Current Rapidbooks are listed below for the location 1A Critical Care Unit.

Description II	Text Shortfall Code II	Edit	Delete
AM CC	30473AM CC	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

Create a new Rapidbook

[Feedback](#) | 
 [About](#) | 
 [Manager Guide](#)

[Terms and Conditions](#) | 
 [Privacy Policy](#) | 
 © 2015 FillShift

To view or edit an existing Rapidbook, click **Edit** next to the appropriate Description.

To delete an existing Rapidbook, click **Delete** next to the appropriate Description.

To add a new Rapidbook, click the **Create a new Rapidbook** button and complete the Shortfall details in the same way as you would [Add a Shortfall](#).

Click “Update Rapidbook”

**Next Topic”** [Location: Preferred Pools >>](#)

# Location: Preferred Pools

[<< Location: Create a Rapidbook](#) | [Location: Owner >>](#)

## Preferred Pools

[Pools](#) are a method of grouping Users within the ShiftMatch system.

If Pools are established and Users are grouped into them, each Level 3 Location can choose to prefer Users from a certain Pool; the **Preferred Pools**. As a result, Users classified in the Preferred Pool will receive preference for matching within that Location.

The screenshot displays the 'Location Edit' interface for '1A Critical Care Unit'. The top navigation bar includes links like 'My Schedule', 'Staffing', 'People', 'Agency', 'Admin', and 'Settings'. The main content area is titled 'Location Edit : 1A Critical Care Unit' and contains a form with the following fields:

- Description:** 1A Critical Care Unit
- Abbreviation:** 1A CCU
- Owner:** Catherine Stuart
- Cost Center:** Cost Centre
- Address:** Address Details
- Phone:** Contact Information
- Preferred Pool:** No Preferred Pool (This field is circled in red in the original image)

Below the main form, there are sections for 'Additional Location Settings' and 'Location Rapidbooks'.

To understand how to classify Users into Pools, see [Add User](#) or [Edit User](#).

### Pools

- ☒ A Team - A Team
- ☒ Default - Used by everyone
- ☐ Late Night Preferred - Late Night
- ☐ Weekend Only - Weekend Only

**Next Topic:** [Location: Owner >>](#)

# Location: Owner

[<< Location: Preferred Pools](#) | [Location: Cost Centres >>](#)

## Location Owner

By assigning an **Owner** to a Location, at Level 3, the Owner of the Location will receive all ShiftMatch notifications (including filled and unfilled Shortfall emails) for that Location.

The screenshot shows the 'Locations' management page in ShiftMatch. The top navigation bar includes links for 'My Schedule', 'Staffing', 'People', 'Agency', 'Admin', and 'Settings'. A search bar for 'Shortfall Search' is also present. The main content area displays a hierarchical tree of locations. On the left, levels are listed from Level 0 to Level 4. The tree structure is as follows:

- Level 0: Base (Edit)
- Level 1: General Hospital (Edit | Add Child)
- Level 2: Western Hospital (Edit | Add Child)
- Level 3: 1A Critical Care Unit (Edit | Add Child) - This level is highlighted with a red circle and a red arrow pointing to it with the text 'Add Owner at this Level'.
- Level 4: Clinic (Edit), 2B Renal (Edit | Add Child), West Ward (Edit), East Ward (Edit)

Click on **Edit** next to the Location Level 3 and nominate the Owner of the Location as below:

FILEDRAFT

My Schedule • Staffing • People • Agency • Admin • Settings •

Shortfall Search

Search

01:10PM | You are signed in as Catherine | Logout | Manager Guide | Ask us | Class: Default ▼

## Location Edit : 1A Critical Care Unit

Home / Settings / Locations / Location Edit : 1A Critical Care Unit

Help

General Location Settings

Description

1A Critical Care Unit

Abbreviation

1A CCU

Owner

Jane Smith ▼

Cost Center

Cost Centre

Address

Address Details

Phone

Contact Information

Preferred Pool

No Preferred Pool ▼

Additional Location Settings

Location Rapidbooks

**Next Topic:** [Location: Cost Centres >>](#)

# Location: Cost Centres

[<< Location: Owner](#) | [Settings: Roles >>](#)

## Cost Centres

By nominating **Cost Centres** at the Level 4 Location, the cost of Shortfalls worked in that Location can be allocated appropriately.

The screenshot shows the 'Locations' management page in ShiftMatch. The interface includes a top navigation bar with links like 'My Schedule', 'Staffing', 'People', 'Agency', 'Admin', and 'Settings'. Below the navigation bar, there's a breadcrumb trail: 'Home / Settings / Locations'. A message states: 'Edit the structure of your setup, locations can be added but not removed.' The main content area displays a hierarchical tree structure of locations. On the left, levels are listed: Level 0, Level 1, Level 2, Level 3, and Level 4. The tree structure is as follows:

- Level 0: Base (Edit)
- Level 1: General Hospital (Edit | Add Child)
- Level 2: Western Hospital (Edit | Add Child)
- Level 3: 1A Critical Care Unit (Edit | Add Child)
- Level 4: Clinic (Edit), 2B Renal (Edit | Add Child), West Ward (Edit), East Ward (Edit)

A red circle highlights the 'Clinic' location at Level 4. A red arrow points to this location with the text 'Add Cost Centres at Level 4'.

In the **Cost Centre** cell, include a reference consistent with Management practice.

FULLSHIFT

My Schedule • Staffing • People • Agency • Admin • Settings •

Shortfall Search

Search

01:18PM | You are signed in as Catherine | Logout | Manager Guide | Ask us | Class: Default ▼

## Location Edit : Clinic

Home / Settings / Locations / Location Edit : Clinic

Help

General Location Settings

Description

Clinic

Abbreviation

Gen Clinic

Owner

Catherine Stuart ▼

Cost Center

Cost Centre

Address

Address Details

Phone

Contact Information

Additional Location Settings

Update Location

**Next Topic:** [Settings: Roles >>](#)

# Settings: Roles

[<< Location: Cost Centres](#) | [Settings: Pools >>](#)

## Roles

The **Roles** page on the **Settings** tab allows you to view the permissions associated with each specific ShiftMatch Role.

Roles are established to group Users who should have similar permissions within ShiftMatch. Some default Roles have been pre-established or new, customized, Roles may be entered.



Due to system mapping and database configuration associations, please consult with ShiftMatch before making any changes.

**Roles**

Home / Settings / Roles

What do roles do?

Roles are used by the system to determine what level of access and function an individual user has. **Role Access** determines which roles an individual role has access to, to...

Role Name	Role Access	Edit
Agency Admin - System Locked	<a href="#">Modify Access</a>	<a href="#">Edit</a>
Agency Casual - System Locked	<a href="#">Modify Access</a>	<a href="#">Edit</a>
Corp Services Worker	<a href="#">Modify Access</a>	<a href="#">Edit</a>
Dispatch	<a href="#">Modify Access</a>	<a href="#">Edit</a>
Manager Admin - System Locked	<a href="#">Modify Access</a>	<a href="#">Edit</a>
Master Admin - System Locked	<a href="#">Modify Access</a>	<a href="#">Edit</a>
Standard Admin - System Locked	<a href="#">Modify Access</a>	<a href="#">Edit</a>
Standard Casual - System Locked	<a href="#">Modify Access</a>	<a href="#">Edit</a>

[Add New Role](#)

To view the permissions and access levels of a Role, click **Edit** next to that role.

To view which other Roles can be viewed or edited, click on **Modify Access**.

**Next Topic:** [Settings: Pools >>](#)

# Settings: Pools

[<< Settings: Roles](#) | [Settings: Classes >>](#)

## Pools

The **Pools** page on the **Settings** tab allows you to view, edit or add User Pools. Users can belong to multiple Pools, and shifts can draw from multiple Pools.

Pools are a method of grouping Users within an organization. The **Default** pool always exists and must not be eliminated and all Users must be a member of the Default pool. Other Pools may be added or edited by Users who hold the correct permissions.

See [Add User](#) or [Edit User](#) for more on how to include a User in a Pool.

See [Add a Shortfall: User Requirements](#) for more on how to nominate a Pool when adding a Shortfall.

See [Preferred Pools](#) for more on how to prefer a Pool in a certain Location.



Due to system mapping and database configuration associations, please consult with ShiftMatch before making any changes to Pools.

The screenshot shows the ShiftMatch interface. The top navigation bar includes 'My Schedule', 'Staffing', 'People', 'Agency', 'Admin', and 'Settings'. The 'Settings' dropdown menu is open, with 'Pools' highlighted. The main content area is titled 'Pools' and includes a breadcrumb 'Home / Settings / Pools'. Below this is a section 'What do pools do?' explaining that pools are used to describe/classify users. A table lists existing pools:

Pool Name ID	A Team	Late Night Preferred	Late Night	Weekend Only	Weekend Only
Default (default)					

Each row in the table has an 'Edit' button. At the bottom right of the page is a blue button labeled 'Add A Pool'.

**Next Topic:** [Settings: Classes >>](#)

# Settings: Classes

---

[<< Settings: Pools](#) | [Settings: Grading Classes >>](#)

## Classes

The **Classes** page on the **Settings** tab allows you to view, edit or add all available User Classes.



Due to system mapping and database configuration associations, please consult with ShiftMatch before making any changes.

For an organization like a hospital where management would like to use ShiftMatch for different staffing groups (eg: nurses and janitorial staff) over the same geographical locations, establishing multiple Classes can help to achieve this.

By establishing two Classes, ShiftMatch allows the view of the architecture to remain constant (ie: the Locations appear the same to all), but Nurses can be scheduled using Grades, Skills, Pools etc relevant to them and Janitors can be scheduled using Grades, Skills, Pools etc relevant to them.

Nurses and Janitors each need to be scheduled to work in the Surgery Location of Cardiology.

The “Surgery” skill a nurse holds will be materially different to the “Surgery” skill a Janitor holds.

ShiftMatch will allow both departments to fill shortfalls in the right Location from Users in the right Class with the rights Grades and Skills-

Members of one Class will not be able to see the Grades or Skills or Users of another Class.

**Classes**

Home / Settings / Classify / Classes

What do classes do?

Classes can be used where there are clearly different user groups, with different grades and users are displayed.

Class Name II

Class Name II	Class Name	Edit
Banking		Edit
Default (default)		Edit
Education	Education	Edit
Emergency/Service	emergency	Edit
Fitness	Fitness	Edit
Misc	Misc	Edit
Nursing	Nursing	Edit
Production	Film/TV Labour	Edit

Add A Class

For more detail on allocation of Grades to the appropriate Class, see [Grading Classes](#)

For more detail on allocation of Skills to the appropriate Class, see [Skill Grouping](#)

**Next Topic:** [Settings: Grading Classes >>](#)

# Settings: Grading Classes

[<< Settings: Classes](#) | [Settings: Skill Grouping >>](#)

## Grading Classes

The **Grading Classes** page on the **Settings** tab allows you to view or edit how each established Grade is assigned to a Class.

! Due to system mapping and database configuration associations, please consult with ShiftMatch before making any changes.

By assigning Grades to a Class, you will be nominating that the assigned Grade should represent Users in the nominated Class.

No other Class will be able to use or see the Grade once it has been assigned.

For more on [Grades](#)

For more on [Classes](#)

The screenshot shows the ShiftMatch application interface. At the top, there's a navigation bar with tabs: My Schedule, Staffing, People, Agency, Admin, and Settings. The 'Settings' tab is selected, and a dropdown menu is open, showing options like Locations, Roles, Pools, Classes, Grading Classes (which is circled), Skill Grouping, Structure, Agency Edit, External Payroll Mapping, Governance, and Return Text. Below the navigation bar, the page title is 'Grading Classes'. There's a breadcrumb trail: Home / Settings / Grading Classes. A section titled 'What do gradings do?' explains that gradings typically reflect pay-grades or seniority and can be assigned to a class. Below this, there's a table with columns for Grade and Class. The table lists several grades and their assigned classes:

Grade	Class
Licensed Practical Nurse 1	Misc
Licensed Practical Nurse 2	Misc
Reg Practical Nurse	Nursing
Registered Nurse 1	Nursing
Registered Nurse 2	Nursing
Nurse Practitioner	Nursing
Co Ordinator	Production
Instructor	Fitness

**Next Topic:** [Settings: Skill Grouping >>](#)

# Settings: Skill Grouping

[<< Settings: Grading Classes](#) | [Settings: Agency Edit – Editing Agency Details >>](#)

## Skill Grouping

The **Skill Grouping** page on the **Settings** tab allows you to view the Class and Skill group (if applicable) associated with each specific Skill.

**!** Due to system mapping and database configuration associations, please consult with ShiftMatch before making any changes.

This allows allocation of established Skills to be assigned to a specific Class for view within that Class only. If a Skill is applicable to all Classes, it should be grouped into the **Default** Class.

For more on [Skills](#)

For more on [Classes](#)

The screenshot shows the ShiftMatch interface with the 'Settings' tab selected. A dropdown menu is open from the 'Settings' tab, with 'Skill Grouping' highlighted. The main content area displays the 'Skill Groups' page. It includes a breadcrumb trail: Home / Settings / Skill Groups. Below this, there is a section titled 'What do skill groups do?' explaining that competencies/skills can be grouped under headings for logistics, triage for nursing, etc. The main table lists skills and their classifications:

Skill ID	Group	Classification ID
General	General	Default
Aged Care	Aged Care	Nursing
Aquafit	Fitness	Fitness
Bariatric	Medicine	Nursing
Bartending	Fitness	Fitness
Building Code	Emergency	EmergencyService
City Eqmt Oper License	Emergency	EmergencyService

**Next Topic:** [Settings: Agency Edit – Editing Agency Details >>](#)

# Settings: Agency Edit – Editing Agency Details

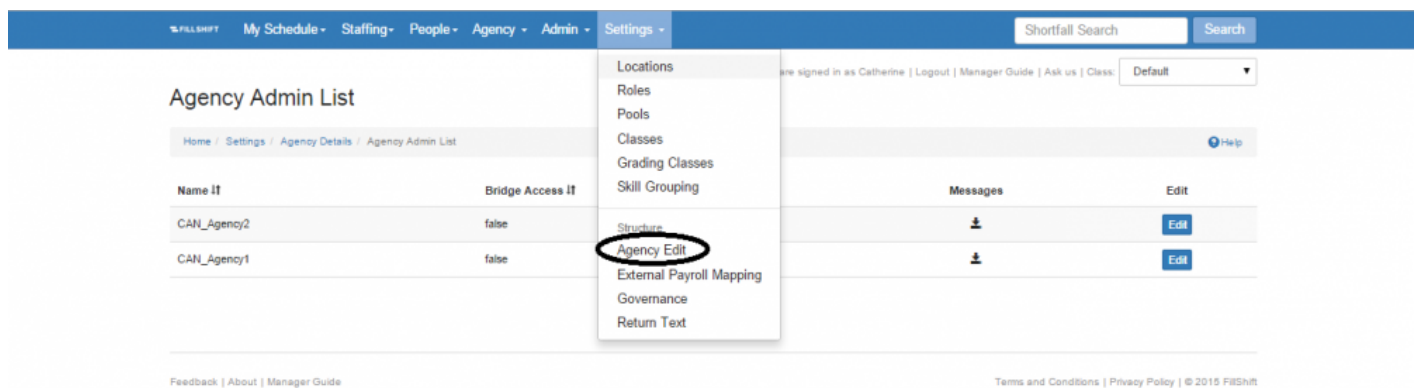
[<< Settings: Skill Grouping](#) | [Settings: External Payroll Mapping >>](#)

## Editing Agency Details



Neither Managers nor Users can add an additional Agency.  
Contact ShiftMatch to enter any new Agencies in the ShiftMatch System.

The **Agency** page on the **Settings** tab allows you to edit the details of Agencies in the ShiftMatch System.



To edit an Agency's details:

1. Click on the **Edit** button name of the Agency you wish to edit.  
[A new screen entitled **Agency Admin** will then appear.]
2. Update the Agency's details with any revised information:
  - **Agency Name**
  - **Abbreviation**
  - **Contact First Name**
  - **Contact Last Name**
  - **Email** – Agency Scheduler email address used for contact when Shortfalls assigned to Agency
  - **Target Email**
  - **Address**

- **City**
- **Province**
- **Postal Code**
- **Contact Priority** – the order (among all Agencies) in which ShiftMatch contacts the Agency when offering Shortfalls
- **Locations**
- **Gradings**

3. Click the “Update Agency Details” button.

The updated details for the Agency will now be reflected in the ShiftMatch System.



Click the **Messages** link associated with the Agency to download a CSV file of all messages sent to that Agency.

**Next Topic:** [Settings: External Payroll Mapping >>](#)

# Settings: External Payroll Mapping

[<< Settings: Agency Edit – Editing Agency Details](#) | [Settings: Return Text – Editing Message Content >>](#)

## External Payroll Mapping

! Due to system mapping and database configuration associations, please consult with ShiftMatch before making any changes.

The **External Payroll Mapping** page on the **Settings** tab is used for the mapping of ShiftMatch Locations and Grades for payroll API.

The screenshot displays the ShiftMatch user interface. At the top, a navigation bar includes links for My Schedule, Staffing, People, Agency, Admin, and Settings. The 'Settings' dropdown menu is open, showing options like Locations, Roles, Pools, Classes, Grading Classes, Skill Grouping, Structure, Agency Edit, **External Payroll Mapping** (highlighted with a red circle), Governance, and Return Text. Below the menu, the 'External Payroll Mapping' page is visible, featuring a table with two columns: 'FillShift Grading' and 'External Grading'. The table lists various nursing roles such as Licensed Practical Nurse 1, Licensed Practical Nurse 2, Reg Practical Nurse, Registered Nurse 1, Registered Nurse 2, and Nurse Practitioner, each with a corresponding 'External Grading' input field.

FillShift Grading	External Grading
Licensed Practical Nurse 1	External Grading
Licensed Practical Nurse 2	External Grading
Reg Practical Nurse	External Grading
Registered Nurse 1	External Grading
Registered Nurse 2	External Grading
Nurse Practitioner	External Grading

**Next Topic:** [Settings: Return Text – Editing Message Content >>](#)

# Settings: Return Text – Editing Message Content

[<< Settings: External Payroll Mapping](#) | [General >>](#)

## Editing Text And Email Message Content

The **Return Text** page on the **Settings** tab allows you to edit the standard content of the text and/or email messages sent to Users.

**Return Text Admin**

Home / Settings / Return Text Admin

Management Alerts

Notifications sent to management. Generally for administrative purposes.

Name ID	Description ID	ID	Edit
User First Shortfall	Admin: When a new User is booked into first Shift	772	<a href="#">Edit</a>
User is Null / Empty	Admin: When a non-existent User is placed into a Shift	667	<a href="#">Edit</a>
User Max Messages	Not used	689	<a href="#">Edit</a>
User moved to Archive	Admin: Inactive User moved to archive (after 12 weeks)	733	<a href="#">Edit</a>
Notification : Shortfalls per period	Admin: When too many Shortfalls are accepted for a period	745	<a href="#">Edit</a>
Notification : Hours per Shortfall	Admin: When too many hours are accepted for a Shortfall	744	<a href="#">Edit</a>
Notification : Hours per period	Admin: When too many hours are accepted for a period	743	<a href="#">Edit</a>
Notification: Shortfalls	Admin: Too many Shortfalls in a day	741	<a href="#">Edit</a>
Notification: days	Admin: Too many Shortfalls in a row	742	<a href="#">Edit</a>
Notification: hours	Admin: Insufficient gap between Shortfalls	740	<a href="#">Edit</a>
Payroll Export Exception	Admin: Where export to an external payroll system produces an error	752	<a href="#">Edit</a>
Payroll Export Failed	Admin: Where export to an external payroll system fails due to connection problems	751	<a href="#">Edit</a>

To edit the content of a text or email message:

1. Click on the **Edit** link next to the specific message title you wish to edit.
2. Revise the **Text Message** and/or **Email Subject** and/or **Email Body** content as desired.
3. Click the “Update Message Text” button near the bottom of the page.

Your revised text and/or email messages will now be updated in the ShiftMatch System.



Available **Message Tags** or pre-established codes for data to include in the message are listed at the bottom of the page

Newly added tags include:

1. **#whoCreatedName#** – the first and last name of the User who created the Shortfall
2. **#whoCreatedEmail#** – the email address of the User who created the Shortfall
3. **#whoUpdatedName#** – the first and last name of the User who last updated the Shortfall
4. **#whoUpdatedEmail#** – the email address of the User who last updated the Shortfall

**Next Topic:** [General >>](#)

# General

---

[<< Settings: Return Text – Editing Message Content](#) | [Grades >>](#)

## General

Details included here are for information purposes only.

- [Grades](#)
- [Skills](#)
- [Employment Types](#)
- [Ratings](#)
- [Governance](#)
- [Help, Feedback and Support](#)
- [About Us, Terms and Conditions, Privacy Policy](#)

**Next Topic:** [Grades >>](#)

# Grades

---

[<< General](#) | [Skills >>](#)

## Grades



Grades may not be added by Users.  
Please contact your ShiftMatch account manager to add Grades.

**Grades** are intended to be used in ShiftMatch to reflect a User's job title.

Eg: Janitor, Teacher, Carpenter, Registered Practical Nurse etc.

They may also be used to reflect seniority.

For example, Grades for Registered Practical Nurses may be set up as follows:

- Registered Practical Nurse 1
- Registered Practical Nurse 2
- Registered Practical Nurse 3

to distinguish between RPNs with either 1, 2 or 3 years of experience.

When Shortfalls are added to ShiftMatch, each will require detail on the **Minimum** and **Maximum Grades** which can match to Users.

ShiftMatch can be customized to prioritize which Grade should match first and which last.

**Next Topic:** [Skills >>](#)

# Skills

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[<< Grades](#) | [Employment Types >>](#)

## Skills



Skills may not be added by Users.  
Please contact your ShiftMatch account manager to add Skills.

**Skills** are intended to be used to reflect specific skills or qualifications held by Users.

For example:

- Transportation workers may hold a Driver's License Class C.
- Nurses may have Midwifery or Surgery or Bariatric skills.
- Teacher's may be qualified to work in the Kindergarten department.

When a Shortfall is added to ShiftMatch, it includes a list of the Skill(s) required to be held by the User who should match the shift.



**Every** Skill chosen as necessary for a Shortfall must be held by a User in order to match the Shortfall.

**Next Topic:** [Employment Types >>](#)

# Employment Types

---

[<< Skills](#) | [Ratings >>](#)

## Employment Types (or “Worktypes”)



Employment Types may not be added by Users.  
Please contact your ShiftMatch account manager to add Employment Types.

**Employment Types** are intended to represent the employment status of each User.

The most common Employment Types used in ShiftMatch are “**Casual**”, “**Part Time**”, “**Full Time**” and “**Agency**”,

**Next Topic:** [Ratings >>](#)

# Ratings

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[<< Employment Types](#) | [Governance >>](#)

## Ratings

By using the **Rating** function, Users can be further sorted into categories to assist in matching.

Managers can customize the definition for each Rating used by editing them in the **Admin > [Content](#) > Rating** section.



If you do not wish to use the Rating function, Rate every User the same and use that Rating as the default in all Shortfalls.

**Next Topic:** [Governance >>](#)

# Governance

---

[<< Ratings](#) | [Help, Feedback and Support >>](#)

## Governance



Contact ShiftMatch to enter any new Governance requirements in the ShiftMatch System.

**Governance** covers all qualifications or certifications that your organization may consider mandatory for Users to maintain.

For example:

- Nurses in Ontario are required to maintain a current registration with the College of Nurses of Toronto.
- Security Guards may be required to main current CPR qualifications.
- Early Childhood Educators must have a current ECE Certificate.

Governance items can include the following characteristics:

- automatic warnings sent at intervals nominated by Management for Users to update their information
- the ability to make Users inactive should they fail to update their information in a timely manner
- mandatory status for Users (or not).

While an unlimited amount of Governance requirements can be added, ShiftMatch recommends that Management limits Governance requirements to the absolutely necessary.




ShiftMatch provides a **Governance Report** which shows all the Users with Governance attributes and the expiry date for each.

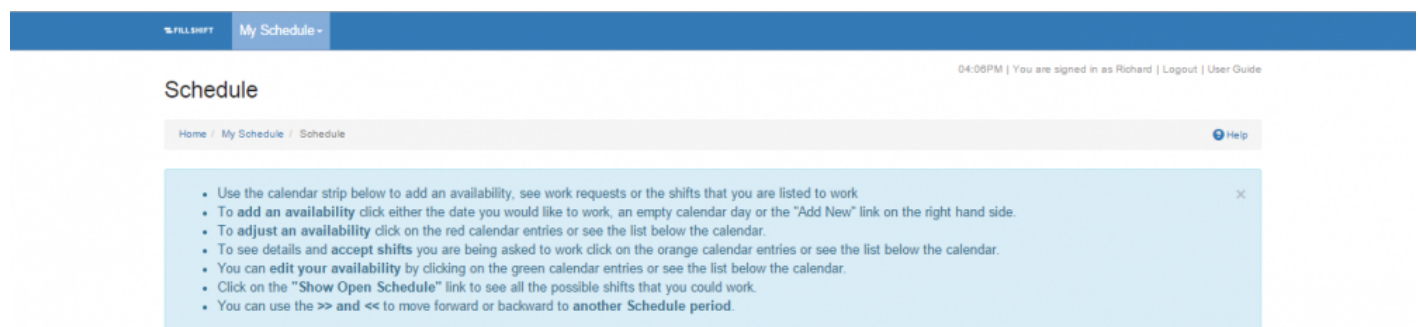
**Next Topic:** [Help, Feedback and Support >>](#)

# Help, Feedback and Support

[<< Governance](#) | [About Us, Terms, Privacy >>](#)


## Help and Support

If you need any assistance using the ShiftMatch system, the  link, when clicked, opens relevant Help tips onto the current ShiftMatch page:



## Feedback

Click on the [Feedback](#) | link on any page to reach the Feedback page.  
Complete your **Name**, **Email address** and **Comments** and click “Submit”.  
Your feedback will be sent to Management.

 My Schedule ▾

03:48PM | You are signed in as Doug | Logout | User Guide

## Talk To Us!

[Home](#) / [News](#) / [Feedback](#) / [Talk To Us!](#) [Help](#)

Name	<input type="text" value="Name"/>
Email	<input type="text" value="Email"/>
Comment	<div>We love getting feedback to help make our system better</div>

Submit

[Feedback](#) | [About](#) | [User Guide](#) [Terms and Conditions](#) | [Privacy Policy](#) | © 2015 FillShift

## Support

- Click the [Manager Guide](#) link to this ShiftMatch [Online Help Manual](#) – ShiftMatch’s online user manual with in-depth information on the entire ShiftMatch site.  
Search for information via the Table of Contents or the **Search** box at the top of the page.
- Click on the [Ask us](#) link on any ShiftMatch page to open the pop up entitled “What can we do for you?”. Complete **Your request**, **Details**, **Name**, and **Your email address** and click “Submit”.  
Your question/request will automatically be forwarded to ShiftMatch Support via Zendesk.
- Click on this link [Zendesk Support login](#) which will take you to the ShiftMatch Zendesk login page.  
Sign in and complete the process to send your question or request to ShiftMatch Support via Zendesk.

**Next Topic:** [About Us](#), [Terms](#), [Privacy](#) >>

# About Us, Terms, Privacy

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[<< Help, Feedback and Support](#) | [Release Updates >>](#)

## About Us, Terms and Conditions, Privacy



Feedback **About** Manager Guide



Terms and Conditions **Privacy Policy** © 2015 F#Shift

On all ShiftMatch pages:

The **About** link provides a brief overview of ShiftMatch and how the ShiftMatch system works.

The **Terms and Conditions** link provides full details of ShiftMatch Terms and Conditions.

The **Privacy Policy** link provides full details of ShiftMatch Privacy Policy.

**Next Topic:** [Release Updates >>](#)

# Release Updates

---

[<< About Us, Terms, Privacy](#) | [Q3 2015 system upgrades >>](#)

## Release Updates

Check in here periodically to see information on recent new releases in ShiftMatch

“Q3 2015”:#q3-2015”

**Next Topic:** [Q3 2015 system upgrades >>](#)

# Q3 2015 system upgrades

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[<< Release Updates](#) | [Q4 2015 system upgrades >>](#)

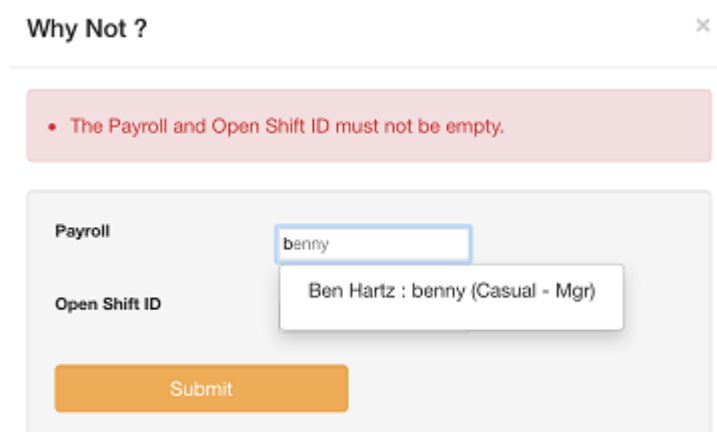
## Q3 2015

Along with general housekeeping and system performance improvements, the following is a list of main additions and enhancements this quarter.

### Predictive User search on Why Not?

*Improved Usability – change courtesy of Cascom Australia*

When entering a user in the Why Not? pop up, a list of possible matches will be listed to make it easier to match to the right user.



### Home phone number of User List > Schedule page

*Improved Usability – change courtesy of Nurse West*


Now display the user's home phone number when manager views the User's schedule from People > User List page.

### Linked Shift indicator shows

*Improved Usability – change courtesy of HotelStaff*

Linked shifts now show a small Link icon

### Unfilled

Shortfall ID It	Shift It	Grade It
IDM618 		
<div>Linked Shortfall</div> <div>This is a linked shortfall with link id : 1</div>		
IDM620	14:00 - 19:00	RN1-RN2

### “Prebook” term is customizable

*Improved Usability – change courtesy of HotelStaff*

The term “Prebook” can now be customized to be in line with your nomenclature (eg: “Manual Match” or “User Fill”)

*Contact your FillShift account manager to have this feature set.*

### “Grade” term is customizable

*Improved Usability – change courtesy of HotelStaff*

The term “Grade” can now be customized to be in line with your nomenclature (eg: “Job Title” or “Position”)

*Contact your FillShift account manager to have this feature set.*

### Broadcast multiple grades

*Improved Usability – change courtesy of Barwon Health*

Can now send broadcasts to multiple Grades.

### Broadcast to multiple unique users

*Improved Usability – change courtesy of KU Childcare & Healthscope*

Enter multiple user ID and separate with comma to send a broadcast to multiple known users.

Note: predictive name search only works on the first user.

### Red-Alert colour coding option on Staffing Schedule

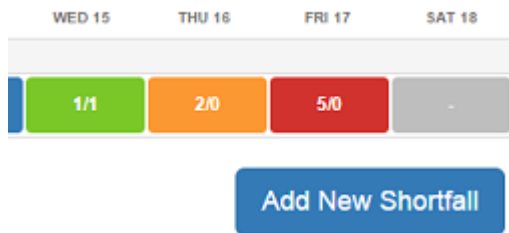
*Improved Usability – change courtesy of Campbelltown*

Back by popular demand, the ability to set a red-alert threshold for the Staffing > Schedule page.

*Settlings > Locations > [location] > Additional Location Settings*

Orange Alert	<input type="text" value="2"/>
Red Alert	<input type="text" value="4"/>

*Resulting display:*



### **Configurable access to User Guides**

*Improved Usability – change courtesy of Cascom Australia*

The links viewable by Users to the Manager’s Guide or the User’s Guide can be determined independently.

*Usage:*

*In Settings > Roles there now 2 new items: Support – Staff Guide or Support – Manager Guide which can be turned on or off.*

### **“Grade” filter on Unfilled Shortfalls**

*Improved Usability – change courtesy of HotelStaff*

The Unfilled Shortfalls list may now be filtered by Grade, in addition to Date, Skill and Location

### **Hide “Skills” from User on the My Schedule > Details page**

*Improved Usability – change courtesy of HotelStaff*

Skills may now be hidden from the User on their My Schedule > Details page.

*Contact your FillShift account manager to have this feature set.*

### **Minimum characters for Login**

*Improved Usability – change courtesy of Cascom Australia*

FillShift can now manage a 3 character login

### **Date-Stamp on Post It notes**

*Improved Usability – change courtesy of HotelStaff*

Post It notes added by users are now date-stamped to give more context to notes placed

**Helena Nurse** Note: Away on vacation till Thurs 16 July : 15/07/2015 09:18:36

### **Select “All” on Unfilled Shortfalls page**

*Improved Usability – change courtesy of Bethanie*

Can now select “All” Unfilled Shortfalls when referring shifts to Agency or other work types.

**Non-mandatory Governance Dates**

*Improved audit – change courtesy of Nurse West*

Corrected an issue where non-mandatory Governance dates prior to the current date would disappear when updating users

**Last/Next Navigation buttons on Staffing > Schedule**

*Improved Usability – change courtesy of Monash Health*

Also back by popular demand, Last Week / Yesterday or Tomorrow / Next Week navigation buttons can be added to the Staffing Schedule page



Contact your FillShift account manager to have this feature turned on / off.

**Linked shift confirmation**

*Improved Communication – change courtesy of Barwon Health*

When linked shifts are accepted, the staff member now receives a single text confirmation, showing the date range of the linked shifts.

**Next Topic:** [Q4 2015 system upgrades >>](#)

# Q4 2015 system upgrades

---

[<< Q3 2015 system upgrades](#) | [Q1 2016 system upgrades >>](#)

## Q4 2015 system upgrades

Along with general housekeeping and system performance improvements, the following is a list of main additions and enhancements this quarter.

### **Date of Hire**

*Improved Usability – change courtesy of FillShift USA*

Each user's personal details shall include a tab for nominating the Date of Hire for purposes of seniority

### **Hours Worked**

*Improved Usability – change courtesy of FillShift USA*

Each user's personal details shall include a tab for indicating the hours worked for purposes of seniority

### **Rapidbook Bulk Upload**

*Improved Usability – change courtesy of Cascom Australia*

Alongside Bulk Shortfall Upload, the new feature will allow Bulk Rapidbook Upload too.

# Q1 2016 system upgrades

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[<< Q4 2015 system upgrades](#) | [Q2 2016 System Upgrades >>](#)

## Q1 2016 System Upgrades

Along with general housekeeping and system performance improvements, the following is a list of main additions and enhancements this quarter.

### System Emails can now be cc'd

*Improved Usability – change courtesy of Cascom Australia*

Return texts have an added field to enable email notifications to be cc'd to multiple destinations.

Add multiple comma separated email addresses or use standard system addresses like #locationOwner# etc.

#### Text Message

A users is working their first shift #firstname# #lastname#, payroll  
#payroll#

#### Email Subject

User First Shift

#### Email Body

A users is working their first shift #firstname# #lastname#, payroll  
#payroll#

#### CC

EXAMPLE TEXT : #locationOwner#, #provider#, admin@gate121.com

### Password Hint Improvement

*Improved usability – change courtesy of FillShift Canada*

Clicking on “Forgotten Your Password” will provide an option of displaying the Password Hint and/or

resetting the Password.

## Forgot password

**Payroll**

**OR**

**Email**

**Password Hint**

Passwo

**Login**

john

**Active?**

true

Show password hint

Reset my password

### Broadcast to Preferred Staff

*Improved targeted communication – change courtesy of Knox Private Hospital*

You can target Broadcast texts to just preferred staff in a given location, if appropriate.

**Broadcast based on Locations**

Choose Preferred Staff ☒ Choose Preferred Staff

**Locations**

☐ Aged Care +

☐ AgedCare 2 +

☒ Armadale +

### **Search users by cell phone number**

*Improved usability – Change courtesy of Healthscope*

You may use a cell number (or partial number) to search for a User.

### **Rapidbook XML Webservice (API)**

*Improved usability – Change courtesy of Eastern Health*

A new Webservice has been created to enable external systems (ie: scheduling software) to push Rapidbooks into FillShift, creating shortfalls.

This will allow easier integration of automated shift needs from external systems to FillShift.

*Contact your FillShift account manager to discuss this function*

### **Accepting a Shift Request removes Offers**

*Improved usability – Change courtesy of Epworth Health*

We have added the ability to remove all other Availability for a day once any shift has been accepted – to ensure only a single shift is accepted per day (where that is the limit).

*Contact your FillShift account manager to discuss this function*

### **Hide Post-It Notes**

*Improved usability – Change courtesy of KU*

We can now totally hide the Post It Note function, if required.

*Contact your FillShift account manager to discuss this function*

# Q2 2016 System Upgrades

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[<< Q1 2016 system upgrades](#) | [Q3 2016 Mini Release >>](#)

## Q2 2016 System Upgrades

These upgrades went live on Tuesday July 27, 2016

As well as some general housekeeping and system performance improvements, the following is list of the main additions and enhancements to ShiftMatch.

### Broadcast to Multiple Work Types

*Improved Usability – change courtesy of Healthscope Knox Private Hospital*

The Broadcast form now has a list of worktypes (aka Employee Types) checkboxes instead of a dropdown list.

Selecting multiple checkboxes is now allowed so that a Broadcast can target users in more than one worktype (e.g. Casual and Part-Time).

**Broadcast basic User filters**

**Login/Registration**

**Shortfall ID**

☐ Include Users with Do Not Disturb on

☐ Include Inactive Users

**Which Employee Type?**

☐ Casual

☐ Part Time

☐ Full Time

☐ Agency1

### Shift Reminder

*Improved Staff Attendance – change courtesy of Hotelstaff*

Users can now set a reminder (hours prior to shift start time) which will send a reminder Text to booked

staff.

A new Return Text is used – #774 shift reminder.

Contact your ShiftMatch account manager to discuss this feature.

## Report Filtering

*Improved Data Analysis – change courtesy of Hotelstaff*

We have added the ability to filter the Analytical Reports (eg shortfalls, offers, cancellations) by Location and also by External Reference.




This enables location-specific reports to facilitate sign-on sheets, schedules, shift reconciles etc.

## Reports

[Demonstration Home](#) / [Admin](#) / [Reports](#)

### Choose your report date range




A date range must be first selected for all reports below. Analytical CSV reports use Location with Shortfall Details, Rapidbook and Cancellation to Order Pos only acts to reduce the search on the Shortfall Details.

25/07/2016		25/07/2016		Hospital / Medical		Order Pos
------------	---	------------	---	--------------------	---	-----------

## Governance CSV Report

*Improved Reporting – change courtesy of YMCA GTA*

A new report is available that details governance items and expiry dates for all users.

Report 	Description 
Shortfall Details	A CSV file with details about shortfalls.
Shortfall Rural Details	A CSV file with details about shortfalls that are used in Rural areas.
User Details	A CSV file with details about staff within the system.
Rapidbook Details	A CSV file with details about rapidbooks within the system.
Location Details	A CSV file with a basic listing of the locations within the system.
Offer Details	A CSV file with a basic listing of the Offers within the system.
Invoice Details	Listing of all the invoices within the system.
Cancellation Details	Exporting of all the cancellations details.
Time to Fill	Break down of the time taken for each shortfall to be filled with a staff member.
User Locations	Listing of all the staff within the system and the locations that they work.
Governance 	Export all the Governance items.

## External Reference Field Naming

*Improved Customization – change courtesy of Hotelstaff*

The External Reference field can now be customized (e: PO Number, shift code etc).

This number can also be used to filter Reports.

Contact your ShiftMatch account manager to discuss this feature.

## Data Entry Error Highlights

*Improved User Experience – change courtesy of ShiftMatch Australia*

When data entry errors occur on forms, the label and field are now **highlighted in red**.

## Shortfall Details CSV Report as XML

*Improved Integration – courtesy of Healthscope*

Users can now access the Shortfall Details as an XML feed for use with third party systems such as data warehouse, Google Sheets, accounting systems etc.

Contact your ShiftMatch account manager to discuss this feature.

## Requested Grade

*Improved Reporting – change courtesy of Hotelstaff*

We have added a dropdown to the shortfall add/edit screen to capture the requested Grade while still allowing the Min and Max Grade parameters.

This provides an additional level of reporting on Grade performance for shortfalls (ie: what was requested v supplied).

Contact your ShiftMatch account manager to discuss this feature.

The screenshot shows a form titled "Shortfall Details" with a blue header. Below the header, there are four rows of input fields:

- Load Rapidbook:** A single dropdown menu with the text "Select a Rapidbook".
- Start - End Time:** Two time selection fields, each showing "08:00" and a clock icon.
- Min - Max Grade:** Two dropdown menus, each with the text "Choose a Grade".
- Requested Grade:** A single dropdown menu with the text "Choose a Grade".

## Linked Shifts

*Improved Staffing Continuity and Flexibility – changes courtesy of Hotelstaff, KU and YMCA GTA*

Multiple improvements have been made to the Linked Shift function. They are:

- **Editing Linked Dialog**

When a linked shift is edited, there is now an on-screen display (Cancel/Continue) warning that a Link is to be broken, including the dates of the other linked shifts.

- **Linked Shift Entry**

Shifts may now be Linked via an option in the Shortfall Details tab

- **Varying Start Time**

Multiple start and end times for Linked Shifts are now available

## Maintain Shift Link When Changing Time

*Improved Flexibility – changes courtesy of Hotelstaff and KU*

Start and end times for Linked Shifts can now be edited without breaking the link.

Contact your ShiftMatch account manager to discuss this feature.

## Date of Termination

*Improved Reporting – change courtesy of ShiftMatch USA*

An optional field is available for staff profiles to store a Termination Date.  
Contact your ShiftMatch account manager to discuss this feature.

## Professional Details

Enter user attributes and classification details here.

☒ Active - Last Change 14/07/2015 15:38

Date Of Hire \*

Date Of Hire



Date Of Termination

Date Of Terminatio



## Upload and Delete Files on Governance Page

*Improved Usability – change courtesy of YMCA GTA*

Users can now upload files and delete uploaded files from the Governance page.  
Contact your ShiftMatch account manager to discuss this feature.

## Enhanced Gazump Function

*Improved Cost Control – change courtesy of Bethanie*

In addition to Externally Filled shifts, the system can now be set to allow **any** Agency shift to be overwritten by a non-agency staff member accepting a shift request.

This gazumping feature can be disabled a pre-determined number of minutes prior to shift start to prevent any cancellation fees.

Contact your ShiftMatch account manager to discuss this feature.

## New Message #tags#

*Improved Communication – change courtesy of ShiftMatch Canada*

New fields available are:

- **#whoCreatedName#** – this generates the Name associated with the User who created the Shortfall. (eg: John Smith)
- **#whoUpdatedName#** – this generates the Name associated with the User who last updated the Shortfall. (eg: Kate White)
- **#whoCreatedEmail#** – this generates the Email Address associated with the User who created the Shortfall. (eg: JSmith@gmail.com)
- **#whoUpdatedEmail#** – this generates the Email Address associated with the User who last updated the Shortfall. (eg: katiwhite123@yahoo.com)

The email tags may be useful when used in conjunction with the cc: fields on return texts, allowing shift notifications to be sent to shift creators/updaters, as well as location owners etc.

### **Customizable Shortfall Details Page**

*Improved Flexibility – change courtesy of Barwon Health*

In addition to the standard columns displayed in the Shortfall Details report, extra columns may be optionally displayed.

The current list of additional columns is: Shift, Grade, Location (level 4), Location (level 3), Pool, Worktype, Skill, Agency, External Reference.

Contact your ShiftMatch account manager to discuss this feature.

### **General Security and Technical Enhancements**

*Improved Flexibility – change courtesy of ShiftMatch Australia*

In addition to the above functional enhancements, this release also contains several system improvements:

- Enhanced user interface and error messages when in view-only mode;
- Enhanced help files and on-page help;
- Automatic temporary halt to all feeds into **Kronos** systems where connection problems occur;
- Additional improved system configuration tools;
- Improvements to bulk user uploads;
- Improved archiving of key data;
- Clearer User response when attempting to accept a deleted shift;
- Removal of non-login pages from search engine indexing.

**Next Topic:** [Q3 2016 Mini Release >>](#)

# Q3 2016 Mini Release

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[<< Q2 2016 System Upgrades](#) | [Q3 2016 System Upgrades >>](#)

## Q2 2016 Mini Release Upgrades

These upgrades went live on Tuesday September 13, 2016

As well as some general housekeeping and system performance improvements, the following is list of the main additions and enhancements to ShiftMatch.

### Same-Day Split Shifts

*Improved Usability – change courtesy of YMCA GTA*

A same-day split shift can now be created with a variable gap in the middle.

For example, in a childcare environment, staff may be required to work 7.30am – 9am for the before school period and then 3.30pm – 6pm for the after school period.

Alternately, aged care providers may be required to attend a client's house at 8.30am – 11am to feed and clean at breakfast and again at 4pm – 7pm to handle medications and dinner.

Contact your ShiftMatch account manager to discuss this feature.

### Shortfall Request Hard Decline

*Better Staff Management – change courtesy of HotelStaff*

A user can now hard decline a shift request online or by prefixing a reply Text with a "-" character (eg: -ABC123).

After a hard decline, no further resends for that Shortfall will be sent to that user.

Contact your ShiftMatch account manager to discuss this feature.

### Display Either Analytical or Operational Reports

*Improved Reporting – change courtesy of ShiftMatch Canada*

A choice can be made to display and generate either the Operational PDF reports or the Analytical CSV reports, or both.

Contact your ShiftMatch account manager to discuss this feature.

### Pre-Shift Balance Horizon

*Improved Shift Planning: Change Courtesy of: Central Coast LHD*

The pre-shift balance screen can now go 7 days into the future.

Contact your ShiftMatch account manager to discuss this feature.

### **Role to Determine Visible Worktypes – Stage 1**

*Improved Versatility. Change Courtesy of: ECMS & Nursewest*

The rules around which work types (eg: Casual, Part Time, Full Time, Agency) have been moved from permissions to Roles. This means that specific Roles can be tailored to show on certain work types on the People page as well as Manual Match text boxes.

**At this initial stage, we require all ShiftMatch customers to review all Roles and assign work types appropriately, prior to enabling this feature by Oct 13, 2016.**

Contact your ShiftMatch account manager to discuss this feature.

### **User's Home Number Field Lengthened**

*Improved Data Recording: Change Courtesy of Nursewest*

The home phone field has been lengthened to up to 22 characters.

**Next Topic:** [Q3 2016 System Upgrades >>](#)

# Q3 2016 System Upgrades

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[<< Q3 2016 Mini Release](#) | [Q4 2016 System Upgrades >>](#)

## Q3 2016 System Upgrades

These upgrades went live on Tuesday October 25, 2016

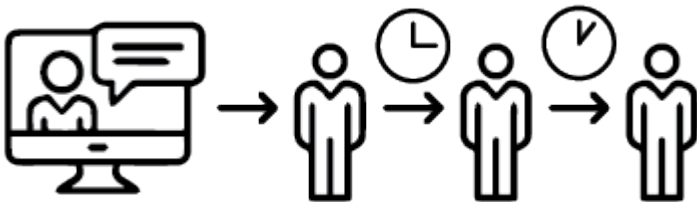
As well as some general housekeeping and system performance improvements, the following is list of the main additions and enhancements to ShiftMatch.

### Variable gap between Shift Requests

*Improved staffing preferencing: Change courtesy of: Monash Health*

Users can now set variable gaps between contacting staff (previously only a common gap could be specified).

For example, you may now set a 10 min gap between contacting Staff Member #1 and #2, and a 5 min gap between Staff Member #2 and #3.



### Variable gap between Agency contact priority tiers

*Improved Agency preferencing: Change courtesy of: Monash Health*

Users can now set variable gaps between contacting Agency tiers (previously only a common gap could be specified).

For example, you may now set a 10 min gap between Tier 1 and 2, and a 5 min gap between Tier 2 and 3.



### Landing Page after saving Governance attachments

*Improved Usability: Change courtesy of: YMCA GTA*

After uploading a document in Governance, users now stay in the User Profile rather than landing back on the User List.

## Clair Demo

[Demonstration Home](#) / [People](#) / [User List](#) / [Clair Demo](#)

- That file has been updated.
- Those details have been successfully updated.

[Login Details](#)

[Personal Details](#)

[Professional Details](#)

[Governance](#)

[Locations](#)

[Skills](#)

### New Level 3 locations automatically chosen

*Improved Staff matching: Change courtesy of: Nursewest*

When a new Level 3 location is added, ShiftMatch can be set to automatically Allocate and Choose the location for all staff that have a sibling Level 3 location chosen.

NSW / Hospital		Chosen by User
<input type="checkbox"/> Select all Hospital sub-locations		
<input checked="" type="checkbox"/> Medical	⊖	✓
<input checked="" type="checkbox"/> Ward 1		✓
<input checked="" type="checkbox"/> Ward 2		✓
<input checked="" type="checkbox"/> Critical Care	⊖	✓
<input checked="" type="checkbox"/> Emergency Department		✓
<input checked="" type="checkbox"/> Intensive Care Unit		✓

### User List Filtering

*Improved Usability: Change courtesy of: Barwon Health*

Users may now be filtered by multiple criteria:

Name, Active/Archive, Grade, Worktype, Skill, Location, Role, Pool, Date of Hire.

Multiple selections under each category can be made by ticking the appropriate checkboxes under each dropdown menu.

## User List

[Demonstration Home](#) / [People](#) / User List

### Filter results

Search Text  ☒ Current Users ☐ Only Active ☐ Archive

Min Grade  Max Grade  Casual, Part Time  Skills

Date of Hire  ☒ On Date ☐ Before Hire ☐ Role

☒ Casual  
☒ Part Time  
☐ Full Time  
☐ Agency1  
☐ Agency2  
☐ Agency3  
☐ Agency4

Login ↑↓	Grade ↑↓	Active ↑↓	Lastname, Firstname ↓	Sms Export
<a href="#">adming</a>	Mgr		Admin, Geelong	
<a href="#">adminh</a>	RN2		Admin, Hospital	

### Open Schedule screen display

*Improved Usability: Change courtesy of: ShiftMatch Australia*

The Open Schedule now displays when scrolling through the Older/Next screens on the Open Schedule.

### Link to User's Schedule from Program View

*Improved Usability: Change courtesy of: Barwon Health*

When a User's name is clicked on the Program/Division view page, it now goes either directly to that User's Schedule page or to the User's Profile Page.

### Content can link to external webpages

*Improved Communication: Change courtesy of: ShiftMatch Australia*

For customers who wish to use more extensive content editing, we can now link to an external website and display that as the content.

This may be useful for power users that want rich text, tables, images etc.

### Visible Worktypes controlled by Roles

*Improved Versatility: Change courtesy of: ShiftMatch Australia*

Roles now dictate which Worktypes (eg; Casual, Part Time, Full Time, Agency) a User can see on the User List page.

**Next Topic:** [Q4 2016 System Upgrades >>](#)

# Q4 2016 System Upgrades

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[<< Q3 2016 System Upgrades](#) | [Q1 2017 System Upgrades >>](#)

## Q4 2016 System Upgrades

These upgrades went live on Friday December 2, 2016

As well as some general housekeeping and system performance improvements, the following is list of the main additions and enhancements to ShiftMatch.

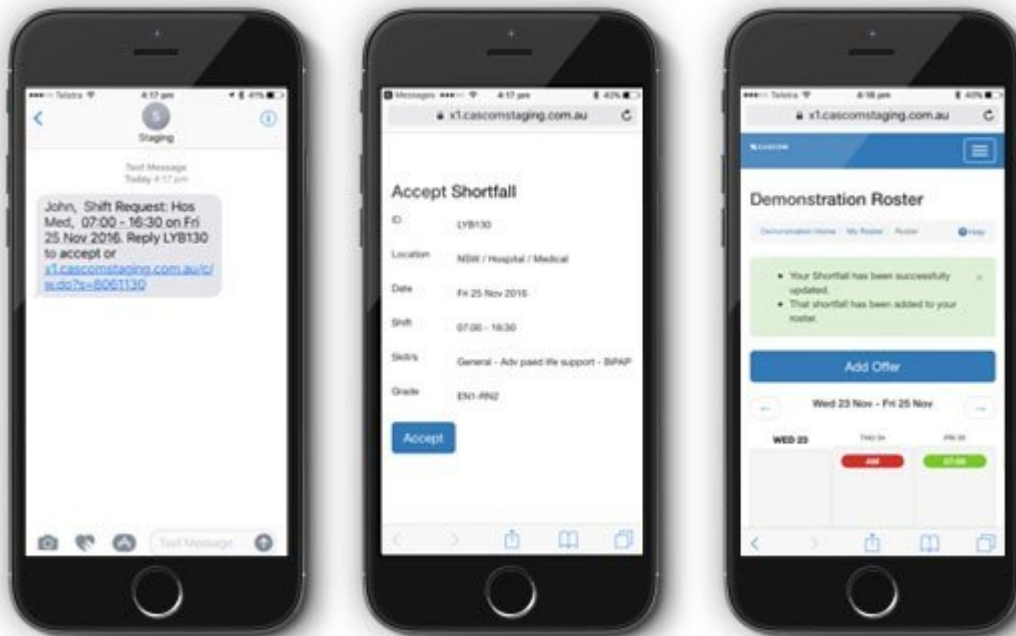
### **Text Link to Accept Shifts**

*Improved user engagement and cost savings. Change Courtesy of: FillShift Australia*

This is a very exciting new feature we've developed which will save staff having to reply with a Text to accept shifts. A link can now be placed in Text/Email requests that takes the user directly to the FillShift website for them to review details and accept shifts online – via smartphone, tablet or computer. We think this is such a good addition to the communication loop that we have enabled this for all customers, if you don't want this feature contact us and we can easily disable it.

Benefits of this new feature are:

- Reduction in Text "shift confirmed" volumes, saving costs
- Increased engagement by leaving users on their up-to-date My Schedule page – encouraging more offer placement and reducing no-shows



## Staff Deactivate & Reinitialise

*Improved usability & efficiency. Change Courtesy of: The Bethanie Group*

There is now a button on the change password page labeled: Inactivate & Reinitialise. Visibility of this button is limited to forceUpdate users and needs to be enabled by FillShift support.

Pressing the button displays a form that shows the username, followed by a list of their future shortfalls (after that calendar day) and a list of their future offers. Pressing cancel will do nothing and close the window. Pressing Inactivate has two impacts:

- The user will be set to inactive
- All of the user's shortfalls will be re-initialised (including linked shortfalls) Please note, a set of linked shortfalls that all belong to that user will now all become available, but are no longer linked.

The screenshot shows the 'John Demo' user profile page with a modal open for 'Inactivate and Reinitialise'. The modal displays two tables: 'Shortfalls' and 'Offers'.

**Shortfalls Table:**

Pkid	Date	Shift	Location
8061130	25/11/2016	07:00 - 16:30	Hospital / Medical
8061138	30/11/2016	07:00 - 16:30	Hospital / Medical

**Offers Table:**

Pkid	Date	Shift
8501757	27/11/2016	AM

The modal includes 'Cancel' and 'Inactivate' buttons. The background page shows the user's login details and a 'Save Changes' button.

## TXT/SMS Message Count

*Improved usability & transparency. Change Courtesy of: FillShift Australia*

To avoid confusion around shortfall messaging, FillShift now shows only Text/SMS request tallies relating to the shift on Shortfall Add/Edit pages and the Staffing Schedule page. The term “Message” has been replaced with “Request” where applicable.

## Unfilled

Delete	Shortfall ID	Shift	Grade	Division	Dept	Worktype	Skill	Requests	History	Agency	Order Pos
<input type="checkbox"/>	LYB130	07:00 - 16:30	EN1-RN2	Medical				4			
<input type="checkbox"/>	LYB136	12:00 - 20:00	EN1-RN2	Medical				0			

## Linked Shortfall History

*Improved usability & communication. Change Courtesy of: FillShift Australia*

Linked shortfalls now show ALL transaction items for ALL of the shortfalls in the linked group, not just the 1st shift in the Link.

### Shortfall History - Created 22/11/2016 12:23:55

Linked Joined (643129)



Pkid	Shortfall ID	Description	User	Pull Sms	Date	Logged User	Primary
62152846	8061136	new shortfall	No User	0	Tue 22/11/2016 12:23:55	Ben Hartz	
62152847	8061137	new shortfall	No User	0	Tue 22/11/2016 12:23:56	Ben Hartz	
62152930	8061137	sms: shortfall offer/work work request - message: 1 : s8061137 u91800 a0	John Demo	0	Thu 24/11/2016 12:17:04	N/A	

## Agency Location Limits

*Improved governance. Change Courtesy of: FillShift Australia*

We have added extra filtering and checking to ensure that agencies are only requested for shifts that match their allocated locations.

Contact Priority	<input type="text" value="2"/>
Locations	<input type="button" value="Choose Locations"/> <input checked="" type="checkbox"/> All Locations
All Locations Selected	
Grades	<input type="button" value="Choose Grades"/> <input checked="" type="checkbox"/> All Grades
All Grades Selected	

### Shortfall Details Archive

*Improved reporting. Change Courtesy of: FillShift Australia*

We all get busy at times and sometime the monthly download of data is over looked so we've created a shortfall/vacancy details archive report accessible anytime. When enabled, a new panel opens at the bottom of the Reports page that shows links to monthly versions of the shortfall-details report.

This enables a full and rich data source to be accessed without having to remember to run reports each month. Happy reporting!

Archive Details

[201610 Shortfall Detail](#)

### Forward Planning Visibility

*Improved usability and planning. Change Courtesy of: FillShift Australia*

Forward planning can be confusing at time and hard to remember exactly when the planned release of shifts will happen. A new button has been added to the Staffing page to show the Forward Planning dates that have been established. This will improve the understanding of Request sending processes when placing shortfalls for future weeks/periods.

[← Last Week](#)
[← Yesterday](#)
**Friday November 25**
[Tomorrow →](#)
[Next Week →](#)
[Add New Shortfall](#)

---

**Hospital / Medical** [Show Forward Planning](#)

**Forward Planning**

Tue 8 Nov 2016 12:00

Tue 8 Nov 2016 16:00

Wed 9 Nov 2016 19:00

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MON 14	TUE 15	WED 16	THU 17	FRI 18	SAT 19	SUN 20	MON 21	TUE 22	WED 23	<b>THU 24</b>	FRI 25	SAT 26	SUN 27
<b>MEDICAL</b>													
1/1	1/1	1/1	1/1	-	1/0	-	-	-	-	-	2/0	3/1	1/1

### Location Details CSV Report Changes

*Improved reporting. Change Courtesy of: YMCA GTA – Canada*

The Location Details CSV report now includes the Cost Centre and the Location Owner

Description	Abbreviation	Active	CostCenter	OwnerId	OwnerPayroll	OwnerName
Base	Base	TRUE	23423	838	benny	Ben Hartz
NSW	NSW	TRUE	23424	838	benny	Ben Hartz
Hospital	Hos	TRUE	23425	1945	mike	Mike Hartz
Medical	Med	TRUE	23426	838	benny	Ben Hartz
Aged Care	Aged	TRUE	23427	1945	mike	Mike Hartz
Emergency	ED	TRUE	23428	1945	mike	Mike Hartz
Support Services	SS	TRUE	23429	1945	mike	Mike Hartz

### Cancellation Screen changes

*Improved usability. Change Courtesy of: Barwon Health*

Notes, Files, and Cancellation info now shows when the Shortfall History screen is displayed.

Attached Files	
Details	<a href="#">pzoh5-8061145-rural-accept-201611231213.pdf</a>
Notes	
reduced load	Ben Hartz 23/11/2016 12:14
Cancellation Info	
reduced load	Ben Hartz 23/11/2016 12:14




## Governance Items Enhanced

*Improved usability. Change Courtesy of: Nursewest, Barwon Health & Monash Health*

Each Governance Item now has a free-form text field for storing registration numbers, keywords etc (up to 40 characters).

## Governance

These fields trigger warnings to users for impending credential events. Some events can make a user inactive on expiration.

<b>Renewal *</b>	30/06/2017 	agora
<b>Children Check *</b>	30/06/2017 	wwc1
<b>OHS</b>	09/12/2016 	Description

## Enhanced User's Schedule Page for Managers

*Improved usability. Change Courtesy of: Eastern Health, Barwon Health*

A host of extra User information now appears with the User Details tab on the Manager's view of a user's Schedule page.

Do Not Disturb	OFF
Date Last Worked	Thu Nov 17 12:00:00 AEDT 2016
Hours Worked Mon 14 Nov - Sun 27 Nov	24.75
Registration 2	
Experience Allowance	0.0
Maximum Hours	0.0
Registration Renewal	30/06/2017
Children Check	30/06/2017
OHS	09/12/2016
CPR Practical	14/12/2016
RSA	
457 Visa	
Visa	16/03/2017

## User Locations CSV Report

*Improved reporting. Change Courtesy of: Barwon Health*

This report now shows user's Payroll number/Login and Grading.

UserPkid	Payroll	Firstname	Lastname	GradingId	Loc2_Description	Loc3_Description	Loc4_Description	LocationPkid
58614	rogeriphone	Roger	iPhone	RN1	Hospital	Medical		880
58614	rogeriphone	Roger	iPhone	RN1	Hospital	Aged Care		882
58614	rogeriphone	Roger	iPhone	RN1	Hospital	Emergency		888
58614	rogeriphone	Roger	iPhone	RN1	Hospital	Maternity		890
58614	rogeriphone	Roger	iPhone	RN1	Hospital	Medical	9 West	2254
58614	rogeriphone	Roger	iPhone	RN1	Hospital	Aged Care	Ward 3	2255
58614	rogeriphone	Roger	iPhone	RN1	Hospital	Maternity	Ward 6	2257
58614	rogeriphone	Roger	iPhone	RN1	Hospital	Maternity	Ward 7	2258
58614	rogeriphone	Roger	iPhone	RN1	Hospital	Emergency	Ward 9	2259
58614	rogeriphone	Roger	iPhone	RN1	Hospital	Maternity	Delivery Suite	5768

But wait there's more...

We're already planning and working on Q1 2017 where more of your feature requests and improvements of our own are in development. 2016 has been a great year and we're looking forward to working together with

you in 2017 in providing the most efficient, user friendly allocations system to make your job a little easier and you staff a little happier.

If you need any further information on any of the features above don't hesitate in contacting us.

Kind Regards

FillShift Canada

**Next Topic:** [Q1 2017 System Upgrades >>](#)

# Q1 2017 System Upgrades

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[<< Q4 2016 System Upgrades](#) | [Video Tour >>](#)

## Q1 2017 System Upgrades

These upgrades went live on Friday May 2, 2017

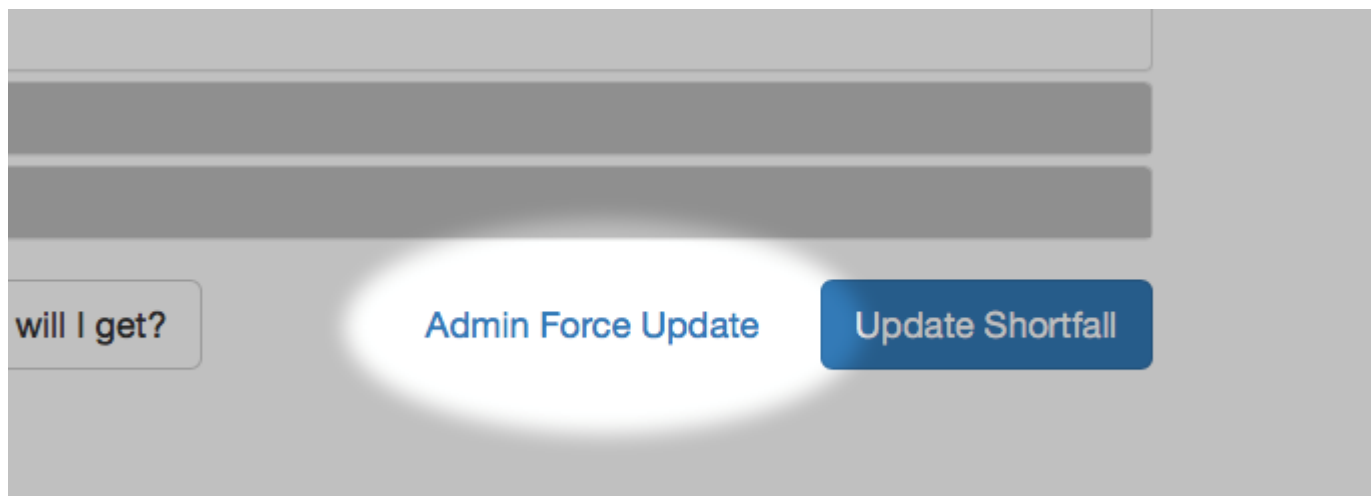
As well as some general housekeeping and system performance improvements, the following is list of the main additions and enhancements to ShiftMatch.

### Redesign Force Update and Add Shortfall button

*Improved application of system rules. Change Courtesy of: Royal Women's Hospital*

We have redesigned Force Update and Add shortfall buttons so that the Add new shortfall button looks more like the default button to discourage unnecessary use of Force update button (where placement rules can be broken).

This function is optional.



### Bypass dwell

*Improved fill rates for urgent shifts. Change courtesy of St John of God*

There is now a checkbox next to the Submit button when creating or editing a shortfall labelled "bypass dwell"

When the checkbox is ticked, it prevents the dwell time from being added to the process time so as to

expedite processing.

This function is optional.

Reminder Hours

0.5

Bypass Dwell

☒ Don't pause between sending Messages

Move to New Location

New Location

Notes

Notes are added each time you save

## Reports > Availability Details CSV

*Improved functionality: Change courtesy of FillShift Australia*

The Availability Details CSV report has columns added that shows if the user is working or not working.

Relevant headings are **StatusID** and **StatusDescription**.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Userid	Firstname	Lastname	Grade	Day	Shiftid	ShiftGroup	Hours	DateCreated	DateUpdated	AutoAccept	StatusId	StatusDescription
2	174580	Clair	Demo	RN1	1/4/17	0:00 AM		7	22/3/17 9:22	22/3/17 9:22	FALSE	10	not-working
3	184614	Freddy	Demo	RN1	1/4/17	ANY_SHIFT	ANY_SHIFT	7	27/3/17 15:52	27/3/17 15:52	FALSE	10	not-working
4	174580	Clair	Demo	RN1	10/4/17	0:00 AM		7	5/4/17 10:18	5/4/17 10:18	FALSE	10	not-working
5	184615	lurch 123456789 123456789 1234	adams	RN1	11/4/17	ANY_SHIFT	ANY_SHIFT	7	10/4/17 7:46	10/4/17 7:46	FALSE	10	not-working
6	174580	Clair	Demo	RN1	12/4/17	ANY_SHIFT	ANY_SHIFT	7	5/4/17 10:23	10/4/17 15:21	FALSE	10	not-working
7	184615	lurch 123456789 123456789 1234	adams	RN1	12/4/17	0:00 AM		7	10/4/17 7:43	10/4/17 16:50	FALSE	10	not-working
8	91801	Roger	Demo	RN1	12/4/17	0:00 AM		7	10/4/17 16:51	10/4/17 16:51	TRUE	100	working
9	184615	lurch 123456789 123456789 1234	adams	RN1	13/4/17	ANY_SHIFT	ANY_SHIFT	7	10/4/17 7:46	10/4/17 7:46	FALSE	10	not-working
10	184615	lurch 123456789 123456789 1234	adams	RN1	14/4/17	0:00 AM		7	10/4/17 7:46	10/4/17 16:52	FALSE	10	not-working
11	91801	Roger	Demo	RN1	14/4/17	0:00 AM		7	10/4/17 16:52	10/4/17 16:52	FALSE	10	not-working
12	184615	lurch 123456789 123456789 1234	adams	RN1	14/4/17	11:15 PM		7	13/4/17 14:16	13/4/17 14:16	FALSE	10	not-working
13	184615	lurch 123456789 123456789 1234	adams	RN1	15/4/17	0:00 AM		7	10/4/17 15:57	10/4/17 16:51	FALSE	10	not-working
14	91801	Roger	Demo	RN1	15/4/17	0:00 AM		7	10/4/17 16:52	10/4/17 16:52	FALSE	10	not-working
15	184615	lurch 123456789 123456789 1234	adams	RN1	16/4/17	0:00 AM		7	10/4/17 16:59	13/4/17 14:25	FALSE	10	not-working
16	91801	Roger	Demo	RN1	20/4/17	0:00 AM		7	10/4/17 16:49	10/4/17 16:49	TRUE	10	not-working
17	184615	lurch 123456789 123456789 1234	adams	RN1	20/4/17	0:00 AM		7	10/4/17 16:49	10/4/17 16:49	FALSE	10	not-working
18													

## Reinitialize Shift Logic

*Improved shift fill rates. Change courtesy of FillShift Australia*

We have strengthened the logic around re-offering a reinitialized shift to those users that missed out in the first round of offers.

## Shortfall History - Created 22/11/2016 12:23:55

### Linked Joined (643129)



Pkid ¶	Shortfall ID ¶	Description ¶	User ¶	Pull Sms ¶	Date ¶	Logged User ¶	Primary ¶
62152846	8061136	new shortfall	No User	0	Tue 22/11/2016 12:23:55	Ben Hartz	✓
62152847	8061137	new shortfall	No User	0	Tue 22/11/2016 12:23:56	Ben Hartz	✗
62152930	8061137	sms: shortfall offer/work work request - message: 1 : s8061137 u91800 a0	John Demo	0	Thu 24/11/2016 12:17:04	N/A	✗

## Governance Description in View only

*Improved usability and visibility in staff profiles. Change courtesy of YMCA of Greater Toronto*

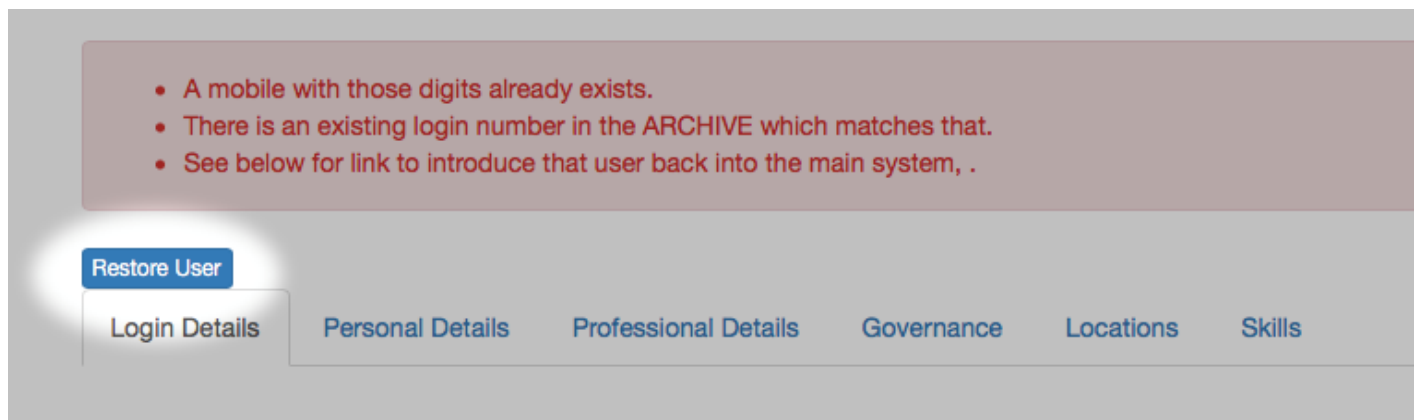
Managers with “view only” access to People info page can now see the Governance items, expiry dates and the Description.

Emp Type	Casual
Renewal	30/06/2017
Children Check	30/06/2017
OHS	
CPR Practical	
RSA	
457 Visa	10/03/2017 : 457 number
Visa	

## Archived Staff Management

*Improved functionality. Change courtesy of FillShift Australia*

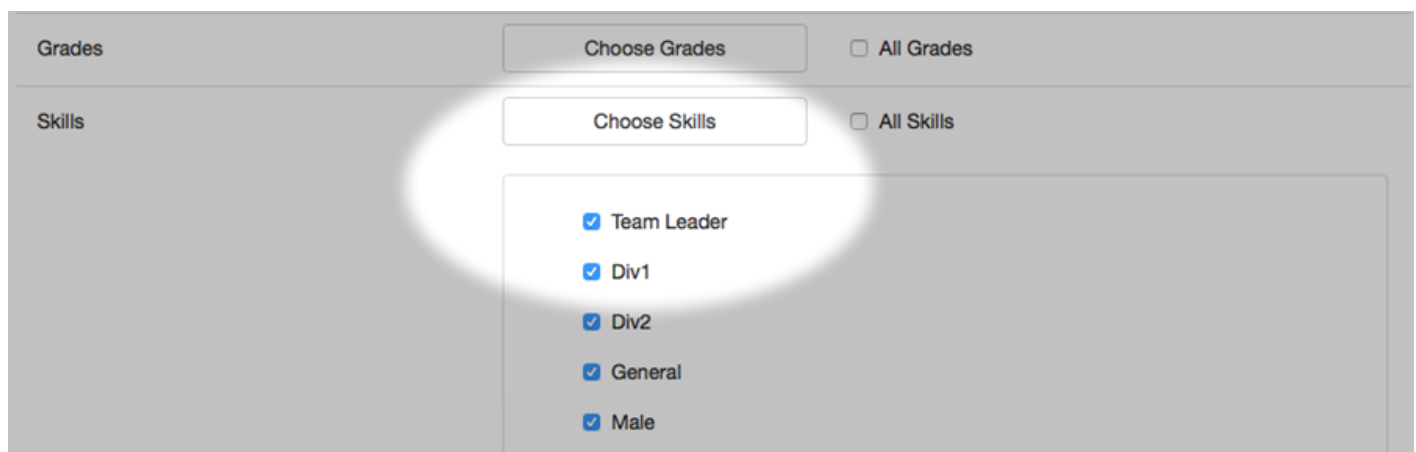
A “Restore User” button will appear under the error message when adding a new user whose unique ID has been detected in the archive.



### Agency Notification Filter by Skill

*Improved Agency targeting. Change courtesy of Monash Health*

We have added “Skill” as a filter for notification to Agency – it operates in the same way as Location and Grade (checkboxes on the Agency Edit screen).



### Preferred Name field

*Improvement to communications. Change courtesy of Nursewest*

A “preferred name” field can now display in User profiles (People Info page). If a preferred name exists it will be used in communications, else the First Name will be utilized.

The function is optional.

<b>First Name</b>	<input type="text" value="Michael"/>
<b>Last Name</b>	<input type="text" value="Hartz"/>
<b>Preferred Name</b>	<input type="text" value="Mike"/>
<b>Address 1</b>	<input type="text" value="1 Smith St"/>
<b>Address 2</b>	<input type="text" value="Address 2"/>

### New staff welcome message

*Improved staff communications. Change courtesy of The Bethanie Group*

A new return text has been created for a once of welcome / instructional text and/or email when a new employee is added to FillShift.

This feature is optional.

See Settings > Return Text > Welcome New Staff

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### Edit the content of the message below

A message will only be sent if there is content in the relevant fields. If there is no TXT content a TXT will not be sent, will not be sent.

#### Sms Message

#firstname#, welcome to Cascom, login here to add your availability and start accepting shifts.

#### Email Subject

welcome to casecom

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### Governance items seen by Casual Staff




*Improved visibility by Staff. Change courtesy of Nursewest*

We added the ability to show governance item details to Casual staff on their Details page (My Schedule > Details).

They are not able to edit but just to view.

## Governance

These fields trigger warnings to users for impending credential events. Some events can make a user inactive on expiration.

<b>Renewal *</b>	<input type="text" value="30/06/2017"/>		<input type="text" value="agora"/>
<b>Children Check *</b>	<input type="text" value="30/06/2017"/>		<input type="text" value="wwc1"/>
<b>OHS</b>	<input type="text" value="09/12/2016"/>		<input type="text" value="Description"/>

## Ability to see targets for Broadcast

*Improved usability and targeting. Change courtesy of Barwon Health*

We have added the ability to have a summary after a broadcast has been sent to know who the broadcast did or did not go to.

This will essentially identify users without cell phones.

After submitting the broadcast a summary screen shows total matches, sending matches (for those that can be sent) and a full user list matching the filters used.

Total Matches	16
Sending Matches	5
User List	lurch 123456789 123456789 1234 adams, Hospital Admin, Medical Admin, Roger Bluephone, Brendan Demo, Clazza, Freddy Demo, Jasmine Demo, John Demo, Roger Demo, Testing Demo, Mike Hartz, Nathan Hotel, Roger iPhone
Can Receive	lurch 123456789 123456789 1234 adams, Clazza, Roger Demo, Nathan Hotel, Roger iPhone,
Message	This is a broadcast message from Cascom

[Change Broadcast Requirements](#)
  
[Submit Requirements](#)

### Ability to choose compulsory fields in profiles

*Improved data integrity. Change courtesy of Barwon Health*

We have added the ability to nominate fields under Personal, Professional or Governance details to be mandatory when adding/editing user profiles.

Fields that can be mandatory include: renewal date, cellphone, email, home\_phone, title, first\_name, last\_name, preferred\_name, address, hire-date, terminate-date, Total hours allowed to work, grade, employment type, class, role rating, pool.

### Display shortfall ID in Invoices

*Improved Agency invoice auditing. Change courtesy of Barwon Health*

You may now display the shortfall ID when shifts are imported into Invoices.

More upgrades and improvements to come in Q2, 2017.

If you have any feature requests, be sure to contact your account manager to discuss.

**Next Topic:** [Video Tour >>](#)

# Video Tour

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[<< Q1 2017 System Upgrades](#) | [Video #1 Login >>](#)

For a brief orientation to the ShiftMatch system, the following videos describe key functionality in each tab:

## **Login via computer, smartphone or tablet**

includes instruction on how to:

- [Login](#)
- Including help if you [Forget Your Password](#)

## **Staffing Schedule Video**

includes instruction on how to:

- [View the Schedule](#)
- [Add a Shortfall](#)
- [View and Edit a Shortfall](#)
- [Delete or ReInitialize](#)
- [PreBook](#)
- [Escalation](#)
- [View Shortfall History](#)

**Next Topic:** [Video #1 Login >>](#)

# Video #1 Login

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[<< Video Tour](#) | [Video #2 Manager Staffing > Schedule Tutorial >>](#)

The video tour demonstrates how to:

- [Login](#) – includes access to ShiftMatch via smartphone, tablet or computer
- What to do if you [Forget Your Password](#)

**Next Topic:** [Video #2 Manager Staffing > Schedule Tutorial >>](#)

# Video #2 Manager Staffing > Schedule Tutorial

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[<< Video #1 Login](#) |

The video tour demonstrates how to:

- [View the Schedule](#)
- [Add a Shortfall](#)
- [View and Edit a Shortfall](#)
- [Delete or ReInitialize](#)
- [PreBook](#)
- [Escalation](#)
- [View Shortfall History](#)

**End of Manager Guide**

# YMCA GTA Staff video

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[<< Video #2 Manager Staffing > Schedule Tutorial](#)

The video tour is specific to YMCA GTA Users and demonstrates how to:

- [Login](#) – includes access to ShiftMatch via smartphone, tablet or computer
- [Details](#) – view and edit Personal Details
- [Locations](#) – choose Locations to work
- [Schedule](#) – view Schedule
- [Availability](#) – add Availability to work
- [Accept Work Requests](#) – accepting via text
- [Help](#) – including Feedback