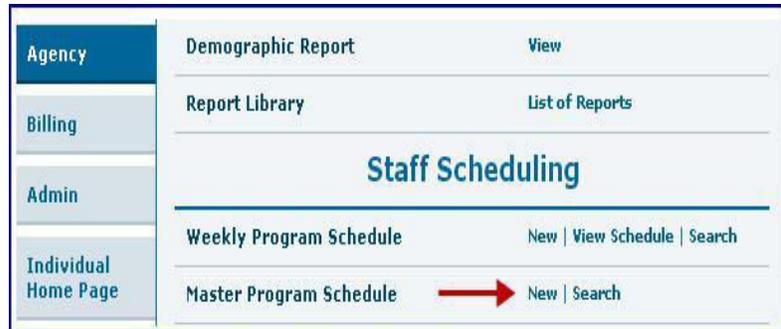


## Staff Scheduling: Master Program Schedule Creating a Master Program Schedule

The **Master Program Schedule** is a default program schedule that can be used as a template to create **Weekly Program Schedules** for a program. Users who have the **SSM Submit** role can create a new master program schedule that covers 1 or 2 weeks.

### Creating a Master Program Schedule

- On the Dashboard, click on the **New** link beside the **Master Program Schedule** option under the 'Staff Scheduling' area under the Agency tab. This will take you to the **Select Program for Master Program Schedule** page. Select the appropriate program from the displayed list; you will be taken to the **Create New Master Program Schedule** page.



**NOTE:** Throughout this schedule, fields marked with a red asterisk (\*) are required fields and must be filled.

Create New Master Program Schedule

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Master Program Schedule Details

**Program (Site):** 1st Street GroupHome(Connecticut)

**Master Program Schedule Name:\***

**Number of Week(s):\***  1 Week  2 Weeks

**Starting Day of Week:** Monday

**NOTE:** The Starting Day of the Week is same as specified in the Provider Preference section.

- On the **Create New Master Program Schedule** page, fill in the required fields as follows:

- **Program (Site):** The program that you had selected earlier is automatically placed here.
- **Master Program Schedule Name:** Enter an appropriate name for the Master Schedule Template. You should choose a name which will later help you to easily identify this template schedule from other schedules.
- **Number of Week(s):** This option allows you to select whether you would like the time period for this template to be one week or two weeks.
- **Starting Day of the Week:** This field will display the starting day of the week as specified by the Provider Administrator at your agency.

Provider

Administrators are able to change this day if needed.

- Once you have filled in all the information on this page, click **Next**. This will take you to the **Master Program Schedule** page where the information you entered is displayed.

## Adding Slots

Click on the **Add Slot** button to add time slots to the schedule you are creating. On the **Master Program Schedule Slot Definition** page that is displayed, you can create time slots and add staff members to these slots.

### Step 1: Slot Definition

In the **Slot Definition** area of this page, enter details by going through the following steps:

#### Single/Multiple Slot:

Specify whether you want to create a single slot or multiple slots for your schedule by selecting an appropriate radio button.

For a **Single Slot**, please enter the following information:

- **Begin Day/End Day:** Select the desired day from the **Begin Day** dropdown list. If you selected '2 weeks' for **Number of Week(s)** on the **Create New Master Program Schedule** page (see above), the day names on the dropdown will be numbered,

where the number indicates the week (1<sup>st</sup> or the 2<sup>nd</sup>) on the schedule that the day belongs to. For example, Sunday(1) on the dropdown will mean the Sunday of the first week on the schedule.

Similarly, the two in 'Sunday(2)' Once stands you select for the **Begin Day**, the **End Day** will automatically be set to the same day. You may select a different **End Day** if required.

- **Begin Time/End Time:** Choose the begin and end times from the time table that appears when you click on the button. You will find hours of the day classified under two tags:

For **Multiple Slots** do the following:

This option will allow you to define multiple slots with the same attributes. For example, to create a slot for Monday, Tuesday and Thursday from 9 a.m. to 5 p.m., you should check the boxes next to Monday, Tuesday and Thursday and set the **Begin Time** to 9 a.m. and **End Time** to 5 p.m.

- **Number of Employee(s):** Enter the maximum number of staff members that you would like to assign to a slot.
- **Unpaid Time:** For calculation purposes, you may factor in other times such as lunch breaks among others.

### Step 2: Adding Staff to Defined Slots

Once you have completed defining your slots, you will need to assign staff to these. In addition to existing staff who are Therap users, other staff can also be added to defined slots.

- **Add Existing Staff**

Click on the **Add Existing Staff** button to assign staff members who are Therap users to the newly defined slots. A list of staff members is displayed on the **Select Staff to Add** page. Select one or more staff members from the list by ticking the checkboxes beside the required names and click on the **Add** button at the bottom-right corner of the form.

Login Name	First Name	Last Name	Title	Select
kathy-reach	Kathy	.	Administrator	<input type="checkbox"/>
madonna-reach	Madonna	.	Other	<input type="checkbox"/>
mary-reach	Mary	.	Other	<input type="checkbox"/>
rob-reach	Rob	.	Administrator	<input type="checkbox"/>
wila	wila	.	Other	<input type="checkbox"/>

**Note:** The number of staff members selected must not exceed the number entered in the **Number of Employee(s)** field on the **Master Program Schedule Slot Definition** page. However, this rule does not apply for **Other Staff** members or those who are **Working Remotely** (see below for details).

▪ **Add Other Staff**

To add a staff member who is not a Therap user, enter the person’s name/title in the **Other Staff** text box and click on the **Add** button. The newly added staff members will appear in a table under the **Staff List** section of the **Master Program Schedule Slot Definition** page.

- **Notes:** you may add related comments in this box (within 3500 characters).
- **Staff Status:** for each staff member listed, you may choose a status based on the following:

*Live-in (Working):* for full-time staff members during their working hours.

*Live-in (On Call):* for full-time staff members who are available on call.

*Live-in (Asleep):* for full-time staff members who will be present but off duty.

*Working:* for staff members during their working hours (on duty).

*Asleep:* for staff members who are off duty.

*Working Remotely:* for staff members who are working from a remote location.

\*Working is the default status listed in the **Staff Status** dropdown.

Once you have completed entering all required data on the **Master Program Schedule Slot Definition** page, click on the **Add** button. This will take you back to the **Master Program Schedule** page and will look similar to this.

Staff List				
Login Name	Name / Title	Notes	Staff Status	Action
JustinAdmin	Administrator, Justin / Program Director	This will be done for a	Live-In(On Call)	Remove
Charlie	Angel, Charlie / CEO LEAD Services	For Two Weeks	Working	Remove
	Not A Therap User	Temporary Substitute	Live-In(Asleep)	Remove

### Master Program Schedule

Status: New

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**Master Program Schedule**

**Program (Site):** 1st Street Group Home(Connecticut)

**Master Program Schedule Name:** Master Schedule Template

**Number of Week(s):** 1 Week(s)

**Starting Day of Week:** Sunday

**Staff Status Legend:**

**LW:** Live-In(Working)    **W:** Working

**LA:** Live-In(Asleep)    **As:** Asleep

**LOC:** Live-In(On Call)    **WR:** Working Remotely

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**Slot List**

To view note entered for a staff, place the cursor on the staff.

Start	End	Unpaid Time	Staff Info	Staff Added/ Total Staff	Action
Monday - 6:00 am	Monday - 7:00 am	0 Hr 0 Min	Administrator, Justin / Program Director (LOC) ; Angel, Charlie / CEO LEAD Services (W) ; <span style="color: red;">Not A Therap User (LAs)</span>	3 / 10	<input type="button" value="Edit"/> <input type="button" value="Remove"/>

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**Work Hours**

Last Name, First Name / Title	Week 1		
	Total	Unpaid	Paid
Administrator, Justin / Program Director	1	0	1
Angel, Charlie / CEO LEAD Services	1	0	1
<b>Total</b>	<b>2 Hr</b>	<b>0 Hr</b>	<b>2 Hr</b>

At the end of the page you will find some buttons located inside an orange bar. Click on:

- the **View By Staff** button to view the schedule by name of staff members and slots that they have been assigned to. This information can also be exported to Excel by clicking on the **Export to Excel** link at the bottom of the page that is displayed after clicking the **View By Staff** button.
- the **Save** button to save the schedule so that you may work on it later. You will find your saved schedules in the **Worklist** link under 'To Do' tab. Saved master program schedules are given the Draft status and need to be Approved status in order to be used as a template for Weekly Program Schedules.
- the **Approve** button to approve the new schedule if it is complete and you would like to submit it for others to be able to view it. Other users will not be able to use this schedule if it has not been approved. (You will need the 'SSM Approve role' to be able to view the **Approve** button).