BUDGET AND STAFFING LEVEL SETUP

Version 5.5

PAR Levels
A guide to both setting the budgeting options available within the SmartLinx applications and utilizing those budgets to schedule appropriately.

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1.1 – Logging In

Using your internet browser (Internet Explorer recommended) navigate to the site designated to your organization. For your reference, please enter the URL for the site on the line below:

http(s)://

Once you have reached the site, you will be presented with the SmartLinx 5 splash screen, illustrate on Image 1.0. This image will remain on the screen while the application is loading.

Once the application has fully loaded, the next screen will appear. The following screen is the Login screen. Here you will be asked to enter your User Name and Password.

Upon logging in you will have a number of applications available to you, please select TA. Click on the icon illustrated in figure 3.
1.2 – Navigation

The application navigation in the SmartLinx suite is template driven and therefore adjusts to each user’s security rights. The user will only be able to navigate to the org levels that they have been given access to.

In order to change the org level that you are currently on, slide the organization pane on the left hand side by clicking on the right arrow in the middle of the “shade”. (Illustrated in Figure 4)

Once the shade slides over, the org tree is displayed and is populated with the org levels available to you. You can navigate through the tree structure by clicking on any of the org levels that have an arrow next to them, exposing a more detailed breakdown of the organizational structure.

The department level is the lowest level that you can navigate to using the org tree.

Once you click on any of these options, the main screen (to the right of the org tree) will update. Some of the options that are available to you at the department level may not be available to you at the center level and vice versa. The screens will adjust accordingly, please note this fact.
2.0 – Overview

In order for an administrative user to get all of the functionality out of the SmartLinx Labor Management Suite, we have designed a work cycle that integrates workflow through many of the key modules of the system. The work cycle is intended to give the administrative user greater control over the labor that they manage by allowing them to configure the optimal operating levels for their organization and then utilizing several key indicators to point out which areas are in need of improvement. This process will give the administrative staff access to many new strings that they can pull to tighten up their operation.

2.1 – Set and Review Budget

Setting up a budget within the SmartLinx Suite, activates a number of reporting options for the administrative user such as the Corporate Planning and Control (CPCS) module. The CPCS module is a collection of interactive reports that allow the user to view information from various levels in the organization based upon this budgeted setup.

2.2 – Set Staffing Levels

Setting the Staffing Levels (PARs) within the SmartLinx Suite gives the schedulers several new tools and reports that allow them to schedule more efficiently. The PARs can also be automatically adjusted by facility census to properly schedule the number of Full Time Equivalents (FTE) required at the lower census levels.

2.3 – Schedule to Staffing Levels

Once the Staffing Levels are set, the scheduler can use the Daily Unit Assignment screen to manipulate the gaps in their staffing. Empty slots are easily identified and superfluous personnel can be allocated to a necessary slot.

The Totals section of the Master Schedule is also updated to assist in scheduling to the Staffing Levels. The hyperlinked values allow the scheduler to see the PAR values for each day, view which employees are allocated to those slots and see all empty assignments. Graphical data is also available from the title of the total row.

By filling in the empty slots and removing the extra employees that are scheduled, the schedule becomes more effective, minimum state and federal staffing requirements can be easily met and minor discrepancies such as employee call outs can be handled efficiently.

2.4 – Drive Attendance to Schedule

The Time & Attendance (TA) module in combination with the SmartLinx time clocks allow the user to restrict employees to the schedule they were given. Time lost by Early Arrivals and Late Departures are eliminated and overtime is significantly reduced.

2.5 – Reconcile Schedule, Attendance and Budget

The user can use the CPCS module and various reports and screens such as Attendance vs. Scheduling to compare these three key values and hold their managers accountable. Discrepancies are easily discernible and values can be compared at all organizational levels from Corporate down to department by department.
3.0 – Budget Setup

The Budgeting screen can be accessed from multiple applications within the SmartLinx Suite, as long as you are at the Facility level in the organization tree. The easiest is within Time & Attendance by accessing the View Menu and selecting the Configuration submenu and finally the Budgeting option.

View > Configuration > Budgeting

The first dropdown is the Effective Date for your budget. By clicking on this dropdown, you can select the New option and choose the date you wish to start your new budget on.

Next, click on the Create Group button. This button can be used to group your different budgeted positions together.

In general, a Budgeted Group is the department in which the Budgeted Positions exist, but does not have to be. The budgeted configuration is a parallel structure to that of your department/position setup. Please be sure that you configure it in the same fashion or as closely as you are able.
Once you have created all of the Budgeted Groups, right-click on a budgeted group and select the Add Position option.

The Budgeted Position window will appear. Populate the fields in descending order. Each field must contain values, but you can enter a zero (0) if you do not wish to populate certain fields, such as Pay Rate.

The Weekday Hours and Weekend Hours field indicate how many total hours are needed to be scheduled on each day of the week (or weekend). For instance, if you need seven CNAs each day, you would put in 56 hours into both fields.

Please note you should never use a duplicate name for Budgeted Positions within multiple groups. Several screens reference the Budgeted Position but do not show the associated Budgeted Group. If you name the Budgeted Position CNA in both Assisted Living and Nursing groups, you will not be able to differentiate which is which.

The Adjust to Census field allows your budget to fluctuate back and forth automatically when the census rises or falls.

Once complete, your screen should look similar to Figure 13.
3.2 – Adjusting the Budget

You can use the Expand All or Collapse All buttons to show or hide all of your budgeted positions with their budgeted groups.

Once your groups are expanded, you can make further changes to the values such as Weekday Hours individually by clicking the position name or right-clicking on the position and selecting the Edit Position option. This will display the Budgeted Position screen as before and allow you to change the values.

You can also change multiple position values at once by clicking the Edit button at the top of the screen. This will unlock the screen values and allow you to click in each one to change them.

One you have completed your changes, be sure to click the Save Changes button so you do not lose your adjustments. All changes will be saved as of the most current effective date listed.
3.3 – Budgeted Position Assignment

Once the budget information has been, each position will need to be associated with its Budgeted Position.

This can be managed from the Positions screen at the department level of the organization tree.

View > Configuration > Positions

If you click on a position’s name, the Job Position window will appear. The final dropdown on this window allows you to select which Budgeted Position this position should be associated with. Choose the appropriate Budgeted position and click the Save button.

This process will need to be repeated in all departments for all positions. It will also need to be repeated anytime a new position is added to the system.
4.0 – Staffing Level Setup

The Staffing Levels, or PARs, are setup based on a Position/Shift/Unit combination. For instance, the Windy Way unit requires 4 CNAs to work on the 7a-3p shift each day at a particular census level.

The staffing levels are accessed from the Schedule Optimizer application. Use the Application Pane and select SO. Also, you must be at the department level in order to access the Staffing Model so be sure to adjust your Organization Pane to the department you wish to setup.

In preparation for setting up your staffing levels, verify that all shifts and units are setup that you would like to base your PARs on. If any are missing, please take a moment to add in those shifts and units before proceeding to the PAR setup.

Access the Staffing Model option from the Configuration submenu, located within Schedule Optimizer’s View Menu.

View > Position Control > Staffing Model

The Staffing Model screen will show all PAR levels that are currently setup for the entire department, as seen in Figure 22.
4.1 – Default Shift Setup

Near the bottom of the Staffing Model screen, click on the Default Shifts button.

The Staffing Model Shifts screen will appear. This screen displays all positions within the selected department and gives you the ability to assign a default shift to each one. Most departments will use the same default shift for each position but larger ones, such as Nursing, can use this screen to define distinct shifts for different groups of employees.

Use the dropdown fields under the Day Shift, Evening Shift and Night Shift headings to select which shift each position should default to.

Click the Save button to complete the setup.
4.2 – Adjusting the Staffing Model

Each position within the staffing model is given a base number of hours worked each day in the Shift Hrs column. Effectively, you are defining the staffing model’s Full Time Equivalent (FTE) for each position. The value must equal the number of hours in the department’s default shift (7.5, 8, etc.) as defined in section 4.1.

The column can be modified by clicking on each value and typing in the appropriate amount.

The values within the adjoining columns must be adjusted on a unit by unit basis. You can select the unit you wish to staff for using the Unit dropdown in the top right corner.

Once the unit has been selected, the Census field will become active. This should be populated with the average Census for that unit.

The columns are broken into two groups of Weekday and Weekend and further into Day, Evening and Night shifts for each. The system allows you to define how many full shifts you need to staff each slot.

The Shifts column defines how many FTEs you need for each of the basic shifts that have been setup. For example, the Day shift would represent the 7a-3p shift or the 6:30a-2:30p shift that you defined in the Staffing Model Shifts screen.

Click in the Shifts cell for each position and type in the appropriate value. Once finished with that unit click the Save button in the bottom right corner. The Hours column will populate once saved and you can move on to the next unit.
4.3 – Compare Staffing Model to Budget

Near the bottom of the screen, you will see the title *Compare Staffing Model to Budget*.

To expand the chart, click and drag the small tab near the middle of the screen up.

This is an additional grid that allows you to view your Staffing Model hours and compare it against the number of Budget hours within the system.

Both grids can be exported to Excel, if necessary.
4.4 – Non-Default Shift Staffing Level Adjustments

After completing the Staffing Model, you can adjust individual shifts and unit PAR levels within the Positions screen.

View > Configuration > Positions

This process should only be used for the occasional one-off shift as any time you adjusted the Staffing Model, these changes will be lost. Therefore, the Staffing Model should always be completed first. Modification of the Staffing Model will cause loss of all changes made in the Positions screen.

Within the Positions screen, click on the hyperlink in either Total Wk Par column for any position you need to assign an adjusted PAR level to.

This will bring up the Par Levels screen for that position.
On the bottom of this screen, click the **Edit** button.

This will change the options and allow you to select the **Add/Remove Shifts-Units** button. Click on it to display a new screen.

The **Add/Remove Shifts-Units** window allows you to select individual Shift and Unit combinations. For instance, checking off the **Windy Way** box in Figure 38 will allow us to set PAR levels for the 6:30a-2:30p Shift/Windy Way Unit combination. Continue checking any combinations that are needed, using the scroll bar on the right to move through the long list of checkboxes. Click the **Save** button when done.

The new shift/unit combination will now show on the Par Levels screen and you can add in the number of FTEs required for each day of the week by clicking on the appropriate cell and entering the value. Click the **Save** button when complete to exit Edit mode.
5.0 – Schedule to Staffing Levels

Once the Staffing Levels have been entered, two important functions will become available within Schedule Optimizer.

5.1 – Master Schedule Totals

The Master Schedule screen will now display a light blue row in the Totals section, entitled Fixed Pars. The Difference row will also show how close you are to the scheduling budget.

This will give your schedulers a goal to aim for when creating each four-week schedule.

5.2 – Daily Unit Assignment

You will also have access to the Daily Unit Assignment screen. This screen lists all PAR levels in a Position/Shift/Unit grid and displays any empty combinations.

Your schedulers can then drag employees from the Employees Working (Out of PAR) section into the required empty cells. This will both remove an extra FTE and fill in a missing one, bringing the schedule that much closer to the budgeted values.
6.0 – Drive Attendance to Schedule

The Time & Attendance module allows you to restrict employees to a scheduled time frame from within the department or facility level of the org tree.

This functionality can be accessed from the Console screen by right-clicking on a displayed time clock and selecting the Employee Records option.

The Timeclock Content screen that displays lists all employees within that department. You can change an employee’s restriction status by checking off their name and then selecting the appropriate restriction from the Restriction dropdown. Click the Submit button to complete the process.

There are five types of restrictions available within the system:

- **None**: Default setting for all employees; all access granted to employees assigned to specific clock without regard to the schedule.

- **Warning Only**: Warning will be issued to alert employees of early punch, but will be accepted into the time keeping system. All clock information for the punch will be processed as a Normal punch;

- **Alert, Re-punch**: Employee will get a message that attempted punch had occurred outside specified timeframe. Punch will not be valid. Employee will then have to re-punch within specified time frame.

- **Supervisor Override**: Any attempt to punch in or out by more than 7 minutes outside of scheduled hours will be denied. Employee will see “Arrival is Out of Schedule” or “Unauthorized Late Departure” message at the clock and will need an approval by supervisor in order to register the punch.

- **Deny Access**: Any attempt by an employee to punch in or out at the clock will be denied. This option is useful for facilities using multiple clocks where certain clocks are not open to all employees.

If you restrict your employees using either Alert, Re-punch or Supervisor Override, they will be unable to clock in/out outside of their scheduled time. This will significantly reduce Early Arrivals, Late Departures and Overtime hours.
6.1 Real-Time Adhoc Queries

Available from the View Menu in TA, the Real-Time Adhoc Queries screen allows you to run customized reports on the employee time cards and report on any exceptions that still occur.

View > Real-Time Adhoc Queries

To use the screen, (1) first you must select the Departments you wish to query from the dropdown. (2) Then you must select the Exceptions you wish to query on from their respective dropdowns. For example, Overtime would be contained in the Paid Codes dropdown whereas Early Arrival and Late Departure are generally under Un-Paid Absences and Codes.

Underneath the Departments dropdown, there are calendar fields that allow you to choose the Start Date and End Date of the report. (3) Use them to select the correct dates.

There are also optional dropdowns available for Employee Status and Type. Below them there are three checkboxes. (4) Show Totals by Employee will add a column that will populate a total on the final row for each employee. Show Comments in Results will add a column showing any comments from the Daily Timecard screen from that day. Include Regular Scheduled Hours in Results should be left unchecked since you are interested in only specific exceptions.

To run the report, (5) click the Submit button. (6) The results can be exported or printed by using the appropriate buttons to the right of the Departments dropdown.

The report rows are interactive and clicking on the Punch Date value will display the employee’s time card for that date.

Figure 44 - Real-Time Adhoc Queries
7.0 – Reconcile Schedule, Attendance and Budget

Once the budget has been entered and positions assigned, all budgetary reports such as the Labor Report and the Corporate Planning and Control System will reflect the values entered.

The CPCS module is generally updated once a day, so do not expect changes to be reflected immediately.

7.1 – CPCS - Key Indicators

The Key Indicators screen is the default screen of the Corporate Planning and Control System, accessed by clicking on the CPCS icon from the Home screen.

The left side of the screen, allows you to view basic data for the corporation based on Census, Hours and PPD. Be sure to be at the corporate level in the org tree to begin.

You can “drill down” into this information by clicking on the linked information from the Corporate level all the way down to Employee level.

The icons in the top right corner of the Key Indicators pane allow you to adjust what information you are viewing and how you are viewing it on the screen, as follows:

Figure 47 - Up 1 Level Icon

The green arrow will bring you back to higher organization levels.

Figure 48 - Export Icons

Most screens can be exported by using the Excel or PDF icons.

Figure 49 - Column Settings Icon

The Column Settings button allows you to turn columns on and off so you are viewing only the data you are interested in. Uncheck any columns you wish to remove.

Figure 50 - Column Settings Window

The Maximize/Minimize button adjusts the Key Indicators location on the screen from its current half screen width to full screen and back.
7.2 – Attendance vs. Scheduling

The Attendance vs Scheduling screen can be accessed from the View Menu in TA.

View > Attendance vs Scheduling

It gives your schedulers the ability to quickly correct discrepancies in their schedule, such as call outs, even if they were not present when it occurred.

The right section contains a graphical representation of the Schedule/Actual/Budgeted hours comparison for the dates listed in selectors.

The grid below the chart shows the values that are represent within it.

Below the date selector are three more reports to assist your schedulers in reconciling against the Actual hours worked. Click on each report’s title to expand it out.

The Scheduled and Not Punched In report allows the scheduler to see all employees who they had originally scheduled but did not show up for work on the scheduled day.

The Punched In and Not Scheduled report shows the opposite. Any employee who was called in to cover a vacant shift but was not added to the schedule will display on this report.

The final report is Timeclock – Schedule Discrepancies. This report allows the user to see any employee who worked a different amount of hours than they were scheduled for.

All three reports are interactive and if you click on the Date value, the Daily Timecard Screen with the discrepancy will display. If the user corrects the discrepancy, such as adding an absence to an employee who called out, that row will be removed from the report. By using these reports daily, the user should be able to correct most discrepancies.
7.3 – Labor Report by Date Range

The Labor Report will present you with the Budgeted versus Actual hour and PPD values for the date range you select. This report is contained in the Reports module under the TA column. Any Unknown values indicate that the worked position does not have a Budgeted Position assigned to it.

To run any of the available reports within the system, verify that you are in the desired level of the org tree and click on the report’s name.

If another window pops up, fill in the requested information. For the Labor Report, you must provide a Start Date and End Date. Click Ok.

The Report will display, as seen below. It can also be exported using the appropriate buttons in the control panel at the top of the report. Do not use the web browser’s default controls to print reports as this will give you a screen print.

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**Figure 58 - Reports Module**

**Figure 59 - Report Parameters**

**Figure 60 - Report Export and Print Controls**

**Figure 61 - Labor Report by Date Range**