

TRAINING UPDATE

Lab Location:
Department:

GEC, SGMC & WOMC
All staff

Date Distributed:
Due Date:

5/4/2021
6/4/2021

DESCRIPTION OF REVISION

Name of procedure:
Scheduling SGAH.L36 v5
Description of change(s):
<p>Section 5: added details to clocking in/out for critical areas and leaving hospital grounds</p> <p>Note: These behaviors were always in effect but were not spelled out in the SOP</p> <p>This revised SOP will be implemented May 13, 2021</p>

Document your compliance with this training update by taking the quiz in the MTS system.

Non-Technical SOP

Title	Scheduling	
Prepared by	Leslie Barrett	Date: 7/1/2009
Owner	Robert SanLuis	Date: 10/6/2011

Laboratory Approval		
Print Name and Title	Signature	Date
<i>Refer to the electronic signature page for approval and approval dates.</i>		
Local Issue Date:		Local Effective Date:

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1. PURPOSE

All supervisors/managers will prepare work schedule assignments **at least two weeks in advance**. The optimum/target for staff is to prepare a one month schedule, two weeks prior to the beginning of each month.

2. SCOPE

This procedure applies to all Laboratory employees.

3. RESPONSIBILITY

- All Laboratory staff must have knowledge of and comply with this procedure.
- Laboratory managers and supervisors are responsible for ensuring compliance with this procedure.
- The Laboratory Services Director and/or the System Lab Manager are responsible for content and review of this procedure.

4. DEFINITIONS

Shift Times – start and end time for work, includes a 30 minute meal break. Times are delineated on the schedule.

FTE – Full time equivalent

Overtime – All time worked beyond the posted schedule; plus or minus 2 minutes.

Shift Planning – electronic scheduling system

5. PROCEDURE

A. Schedule

Step	Action
1	An electronic scheduling system is utilized and includes number of employees per shift, total scheduled hours, total scheduled FTE's and budgeted FTE's. Where appropriate, assigned duties/workbench may be included.
2	Schedule must be available to staff (posted or electronic).
3	All staff are required to work weekends as scheduled.
4	Staff will be provided a day off for working a weekend day. The day off will depend on the needs of the operation.
5	All staff will be scheduled to work holidays. Observed holidays are: New Year's Day Memorial Day July 4th Labor Day Thanksgiving Day Christmas Day
6	All employees are expected to clock in no sooner than 2 minutes prior to the start of their shift and clock out no later than 2 minutes after the end of their posted shift. A grace period of 7 minutes will be utilized to track and enforce attendance.
7	Changes to the schedule: a. A change may be requested via Shift Planning or on a Schedule Change Request form. 1) Refer to Appendix A for details to request a change in Shift Planning 2) If using a Schedule Change Request form, it is initiated by the individual requesting the change. The individual agreeing to cover the shift must also sign the form. The form is then given to the supervisor/manager for approval. A copy of the form is retained by the supervisor.

Step	Action
	<p>3) <u>Schedule changes require a minimum of 72 hour notice.</u> The only exception is in case of an emergency. Emergency to be determined by the supervisor and/or manager.</p> <p>b. All written changes on a posted schedule MUST be made by a supervisor, manager or group lead who initial and date the changes. Supervisors/managers and Group Leads are the only persons authorized to make changes.</p> <p>c. Vacation requests, FMLA, or other scheduled time off must be pre-approved before physically making changes to schedule. Vacation requests are to be made electronically via Shift Planning (or Workforce Central if appropriate)</p> <p>d. For unscheduled FMLA or Bereavement time off, the employee must:</p> <ol style="list-style-type: none"> 1) must notify the Administrative On call supervisor/manager, if the occurrence begins during a weekend 2) notify their immediate supervisor, if the occurrence begins on a weekday
8	No employee should be scheduled for a double shift on a routine basis. This should only be done in rare cases in the event of an emergency.
9	Scheduled overtime is not allowed. In the event of an emergency, a manager, director or the Administrative On call must pre-approve scheduled overtime.
10	The process for scheduled absences is detailed in the procedure TOP (Time Off with Pay) Request.
11	Unscheduled absences (Bereavement, Jury, TOP) and missed punches are documented on the Workforce Central Adjustment Log. The Group Lead or Tech in-charge (TIC) must verify and sign the entry.
12	Violations of this policy will result in disciplinary action.

B. Overtime

Step	Action
1	Employees are expected to work only their scheduled hours, unless their supervisor, manager or director deems it necessary and authorizes them to work overtime.
2	Clocking in more than 2-minutes before and after the posted schedule is considered overtime.
3	Occasionally, overtime will be mandatory to ensure adequate staffing. In these instances, as much advance notice as possible will be given to each employee affected. <u>It is important that staff remain on duty until the next shift arrives and adequate staffing is determined by a supervisor, Group Lead or TIC.</u>

Step	Action
4	Employees who work overtime may do so only with the approval of a manager/director. Document the occurrence and approval on the Workforce Central Adjustment Log. Employees who fail to complete the required documentation will be counseled and repeated failures will result in disciplinary action.

C. Meals and Break

Step	Action
1	Laboratory employees are permitted to take one unpaid, 30-minute meal period per each six (6) hour workday. Staff are required to clock out and in for the meal break.
2	In the event a meal period is missed due to extreme workload or staffing coverage, documentation will be recorded on the Workforce Central Adjustment Log. The Group Lead or TIC must verify and sign the entry.
3	Break periods are limited, as workload permits, to one fifteen-minute period per eight (8) hour day. Combining of break and meal break is not permitted.
4	Employees may not use break periods to: <ol style="list-style-type: none"> offset late arrival or early departure from the lab, or extend the meal period Employees <u>may not take meal or break periods in the first hour or last hour of the shift.</u>

D. Clocking In/Out

Step	Action
1	For safety purposes, employees leaving hospital grounds must inform the supervisor, Group Lead or TIC.
2	Staff are not allowed to leave the building if they are the ONLY person working in a critical department. <ol style="list-style-type: none"> When leaving the laboratory area, they must notify the Charge RN or Charge Tech. If an employee does leave the area, he/she must be reachable by vocera or cell phone and must return immediately if requested.
3	Employees who leave the hospital grounds for non-work related activities are required to clock out and back in upon return. This includes: <ol style="list-style-type: none"> Picking up food for break Smoking off hospital grounds Walking during break
4	If staff go off-site for work-related purposes, clocking out is not required.

E. Documentation

Step	Action
1	Workforce Central Adjustment (WFC) Logs must be retained for 8 years in accordance with the Corporate Records Retention Schedule (Quest Diagnostics intranet).
2	Other types of time keeping changes (email, LIS mailbox, etc.) must be kept with the log or stored electronically.

6. RELATED DOCUMENTS

- Attendance Policy
- Paid Time Off (PTO) Request
- Schedule Change Request form (AG.F63)
- Workforce Central Adjustment Log (AG.F64)

7. REFERENCES

Your Employee Handbook, Quest Diagnostics Nichols Institute, Chantilly, Jan 2011.

8. REVISION HISTORY

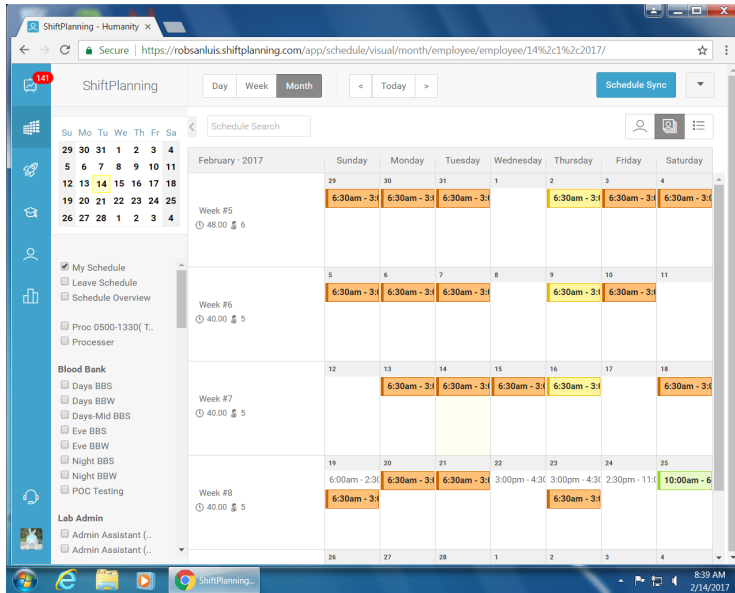
Version	Date	Reason for Revision	Revised By	Approved By
		Supersedes SOP L029.002		
000	7/23/2010	Update owner Section 5: A.5, A.6.d added, B.2&3 updated, C.1 updated, D.1 added notification; changes due to Kronos implementation Section 7: update Section 9: replace B with Workforce Central Log	L. Barrett	L. Loffredo
001	10/6/2011	Update owner Section 1: add optimum time frame Section 3: update job titles Section 5: A.4 added; A.7. add documentation for schedule change; C.3 modify break to one Section 7: update	L Loffredo	L. Loffredo
002	2/16/2017	Header: add other sites Section 3: update job titles Section 4: add Shift Planning Section 5: edit process to request schedule changes or TOP, add WFC documentation Section 6: move forms from section 9 Section 9: add Shift Planning steps Footer: version # leading zero's dropped due to new EDCS in use as of 10/7/13	L Barrett	R SanLuis
3	12/8/20	Header: changed WAH to WOMC Section 6: updated SOP title	L Barrett	R SanLuis

Version	Date	Reason for Revision	Revised By	Approved By
4	4/29/21	Section 5: added details to clocking in/out for critical areas and leaving hospital grounds	L Barrett	R SanLuis

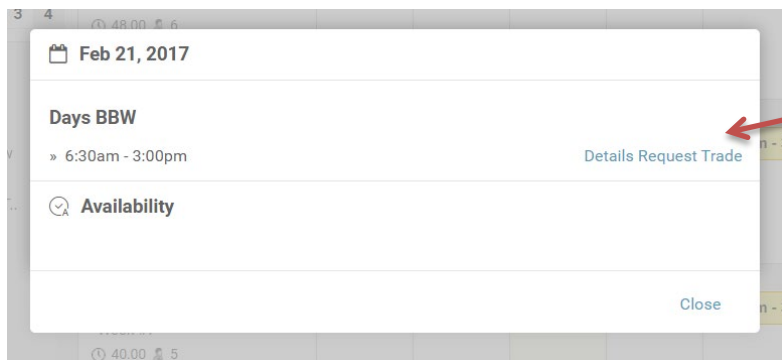
- 9. ADDENDA AND APPENDICES**
 - A. Requesting a Schedule Trade in Shift Planning

Appendix A

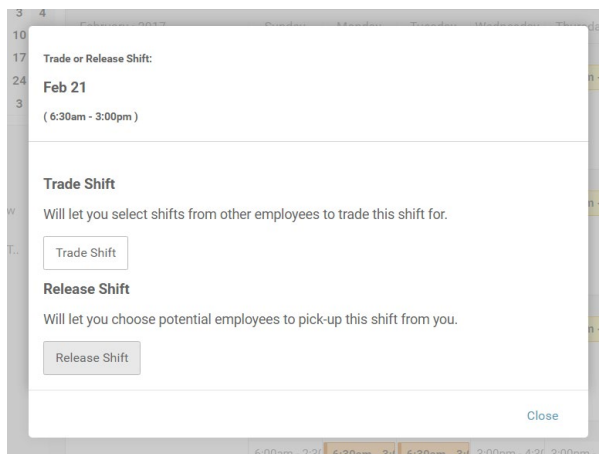
Requesting a Schedule Trade in Shift Planning



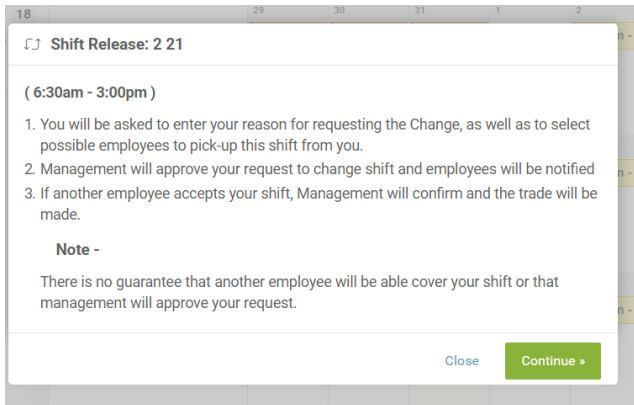
1. Employee who is currently scheduled for the shift will pull up his/her schedule and double-click on the shift that will be traded.



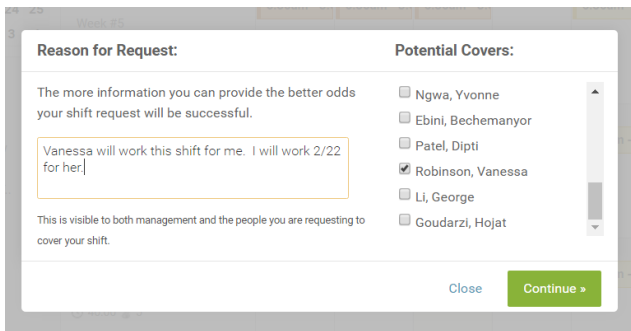
2. A pop-up box will appear for the shift. Click on "Request Trade."



3. A “Trade or Release Shift” pop-up box will appear. Click the “Release Shift” button. **DO NOT** use the “Trade shift” button, because the other person will not see the change.



4. A “Shift Release” pop-up will appear with instructions. Click the “Continue” button.

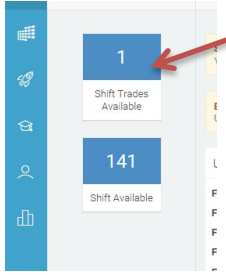


5. A “Reason for Request” pop-up will appear.
 - a. Type the reason for request in the box on the left part of the screen.
 - b. Select the name of the person who will work the shift on the right side of the screen.
 - c. Click the “Continue” button.

6. You will receive a notification that a shift release has been sent.

Employee	Shift Details	Potential Acceptors	Management
Abellano, Mary-Dale » Feb 14, 2017-8:42am Vanessa will work this shift for me. I will work 2/22 for her.	Days BBW Feb 21, 2017 6:30am - 3:00pm	Robinson, Vanessa	Accept Reject Remove Request

7. A supervisor will receive the shift release notification. The supervisor will have the opportunity to accept or reject the trade or to delete the request.
8. If the supervisor accepts the trade, a notification will be sent to the person who will pick up the shift. The notification will appear in the top, left-hand corner of the screen.



9. Click on the “Shift Trades Available” box.
10. A summary of the trade will appear. The person picking up the shift must accept or reject the trade.

Shifts Available to Pick-Up

Employee	Shift Details	Your Action
Abellano, Mary-Dale » Feb 14, 2017 - 8:42am Vanessa will work this shift for me. I will work 2/22 for her.	Days BBW Feb 21, 2017 6:30am - 3:00pm	Accept / Reject

11. The trade will go back to the supervisor for a final approval.

Manage Shift Trades:

Employee	Shift Details	Potential Acceptors	Management
Abellano, Mary-Dale » Feb 14, 2017-8:42am Vanessa will work this shift for me. I will work 2/22 for her.	Days BBW Feb 21, 2017 6:30am - 3:00pm	Robinson, Vanessa Accepted Accept / Reject Awaiting Response	Remove Request

12. The trade will populate on the schedule as soon as the supervisor approves a second time.