# API Self Scheduling

Log into the API portal at the Duke@Work website. Use your NETID and password to log in.

From the welcome screen, click on the Employee button.

If you only have access to your own time, your current time card will appear on the screen. If you have access to employees in one or more departments for time and attendance and/or staffing and scheduling, you will need to click on My Time Card to get to your time card screen.

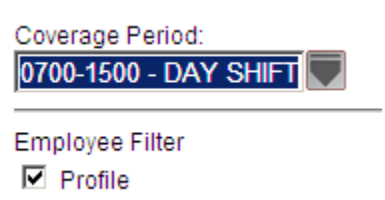Under Employee Favorites click on Open Self Schedule.
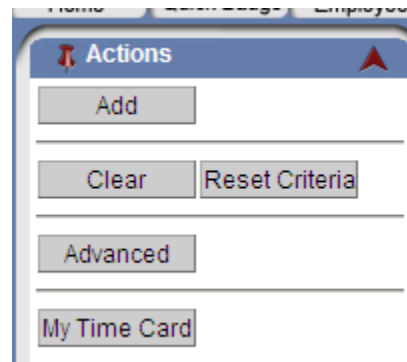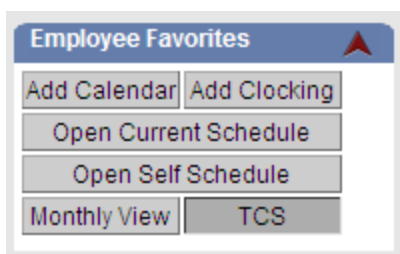
Your name will display in the upper left hand corner of the screen. You go to the right to enter your self schedule requests. Your coworkers names and what they have self scheduled will appear below the area where you enter your own self schedule requests.

You can see the current, closed schedule and the open scheduling period. Use the red arrows under Current Display to change the date range that you see.

If you want to see a specific coverage period and/or only staff scheduling in your own profile, use the check boxes on the left hand page to create these filters.

To enter a request to work on a specific day, use the drop down arrows below the date you want to work. Choose the appropriate activity code from the list.

 NOTE: The activity codes that are available to you are determined by your manager. Not all departments or profiles will see the same list of activity codes to choose from.

The red numbers below your self scheduling grid indicate how many staff the unit needs for that day and coverage period. If there is a blue number or a dash (ie, see Thursday night below), the day has enough staff and you most likely will not be able to sign up for that day. NOTE: Some departments do allow overstaffing. This is left up to the individual departments. Overstaffing is a rare setting – if you have concerns about being able to schedule for a particular shift, contact your manager or scheduling committee. Do NOT call the help desk. They can not adjust the staffing needs.

Mon 12/03	Tue 12/04	Wed 12/05	Thu 12/06	Fri 12/07	Sat 12/08	Sun 12/09
▼	▼	▼	▼	▼	▼	▼
-7.00	-7.00	-7.00	-7.00	-7.00	-7.00	-7.00
-7.00	-7.00	-7.00	-7.00	-7.00	-7.00	-7.00
-7.00	-7.00	-7.00	-7.00	-7.00	-7.00	-7.00
-7.00	-7.00	-7.00	--	-7.00	-7.00	-7.00

The system will remind you to sign up for enough hours to meet your approved hours AND to sign up for your required weekends. All staff at a .6 FTE or higher will be reminded to sign up for at least one weekend. If you are weekend option (full or split) the system will remind you to sign up for 4 weekends. The same code is used for full and split weekend option staff, so the system will remind you to sign up for 4, even if only 2 are required.

Description
Minimum Weekends requirement not met for Schedule Period (Begin: 11/19/2012, End: 12/16/2012). Scheduled: 0, Required: 4
Minimum Approved Hours: Weekly/Bi-Weekly was not met for Schedule Period (Begin: 11/19/2012, End 12/16/2012) during time frame 12/03/2012 to 12/16/2012. Approved: 0.0, Required: 72.0

When you are finished entering the dates you want to work, click on Save. If your warning messages do not adjust appropriately, click on Validate Me Now.

Self Scheduling Actions ▲
Save
Validate Me Now

CLOSING TIPS

1. The schedule will HIDE from the staff between the day the schedule locks and 14 days before the schedule begins. You will not be able to see what the manager/scheduling committee are doing.
2. If the manager/scheduling committee have not loaded the staffing template, you will not be able to self schedule. This is the case if you do not see any numbers on the self scheduling grid indicating needs (red numbers) or overstaffed (blue numbers). Call you manager, not the helpdesk, to get the needs entered.
3. Warning messages from the system when self scheduling are true. Read them.
    a. If it says you do not have a license, talk to your manager to get your license updated in API.
    b. If it says you scheduled for a day that is full (has no needs), then you have.
    c. If it says you scheduled too many days/hours in a row (extended the work stretch), then you have. The limit is 12 hours per day, and 56 hours in a row (five 12s or seven 8s).

Self Scheduling Messages

What they mean, and what to do….

1. If you get a message when you try to log in to API that says you are not authorized to view this page, try the following:
   - Make sure you are using IE (Internet Explorer)
   - Go to Tools>Compatibility View Settings and put your browser in compatibility mode

   The help desk can help you with these steps. Different browser versions will have the compatibility settings in different places.
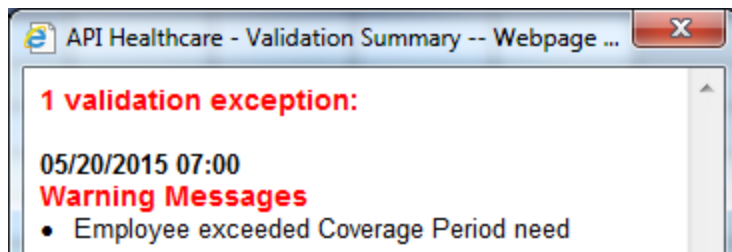
2.

Most likely problem: The person tried to schedule for a shift that is already at its max. In this message we can see the date in question is 5/20/15. NOTE: If you enter several shifts and one is full, the system will not save ANY of them.

Alternate problem: The staffing template has not been entered by the manager or scheduling committee. If you do not see any numbers to indicate how many people are needed on any days of the scheduling period, the template is not entered. Without a template the system believes the need for each day is ZERO and you won't be able to schedule any day.

Solutions: Do not call the helpdesk – they can't fix this issue. Do not contact the API Resource Group, they will not alter the template – only the manager can do that.

You will have to select a different shift or shifts to complete your self scheduling.
If the template is missing, ask your manager or scheduling committee to enter the template.
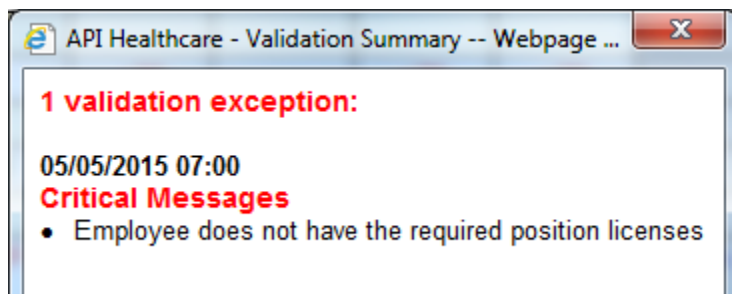
3.

Problem: The license or listing required to do this job is missing or expired in the API system.
Even if you have renewed your license or listing, API does not know that until your manager or her designee updates API.

Solution: Do not call the helpdesk. They can not update your license or listing for you. Speak to your manager. And if you truly have not updated your license or listing you need to do so ASAP.

4.

05/06/2015 08:00
Warning Messages
- Employee exceeded Coverage Period need
- Schedule violates employee maximum work stretch days rule
- Schedule violates employee maximum work stretch hours rule

Problem 1: Violates max work stretch days = you have tried to schedule to work too many days in a row.

Problem 2: Violates max work stretch hours= you have tried to schedule too many hours in a row.

Solution: Do not call the help desk. You will have to remove one of the days in the string of days you have scheduled. The system will not let you

- schedule more than seven days in row
- schedule more than 60 hours in a row

5. You do not see any numbers or a drop down for self scheduling AND under the PROFILE on the left side it
says No
Profile
Permissions.

Problem 1: Your position has not been assigned to a profile. This can happen if this is a new department, just starting to use API or if the department gets a new job code (ie, the dept never had a CNIV before and now you are a CNIV).

Solution: Ask you manager to contact the API Resource Group to have the position added. apiresourcegroup@duke.edu or call 919-681-2484.

Problem 2: You have not been assigned a station for to match your profile. Not all departments use stations, but for those that do this can be a common message, especially for new hires or if someone becomes newly qualified for a station. Charge Nurse is an example of a station used by some departments. Other departments, such as the float pool, use stations to divide staff into their eligible work groups, such as Critical Care, Med/Surg, Peds, and Ambu/Proc.

Solution: If your department uses stations, this is the most likely cause of your self scheduling problem. Ask you manager to check to see if a station has been added to your profile.

6. You get the following message when you open the Self Scheduling screen
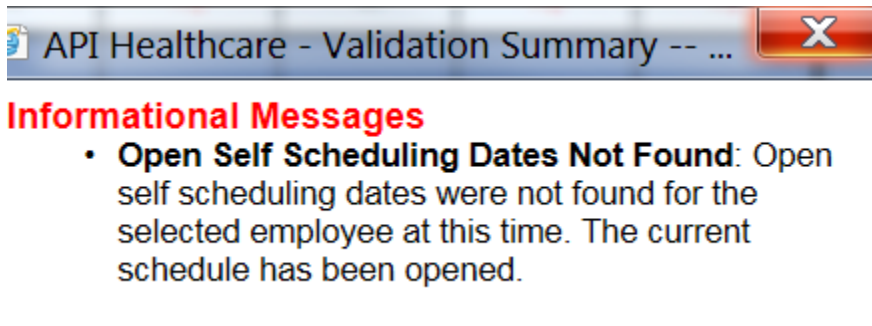
Problem 1: Self scheduling is currently closed. For nursing departments, self scheduling opens 84 days before the schedule begins and closes 35 days before the schedule begins. A calendar is available on the intranet at http://finance.duke.edu/systems/work/api/scheduling/managers/keydates.php.

Self scheduling is also not available when payroll is closed to employees.
Solution: Wait for self scheduling to open.

Problem 2: You have not been put in a Self Scheduling Group. Not all departments use self scheduling groups, but if yours does, and you are a new hire, your manager may not have updated your API profile to reflect your group. Groups allow some staff to start self scheduling prior to other staff.
Solution: Talk to your manager – and your manager will have to contact the APIResourceGroup to get your self scheduling group updated.

Problem 3: Your department may use self scheduling groups to allow some groups to get into the system ahead of others. This message could simply mean that your group is not open yet.
Solution: Wait for self scheduling to open for your group. Talk to your manager if you have questions about a self scheduling group.