mySchedule Manager Guide – Annual Vacation – Editing Vacation Groups

Introduction

The Annual Vacation module on mySchedule allows managers to define groups of employees who will be considered together, and to customize group names. This document outlines how to access these features, and each of the options available for editing employee groups.

Key Notes:
- By default, groups will include employees in a specific occupation in one ESP unit
- Where possible, customized groups from previous years will be retained
- Groups can be edited to combine these groups with multiple employee types and employees across multiple units
- Employees in one occupation in one unit cannot be split into smaller groups

Access the Annual Vacation Module

1. Login to mySchedule.northernhealth.ca with your Northern Health user account.

2. Select the **Scheduling** menu item located in the top left of the screen

3. Select **Manage Vacation**
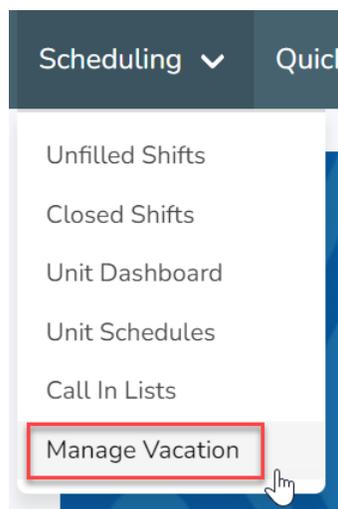
Reviewing Employees

1. From the **Manage Vacation Groups** page, select **Edit Group** beside the group you wish to edit.

2. Groups can be combined, separated, and edited until the deadline listed in the **Deadline to Edit** section (the screenshot below is for demonstration purposes and does not indicate a real date). After this deadline, groups cannot be edited, and will proceed through the vacation process as-is.

3. Scroll to the **Unit and Occupations** section. This section will list the unit and occupation, as well as a **Participant Count** including the number of employees this group includes:

4. To view the employees included in this group, select **View Eligible Participants** to open the Eligible Participants overlay:

5. The **Eligible Participants** overlay lists vacation-eligible employees in seniority order, including their names, employee numbers, home unit and occupation, and the Start-Expiry position information for the unit:

- The **Start-Expiry** field indicates the employee's **Eligibility Range** for the vacation group.

  o Permanent Staff in your areas will typically have no expiry date listed

  o A start or expiry date in the middle of the vacation year indicates that this employee is either part of another vacation group for part of this time, or is in a casual position for that time period. These employees can only apply for vacation in this group during their eligibility range

  o Employees changing from one eligible status to another within one vacation group may be listed twice – this will not interfere with the employee's ability to apply for vacation

6. To close this window, click the **X** in the top right corner, or anywhere outside of the overlay.

Adding Employee Groups

1. In the Unit and Occupations section, select **Add Unit and Occupation**.
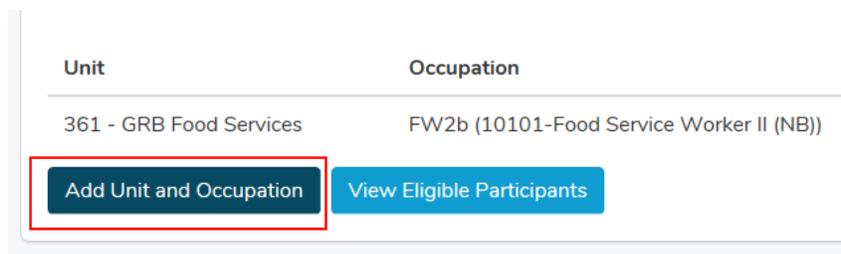
2. This page will display all unit and occupation pairs in all units you have manager access to (this includes delegated access, as well as any units reporting to your direct reports). Above the group listing are search tools that you can use to filter the list if need be.

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3. To add one or more vacation groups to the group you are currently editing, check the **Add to Vacation Group** box beside each group, and select **Add Unit-Occupation Pairs** to finalize your request. To exit this menu without combining groups, select **Cancel**.

   NOTE: If the Unit-Occupation pair you are adding here has an edited quota or list of Approvers, this information will be deleted when the pairs are added. Any quota edits or Approvers attached to the group you are currently editing will be applied to the combined group.

4. Once the groups are combined, you will see a confirmation message. Click the **Return to Edit Vacation Group** link to return to the previous page.

Removing Employee Groups

1. In the Unit and Occupations section, select **Remove** beside a unit and occupation pair to separate it into its own vacation group.

NOTE: The new vacation group will copy the quota from the current group, including any edits made. Approver access will not be copied to the new group. The new group may need to be edited or reviewed.

2. A confirmation message will be displayed, including a link to the Edit Vacation Group page for the new vacation group.

> Successfully moved unit-occupation pair to a new vacation group. Click here to see.

Updating Vacation Group Names

1. Vacation groups will have a default name indicating the unit and occupations included. These can be very long, and can be edited to provide a clearer title for yourself and your employees. This can be edited in the **Vacation Group Name** section.

> ## Vacation Group Name
>
> This is the name of the vacation group that will be viewable by all profiles. The default is a combination of both the unit and occupation names. For multiple unit and occupations within a group, "(and more)" will be displayed at the end to indicate the vacation group consists of multiple unit and occupation pairs.
>
> **Current Name**   361 - GRB Food Services C3b (10062-Cook III)... (and more)
>
> **Set Custom Name**   [   ]   Save

2. To edit the title, enter the new title in the **Set Custom Name** field, and select **Save**.

NOTE: Employees may belong to multiple vacation groups, so names should still include some information indicating the department. For example, "UHN Emerg RNs" is a clearer group name than "Nursing Staff". Group names must be a minimum of 10 characters, and must be unique. If either of these conditions is not met, a notice will display indicating further changes are required.

> **Current Name**   361 - GRB Food Services C3b (10062-Cook III)... (and more)
>
> **Set Custom Name**   [GRB Foods   ✕]   Save

3. A confirmation message will be displayed at the top of the page, and the **Current Name** field will be updated to indicate the new name:

NOTE: Group names will include an ID number at the end of the name, whether you are using the default name or a custom name. This is to help identify the group for technical reasons, and cannot be edited or removed from the name display.

Successfully updated the name to GRB Foods.

Vacation Group Name

This is the name of the vacation group that will be viewable by all profiles. The default is a combination of both the unit and occupation names. For multiple unit and occupations within a group, "(and more)" will be displayed at the end to indicate the vacation group consists of multiple unit and occupation pairs.

Current Name   GRB Foods