mySchedule Manager Guide – Annual Vacation - Setting Unit Quotas

Introduction

The Annual Vacation module on mySchedule uses a quota system that will help indicate how many employees can be awarded vacation on each calendar day. This helps employees to enter requests that are more likely to be approved, and provides context to managers when processing requests.

Notes:
- Quotas for each vacation group will be set to **one (1)** by default
- Customized vacation groups imported from previous years will have quotas reset to one (1) for all days and must be re-entered
- Quotas can be set for all rounds before the first round begins
- Managers can update quotas for time ranges or individual days
- Quotas cannot be set for different types of shift within each day (eg. one night shift and one day shift for each calendar day)
- Once the first round begins, quotas can be modified, but the changes will not take effect until the start of the next round.

Access the Quota menu

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 Annual Vacation**
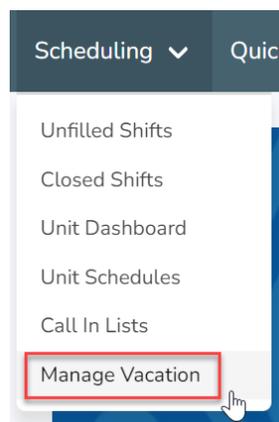
4. On the **Manage Vacation Groups** page, select **Edit Group** for the group you intend to edit:

Manage Vacation Groups
Disclaimer: Must be logged in as a Manager in order to edit a vacation group.

Name	Current Round	Employee Submissions ⓘ		
421 - UHN PACU DC1j (20000-DC1 Nurse)	N/A	0	Process	Edit Group
423 - GTW HK & Laundry HKCb (10001-Cleaner)	Round 1	0	Process	Edit Group

5. On the **Edit Vacation Group** page, scroll to the bottom to find the Quota section, and select **Edit Quota**:

Quota

Quota is the maximum vacation amount which can be granted within a vacation group.

Edit Quota

6. The existing quota is displayed by month, and each month can be expanded individually, or as a group. Use the arrow to open or close a specific month, or the **Expand All Months/Collapse All Months** link to open/close all months at once:

Default view:

Monthly Breakdown   Expand All Months

Aug 01 - 31, 2023	⌄

Sep 01 - 30, 2023	⌄

Expanded View:

Monthly Breakdown   Expand All Months

Aug 01 - 31, 2023							⌃

Week	Sun	Mon	Tue Aug 01	Wed Aug 02	Thu Aug 03	Fri Aug 04	Sat Aug 05
Aug 01 - 05			1	1	1	1	1

	Aug 06	Aug 07	Aug 08	Aug 09	Aug 10	Aug 11	Aug 12
Aug 06 - 12	1	1	1	1	1	1	1

7. There are three different options for editing the quota, which may be useful in different situations – please note that these options will update the quota regardless of whether the view of the month is expanded/collapsed:

    - **Set Daily Range** – this allows you to apply the same quota every day for a specific range of time. This option may be useful for units with similar staffing levels on weekdays and weekends.
    - **Set Weekly Range** – this allows you to apply a pattern with different quotas for different days of the week. This option may be useful for units with lower staffing levels on weekends.
    - **Individual Days** – this allows you to modify quotas for specific days. This option may be useful for areas with lower staffing levels on statutory holidays, or with irregular staffing levels.

Editing Quota – Set Daily Range

1. To set a daily range quota, enter the number you want to apply in the **Set Quota** field:

Set Daily Range

Set Quota [3] from: [_____] 📅 to: [_____] 📅

2. Select a start date using the calendar in the from field, and an end date using the calendar in the to field:

Set Daily Range

Set Quota [3] from: [January 01, 2020] 📅 to: [January 31, 2020] 📅

| ← | January 2020 | | | | | → |
Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Set Weekly Range

	Sun	Mon	Tu
Set Quota	[___]	[___]	[

3. Select **Apply** to apply this quota to the selected date range:

4. Check the quota display below to confirm that the quota has updated:

5. Select the **Save** button to save your changes:

Editing Quota – Set Weekly Range

1. To set a weekly range quota, enter the number you want to apply for each day in the **Set Quota** fields:

Set Weekly Range

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
Set Quota	1	2	2	2	2	2	1

2. Select a week start date and a week end date from the drop-down menus

from week start: to week end:

Wed, Jan 01, 2020 ∨   Sat, Jan 04, 2020 ∨

Sat, Jan 04, 2020
Sat, Jan 11, 2020
Sat, Jan 18, 2020
Sat, Jan 25, 2020
Sat, Feb 01, 2020
Sat, Feb 08, 2020
Sat, Feb 15, 2020

3. Select **Apply** to apply this quota to the selected date range

from week start: to week end:

Wed, Jan 01, 2020 ∨   Sat, Feb 01, 2020 ∨

Apply

4. Check the quota display below to confirm that the quota has updated:

5. Select the **Save** button to save your changes:

Editing Quota – Individual Days

1. To edit the quota for an individual day, scroll down to the current quota display:

2. Delete the existing quota for that date, and enter the new quota:

3. Select the **Save** button to save your changes

Quota Changes During the Vacation Process/Auditing Past Rounds

1. Once a round becomes active and open for employee applications, the quota can no longer be edited. However, the quota for future rounds can still be edited using the same tools. An information bar with clarify which rounds are currently open for editing:

Audit Round 1	Edit Upcoming Rounds Quota

Editing quota for all future   rounds: Round 2, Round 3
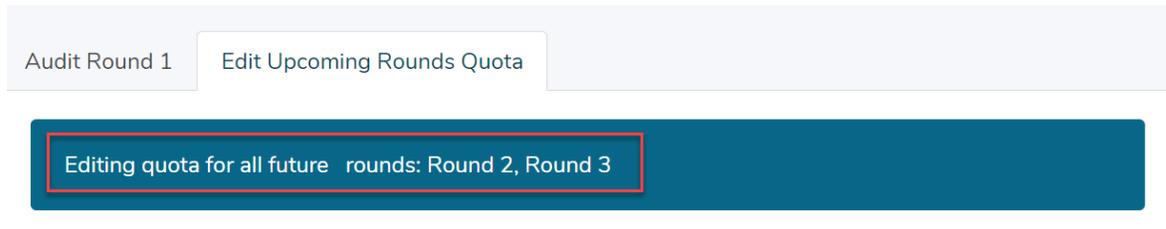
2. To view the quotas used in open or past rounds, select the corresponding Audit Round tab for the round in question. These tabs will appear throughout the process each time a new round opens for applications:

Audit Round 1	Edit Upcoming Rounds Quota

Editing quota for all future   rounds: Round 2, Round 3
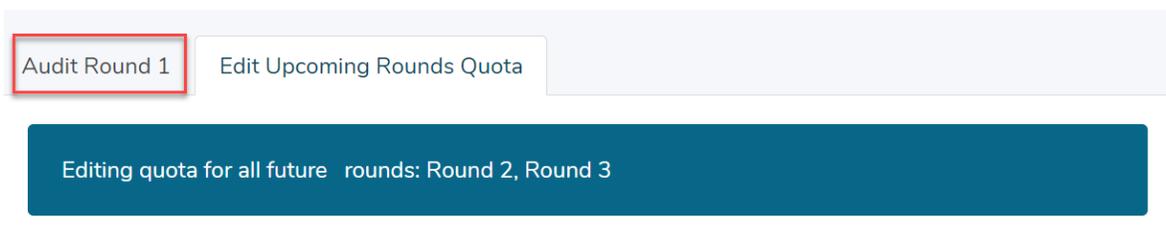
3. To view the full edit history, select Audit quota changes:

Audit quota changes
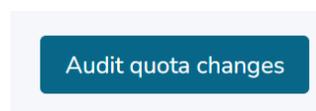
This page will list each time a change to the quota has been saved, including who made the change, the date and time of the change, and the action taken (only Quota Value is available as an action type at this time):

Updated By	Updated At	Action
██████████	Jun 12, 2023, 14:06 PDT	Quota Value