



Use the Call List to Fill Open Shifts and Record Call Outcomes

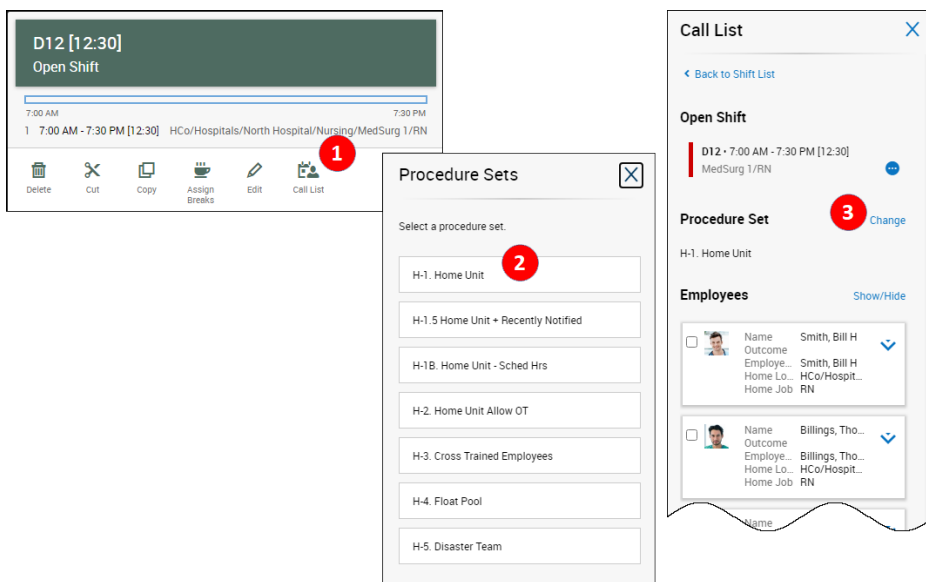
This job aid explains how managers can use the Call List feature to ensure the right staff coverage, and how to record and view outcomes in the Call Log.

About the Call List / Call Log

- The Call List enables you to easily identify the best employee to fill an open shift from a list of qualified employees generated by a procedure set.
- You can then choose an employee from the list and assign the shift directly to them from the Call List.
- Organizations often have multiple procedure sets with progressively fewer restrictions on employee eligibility. If no employee identified by that procedure can fill the open shift, the manager may run the next procedure set.
- When attempting to fill open shifts, the Call Log feature allows you to record the outcome of phone calls (e.g., Accepted, Declined, No Response). This can eliminate duplicate calls, document attempts to comply with regulations or policies, and can even be used to sort employees when attempting to fill open shifts in the future.

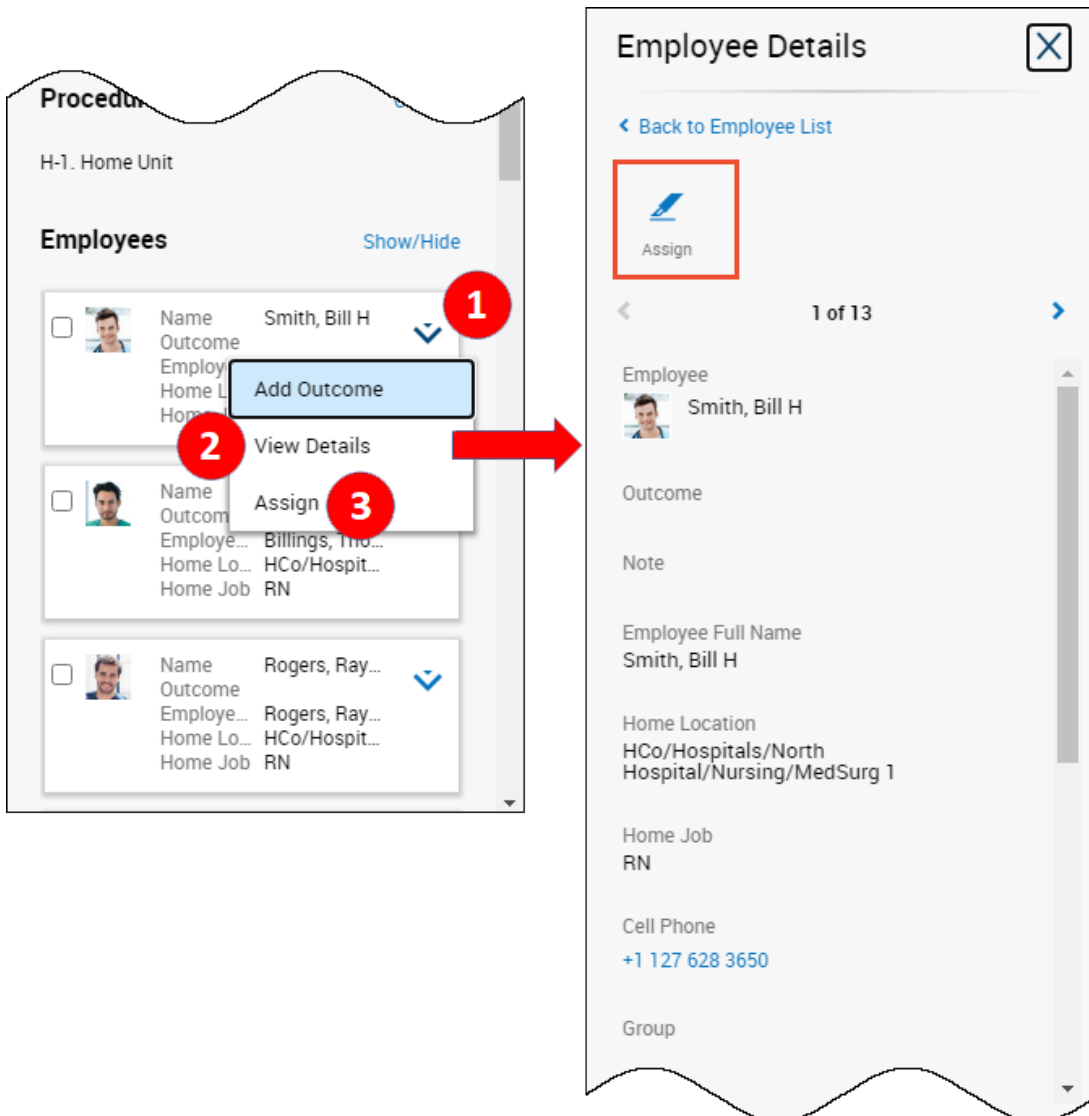
To access the Call List:

1. On the Schedule Planner, right-click on an open shift and select **Call List** from the glance. (Alternatively, you can access **Tools**, select **Call List**, and then choose the appropriate open shift.)
2. Choose a procedure set.
3. The system will search for and display a list of employees that are eligible to fill the shift based on the procedure set selected. If there are no available employees listed, or you want to choose a different filter, select the **Change** link and choose another procedure set.



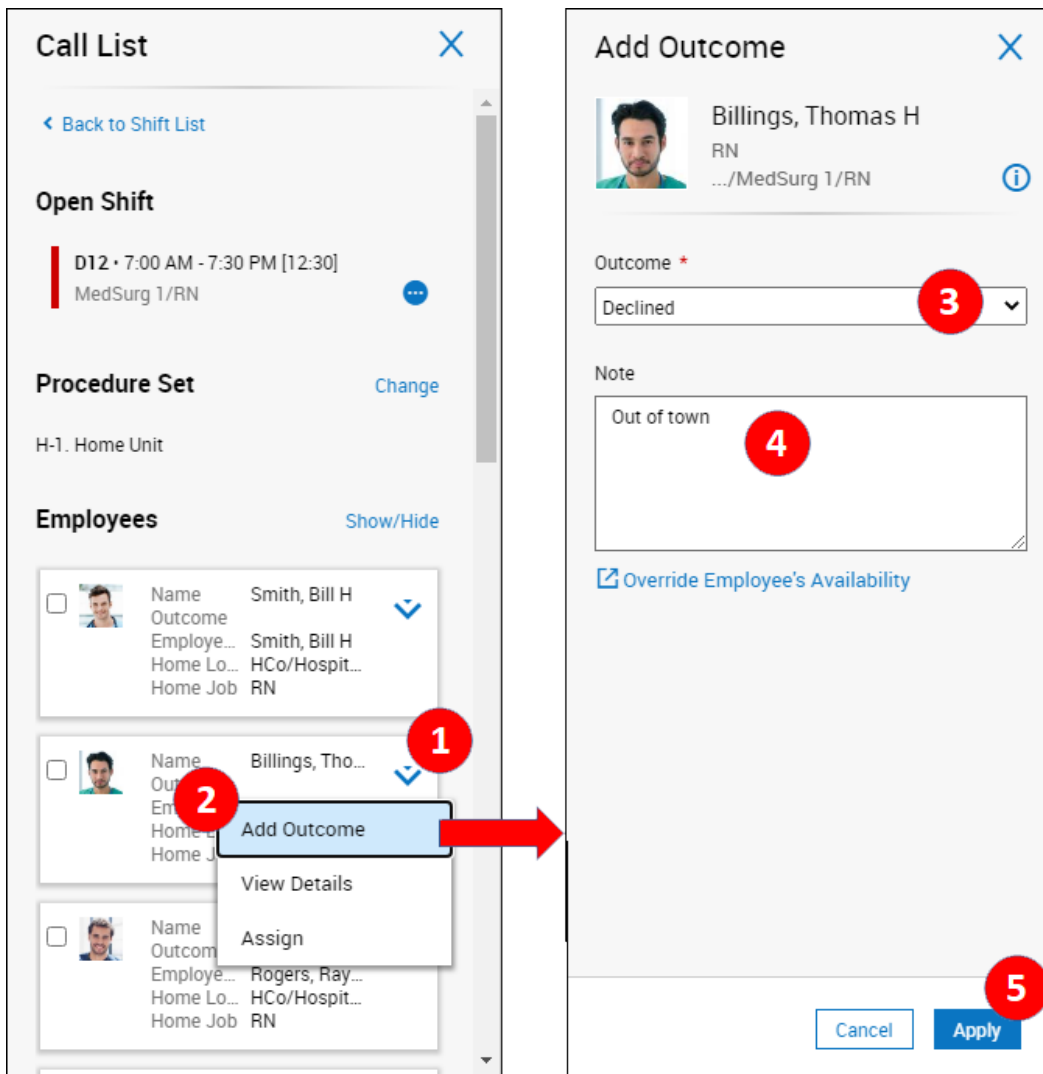
To use the Call List:

1. Select the blue down arrow next to an employee for more information / actions. (Adding outcomes is covered in the next section.)
2. Select **View Details** to see more information about the employee, such as their home location, any skills and certifications, and contact information.
3. Select **Assign** to move the open shift to that employee's schedule. (Notice that you can also assign the open shift on the Employee Details slider.) A confirmation message will display when the open shift has been successfully assigned.



To record a call outcome

1. On the Call List slider, locate the employee whom you contacted and select the **blue down arrow** on that employee's cell.
2. Select **Add Outcome**.
3. On the Add Outcome slider, access the **Outcomes** drop-down list and select the appropriate option. (Choosing the "Accepted" option logs that outcome and automatically assigns the open shift to that employee.)
4. Optionally, you can type an entry in the **Notes** box.
5. Select **Apply**.



Call List

[Back to Shift List](#)

Open Shift

D12 • 7:00 AM - 7:30 PM [12:30]
MedSurg 1/RN

Procedure Set [Change](#)

H-1. Home Unit

Employees [Show/Hide](#)

Name	Outcome
Smith, Bill H	▼
Billings, Tho...	▼
Rogers, Ray...	▼

Add Outcome

Billings, Thomas H
RN
.../MedSurg 1/RN

Outcome *
Declined

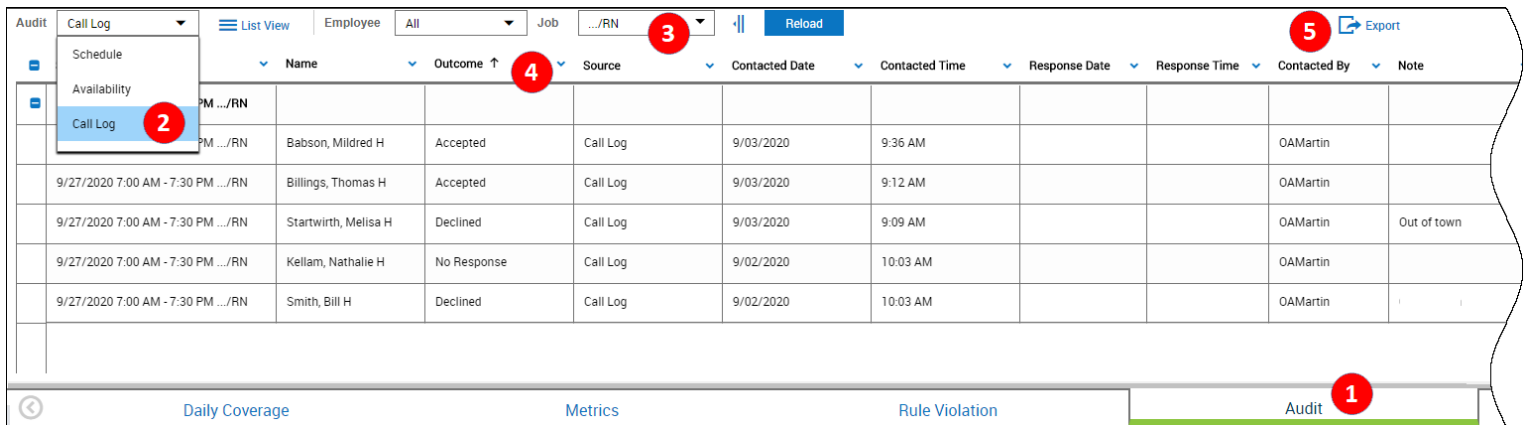
Note
Out of town

[Override Employee's Availability](#)

Cancel Apply

To view the call log

1. Access the **Audit** add-on tab at the bottom of the Schedule Planner.
2. From the Audit drop-down list, select **Call Log**.
3. Optionally, you can filter the view to a single employee or a single job.
4. The default sort is by shift, but you can select the blue down arrows on column headings to sort and/or group the information by the values in that column.
5. Optionally, you can export the information to an Excel spreadsheet.

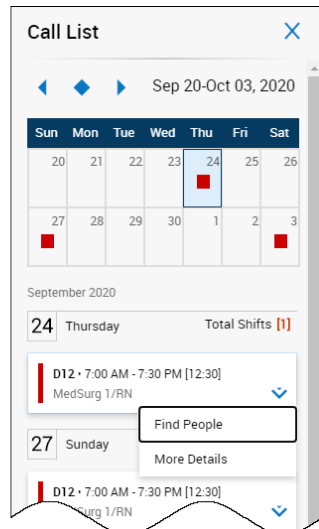
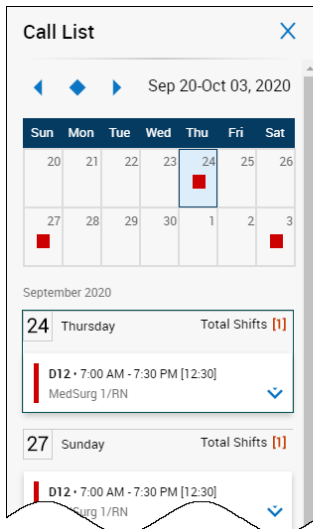


Name	Outcome	Source	Contacted Date	Contacted Time	Response Date	Response Time	Contacted By	Note
Babson, Mildred H	Accepted	Call Log	9/03/2020	9:36 AM			OAMartin	
Billings, Thomas H	Accepted	Call Log	9/03/2020	9:12 AM			OAMartin	
Startwirth, Melisa H	Declined	Call Log	9/03/2020	9:09 AM			OAMartin	Out of town
Kellam, Nathalie H	No Response	Call Log	9/02/2020	10:03 AM			OAMartin	
Smith, Bill H	Declined	Call Log	9/02/2020	10:03 AM			OAMartin	

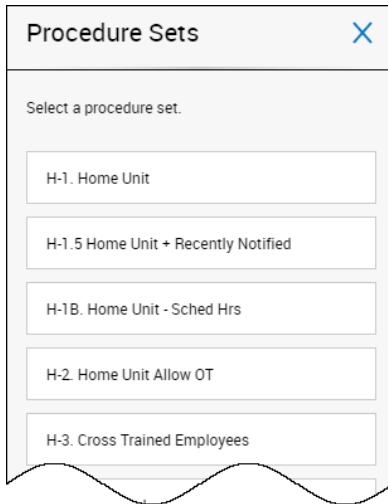
Navigation tabs: Daily Coverage, Metrics, Rule Violation, **Audit**

Fill an open shift using the call list (desktop):

1. From the Call List slider, simply select an **open shift**, or click the blue down arrow and select **Find People**.



2. Select a **Procedure Set** from the list available. This list will vary depending on your setup.



3. The system will search for and display a list of employees that are eligible to fill the shift based on the procedure set selected. If there are no available employees listed, or you want to choose a different filter, click **Procedure Sets** and select another procedure set.

