FIELD MANUAL

CC Scheduling — User Guide and Training Manual

How to use the Continuous Care scheduling application, and how to learn it.

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About this guide

This is the only document you need in order to use CC Scheduling. It covers every screen, every rule the app enforces on your behalf, the help built into the app, and a complete training programme for new users.

You do not need to read it end to end. Find yourself in this table:

IF YOU ARE…	READ
New to the app	Part 1, then work through Part 6 — Training programme session by session
Training someone else	Part 6. It has session plans, exercises, check-yourself questions and a sign-off checklist
Trying to do one specific thing	Part 2 — Everyday tasks. Step-by-step, one task per card
Looking up how a screen works	Part 3 — The screens
Wondering why the app did something	Part 4 — Rules the app enforces. Most support questions are one of these rules working correctly
Stuck	Part 7 — Quick reference or Part 8 — When something looks wrong

You do not need to keep a copy. It is built into the app: click **Guide** at the top-right of any screen and it opens in a new browser tab. To print it, email it or read it offline, click **Download PDF** under its contents panel.

A note on honesty: Part 9 lists what the app does **not** do yet. If you are training people, read it, so nobody is promised a button that isn't built.

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- **Part 1 — Getting started** · signing in, roles, picking a program, the layout
- **Part 2 — Everyday tasks** · step-by-step task cards
- **Part 3 — The screens** · one section per screen, plus printing
- **Part 4 — Rules the app enforces** · shift patterns, past dates, preferences, hours, overtime
- **Part 5 — Help built into the app** · Guide, page help, What's new
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PART 1

Getting started

1.1 Signing in

There is no separate CC Scheduling account and no separate password. You sign in as yourself, with your Windows (Active Directory) account.

Depending on how your site is set up, one of two things happens when you open the app:

- **You are signed in automatically** from your Windows session and go straight to Home.
- **You see a Sign in card** asking for two things:

FIELD	WHAT TO ENTER
Windows Username	The username you use to log in to your VITAS computer. Just the username — no `VITAS\` in front of it
Password	Your Windows password

The eye icon at the right of the password box shows what you typed — useful if a sign-in keeps failing and you suspect a typo. When your Windows password changes, this changes with it.

If sign-in is refused, the message tells you which of these it is:

MESSAGE	WHAT IT MEANS
An error on the sign-in card itself	Active Directory did not accept that username and password. Check for a typo and for caps lock
"Your Windows account (…) is not configured for CC Scheduling…"	Your password was fine, but your account has not been linked to a CC Scheduling user code. That is an access request, not a fault — contact whoever manages CC access for your region
"…mapped but the assigned role is inactive…"	Your account is linked, but the user code behind it has been switched off. Also an access request
"An error occurred while loading your access rights…"	The app could not read your permissions. Try again in a minute; if it persists, report it

After you sign in you always land on **Home**. If you have access to exactly one program, the app selects it for you.

1.2 If you have more than one user code

Behind your Windows account sits one or more **user codes** — six-character IDs such as `00KRAM` that carry your permissions and your program access. Most people have one and never think about it.

If you have more than one, a **Choose your role** screen appears before you can work: the same person can be a scheduler in one program and an administrator in another, and the app needs to know which you are being. The code you used last time is marked **Last used** and is picked again for you next time.

To switch codes later without signing out, click the **user chip** at the top-right of the screen (it reads like `kramachandran.00KRAM`). It is only clickable when you have more than one code.

> Your permissions are not set up in this app. They come from the same records the old Delphi CC Scheduler reads, so whatever you could do there, you can do here.

1.3 What your access level means

Look at the small line under your name in the bottom-left corner of the sidebar:

LABEL	WHAT IT MEANS
SCHEDULER	You can view and change schedules
ADMIN	Scheduler, plus Employee Mgmt, plus a 24-hour edit grace window (see 4.2)
READ-ONLY	You can see everything you have access to, but nothing you change can be saved
· DEMO	A training or demonstration session

The sidebar shows only the screens you have rights to. If a colleague has a menu item you don't, that is a permissions difference, not a missing feature. See 4.7 for read-only.

1.4 Pick a program first — everything depends on it

A **program** is a CC office or territory, such as `11 – Dade-Monroe`. Almost everything is scoped to one: until you pick a program the grids are empty and the search box is switched off.

The **Program** box sits near the top of the sidebar. To pick one:

1. Click the box (it says **Select program…** when empty).
2. Type a program code or part of a name. `11` finds Dade-Monroe; `brow` finds Broward. An exact code always comes first, so `11` never lands on 110.
3. Use ↑ / ↓ to move through the matches, and press **Enter** to take the highlighted one. **Esc** backs out without changing anything.

Above the box you then see the program name and its shift pattern, for example **Dade-Monroe · 12-hour shifts**. The pattern changes the shape of the Schedule grid — see 4.1.

Worth knowing:

- Your program list is not everyone's. Depending on your access you get your own assigned programs, every CC program in your region, or all of them.
- The list only offers programs that run Continuous Care (have CC teams). If one you expect is missing, raise it rather than assuming a display problem.
- Your program **stays picked** as you move between screens, including Home.

1.5 The layout

The sidebar (left, dark purple)

ITEM	WHAT IT IS
`cc`	Click to collapse the sidebar to icons, and again to expand. Useful on the Schedule grid
CC Scheduling and the version (e.g. `v2.7.16` `what's new`)	The version is a link to **What's new** — see 5.3
Program	The program box described above
Workspace	The screens you have rights to — see Part 3
Status strip	A dot and the environment name. Green means connected, red means no connection, grey means not yet checked. IT administrators also see a gear that shows which database the app is connected to and can test the connection
Your identity card	Initials, name, user code, access level, and sign-out

The top bar (across the top)

ITEM	WHAT IT IS
Workspace / screen name	Where you are
Program chip	The active program's code and name, or **No program selected**
Search patients, employees…	Searches **the active program** only. Click a patient to jump to their column on the Schedule grid; click an employee to open their Employee Schedule. It lists up to 25 patients and 25 employees and says when there are more — keep typing to narrow it. If nothing matches it tells you which program it searched
User chip	Your Windows login and user code, e.g. `kramachandran.00KRAM`. Hover for your full name. Click it to switch role if you have more than one code
Guide	Opens this document in a new tab
?	Short help for the screen you are on

PART 2

Everyday tasks

Each card is one job, start to finish. The screens behind them are described in full in Part 3. If a step is refused, the app says why; Part 4 explains the rules behind it.

2.1 Check what is covered and what is open

1. Pick your program (1.4).
2. Open **Schedule**. It loads by itself for the current payroll period.
3. To get back to the current payroll period from elsewhere, click **This period**. Use ‹ and › to step back or forward one whole payroll period.
4. Read the grid: an empty cell with a **+** is an open shift; a chip is someone assigned.
5. For a list of every open shift across the program, open **Open & Unstaffed** instead (3.8).

2.2 Staff an open shift

1. On **Schedule**, click the empty cell (or the empty part of a partly covered cell). The **Assign employee** panel opens.
2. If needed, adjust **Start** and **End** (12-hour programs only). The times start from the availability the employee declared, if any.
3. Narrow the list with the discipline tabs (**All / LPN / HHA / RN / Other**) and, if shown, the type buttons. **Telecare** is always at the top; everyone else is A–Z by surname.
4. Check the row before you choose: the **hours badge** (their week so far), a 📝 availability note, and the declared shift tag.
5. Click **+ Assign** on the person you want.
6. If the app warns **Overtime Warning**, decide, then click **Assign Anyway** or back out.
7. If you assigned an **agency**, a box opens for the attendant's name — fill it in if you know it (2.5).

2.3 Confirm a shift

1. Find the chip on **Schedule**. A **U** badge means unconfirmed.
2. Click the **U**. It turns to **C** and the hours start counting. Or right-click the chip → **Mark Confirmed**.
3. To undo, click the **C**, or right-click → **Mark Unconfirmed**.

2.4 Change the hours, add a note, or remove an assignment

TO	DO THIS
Change the times	Right-click the chip → **Edit Hours** → change → **Save**. Not offered on 8-hour programs, where shifts are fixed
Add a note to the shift	Right-click → **Add Note** (up to 253 characters) → **Save**. A red dot appears on the chip
Read a note	Click the red dot, or right-click → **View Note**
Remove the assignment	Click the × on the chip, or right-click → **Delete Assignment**, then confirm **Delete**

2.5 Record an agency attendant

When you book an agency you are booking the company; the person they send is recorded separately.

1. On an orange agency chip with a ➖, click the agency name — or right-click → **Set Attendant**.
2. Enter the attendant's first and last name and save. It appears on the chip.
3. To change it later, right-click → **Replace Attendant**.

2.6 Look up a patient — the case sheet

1. On **Schedule**, click the patient's name at the top of their column.
2. The **Staffing** tab shows what you need to staff them: requirements, how to get there, who to call, this period's coverage, and the latest comments.
3. Click the **Case Sheet** tab for the full record: patient, address, program, caregiver, hospice team, physicians, diagnosis, services and identifiers.
4. To print it, click **Print**, choose whether to include this period's coverage, then **Print** again.

2.7 Log a call or a message about a patient

1. On **Schedule**, click the speech-bubble icon in the patient's column header. (Or the **Comments** link on Patient Schedule, Employee Schedule or Open & Unstaffed.)
2. Type only what happened — "Called LPN Jean to confirm Thursday, left message." Your name and the time are added for you.
3. Click **Add comment**. Comments cannot be edited or deleted afterwards (4.10); to correct one, add another.

2.8 A patient has been discharged — tell the staff

1. Set the status filter to **Discharged** or **All** so the patient appears.
2. On each upcoming chip, click the ✉ (or right-click → **Mark Notified**) once the employee has been told the case stopped.

3. The chip stays on the grid, faded and struck through, so you can see who has been told. To undo, click ↺ or right-click → **Un-mark Notified**.

2.9 Record an employee's availability

1. Open **Availability**. It shows this week; use ‹ **month** › to move a month at a time.
2. Click the day cell for the person.
3. Tick every shift symbol they are available for (and **S** or **TO** if they are not). Add a note to a symbol with its 📝 button if there is a caveat.
4. Click **Save**.
5. To repeat last month's pattern, right-click the person's name → **Copy Last Month**.

2.10 Print the patient schedule or the hours report

1. On **Schedule**, set the dates you want (or **This period**).
2. Click **Print** ▾ and choose **Patient schedule** or **Hours report**.
3. Check the preview. For the hours report you can change its dates and click **Reload**.
4. Click **Print** in the preview.

2.11 Hand over at the end of a shift

1. Open **CC Shift Change Report**, check the **Date**, and pick **Single Day** or **Weekend**.
2. The shift counts fill themselves in. Fill in the on-call names, the count fields, the questions against each open shift, and the confirmation details.
3. Click **Save**, then **Print** if you need it on paper.

2.12 Find out who staffed a shift, and when

1. Open **Staffing Audit**, set the **Dates**, and click **Run**.
2. Use the filter box to narrow to a patient, employee, MR# or team.
3. **Staffed by** and **Staffed on** say who made each assignment and when.

PART 3

The screens

3.1 Home

Your landing page after sign-in. A summary, not a workspace.

- Before a program is picked: a greeting and **Select a program to begin**.
- With a program: four cards — **Program**, **Shift Mode**, **Date Range** (the window the Schedule is set to) and **User** (Read-only or Full access).
- **Quick navigation** — buttons for Schedule, Patient Schedule, Employee Schedule, Availability, Pool / Agency and Employee Management, as your rights allow. The other screens are in the sidebar.
- **About this app** and **System status** — the connection and how you signed in.

Coming back to Home does not reset anything.

3.2 Schedule — the main staffing grid

This is where the work happens. Everything else supports it.

Reading the grid

Patients run across the top as columns. Dates run down the side as rows, the same orientation as the old CC Scheduler.

Each **row** is one date and one shift: two per day (Day, Night) on a 12-hour program, three (Day, Eve, Mid) on an 8-hour one. Today is highlighted, weekends are tinted, and the date column stays put when you scroll sideways.

Each **patient column header** shows the team, a status pill (**Active**, **Pending**, **Disch**), the name, MR number and city, a **comment icon** (with a count if there are comments), and **preference badges** — see 4.3. Up to four badges show inline; **+N** covers the rest. Hover any badge for its meaning.

- **Click** a patient's name to open their **case sheet** (3.3).
- **Right-click** the header for **Case Sheet**, **Quick Info**, **Preferences** and **View Schedule**.

Each **cell** is one patient on one shift:

WHAT YOU SEE	WHAT IT MEANS
Empty cell with +	Open shift. Click to staff it
Named chip	A VITAS employee is assigned
Orange chip	An agency is assigned. A ▪ means no attendant name is recorded yet
Red-striped chip with ⚠	**TELECARE CC** — the case is covered by phone, nobody is going (4.4)
Chip smaller than the cell, amber underline	**Partial coverage** — part of the shift is still open
Faded, dashed, struck-through chip	Notified or cancelled. Counts for nothing (4.9)
Greyed row, lock icon on the date	Past date — locked for you (4.2)

Each chip has a **C** or **U** badge (confirmed / unconfirmed), the discipline and the name. A **red dot** in the corner means a note; click it to read. Hover a chip for the full detail — the strip along the bottom of the screen shows it too.

The header and toolbar

At the top right, three counters: the first is labelled with the status filter (**ACTIVE**, **PENDING**, **DISCHARGED**, or **PATIENTS** for All) and counts the patients shown; **UNCONFIRMED** and **ASSIGNED** count chips on the grid.

CONTROL	WHAT IT DOES
‹ / ›	Step back or forward **one whole payroll period** and reload (4.6)
This period	Jump to the payroll period containing today. Highlighted when today is in view. Like ‹ / ›, it keeps your place sideways in the grid
Two date boxes and ↻ **Refresh**	Set any custom range, then **Refresh**. The end can never be before the start. **Refresh** on its own reloads the patients and the schedule for the dates shown, and leaves the grid scrolled where it was
Status	**Active** (default), **Pending**, **Discharged**, **All** — which patients appear
Sort	**Name**, **Team**, **ADT (Newest First)** (default), **ADT (Oldest First)**
Jump to patient…	Pick a patient; the grid scrolls to them. If the status filter hides them, it widens to **All** and tells you
act / dis / pen	How many active, discharged and pending patients the program has
Color: Tinted / Bar	Two ways of colour-coding chips by employee type
Compact / Normal and the slider	Row density and height
Auto-refresh	The grid reloads itself on a set interval, the same for everyone
Print ▾	**Patient schedule** or **Hours report** — see 3.15

The grid loads by itself when you open the screen, change the program, or use ‹ › / **This period**. You only need **Refresh** after typing new dates, or to pick up other schedulers' changes before the next auto-refresh. When you pick a program, the range is its current payroll period.

Assigning someone — the Assign employee panel

Click an empty cell (or the open part of a partly covered one). The panel shows:

- **Start / End / Reset** — the shift times, on 12-hour programs. On 8-hour programs a banner says the times are locked.
- A banner if the shift conflicts with something, and a note naming the patient's preferences ("This patient's preferences: …"). Everyone available is still listed; staff who do not meet a preference are marked with the reason (**Not LPN**, **Not female**, **Agency** and so on), shown paler, and listed after those who do (4.3).
- **Discipline tabs** — **All / LPN / HHA / RN / Other**, with counts.
- **Type buttons** — Full-time / Part-time / Per-diem / Agency, when more than one type is present. Click one or several; **Clear** shows everyone. They reset each time you open the panel on another cell.

- **The list** — **Telecare** first, then everyone A–Z by surname, with anyone who misses the patient's preferences after them, also A–Z. Each row shows the name, a 📝 availability note for this shift if there is one, team and ZIP, a tag for the shift they declared available (amber, with its hours, if it doesn't cover the whole shift), discipline, type, an **hours badge**, ⓘ for their details, and **+ Assign**.
- At the bottom, **N of M employees** and **× Close**.

The **hours badge** is the employee's total for the **Monday–Sunday week** of that shift — confirmed and unconfirmed, across programs. Green under 32, amber 32–40, red 40 and over. If assigning would take a VITAS employee over 40, you get an **Overtime Warning** with **Assign Anyway**. See 4.5.

When you assign someone who declared availability for part of the shift, the times start from what they declared.

If the app refuses an assignment, it says why and keeps the panel open — a conflict, a STOP preference, or a past date.

Working with an existing assignment

Right-click a chip for its menu. The header shows the name and discipline.

MENU ITEM	WHEN IT APPEARS	WHAT IT DOES
Mark Confirmed / Mark Unconfirmed	Active and pending patients	Same as clicking the C/U badge
Edit Hours	12-hour programs, not discharged	Change the start and end
Set Attendant / Replace Attendant	Agency and Telecare	Record who the agency sent, or who took a Telecare call
Add Note / View Note	Always	Up to 253 characters
Mark Notified / Un-mark Notified	Discharged patients	Record that the employee was told the case stopped
Employee Info	Not Telecare	The employee's details
View Employee Schedule	Not Telecare	Opens Employee Schedule for that person
Delete Assignment	Always	Removes it, after you confirm

The × on the chip also deletes (after **Delete Assignment?** → **Delete**). On a discharged patient's chip it is replaced by ✉ (Mark Notified).

The side panel: Hours, Legend, Alerts

On the right; click › to fold it to a thin rail.

- **Hours** — **Confirmed hours** for the dates and patients on screen, one row per person, **A–Z by surname**, with a colour stripe for employment type. The bar's full length is 40 hours for every 7 days on screen, so a two-week view is not mistaken for overtime; it turns amber near the limit and red over it. Agency and Telecare appear but never alert.
- **Legend** — the colour and badge key.
- **Alerts** — **Hours over 40**: any VITAS employee over 40 confirmed hours in a Sunday– Saturday week, e.g. *"Xiomara Alvarez Segura is at 44h the week of Oct 4–Oct 10."*

3.3 The patient case sheet

Click a patient's name on the Schedule grid (or right-click → **Case Sheet**).

The header shows the name, status, any **STOP** badge, patient number, age and sex, program, team and admission date. Two tabs:

Staffing (opens first)

- **Staffing requirements** — the patient's preferences as a checklist, STOP first: who may be sent, gender, language, pets, smoking.
- **Get there · who to call** — address, directions, home phone, caregiver and attending physician. Phone numbers are links.
- **Coverage** for this payroll period — a strip of Day/Night (or three-shift) slots coloured by employment type, with unconfirmed shifts hatched, open ones dashed, and slots after a STOP marked. Counts above it: shifts filled, unconfirmed, confirmed hours. **Open in grid** → takes you to the patient on the Schedule.
- **Comment log** — the latest three entries; **All N** → (or **Add** →) opens the full log.

Case Sheet — the full record in sections: Patient, Address, Program, Primary caregiver, Hospice team, Physicians, Diagnosis, Services, Identifiers. Fields with nothing recorded are left out, and listed at the bottom under "Not shown because blank".

Print — click **Print**, tick or untick **Include this period's coverage**, then **Print**. It goes straight to your browser's print dialog as a formatted document (3.15).

> The case sheet is read-only. To change preferences, use right-click → **Preferences** on the patient header. Hospice team roles use the same abbreviations as the old CC Scheduler (RN, PCL, TMG, SW, CHAP, HHA); hover for the full name where there is one.

3.4 Patient Schedule

A date-ordered list of coverage — for one patient, every patient in the program, or across all your programs. Read-only apart from comments.

1. **Patient:** pick a patient by typing part of their name or their MR number, or **— All Patients —**. Each patient is listed as *Name #MR number*, and the heading shows the MR# beside the name once you Fetch, so two patients with the same name cannot be mixed up.
2. **Status: Both**, **Confirmed** or **Unconfirmed**. It applies when you click Fetch.
3. Set the dates (they start as the dates the Schedule shows; at most **92 days**) and click 🔍 **Fetch**.
4. To look across programs, turn on **All programs** (3.14).

Columns — Date, Patient and MR# (All Patients only), Program, Shift, Times, Hours, Employee (agency rows show *Agency – Attendant*), Team, Disc., Type, Status, Comments. **Type** reads **Agency** for agency staff and **Telecare** for the open-shift placeholder; VITAS staff show their employment type (Full-Reg, Part-Tmp and so on). Click a heading to sort; drag one into the bar above the grid to group by it.

Print and **Export** appear once there are rows. Print is landscape with every column fitted (3.15). Export downloads a CSV that opens in Excel, with the patient's name and MR# on every row.

Worth knowing:

- **Team** is the **employee's** team, not the patient's.
- **Program** is the program the shift was scheduled under; a transferred patient keeps the old program on old rows.
- The comment count is per patient, so every row for the same patient shows the same number.
- A fetch shows at most **20,000 rows**. A banner says when there were more — narrow the dates or pick one patient. A range longer than 92 days is refused with a message.

3.5 Employee Schedule

The same idea from the employee's side.

1. **Employee:** pick one, or **— All Employees —**. The list holds active VITAS RN, LPN and HHA staff in the program — not agency staff.
2. Set Status and dates (at most 92 days), then 🔍 **Fetch**. **All programs** and the 20,000-row limit work as on Patient Schedule.

Columns — Date (weekends highlighted), Employee (All Employees only), Shift, Times, Hours, Patient, Program, Status, Comments.

Weekly badges above the grid read like **Wk 10/5: 36h** — green under 32, amber 32–40, red 40 and over. Weeks run **Monday to Sunday**. With All Employees they add up everyone.

🖶 **Print** prints the list (there is no Export here). The **Comments** link is the **patient's** log, not the employee's.

You also arrive here from: the top-bar search (employee results), right-click a chip → **View Employee Schedule**, and the 🗓️ button on Availability (which keeps its dates).

3.6 Availability

Who is available to work, by date and shift. The Assign employee panel reads this, which is what makes this screen worth keeping current.

Opening and moving around

- It loads by itself for today and the next six days.
- ‹ **month** › moves a whole calendar month; click the month name to show all of it. Or set two dates and click ↻ **Load** (which becomes **Cancel** while loading).
- Tabs: **All**, **RN**, **LPN**, **HHA**, **Full-time**, **Part-time**, with counts.
- **Find employee…** — type a name (or switch to **Emp #**), choose **contains** or **exact**, click **Find**, then **Next** (or F3) for the next match. It searches everyone, switching tabs if needed. **Esc** clears the highlight.

The grid — one column per date, one row per person (A–Z). The name cell shows a discipline tag and a type tag, with a coloured border. A cell holds the symbols recorded for that day: green for shifts, red for not available. An amber dot means a note; hover a cell to read its symbols and notes.

Recording availability

1. Click the day cell (or press Enter on it).
2. The picker lists the symbols in groups — your program's shift length first, then 4-hour shifts, then the other length, then **Not available**.
3. Tick every symbol that applies. A ticked symbol gets a 📝 button for a note — e.g. `ot`, `pto`, `Holiday Commitment` — then **Apply**.
4. Click **Save**. You see **Availability updated**.

	SYMBOL	MEANING
12-hour	`D12` `N`	8a–8p · 8p–8a
8-hour	`D8` `E` `MN`	8a–4p · 4p–12a · 12a–8a
4-hour	`D4` `E4`	12p–4p · 4p–8p
Not available	`S` `TO`	Sick Time · Time Off

Row buttons and menus

WHERE	WHAT
📝 **beside the name**	The employee's comments (profile notes and activity log)
🗓️ beside the name	**Copy Last Month** into **this month**, **this month + 1 more**, or **this month + 2 more**
🗓️ **beside the name**	That person's Employee Schedule, for the same dates
Right-click the **name**	**Copy Last Month for...** and **Employee Note for...**
Right-click a **day cell**	**Copy Last Month for...**, **Cut Cell**, **Copy Cell**, **Paste Cell** (Ctrl+X / C / V)

Paste replaces the target day with exactly what was copied; notes are not copied. **Copy Last Month** lines up by weekday (Mondays land on Mondays), only ever adds, and fills every chosen month from last month — running it twice changes nothing.

Worth knowing

- Every symbol is offered on every program; staff do record 8-hour codes on 12-hour programs.
- **S** and **TO** are shown so you can tell "said no" from "hasn't answered". They never put anyone in the Assign employee list.
- Removing a symbol removes its note.
- Read-only users can hover to read and can **Copy Cell**, but cannot open the picker, cut or paste.

3.7 Availability Report

A printable record of recorded availability. Two modes:

- **One employee** — pick the employee and a date range (**This month** fills it in), then ↻ **Run**.
- **Program, from a date** — **Non-pool staff** or **Pool staff**, from a date onwards with no end. This replaces the old JOCC availability reports. "Pool" here means per-diem staff.

The result is grouped by employee: name, code, discipline and type, then **Date, Symbol, Shift, Note, Entered by, Entered**. **Export CSV** and **Print** appear once there are results. Very large results stop at 20,000 records and say so.

3.8 Open & Unstaffed

Every shift in a date range that still needs a real person.

- It runs by itself for today and tomorrow. Set **Dates** (up to 31 days) and click **Find**.
- **All programs** covers every program you have access to.
- Each row is one patient, shift and date, in one of three states:

STATE	MEANING
Open	Nothing scheduled
Partially open	Someone covers part of it; a gap of more than 15 minutes remains
Unstaffed	Only Telecare holds it — covered by phone, nobody going

- Filter with the state buttons (each with a count) or the search box (**Patient, MR# or team…**).
- Columns: Date, State, Needs (hours), Shift, Patient, MR#, Team, Program, **On it now** (who covers part of it, with an Unconfirmed pill), **Staff**, Comments.
- **Staff** takes you to the Schedule grid for that patient's week, switching program if needed, so you can fill it.
- **Print** and **Export** once there are rows.

3.9 CC Shift Change Report

The handoff sheet between day and after-hours staff, generated from the schedule and saved per program and date.

- **Date** (changing it reloads), **Type** (**Single Day** or **Weekend** — a label on the report), ↻ **Load**, **Save**, 🖶 **Print**, **Export**.
- The subtitle says when it was last saved and by whom, or **not yet saved**.

The sheet:

- **MOC** and **AOC** on-call lines (free text).
- **Shift counts** — census at handoff, open shifts and shifts to confirm, each split **P/A** (shifts starting at noon or later / earlier). Worked out fresh every time.
- Eight count fields you fill in — open shifts sent to and staffed by After Hours, new shifts received, unstaffed shifts sent to the program, unconfirmed shifts sent each way, and ADTs to update (day and night).
- **Special instructions from team**.
- **Open shifts** — each with **Staff contacted?**, **All agencies contacted?**, **Case staffed?**, **MOC/AOC aware?**, **Preceding staff notified?** and comments.
- **Unconfirmed shifts** — with who obtained confirmation and whether a message was left.

- **Shift report detail** — **Received report from** and **Name of coordinator**, then that day's patient comments, grouped by team and patient.

Fill it in and click **Save**. Read-only users can view but not change it. **Print** and **Export** carry everything typed on the sheet, with long comments printed in full.

> "Open" here means a shift with nobody on it at all. A Telecare or partly covered shift counts as staffed on this sheet, unlike on Open & Unstaffed.

3.10 Staffing Audit

Who was assigned to what, by whom, and when.

- **Dates** (default: the last two weeks; up to 92 days), **All programs**, **Include cancelled** (on by default), **Run**. It also runs when you open it.
- Filter box: **Patient, staff, MR#, team or who staffed it…**
- **Grid** view — Date, Shift, Start, End, Hrs, Patient, MR#, Team, Stat, LOC, Emp ID, Staff, Disc, Source (VITAS or Agency), Status, **Staffed by**, **Staffed on**, Program, Note. Cancelled rows are greyed.
- **Report** view — the same rows as the **CC Patient Schedule** document, shown as paper (3.15).
- **Print** and **Export** once there are rows. Printing from Report view prints the document; from Grid view, the table (landscape, every column fitted).

3.11 Pool / Agency

The agency staff attached to the program. Needs the Pool / Agency right.

It loads when you open it (↻ **Load Pool Staff** reloads). Columns: Last Name, First Name, Discipline, Type (the agency's contract code), Team, Cell, Home, **Comments**.

Comments opens **profile notes** (standing facts, editable) and the **activity log** (dated, signed, permanent) — see 4.10.

Worth knowing: this is a roster only — agency staff are assigned from the Schedule grid. Telecare is not an agency and is not listed. VITAS per-diem staff are on Employee Mgmt.

3.12 Employee Management

Administrators only. The program's active VITAS staff.

It loads when you open it (↻ **Load Employees** reloads). Columns: Last Name, First Name, Discipline, Type, Team, Status, Cell, Home, City, **Comments**.

- **Type** buttons, when there is more than one type, filter the list; the heading then reads "12 employees of 48". **Clear** removes them. Column filters (in each header) narrow the list too, but do not change that count.
- **Comments** opens **Profile notes** — allergies, certifications, "DO NOT USE", contact numbers; three lines of 255 characters, corrected in place with **Edit** — and the **activity log**, which cannot be changed.

3.13 Maintenance

IT administrators only. Configuration that used to need a database request.

Shift hours — each program's stored pattern and the one **In force**. **12-hour**, **8-hour** or **Clear** (back to the 12-hour default). Programs 91–99 are **pinned** to 8-hour and cannot be changed. A change takes effect the next time the program is selected and does not move existing assignments.

CC teams — which teams count as Continuous Care for a program. **Add a team to** a program, or **Remove** one. Removing a program's last team asks first, because the program then drops out of everyone's program list.

3.14 Seeing more than one program

Patient Schedule, **Employee Schedule**, **Open & Unstaffed** and **Staffing Audit** have an **All programs** button (it reads **All N programs** when on). It widens the view to every program you are authorised for, and the Program column tells them apart.

- It can never show a program you could not pick yourself.
- It only appears if you have more than one program.
- On the two schedule screens, turning it on switches to All Patients / All Employees.

3.15 Printing

Everything prints **landscape** on Letter paper, and every column fits the page.

Documents — the **case sheet**, the **CC Patient Schedule**, the **Hours Report**, and Staffing Audit's **Report** view — are formatted printouts. Each page has a header (VITAS Healthcare · Continuous Care, and the report's name) and a footer with **who printed it and when**, **CONFIDENTIAL — contains PHI**, and **Page X of Y**.

- **Patient schedule** (Schedule → **Print** ▾) — every patient's shifts for the dates on screen, grouped by team then patient. Summary boxes at the top; each shift's date, shift, discipline, staff (agencies tagged), code, time, **status** (Confirmed / Unconfirmed / Notified) and who created it; hours per patient split VITAS / Agency × LPN / HHA / RN; and an **Hours by discipline** table at the end. **Include patients with no shifts** lists everyone (on when the dates include today).
- **Hours report** (Schedule → **Print** ▾) — opens on the dates the Schedule shows; change them and click **Reload**, or click **Period-to-date** for this payroll period so far. Summary boxes, **Over 40 confirmed hours in a week** (VITAS staff, Sunday–Saturday), **All workers** A–Z (one row each, confirmed and unconfirmed hours, patients), and a **Summary by category**.
- **Case sheet** — see 3.3. It goes straight to the print dialog; the others open a preview with a **Print** button first.

Screen prints — Patient Schedule, Employee Schedule, Open & Unstaffed, Availability Report, Shift Change Report and Staffing Audit's Grid view print the page itself: the toolbar is dropped, the table fills the width, and wide tables use smaller type rather than cutting columns off. Long lists run onto further pages.

> If your browser adds its own date and web address at the edges of the page, turn off **Headers and footers** under **More settings** in the print dialog.

Exports (CSV). If a report was cut short at its row limit, the exported file says so: its name ends in `_TRUNCATED`, and its last line gives how many rows it holds out of how many. Narrow the dates or the scope and export again for the rest.

To print the Schedule **grid** itself, use your browser's print (Ctrl+P) on the Schedule screen.

PART 4

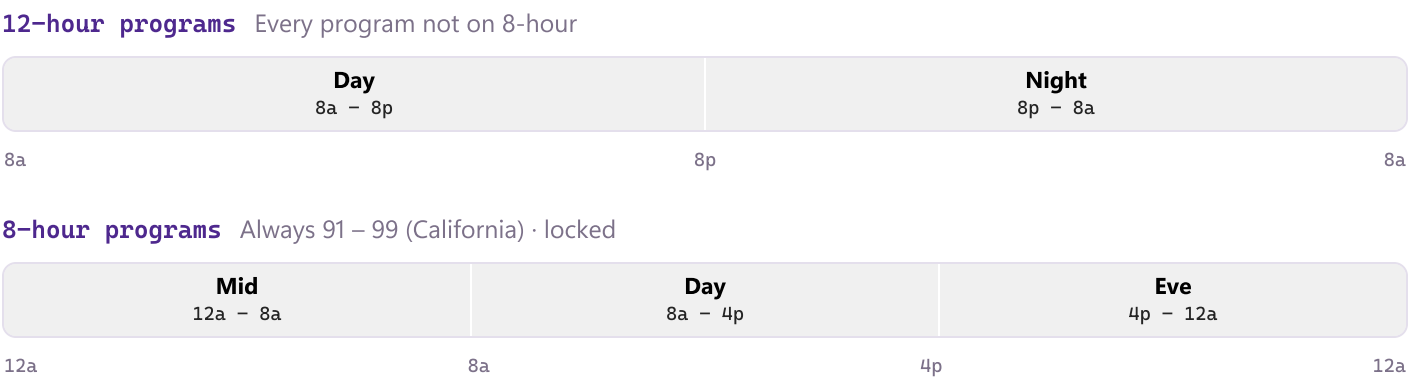
Rules the app enforces

This part is the difference between using the app and understanding it.

4.1 Shift patterns

Every program is either **12-hour** or **8-hour**, shown above the program box as "· 12-hour shifts" or "· 8-hour shifts".

PATTERN	ROWS PER DAY	SHIFTS
12-hour (most programs)	2	**Day** 8a–8p · **Night** 8p–8a
8-hour	3	**Day** 8a–4p · **Eve** 4p–12a · **Mid** 12a–8a



Three rows per date, and **no partial hours** — whole blocks only.

The times are the same for every program. Every 12-hour program runs 8a–8p and 8p–8a, including Dade-Monroe and Broward — a full day shift is 12 hours.

California (91–99) is always 8-hour, whatever else is configured. On an 8-hour program there are no partial hours: the time boxes are hidden in the Assign employee panel and **Edit Hours** is not offered. A program's pattern is otherwise set on the Maintenance screen (3.13).

4.2 Past dates and the admin grace window

Past shifts are locked: the row is greyed, the date has a lock icon, and nothing on it can be changed — no new assignment, delete, confirm, notified, attendant name, hours or note. A note on a locked shift still opens, read-only.

YOU ARE	YOU CAN STILL CHANGE
Scheduler	Today onward, and **yesterday's overnight shift** (Night on a 12-hour program, Evening on an 8-hour one) until midnight
Admin	Today onward, and **all of yesterday** — a grace window for overnight events

Two days back is locked for everyone. "Today" is your program's own day, so a Pacific program rolls over at midnight Pacific time.

4.3 Patient preferences and STOP scheduling

Some preference badges are checked against everyone the Assign employee panel lists, and three stop assignments altogether.

STOP — hard blocks on new assignments

BADGE	EFFECT
STOP	The case is stopped now. Every new assignment is refused
STOP @ 8AM	Refuses anything starting at or after the next 8:00 AM
STOP @ 8PM	Refuses anything starting at or after the next 8:00 PM

"Next" means the next time the clock reaches it: on Tuesday afternoon, STOP @ 8AM refuses a Wednesday morning shift but not a Tuesday evening one. Existing assignments stay editable. The case sheet's coverage strip marks the slots after a STOP.

Badges the Assign employee list checks

Nobody is hidden, as in the old CC Scheduler: the panel marks whoever does not meet these and lists them last, and the choice is yours.

BADGE	MARKED WHEN THE EMPLOYEE IS
VITAS	An agency (**Agency**) — VITAS staff only
♀ / ♂	Not that sex (**Not female** / **Not male**)
LPN ATC	Not an LPN (**Not LPN**) — LPN around the clock
RN ATC	Not an RN (**Not RN**) — RN around the clock

LPN 8A, **LPN 8P** and **LPN** are shown on the patient but not checked.

Badges that inform without blocking

BADGE	MEANING
IV	IV case
NO CHG	Do not change staff — continuity required
12HR / DAY / PM	12-hour shifts only · daytime only · nighttime only
🐕 🐈 🐾	Dog · cat · other pet
🚬 / 🚭	Smoker in the house · no smoking
🗣 **ES / HT / TL / FR / EN**	Spanish · Creole · Filipino · French · English
P / +N	Has preferences / more than fit. Hover to read

4.4 Telecare is not a person

TELECARE CC means "the case is open and handled by phone". It is not an employee or an agency.

- It is always at the top of the Assign employee list, whatever the filters.
- It does not count toward anyone's hours or overtime.
- It counts as coverage on the grid — a 12p–4p Telecare on an 8a–8p shift leaves 4p–8p open.
- On **Open & Unstaffed** a shift held only by Telecare shows as **Unstaffed**.
- **Set Attendant** can record who took the call.

4.5 Confirmed hours and the 40-hour line

Every assignment is **C** (confirmed) or **U** (unconfirmed). That drives the numbers, and there are two different checks against 40 hours — worth knowing which is which:

WHERE	WHAT IT COUNTS	WEEK
Hours badge and Overtime Warning in the Assign employee panel	Confirmed **and** unconfirmed, across programs, plus the shift being assigned	**Monday–Sunday**
Alerts tab, and **Over 40 confirmed hours in a week** in the Hours Report	Confirmed only	**Sunday–Saturday**

Both apply to VITAS staff only; agency contracts have their own terms and Telecare is not a worker. The **Hours** tab and the Hours Report also show totals per person: confirmed only on the Hours tab, confirmed and unconfirmed in separate columns on the report.

Colours you will see: green under 32 hours, amber 32–40, red 40 and over.

Older rows may show **U** even though the shift was worked, especially anything carried over from the old system.

4.6 Payroll periods

A payroll period is **two weeks, Sunday to Saturday twice**, from the same payroll calendar the old CC Scheduler reads. On the Schedule screen ‹ › step a whole period and **This period** returns to today's. The Hours Report defaults to "this period so far", and the case sheet's coverage strip shows the current period.

4.7 Read-only access

If you can see but not save, it is one of two things:

REASON	WHAT IT LOOKS LIKE	WHAT TO DO
Your account is read-only	**READ-ONLY** under your name; buttons that change things are dimmed	An access change — ask whoever manages CC access
A scheduled system window	You are turned away at sign-in or see no screens, for a defined period	Wait it out — planned maintenance

Read-only users can still read notes and comments; only saving is blocked.

4.8 Agency is a vendor; the attendant is a person

When you assign an agency you book the **company**:

- The same agency **can** cover two patients at once — it sends different people. It cannot be booked twice on the same patient and shift.
- The person sent is the **attendant**, recorded with **Set Attendant**. Changing it does not touch the shift's confirmation or note.

4.9 Discharged patients and Mark Notified

When a patient is discharged, the staff on their upcoming shifts need to be told. **Mark Notified** records that you told them.

- On a discharged patient's chip the × becomes ✉. The right-click menu also has **Mark Notified**.
- A notified chip **stays on the grid**, faded and struck through with a small ✉, so you can see who has been told. ↺ or **Un-mark Notified** undoes it.
- A notified chip counts for nothing — no hours, no coverage.

- Faded chips with no ↺ on *active* patients are old cancelled shifts from the legacy system, shown for reference only.

> The app does not currently stop you from staffing an open shift on a discharged patient. Don't — check the **Disch** pill on the column header first.

4.10 Comments are a log, not a notepad

Scheduling comments — on a patient, or in an employee's activity log — follow three rules:

1. **The time and your name are added for you.** You type only what happened.
2. **Nothing can be edited or deleted, by anyone.** To correct something, add a comment saying so. The wrong entry stays, with the correction after it — an accurate record.
3. **Anyone authorised for the program can add one.** Read-only users can read but not add.

Up to 2,000 characters per entry. **Employee profile notes** are different — standing facts (allergies, certifications, "DO NOT USE") that are meant to be corrected in place.

PART 5

Help built into the app

5.1 The Guide button — this document

Top-right, next to **?**. It opens this guide in a new browser tab, so it sits beside your work. The contents panel on the left links to every section; hover a heading and click the **#** beside it to copy a link straight to it — the quickest way to answer a colleague. **Download PDF**, under the contents, saves the whole guide as one file, with a contents page and page numbers, for printing or sending to someone without the app.

5.2 The ? button — help for this screen

Opens **How to use this page** with a short article for the screen you are on. Move to another screen and click it again for that screen's article. The footer links to this guide.

5.3 What's new — the version badge

Under **CC Scheduling** in the sidebar you see something like `v2.7.16 what's new`. Click it for every change that has shipped, newest first, written in terms of your work.

- **When something behaves differently from yesterday, look here first.** The change is probably described, with the reason.
- **When you report a problem, quote the version.** It is worked out from the build automatically, so it always matches what you are running.

PART 6

Training programme

This part turns the guide into a course. It is written for two readers: the new user working through it, and the trainer running it.

6.1 Before you start

- **Practise on the training environment, never on live patients.** Your trainer will tell you which environment to use and make sure your account can reach it. Everything you do in the live environment changes real schedules that real staff will act on.
- **Have the Guide open** in its own tab (top-right, **Guide**) while you work through a session.
- **Each session has:** what you will be able to do, a short walkthrough, a hands-on exercise, and check-yourself questions. Answers are in 6.10.

6.2 Learning paths by role

ROLE	SESSIONS	ROUGHLY
Scheduler	1, 2, 3, 4, 5, 6, 7	5–6 hours over two or three days
Admin office staff	All scheduler sessions, then 8	Add 45 minutes
Read-only viewer (managers, auditors)	1, 2, 6	2 hours
IT administrator	1, 2, then 8 and 9	2 hours

Do the sessions in order. Each builds on the one before.

6.3 Session 1 — Orientation (30 minutes)

You will be able to: sign in, pick a program, find your way around, and get help.

Walkthrough: Part 1 and Part 5.

Exercise

1. Sign in. Read your access level under your name in the sidebar.
2. Pick a program by typing its code and pressing **Enter**. Then pick it again by typing part of its name.
3. Find your user chip at the top-right. Hover it to see your full name.
4. Open each screen in the sidebar once. On each, click **?** and read the first paragraph.
5. Click the version badge and read the newest entry in What's new.

Check yourself

1. Where do you pick the program, and what happens on other screens if you don't?
2. What is the difference between **Guide** and **?**?
3. You see **READ-ONLY** under your name. What does it mean, and who do you ask?

6.4 Session 2 — Reading the schedule (45 minutes)

You will be able to: read the grid, move between payroll periods, find a patient, and read a case sheet.

Walkthrough: 3.2 (Reading the grid, The header and toolbar), 3.3, 4.1, 4.6.

Exercise

1. Open **Schedule**. Click **This period**. Note the dates it shows.
2. Click ‹ once. Which period are you looking at now? Click **This period** to return.
3. Use **Jump to patient…** to find a patient. Then find the same patient with the top-bar search.
4. Find one of each: an open shift, a confirmed chip, an unconfirmed chip, an agency chip, and (if any) a Telecare chip. Hover each.
5. Click a patient's name. Read the Staffing tab, then the Case Sheet tab. Close it.
6. Change the status filter to **All**, then back to **Active**. Watch the counters change.

Check yourself

1. How many rows per day does an 8-hour program have, and what are they?
2. A chip is smaller than its cell with an amber underline. What does that mean?
3. What do ‹ and › move by?

6.5 Session 3 — Staffing shifts (60 minutes)

You will be able to: staff an open shift, read the Assign employee panel, and understand why the app refuses or warns.

Walkthrough: 2.2, the Assign employee panel in 3.2, 4.3, 4.4, 4.5.

Exercise (training environment only)

1. Open an empty cell on a future date. Read the panel top to bottom before choosing.
2. Use the discipline tabs and type buttons. Notice that Telecare never disappears.
3. Find someone with a 📝 note and read it. Find someone with an amber declared-shift tag.
4. Assign a VITAS employee. Then assign an agency to another shift and record an attendant.
5. Find a patient with a **VITAS** or gender badge and open the panel on their shift. Who is missing from the list, and why?
6. Try to assign someone to a past date. What happens?

Check yourself

1. Why might the employee you want not be in the list?
2. What does the hours badge count, and over which days?
3. Is Telecare an agency? Does it count toward overtime?

6.6 Session 4 — Keeping the record straight (45 minutes)

You will be able to: confirm shifts, change hours, add notes, log calls, handle a discharge, and correct a mistake properly.

Walkthrough: 2.3 to 2.8, 4.8 to 4.10.

Exercise (training environment only)

1. Confirm a shift by clicking its **U**. Unconfirm it from the right-click menu.
2. Change a 12-hour shift's end time with **Edit Hours**.
3. Add a note to a chip, then read it from the red dot.
4. Log a call in a patient's comments. Then add a second comment correcting the first.
5. On a discharged patient, Mark Notified on a chip, then undo it.
6. Delete one of your practice assignments.

Check yourself

1. You logged a comment on the wrong patient. How do you fix it?
2. What is the difference between a shift note and a patient comment?
3. Does a notified chip count toward hours?

6.7 Session 5 — Availability (45 minutes)

You will be able to: record and change availability, use notes, copy a pattern forward, and find someone quickly.

Walkthrough: 2.9, 3.6.

Exercise (training environment only)

1. Open **Availability**. Move forward a month with ›, then back.
2. Use **Find employee…** to find someone by name, then press **Next**.
3. Record a `D12` and an `N` on one day for someone, with a note on one of them. **Save**.
4. Copy that day and paste it onto the next day.
5. Right-click a name and **Copy Last Month** into this month.
6. Open the Schedule, open the Assign employee panel on that day, and find your note.

Check yourself

1. Does Paste add to what is already in the cell, or replace it?
2. If the 1st of the month is a Thursday, how does Copy Last Month line things up?
3. What do `S` and `TO` mean, and do they make someone available?

6.8 Session 6 — Finding gaps, reports and printing (45 minutes)

You will be able to: find every open shift, print the patient schedule and hours report, and check who staffed what.

Walkthrough: 3.8, 3.10, 3.15, 3.4, 3.5.

Exercise

1. Open **Open & Unstaffed** for the next three days. Filter to **Partially open**. Click **Staff** on one row and see where it takes you.
2. On **Schedule**, **Print** ▾ → **Patient schedule**. Read the preview: find a patient's hours line and the **Hours by discipline** table. Close it.
3. **Print** ▾ → **Hours report**. Find the over-40 section. Click **Period-to-date**.
4. On **Patient Schedule**, fetch one patient for this period. **Export** it and open the file.
5. On **Staffing Audit**, run the last week and find who staffed one shift, and when.

Check yourself

1. On Open & Unstaffed, what is the difference between **Partially open** and **Unstaffed**?
2. What is printed in the footer of every formatted printout, and why?
3. Which over-40 check uses confirmed hours only?

6.9 Sessions 7–9 — Handover, administration, configuration

Session 7 — End-of-shift handover (30 minutes), schedulers. Walk through 2.11 and 3.9. Generate today's CC Shift Change Report, fill in the open-shift questions, **Save**, and print it. *Check yourself:* why might a shift appear open on Open & Unstaffed but not on the Shift Change Report?

Session 8 — Administration (45 minutes), admins. 4.2 and 3.12. Edit yesterday's assignment using the grace window. On **Employee Mgmt**, filter to one type, open someone's Comments, and correct a profile note. *Check yourself:* how far back can an admin edit?

Session 9 — Configuration (30 minutes), IT administrators. 3.13. Review a program's shift hours and CC teams (in the training environment). *Check yourself:* what happens to a program when its last CC team is removed?

6.10 Answers to the check-yourself questions

Session 1 — (1) The Program box near the top of the sidebar; without one, grids are empty and search is off. (2) Guide is this whole document; ? is a short article about the screen you are on. (3) You can see but not save; ask whoever manages CC access.

Session 2 — (1) Three: Day 8a–4p, Eve 4p–12a, Mid 12a–8a. (2) Partial coverage — part of the shift is still open. (3) One whole payroll period (two weeks, Sunday to Saturday).

Session 3 — (1) A patient preference filters them out (VITAS-only, gender, credential), or a type or discipline filter is on. (2) Their hours for the Monday–Sunday week, confirmed and unconfirmed, across programs. (3) No. No — it is not a worker.

Session 4 — (1) Add a new comment on that patient saying it was entered in error, and log it on the right patient; comments cannot be deleted. (2) A note belongs to one shift (253 characters, editable); a comment is a permanent, signed log entry about the patient. (3) No.

Session 5 — (1) Replaces. (2) By weekday — Mondays land on Mondays, starting from the first matching weekday of last month. (3) Sick Time and Time Off; no, they mean not available.

Session 6 — (1) Partially open has a real person on part of it; Unstaffed is held only by Telecare. (2) Who printed it and when, CONFIDENTIAL — contains PHI, and page numbers — so a printout can always be traced and is handled as confidential. (3) The Alerts tab and the Hours Report's over-40 section.

Sessions 7–9 — (7) The Shift Change Report counts Telecare and partial cover as staffed; Open & Unstaffed does not. (8) Back to yesterday. (9) It drops out of every user's program list.

6.11 Sign-off checklist

The trainer ticks each item once the trainee has done it unaided.

CAN…	TRAINEE	TRAINER
Sign in, pick a program by code and by name, and switch role if they have more than one code	☐	☐
Find help: Guide, ?, What's new	☐	☐
Read the grid, explain every kind of chip, and move between payroll periods	☐	☐
Open and read a case sheet, and print it	☐	☐
Staff an open shift, explaining why someone is missing from the list	☐	☐
Book an agency and record the attendant	☐	☐
Confirm, edit hours, add a note, and delete an assignment	☐	☐
Log a patient comment and correct one properly	☐	☐
Mark Notified on a discharged patient, and undo it	☐	☐
Record availability with a note; copy, paste and Copy Last Month	☐	☐
Find open shifts on Open & Unstaffed and staff one from there	☐	☐
Print the patient schedule and the hours report, and explain the two over-40 checks	☐	☐
Complete and save a CC Shift Change Report	☐	☐
Find who staffed a shift on Staffing Audit	☐	☐
Admins: use the grace window; manage employee profile notes	☐	☐

Trainer notes

- Keep every hands-on exercise in the training environment. Confirm the environment name on the sidebar status strip before starting.
- Sessions 3 and 4 create practice data. Delete practice assignments at the end of the session; practice comments cannot be deleted, so write them clearly as training entries.
- Part 8 is the best source of "what if" questions for a trainee who is ahead of the group.

PART 7

Quick reference

A desk card. Everything here is explained in Parts 3 and 4.

Chips and cells on the Schedule grid

APPEARANCE	MEANING
Empty cell, +	Open shift
Named chip	VITAS employee assigned
Orange chip (▬ = no attendant yet)	Agency assigned
Red-striped, ⚠ TELECARE CC	Covered by phone. No hours, but counts as coverage
Chip smaller than the cell + amber underline	Partial coverage
Faded, struck through, small red ✉	Notified. Counts for nothing. ↺ to undo
Faded, struck through, no ↺	Old cancelled shift on an active patient
C / U badge	Confirmed / Unconfirmed. Click to flip
Red dot on a chip	A note. Click to read
Greyed row, lock on the date	Past date, locked
Speech bubble on a patient header	Comments. A number means there are some

Employee type colours

The same colours on the grid, the Legend tab, the Assign employee panel and the Hours tab.

COLOUR	TYPE
Purple	VITAS · Full-time
Green	VITAS · Part-time
Dark green	VITAS · Per-diem
Orange	Agency
Orange hatched, dashed	Telecare — a coverage marker, not a person

Hours colours

COLOUR	HOURS
Green	Under 32
Amber	32–40
Red	40 and over

Mouse gestures

WHERE	CLICK	RIGHT-CLICK
Schedule — empty cell	Assign employee panel	—
Schedule — chip	**C/U** flips confirmation; red dot opens the note; agency name sets the attendant	Mark Confirmed/Unconfirmed, Edit Hours, Set/Replace Attendant, Add/View Note, Mark/Un-mark Notified, Employee Info, View Employee Schedule, Delete Assignment
Schedule — patient name	Case sheet	Case Sheet, Quick Info, Preferences, View Schedule
Schedule — speech bubble	Patient comments	—
Patient / Employee Schedule — column heading	Sort	— (drag to the bar above to group)
Availability — day cell	Symbol picker	Copy Last Month, Cut / Copy / Paste Cell
Availability — name	—	Copy Last Month, Employee Note

Button names, by screen

The button that loads or runs a screen is not called the same thing everywhere:

SCREEN	BUTTON
Schedule	↻ **Refresh** (also loads by itself)
Availability, Shift Change Report	↻ **Load** (Availability also loads by itself)
Patient Schedule, Employee Schedule	🔍 **Fetch**
Availability Report	↻ **Run**
Staffing Audit	**Run**
Open & Unstaffed	**Find**
Pool / Agency	↻ **Load Pool Staff** (loads by itself)
Employee Mgmt	↻ **Load Employees** (loads by itself)

Where a comment goes

YOU WANT TO RECORD	WHERE
A call about covering a patient's shift	Patient comments — speech bubble on Schedule, or Comments on Patient Schedule, Employee Schedule or Open & Unstaffed
A call to a member of staff	Activity log — Comments on Employee Mgmt or Pool / Agency
A standing fact about a person	Profile notes — Comments on Employee Mgmt or Pool / Agency
Something about one specific shift	The chip's note — right-click → Add Note
Availability caveat for one shift	The symbol's 📝 note on Availability

Shift patterns

PATTERN	SHIFTS
12-hour (most programs)	Day 8a–8p · Night 8p–8a
8-hour (always 91–99)	Day 8a–4p · Eve 4p–12a · Mid 12a–8a — **locked, no partial hours**

PART 8

When something looks wrong

WHAT YOU SEE	WHY, AND WHAT TO DO
Sign-in is rejected on the card	Active Directory did not accept the username and password. Use the eye icon to check; username only, no `VITAS\`
"Your Windows account is not configured..." or **"...role is inactive..."**	Your password was fine; your account is not set up for CC Scheduling. An access request
Every grid is empty	No program picked
The program list is empty	No program access in this environment. An access request
A program you expect is missing	It has no CC teams configured. Report it
The search box is greyed out, or finds nothing	Pick a program first; search only covers the active program
A patient is missing from the grid	Check the status filter (Discharged patients are hidden on **Active**) and the dates. **Jump to patient...** widens the filter for you
I can't find a discharged patient's shifts	Set the filter to **All** and sort by **Name** — the default ADT sort pushes discharged patients far right
A cell will not accept anyone	Past date, or a STOP preference. The app says which
The employee I want is not in the list	A preference (VITAS-only, gender, credential), a discipline tab, or a type button is filtering them. Agency staff never appear if the patient is VITAS-only
Overtime Warning when the Hours tab shows under 40	They measure different things — the warning counts unconfirmed hours too, over a Monday–Sunday week. See 4.5
Hours look too low	Only confirmed hours count on the Hours tab. Look for **U** badges
Edit Hours is missing	8-hour program (times are locked), or a discharged patient
A 12-hour shift in Dade-Monroe or Broward shows 12 hours, not 11	Correct — every 12-hour program runs 8a–8p and 8p–8a
"Lock request time out period exceeded" or a save fails after a few seconds	Someone else, possibly in the old CC Scheduler, is changing the same records. Wait a moment and try again
Everything says READ-ONLY	See 4.7

WHAT YOU SEE	WHY, AND WHAT TO DO
My permissions changed but nothing looks different	Rights load at sign-in. Sign out and back in
The screen changed since yesterday	Click the version badge — **What's new** probably explains it
There is no Print button	Print and Export appear once there are results. Run or Fetch first
The printout has the browser's date and web address on it	Turn off **Headers and footers** in the print dialog's **More settings**
The ? panel says no article exists	Tell your CC administrator which screen; this guide covers it in Part 3
Anything else	Your CC administrator. Quote the version from the sidebar

PART 9

Not built yet

Read this before you train anyone, so nobody is promised a button that does not exist.

NOT AVAILABLE	DETAIL
Recording pool staff availability	Pool / Agency is a roster. Availability for agency staff cannot be recorded or viewed
A New Patient / After-Hours intake form	Requested; not built
A feedback button	Report problems to your CC administrator, quoting the version

If any of these blocks you, tell your CC administrator. What gets reported gets prioritised.

Glossary

TERM	MEANING
Active Directory (AD)	The VITAS directory holding your Windows account. CC Scheduling signs you in against it
ADT	Admission / Discharge / Transfer. The ADT sort orders patients by their ADT effective date
Agency	An outside staffing vendor. You book the vendor; the attendant is recorded separately
AOC / MOC	The on-call contacts named at the top of the CC Shift Change Report
ATC	Around the clock. **RN ATC** means an RN on every shift
Attendant	The person an agency sends
Case sheet	The patient's record, opened by clicking their name on the Schedule
CC team	A team that counts as Continuous Care for a program. A program with none is not listed
CHAP / HHA / SW / TMG	Hospice team roles on the case sheet: chaplain, hospice aide, social worker, team manager
Confirmed / Unconfirmed	Whether the office has confirmed the assignment
Declared shift	The availability symbol an employee recorded for that day. Assignment times start from it
Discipline	RN, LPN, HHA or Other
Full-time / Part-time / Per-diem	VITAS employment types (stored as Full-Reg, Part-Reg and Part-Tmp)
LOC	Level of care. **C** is Continuous Care
Mark Notified	Recording that an employee was told a discharged patient's case stopped
MR number / Patient #	The patient's number
Notified vs cancelled	Notified is a discharge you communicated (can be undone); cancelled is an old cancelled shift from the legacy system
Partial coverage	Part of a shift is staffed and part is still open
Payroll period	Two weeks, Sunday to Saturday twice
PCL	A hospice team role on the case sheet, shown as the old CC Scheduler showed it

TERM	MEANING
PHI	Protected health information. Every formatted printout is marked as containing it
Program	A CC office or territory. Almost everything is scoped to one
Shift pattern / shift mode	12-hour or 8-hour, set per program
STOP	A preference blocking new assignments, now or from the next 8AM / 8PM
Team	A staffing team. The patient header shows the patient's team; schedule lists show the employee's
Telecare	A coverage marker for a case handled by phone. Not a person
Unstaffed	On Open & Unstaffed: a shift held only by Telecare
User code	The six-character ID carrying your permissions, e.g. `00KRAM`
User chip	Top-right; your login and user code, e.g. `kramachandran.00KRAM`

Something wrong or missing in this guide? Tell your CC administrator and name the screen it relates to. That is the fastest route to getting it fixed.