



Mobile App Quick Reference Guide for Staff

Date: August 29, 2024

HealthStream
500 11th Avenue North, Suite 1000
Nashville, TN 37203
HealthStream.com

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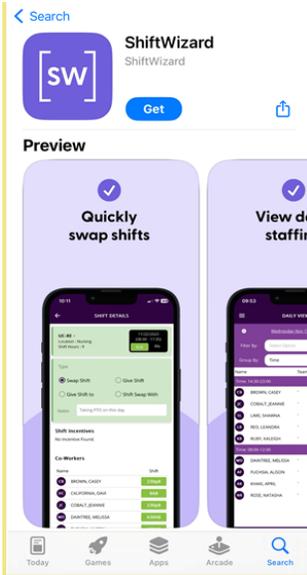
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Get Started

The ShiftWizard mobile app can be used complete shift swaps, view icons, self-schedule, view the daily schedule, send messages to staff members, and view open shifts.

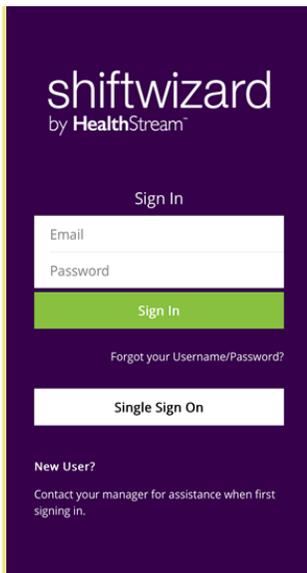
NOTE: Users must **Log Into ShiftWizard** on a computer and set up **Universal Login** prior to accessing the mobile app.

1. From the app store on your mobile device, search for and download the ShiftWizard mobile app.

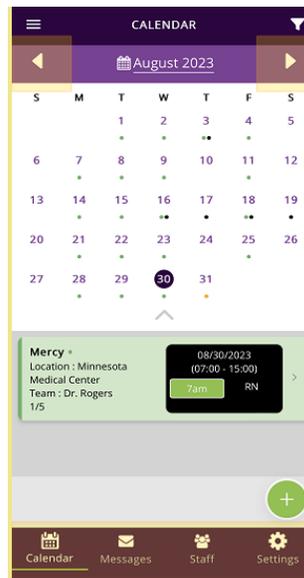


2. Open the app, enter the email and password for your ShiftWizard account, then select the Sign In button.

NOTE: If your organization uses SSO, select the Single Sign On button.



3. Upon logging into the mobile app, staff are brought to the Calendar screen. Color-coded dots display under dates, as outlined below.
 - **Green:** Shifts you're scheduled to work, regardless of department or location.
 - **Red:** Needs shifts for the department being viewed.
 - **Yellow:** Shifts you have requested to work, pending manager approval.
 - **Blue:** Shifts open for self-scheduling.
 - **Purple:** Available shifts with incentives.
 - **Black:** Days with icons.
4. Select the left or right arrow at the top of the screen to navigate to another month.

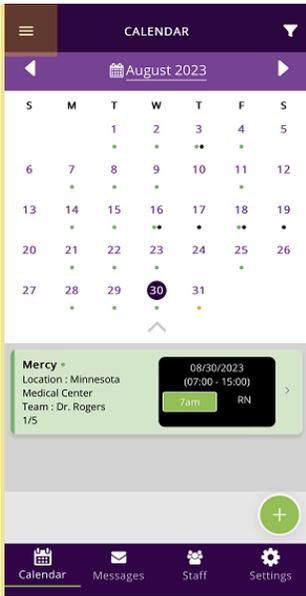


5. Navigate to the Calendar, Messages, Staff, or Settings menu using the buttons at the bottom of the screen.

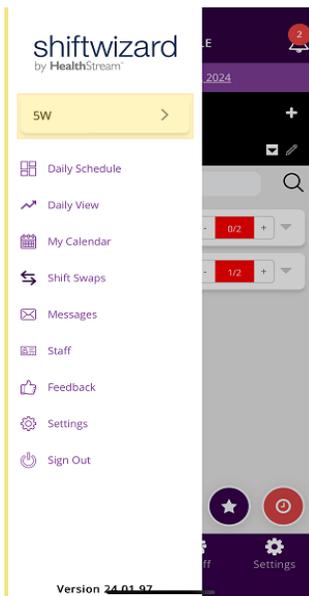
Navigate the ShiftWizard Mobile App

Navigating ShiftWizard is similar to navigating any app. Once logged in, ShiftWizard opens at the home page, either the Calendar or the Daily Schedule, depending on your user access level. The hamburger menu guides users to key components in ShiftWizard. The descriptions are provided below.

NOTE: Menu options will vary depending on your user role and permissions.



1. **Location:** Select the Location field to access a different department in the facility, based on your user permissions.

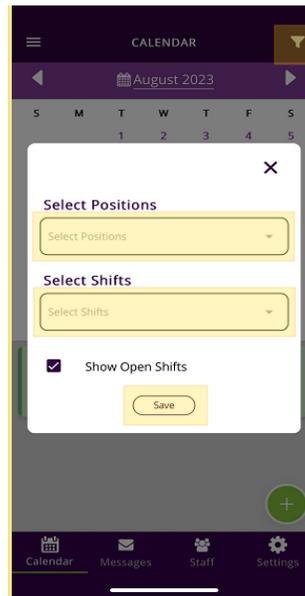


2. **My Calendar:** Upon logging into the mobile app, staff members are brought to the My Calendar screen. The My Calendar screen displays all shifts you are scheduled to work, as well as shifts you are eligible to request to work. You can also swap shifts or request time off from this screen.
NOTE: This screen is also accessible from the menu bar at the bottom of the app.
3. **Daily View:** View all staff members working in the department on the selected day.
4. **Shift Swaps:** View and manage open and pending Shift Swaps.
5. **Messages:** Send and receive messages to other staff members directly through the ShiftWizard app. This screen is also accessible from the menu bar at the bottom of the app.
6. **Staff:** View all staff members in your department. This screen is also accessible from the menu bar at the bottom of the app.
7. **Feedback:** Submit feedback to ShiftWizard regarding mobile app performance.
8. **Settings:** Change your profile picture, update your password, or contact support. This screen is also accessible from the menu bar at the bottom of the app.
9. **Sign Out:** Sign out of the ShiftWizard mobile app.

Calendar

Upon logging into the mobile app, staff are brought to the Calendar screen. Follow the steps below to navigate to the Calendar at any time.

1. Select the Calendar button at the bottom of the screen. Color-coded dots display under dates, as outlined below.
2. Select the left or right arrow at the top of the screen to navigate to another month. By default, the current month will display with the current date highlighted in purple.



4. Select a shift in the calendar. The Staff Shift Details pop-up window displays the shift details, staff members currently scheduled to work the shift, and options specific to the shift's status, as outlined below.

BEST PRACTICE: Configure ShiftWizard Calendar Sync to sync your Shifts and Icons in your Shiftwizard mobile app with your personal calendar app.

3. Select the Filters button in the top right corner to view specific positions or shifts. Select the Save button to apply the selected filters.

NOTE: Uncheck the Show Open Shifts checkbox to only view shifts you are currently scheduled to work.

Shift Swap or Give

Follow the steps below to swap a shift with another staff member.

NOTE: Shift swaps and shift gives must first be accepted by both staff members involved before they will be sent to a supervisor for final approval.

Initiate a Shift Swap

The staff member currently scheduled for the approved shift must initiate the shift swap following the steps below.

1. Select a date with a green (approved shift) dot.



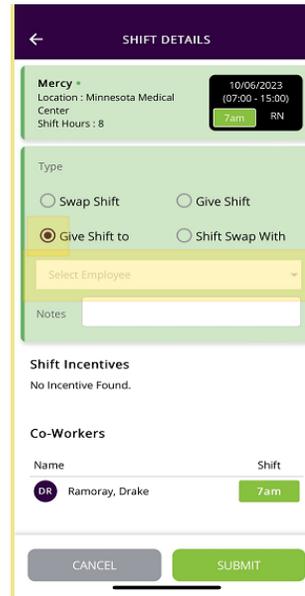
2. Select a green shift at the bottom of the screen. The shift details display.
3. Request to swap or give the shift by selecting a radio button, as outlined below.

- **Shift Swap:** Post the shift out to all qualified staff members, allowing them to propose a trade with one of their scheduled shifts.

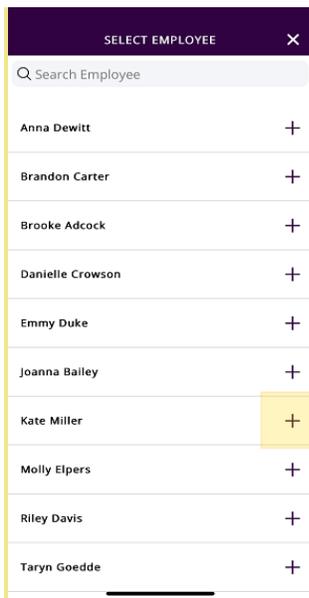
NOTE: You will need to accept their proposed shift from the Notifications Center > Shift Swap Center before it can be approved by your manager.

- **Give Shift:** Post the shift out to all qualified staff members, without offering to trade a shift.
- **Give Shift To:** Select this option if a Give Shift has been discussed with a qualified staff member. A Select drop-down menu displays, allowing the specific staff member to be selected.
- **Shift Swap With:** Select this option if a Shift Swap has been discussed with a qualified staff member. A Select drop-down menu displays, allowing the specific staff member and shift to be selected.

4. For Give Shift to and Shift Swap With, a Select Employee field displays. Select the field to view a list of eligible employees.

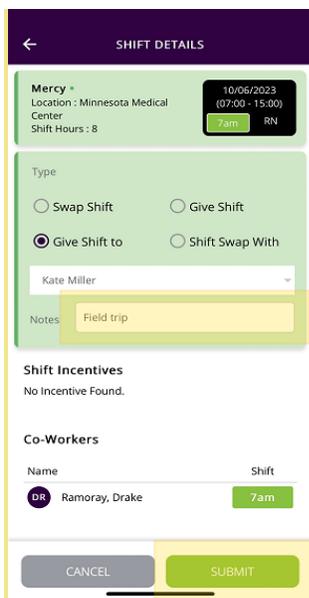


5. Select the plus button next to the desired employee.



6. Add a note, if needed, then select the Submit button.

NOTE: For Give Shift to and Shift Swap With submissions, the request is sent to the employee specified in the respective field. The other employee must follow the [Accept a Shift Swap](#) process before your manager can approve the request. For Swap Shift and Give Shift submissions, the shift is posted in the Shift Swap Center. You will receive a notification when a swap is proposed.



7. A black (icon) dot displays below the date on the Calendar screen. Tap the date to

view the shift swap status (ribbon icon), as outlined below.

- **Purple:** Shift Swap Requested: Indicates a staff member has initiated a shift swap or shift give and is awaiting a co-worker's acceptance. Automatic with the Shift Swap process.
- **Yellow:** Shift Swap Pending: Indicates two staff members agreed to a shift swap or shift give and the request is pending manager approval. Automatic with the Shift Swap process.
- **Green:** Shift Swap Approved: Indicates two staff members agreed to a shift swap or shift give and a manager has approved the request. Automatic with the Shift Swap process.
- **Red:** Shift Swap Denied: Indicates two staff members agreed to a shift swap or shift give and a manager denied the request. Automatic with the Shift Swap process.

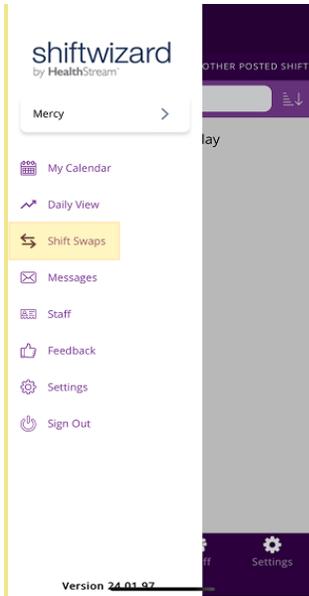
NOTE: You are still responsible for the shift until a manager has given approval.



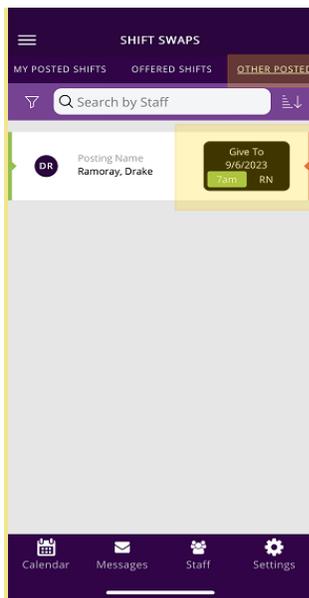
Accept a Shift Swap

The staff member accepting a shift must follow the steps below before a manager can approve the swap request.

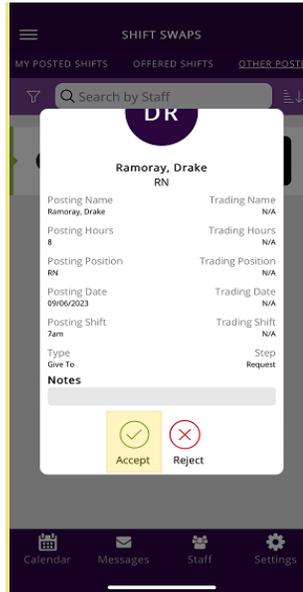
1. Select the Menu (hamburger) button in the top left corner.
2. Select Shift Swaps. The Shift Swap Center loads displaying the My Posted Shifts tab.



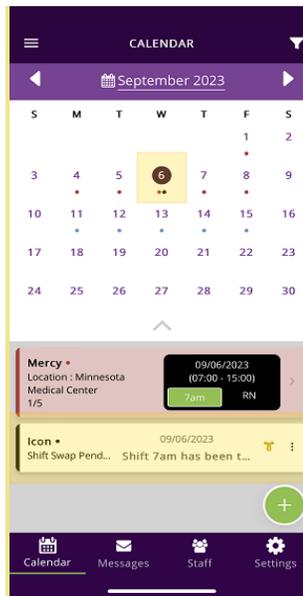
3. Select the Other Posted Shifts tab, then select the shift being accepted. A pop-up window displays the shift swap details.



4. Select the Accept button. The shift swap is sent to your manager for approval and the Shift Swap screen reloads.



5. A black (icon) dot displays below the date on the Calendar screen. Tap the yellow ribbon icon to view the shift swap details.

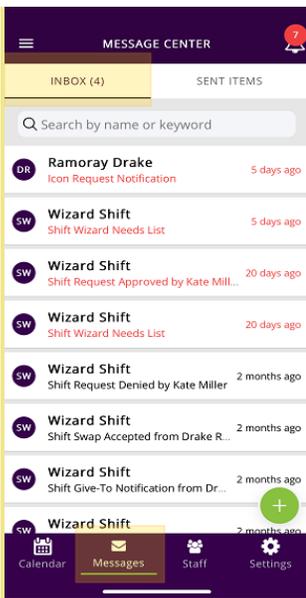


Message Center

The Message Center allows staff members to send messages about shifts directly through the ShiftWizard app. Messages can be sent by email, voice call, text message, notification, or as a ShiftWizard Application Message, which can be viewed by accessing ShiftWizard on a desktop web browser or through the mobile app.

Navigate to the Message Center by selecting the Messages button at the bottom of the screen, or select the hamburger button > Messages. By default, the Inbox tab displays.

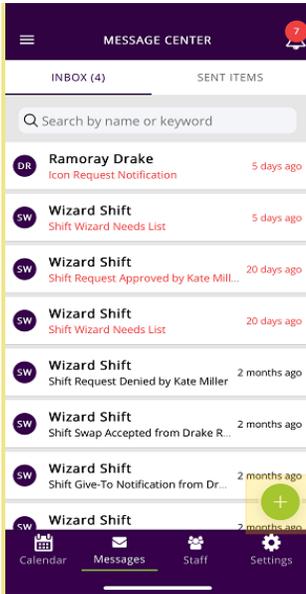
NOTE: The Inbox tab displays the number of unread messages in parenthesis. Unread messages display with the Subject and Date fields in red font.



Send a Message

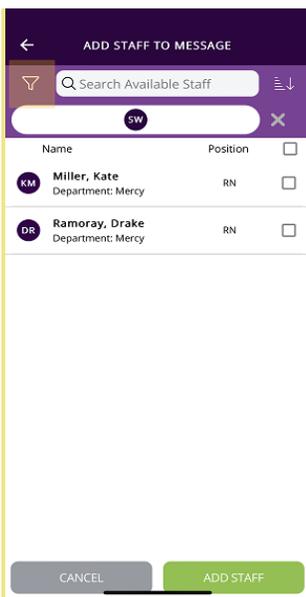
Send a message about shifts directly through the ShiftWizard app. Messages can be sent by email, voice call, text message, notification, or as a ShiftWizard Application Message, which can be viewed by accessing ShiftWizard on a desktop web browser or through the mobile app.

1. From the Message Center, select the green plus button.

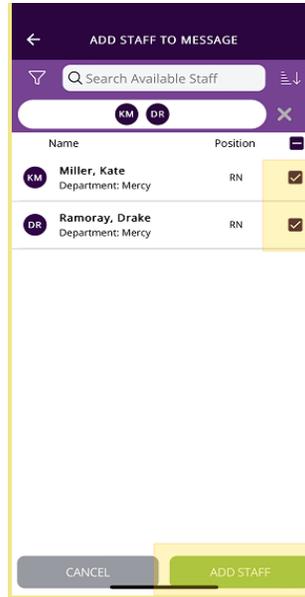


2. Type in the Search Available Staff text box at the top of the screen or select the [Filter](#) button.

NOTE: By default, only staff in your current department display.

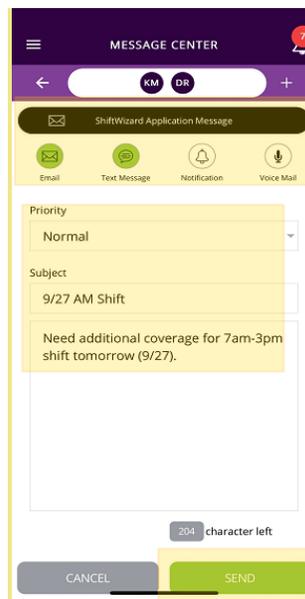


3. Check the checkboxes next to the desired staff members, then select the Add Staff button.



4. Select at least one message type at the top of the window. Multiple message types can be selected at once.

NOTE: Additional fields will display, depending on the message types chosen.



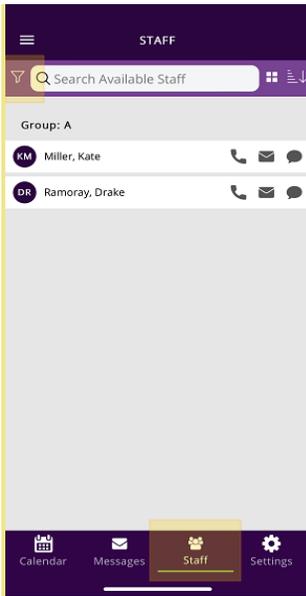
5. Fill out the message fields, as desired, then select the Send button.
6. Select the OK button on the confirmation pop-up message.

Staff

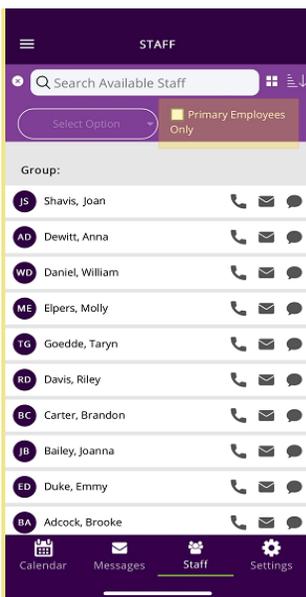
The Staff screen allows users to call or message other employees using the ShiftWizard Message Center.

NOTE: The contact options available on this screen may vary based on your organization's configuration.

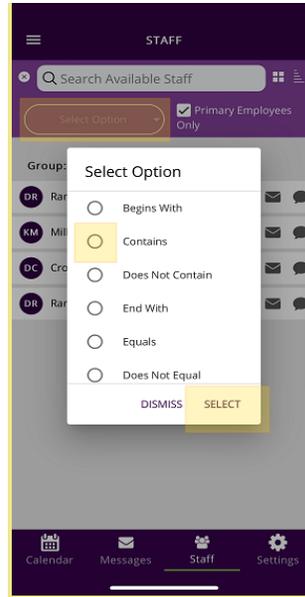
1. Select the Staff button at the bottom of the screen. The Staff screen displays Primary Employees in the current department.



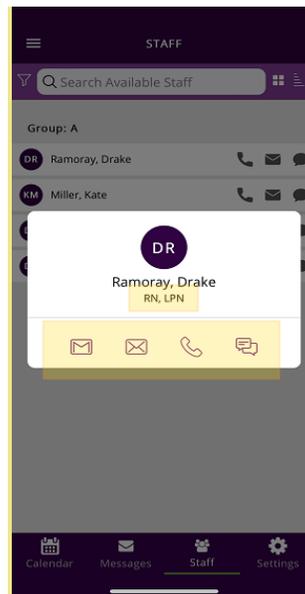
2. Select the Filter button in the top left corner, then uncheck the Primary Employees Only checkbox to view all staff members authorized to work in the current department (primary and secondary employees).



3. Select the Select Option drop-down menu to select a search filter.



4. Select the desired staff member's name. A pop-up message displays the positions the staff member has permission to work for the current department.



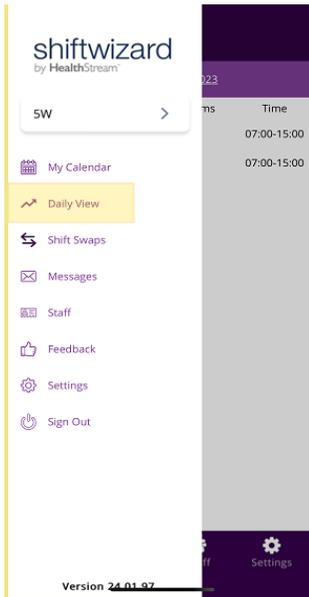
5. Select a button at the bottom of the pop-up window to call the staff member or send a ShiftWizard application message, email, or text message through the **Message Center**.

NEXT: View all staff working in the department today from the "Daily View" on the next page screen.

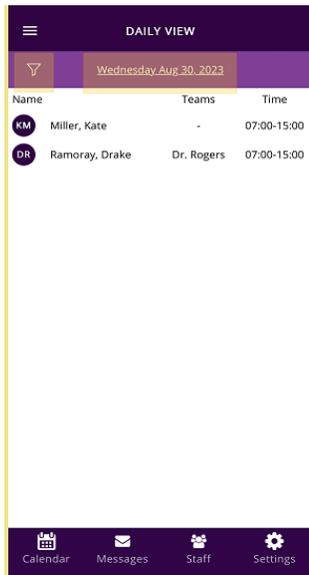
Daily View

View all staff working in the department on a selected day from the Daily View screen.

1. Select the menu (hamburger) button in the top left corner.
2. Select Daily View. The screen reloads with the selected department information.



3. Select the Filter button to filter or group staff members by Team, Time, or Name.

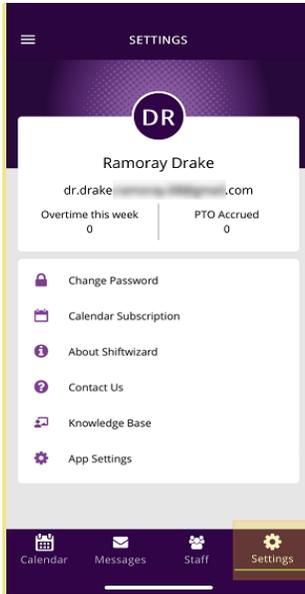


4. Select the Date to view the staff members working in the department on a different date.

Settings

The Settings screen provides access to user-specific settings within ShiftWizard.

1. Select the Settings button in the bottom right corner.



2. Select an option from the menu to change your ShiftWizard password, sync your Shifts and Icons in your ShiftWizard mobile app with your personal calendar apps, or access the mobile app knowledge base.