

# Dynamic Calendar

## Staff Member Guide




Dynamic Calendar is a central point of organization for staff members, showing visits and opportunities for each person individually .

## Dynamic Calendar Is Mobile-First!

First off, the new **Dynamic Calendar** is mobile friendly. It looks great on a smartphone, a tablet or a laptop. No more awkward scrolling to see the days of the week or the weeks of the month.

## Personal Calendar

### What a Staff Member Sees

Staff members always see their personal Calendar when they access the **Dynamic Calendar** by clicking or tapping on the **Calendar**  button.

### Personal Calendar with Capacity Display

With the **Dynamic Calendar**, any staff member will be able to look at his or her individual personal **Calendar** with an improved design custom-made for mobile devices.


### *Capacity Display*

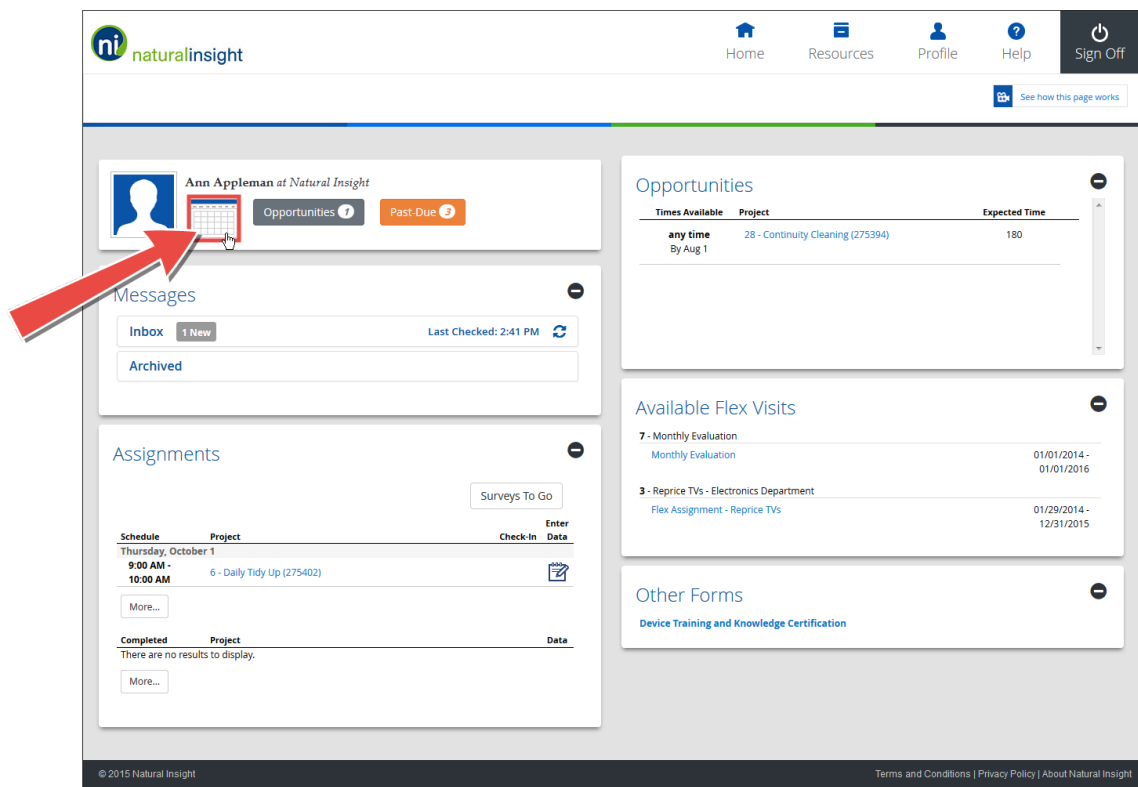
Staff members will immediately know if they are at capacity or not! With **Hours Management** activated, each staff member will have a daily view of how many hours she is available to work per day and she cannot go over the allotted maximum.

Ask your manager if your version of Natural Insight uses **Hours Management** so you are aware of whether **Capacity Display** is active within your personal **Calendar**.

# Personal Calendar

The personal **Calendar** for a staff member shows his scheduled and completed visits.

A staff member accesses his personal **Calendar** via the **Calendar**  button within the *Profile* pod on his **Home** page.



## Capacity Display

The staff member's personal **Calendar** in the weekly and daily view broadcasts the staff member's **Capacity Display** for each day. **Capacity Display** is the ratio of a staff member's daily visit hours over his *Maximum Hours (Day)*. *Maximum Hours (Day)* is a cap on the number of hours a staff member is allowed to work per day. The *Maximum Hours (Day)* setting is available when **Hours Management** is activated for your Natural Insight account.

Ask your manager if your version of Natural Insight uses **Hours Management** so you are aware of whether **Capacity Display** is active within your personal **Calendar**.

The daily **Capacity Display** ratio is calculated in one of three ways depending on whether the visit(s) of the day have been completed or not.

1. If all visit(s) have been completed for the day, **Capacity Display** equals:

$$\text{total completed visit hours for the day} / \text{Maximum Hours (Day)}$$

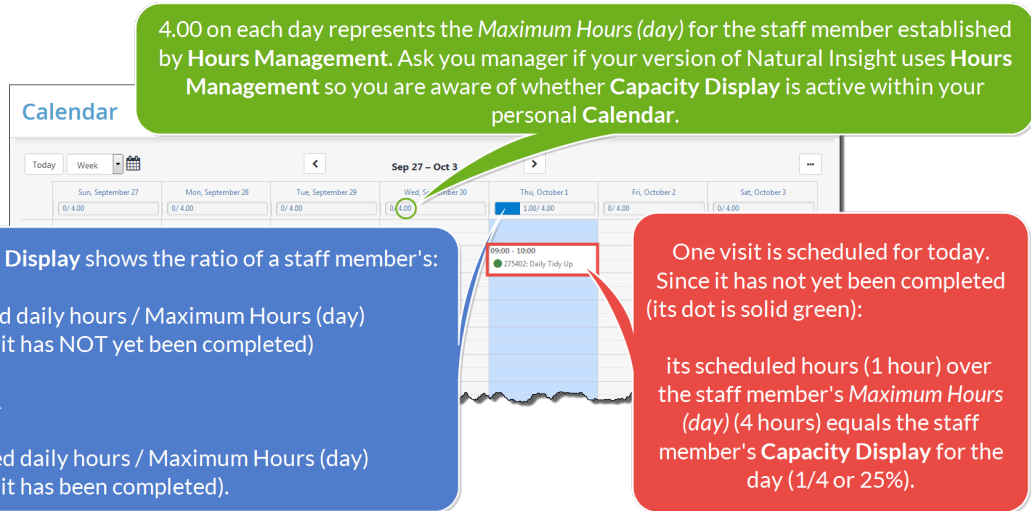
2. If all visit(s) have not been completed for the day, **Capacity Display** equals:

$$\text{total scheduled visit hours for the day} / \text{Maximum Hours (Day)}$$

3. If some visit(s) for the day are completed while others are not, **Capacity Display** equals:

$$\frac{\text{the total of completed visit hours for the day (for completed visits)} + \text{the total of scheduled visit hours for the day (for scheduled visits)}}{\text{Maximum Hours (Day)}}$$

For example, in the next screenshot, a staff member is scheduled for a one hour visit on Thursday, October 1, 2015. Since the visit has not yet been completed, the visit's scheduled hours - 1 hour - are used in the calculation of the daily **Capacity Display** October 1, 2015. The staff member's *Maximum Hours (Day)* happens to be 4 hours. As a result, the daily **Capacity Display** for October 1, 2015 is 1/4 or 25%.



4.00 on each day represents the *Maximum Hours (day)* for the staff member established by **Hours Management**. Ask you manager if your version of Natural Insight uses **Hours Management** so you are aware of whether **Capacity Display** is active within your personal **Calendar**.

**Capacity Display** shows the ratio of a staff member's: scheduled daily hours / *Maximum Hours (day)* (if the visit has NOT yet been completed) AND/OR completed daily hours / *Maximum Hours (day)* (if the visit has been completed).

One visit is scheduled for today. Since it has not yet been completed (its dot is solid green): its scheduled hours (1 hour) over the staff member's *Maximum Hours (day)* (4 hours) equals the staff member's **Capacity Display** for the day (1/4 or 25%).

### Weekly and Daily Mobile View of Capacity Display



Daily Capacity Display in weekly view

Daily Capacity Display in daily view

**Capacity Display** is a useful visual indicator to the staff member of the staff member's capacity - how many hours a staff member can work in a day. **Hours Management** allows or prevents the staff member from scheduling additional visits for the day based upon his **Capacity Display** ratio. Once a staff member has reached the *Maximum Hours (Day)* cap, **Hours Management** prevents the staff member from scheduling visits.

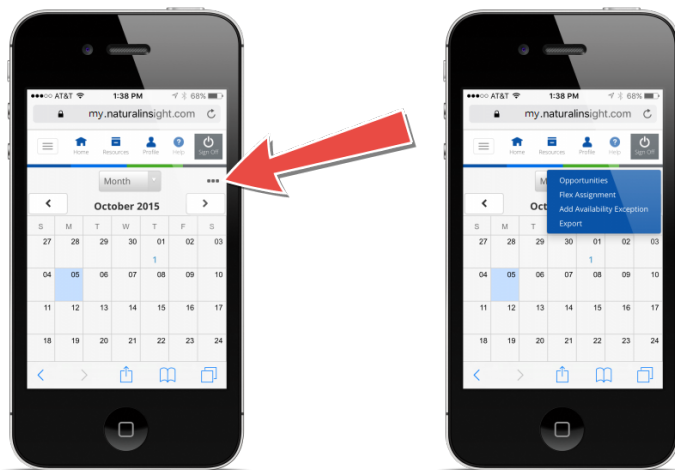
A staff member is not allowed to surpass his *Maximum Hours (Day)* when scheduling new visits. In other words, if a staff member's daily **Capacity Display** is 100%, he has reached capacity for the day and cannot schedule additional visits for that day.

However, a staff member's manager can always override the staff member's *Maximum Hours (Day)* cap and schedule the staff member for a visit even if the added visit hours would surpass the staff member's *Maximum Hours (Day)* cap.

## Personal Calendar Menu

Staff members access options by tapping on the **Personal Calendar Menu**  button.

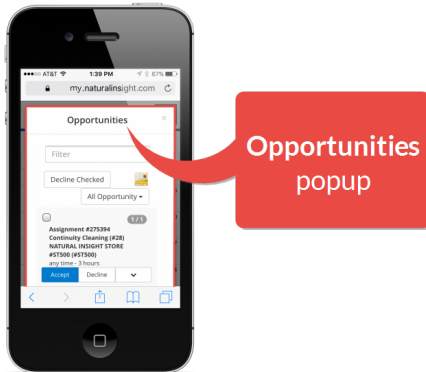
### Personal Calendar Menu Options in Monthly and Weekly View



From the personal **Calendar's** monthly and weekly views, the available options are:

» Opportunities

View and schedule opportunities via the **Opportunities** popup.



» Flex Assignments

View and schedule available **Flex Assignments** via the **Flex Visit** popup.

» Add Availability Exception

Add an **Availability Exception** - a reminder to the staff member of days or times within a day when the staff member is not available (such as *Vacation* or *Dentist Appointment*) - to the **Calendar**.

**Add Availability Exception** ✕

All Day:

Start Date:

End Date:

Name:

Availability Exception Tag:

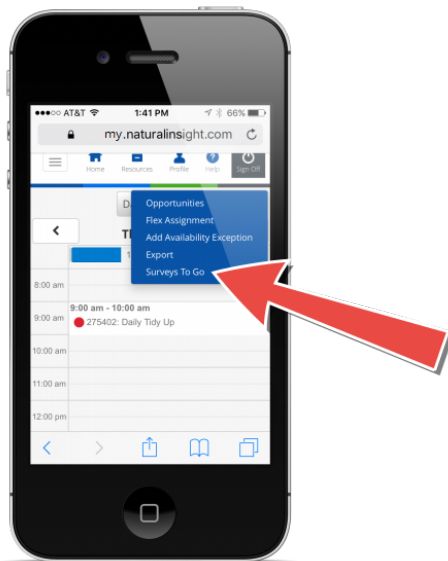
**NOTE:** An **Availability Exception** has no bearing upon a staff member's ability to accept or schedule work. It is only a visual reminder for the staff member.

» Export

Export a PDF of the **Calendar** that the staff member can download or print.

**Personal Calendar Menu** ☰ **Options in Daily View**

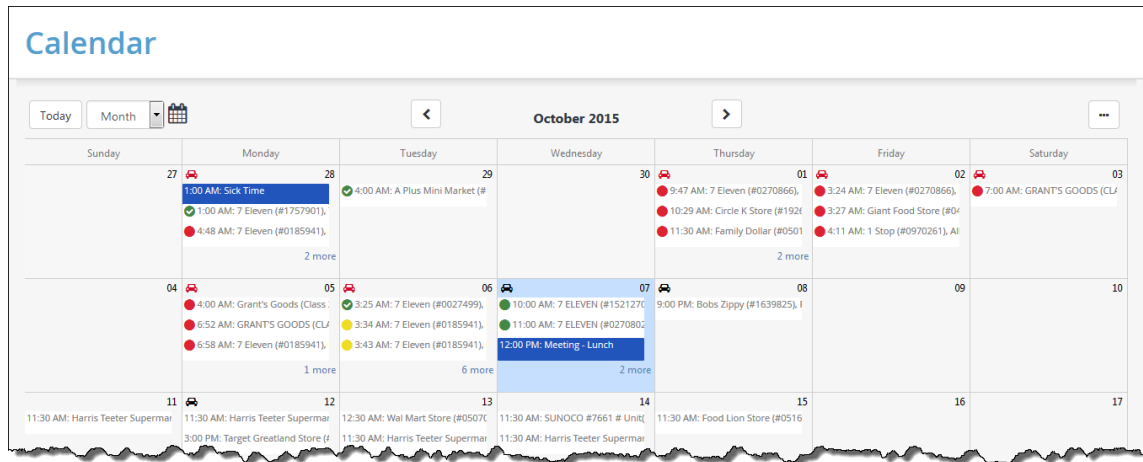
From the personal **Calendar**'s daily view, the available options are the same as in the monthly and weekly view **PLUS** the **Surveys To Go** option is added. The **Surveys To Go** button allows a staff member to download (when an Internet connection is present) the surveys for scheduled visits for *the day* and then access these surveys throughout the day even if no Internet connection is present.





## Personal Calendar Legend

Several colored icons provide you with information about the items displayed on the personal Calendar.

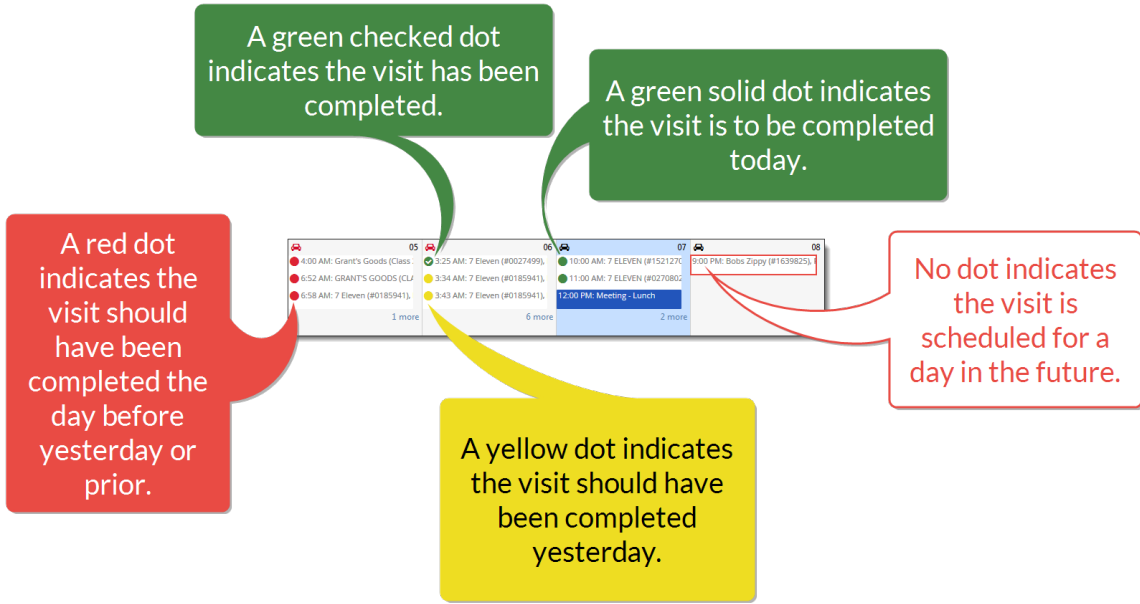


## Visit Legend

When visits are listed on the personal Calendar, a staff member may see one of the following indicators:

- A green solid dot indicates a visit is to be completed today.
- A green checked dot indicates that a visit has been completed - i.e., the visit's survey has been submitted.
- A yellow dot indicates that the visit should have been completed yesterday.
- A red dot indicates that the visit should have been completed the day before yesterday or prior.

No dot indicates that the visit is scheduled for a day in the future - i.e., tomorrow or beyond.



A green checked dot indicates the visit has been completed.

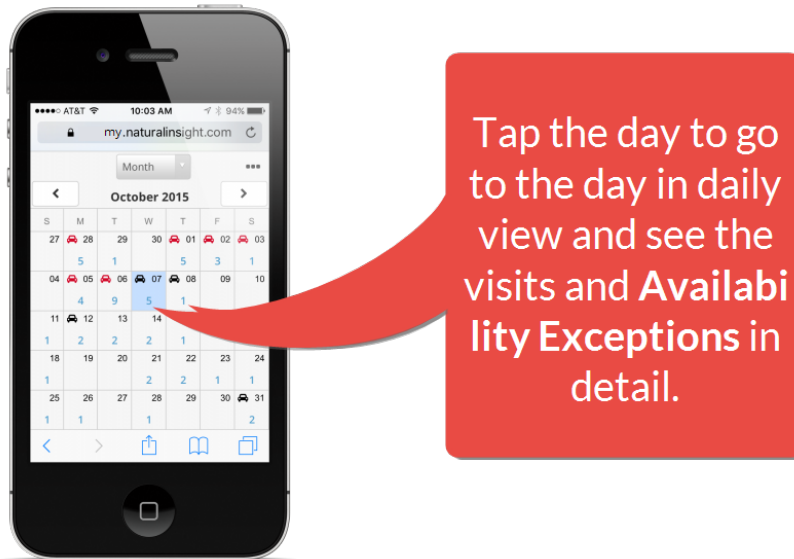
A green solid dot indicates the visit is to be completed today.

A red dot indicates the visit should have been completed the day before yesterday or prior.

A yellow dot indicates the visit should have been completed yesterday.

No dot indicates the visit is scheduled for a day in the future.

In mobile monthly view, the staff member will not see colored visit indicators due to limited screen real estate. Instead, the staff member will see the number of visits plus **Availability Exceptions** for that day in blue.



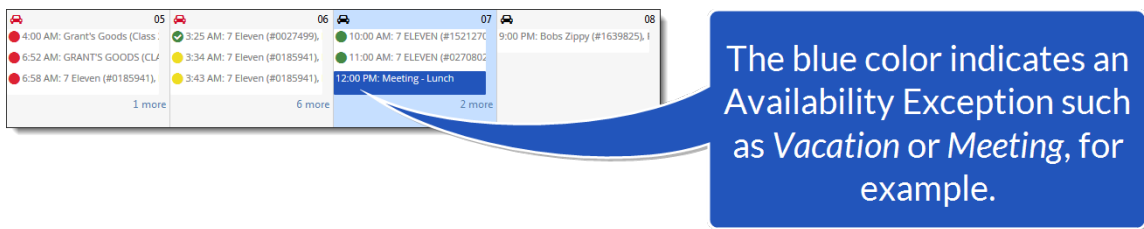
Tap the day to go to the day in daily view and see the visits and **Availability Exceptions** in detail.

Tapping this number opens the selected day in daily view where the staff member can easily access each visit and **Availability Exception** as well as the **Routing** button and the **Capacity Display** for the day.




### Availability Exception Indicator


An **Availability Exception** such as *Vacation*, *Meeting* etc. will be listed in blue.

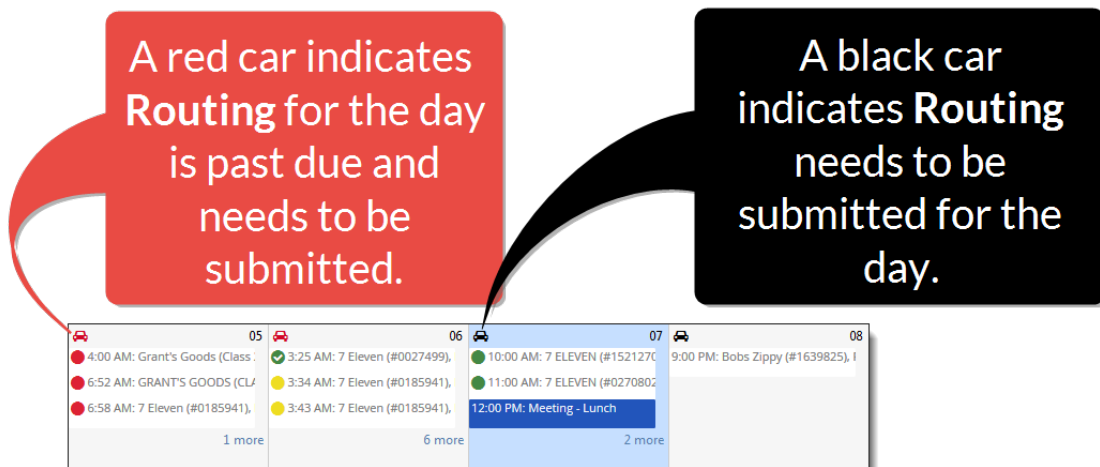


### Routing Indicators

If **Routing** is available for a visit on a particular day, the staff member will see a **Routing** button on a **Calendar** day in one of two colors:

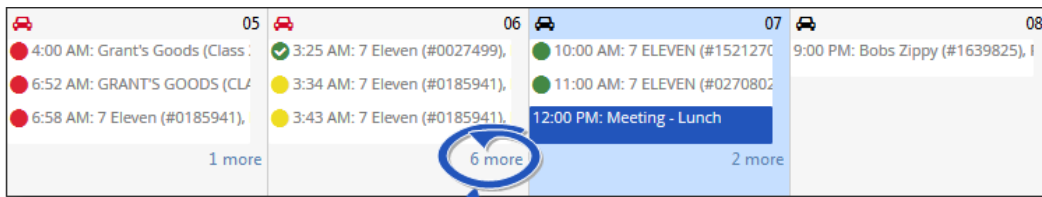
 The black car button indicates that **Routing** needs to be submitted once the visits for the day are completed. When the black car button is tapped or clicked, the **Routing** popup with map displays with turn-by-turn directions as well as the interface to submit **Routing** for the day.

 A red car button indicates that **Routing** is past due and needs to be submitted for the day. Click or tap the red **Routing** button to open the **Routing** popup and submit **Routing** for the day.



### More Assignments Indicator

If more visits exist that are not viewable on a calendar day within the monthly or weekly view of the personal **Calendar** due to space limitations, clicking or tapping on the **more** button will take the staff member to the daily view of the **Calendar** for that day in which all visits can be viewed in detail.



Clicking or tapping the **more** button will take the staff member to the daily view of the day in order to see all visits of the day.

### Calendar Views

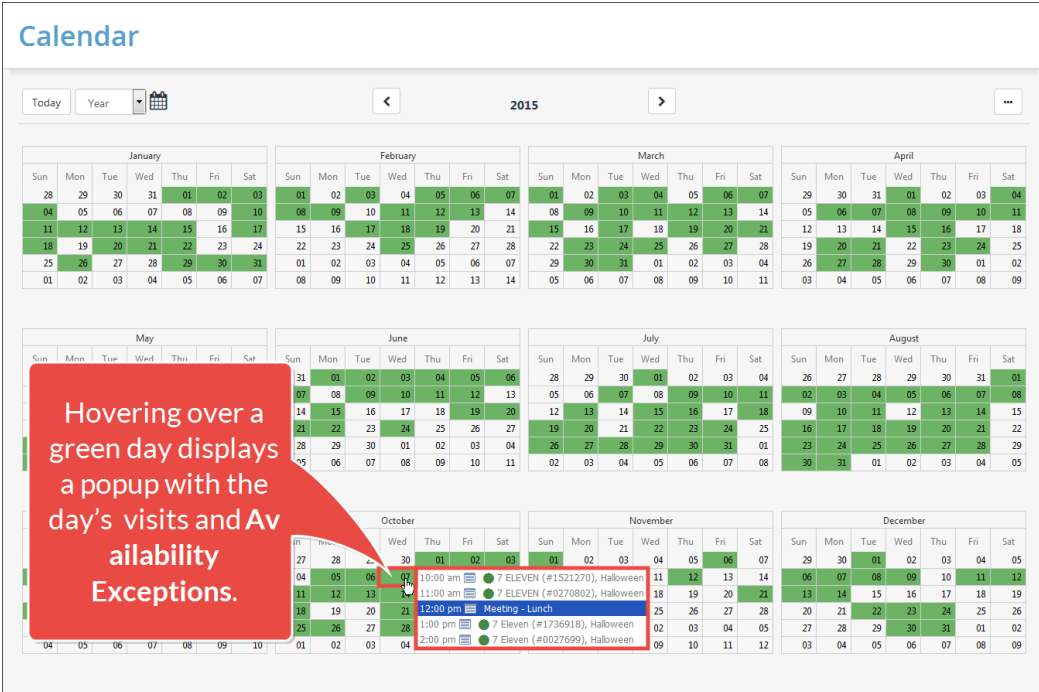
The personal **Calendar** offers three views on smartphones:

1. Daily
2. Weekly
3. Monthly

Four views are available on other devices such as tablets and laptops:

1. Daily
2. Weekly
3. Monthly
4. Yearly

The yearly view displays each day on which one or more visits exists as green. Hovering over a green day displays a popup with the day's visits and **Availability Exceptions**.



Clicking on the green day in the yearly view will open the day in daily view.