API Staffing and Scheduling Class

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API ROLES

There are different types of access to TASS (Time and Attendance Staff Scheduling). These are called ROLES.

Time and Attendance Roles

Request from your HR representative who is the liaison with Corporate Payroll. Completion of an online class is required.

Approving Supervisor: Approve, modify, and approve employee timecards. Will receive email notifications on expiring licenses (if they are entered in API). Access to all time and attendance reports.

Editing Supervisor: Mostly the same as an approver, but can not approve the timecards.

TA Reports Only: Access to time and attendance reports but can not modify or approve timecards.

Staffing and Scheduling Roles

Request by sending an email to apiresourcegroup@duke.edu

Supervisor Manager: View and modify schedules. Will see true absence codes on schedule (ie, FMLA and PTO will be visible). Can approve PTO requests (even without time and attendance access). Has access to all SS reports, including attendance reports. Can enter and update licenses. Is also given Schedule maintenance access to have access to the Current Staffing Overview screen. Publishes the final schedule.

Scheduler: View and modify schedule. Absence codes appear as OFF. Can see PTO requests, but can not approve them. Can create and modify schedules, but can not publish them. Has access to all schedule reports, but not attendance reports.

Schedule Maintenance: Can view and modify the schedule on the main schedule screen or the Current Staffing Overview screen. Enters schedule changes such as call outs (can enter the PTO code), floats, and trades. Has access to daily roster reports only. Note: can only float staff to and from departments the person has access to. If a float is needed and one does not have access, the staffing office can enter the float.

Schedule Maintenance Reports Only: Access to only daily rosters, 4 day roster and 7 day roster reports

SS Reports Only: Access to all staffing and scheduling reports, including attendance reports. Can not update the schedules.

SS License Editor: Can add and update licenses on employees and run reports related to licenses.

EdTrack Roles:

After completing the online class, submit the form to request access. The form is embedded in the online class. The request is processed by CEPD.

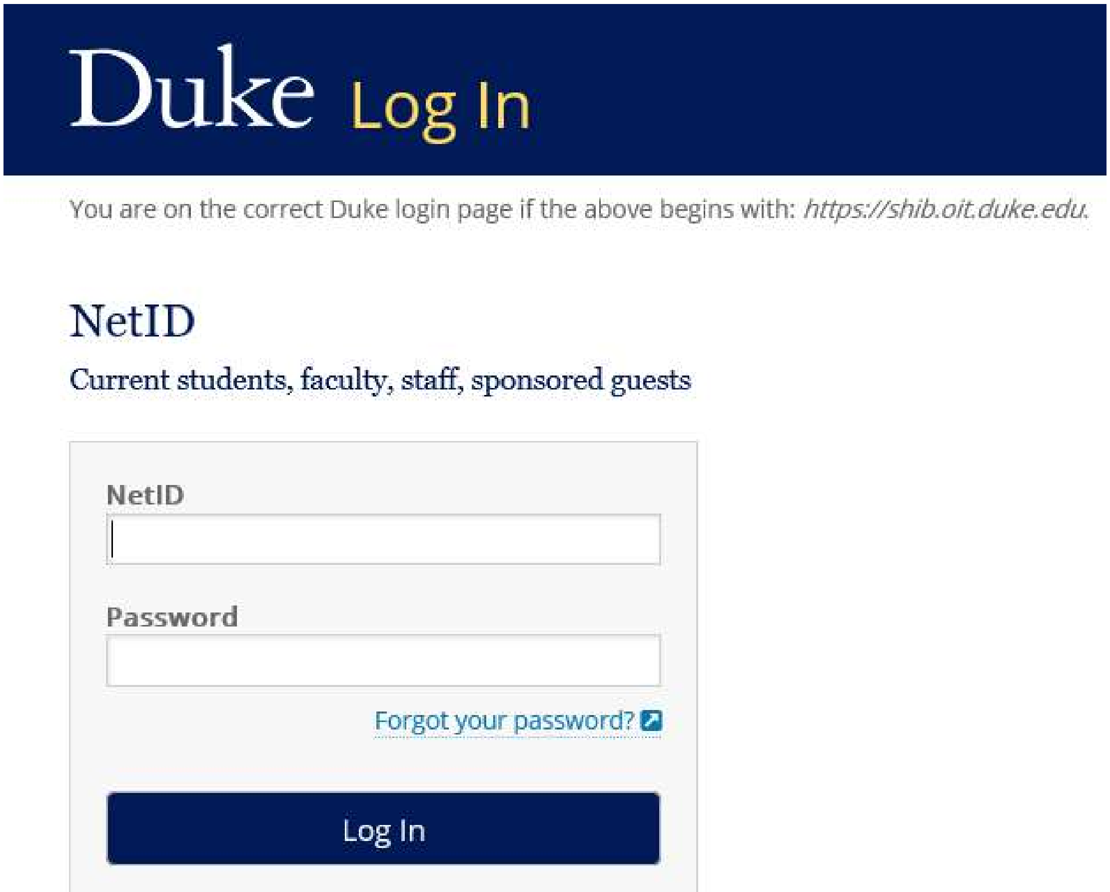
ED Manager: Can create and update attendance for local classes, such as staff meetings and inservices. Access to all EdTrack reports.

ED Reports Only: Access to all EdTrack reports.

Log In

Links are available under Duke@Work, facility intranet pages or by going to time.oit.duke.edu

The links will take you to the familiar Duke log in page (this is actually called Shibboleth)



User your netid and password to log in.

What you see on the Home screen will depend on what ROLES you have, so don't be alarmed if your page looks different than a coworkers.

ONE TIME TASK – Set your preferences

Setting a default organization unit or schedule group means that you won't have to type this information in every time you want to open a schedule or run a report. The information will default. If you transfer to another department, you will have to update the information yourself. It doesn't update just because your employee record changes.

You can overwrite the default if you have access to multiple areas.

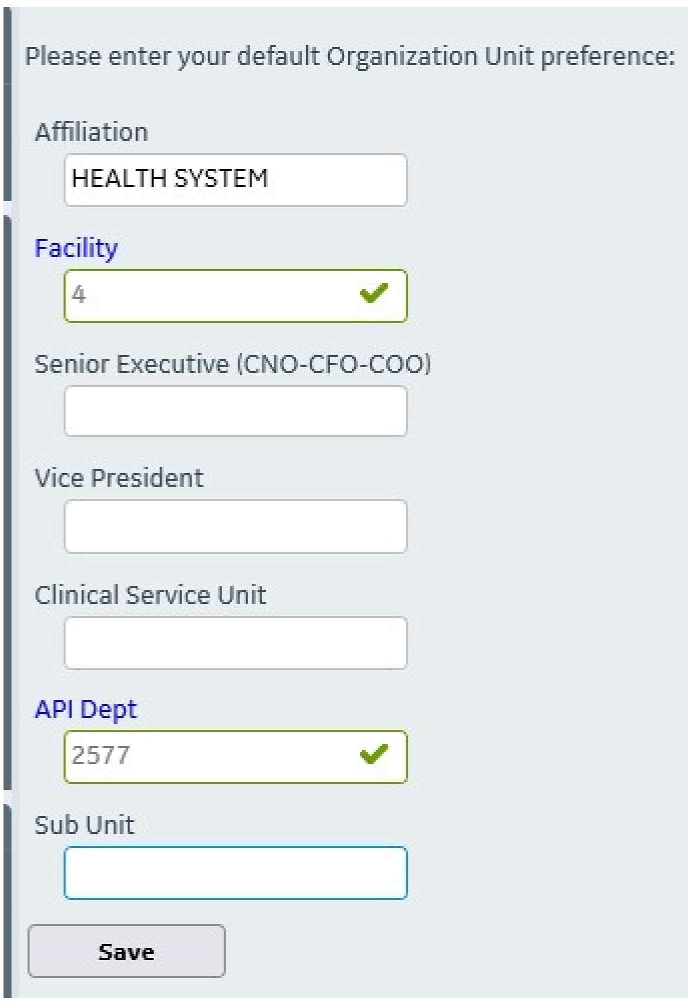
Go to Preferences>My Preferences>Default Organization Unit

Enter your Facility.

1=DUH 4=DPC 7=PRMO 20=Corporate 21=HomeCare&Hospice

26=Clinical Labs 50=Duke Regional 51=AHS/DASC 60=Duke Raleigh

Enter your 4 digit API department number



If you don't know you department number, you can search using the list on the far right OR you can look at your own timecard or the timecard of one of your employees to find the number.

All the other fields can be left blank.

Click SAVE

If you have access to a schedule group (multiple departments grouped into one schedule or report view), you can set a default schedule group instead.

Go to Preferences>My Preferences>Default Schedule Group

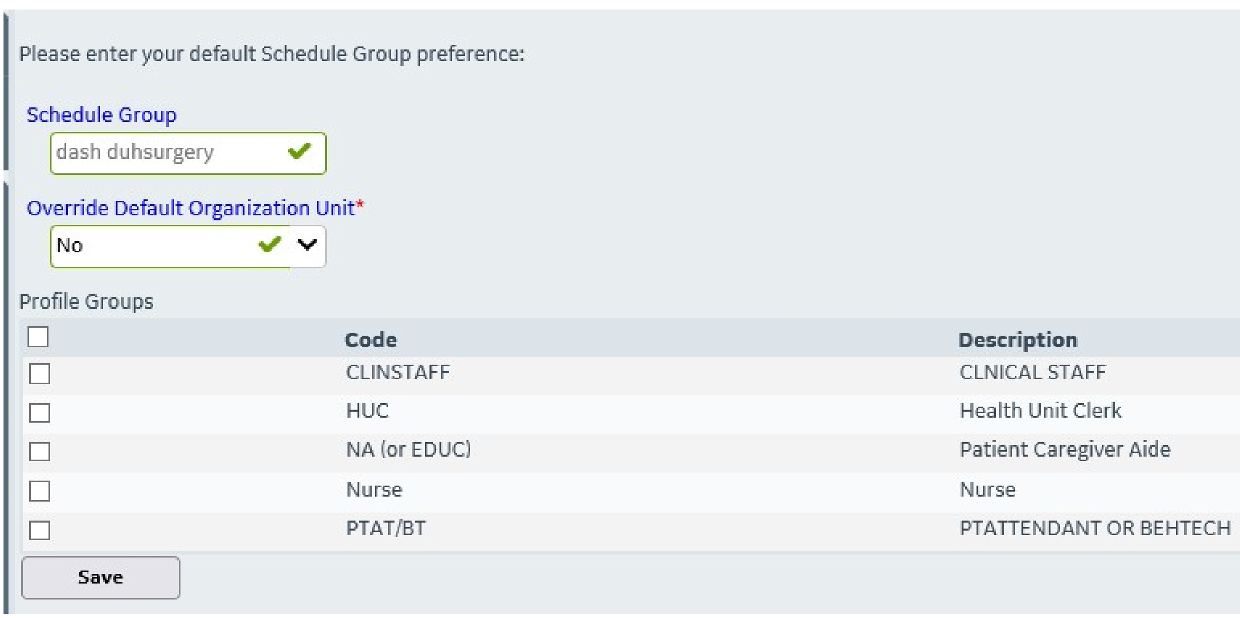
Enter the name of your Schedule Group (a search list is to the right)

If you want to always start with your Schedule Group change Override Default Organization Unit to YES.

If you want to always start with a specific unit and you set that unit up as a default, leave at NO.

If you want to open the schedule of a specific profile, use the check box to select. Note: You can only do this with Schedule Groups, not with single departments.

Click Save.

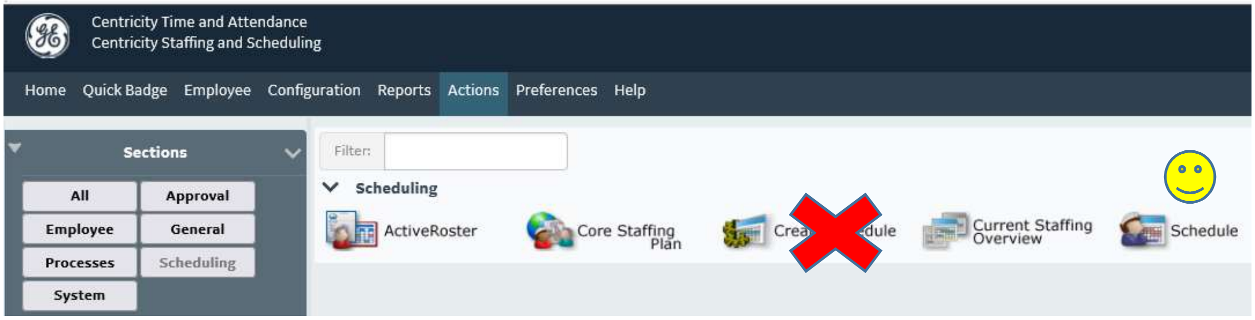


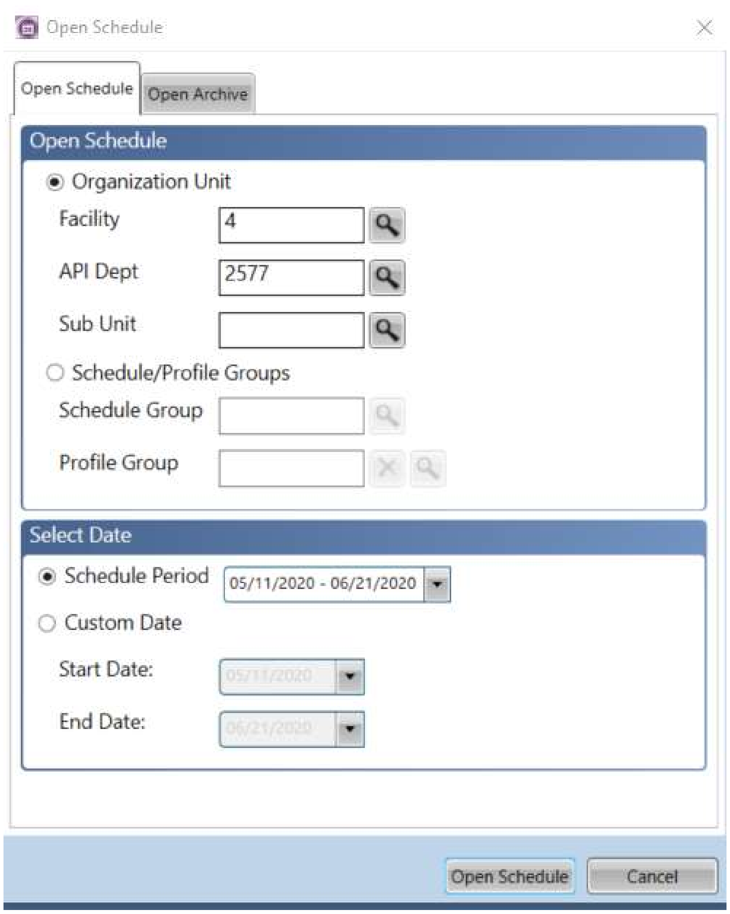
Open a Schedule

Only one browser will open a schedule: Microsoft Edge

You can see if your system is lacking any requirements by going to Actions>System>System Checker. Follow the Prompts and you will be told if anything needs to be installed. You will have to contact your IT support to get your Duke machine updated.

Go to Actions>Scheduling>Schedule (NOT CREATE SCHEDULE)





The Open Schedule Dialogue Box will open. If you set up a default organization unit, it will be filled in automatically. If not, choose your facility/department OR schedule group here.

Select Date: Your facilities schedule periods are defined and can be selected by using the drop down menu. You can also select a specific date using Custom Date. This can be one day to 12 weeks.

Click Open Schedule

For more information on all the Open Schedule options and what they do [API DukeShift User Group Materials | Financial Services | Duke]

TOP:

Name of your employees – to the right you can see various details on your employees. We will customize what you see here.

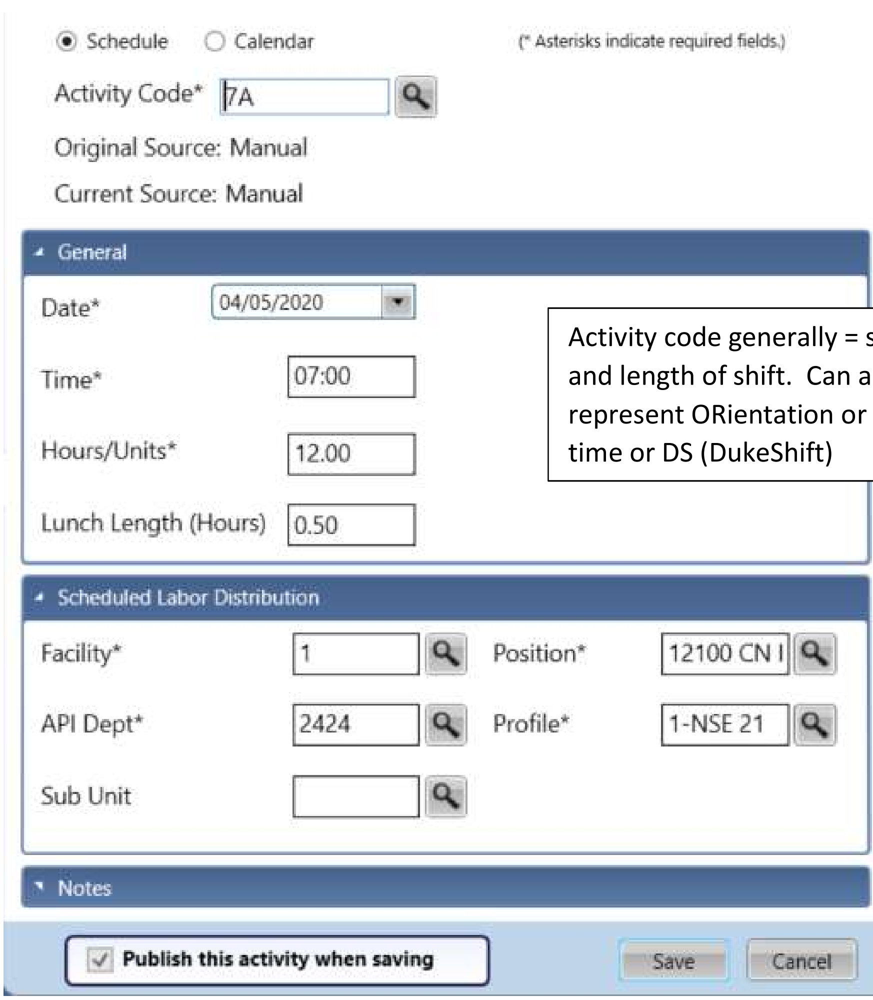
Employees are added and removed into API via the employee SAP download, which generally happens on Fridays. The administrators can not manually enter or remove a primary employee record.

If you have a secondary employee that exists in API in the health system (not PDC) an administrator can create an alternate position in order for that employee to appear on your schedule screen.

Schedule – represented by a combination of activity codes, positions, and profiles to tell you when and in what role a person is working.

Anatomy of a schedule

If you double click on a cell that represents a person (row) and date (column) you see the form that shows you all the parts of the schedule.



Activity code generally = start time and length of shift. Can also represent ORientation or InDirect time or DS (DukeShift)

If you need to float someone, change the facility and department number to the floated department (if you have access). You can also change the position (facdeptjobclass) or profile. For instance, you can change the profile from NSE to CH or NA to PTATT or HUC or CMA to PSA. You want the profile to represent the role being performed by the employee for that shift. Profile does NOT equal job code or job title.

Blue=day   Green = eve   Red = night

The icon next to Ellen is a PTO request

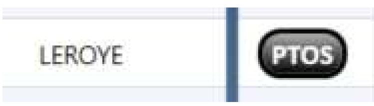
The ED next to Jessica is an EdTrack class enrollment – you can not delete it – they would have to un-enroll form the class

The 0700/6 next to Jessica is lighter than the others. It is unpublished. The darker codes are published.

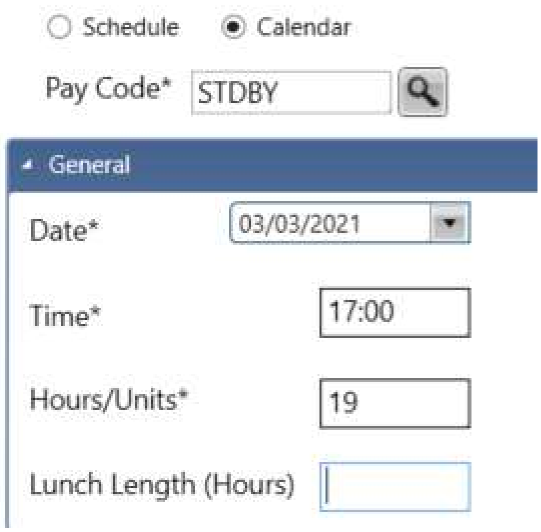
The 0700 = start time and the 6=number of hours in the shift

The heavy line to the left of Mallory's second schedule means this is an alternate schedule – she is scheduled to work BUT in another department. See page 10 to learn how to hide alternate schedules from view.

Approved PTO shows on the time card and the schedule like so



You can also manually add PTO, FML (Supervisor/Manager access required), STDBY or JURY to a schedule by selecting Calendar. Use the magnifying glass to see the list of available PAYCODES. Enter the start time and number of hours, and save.

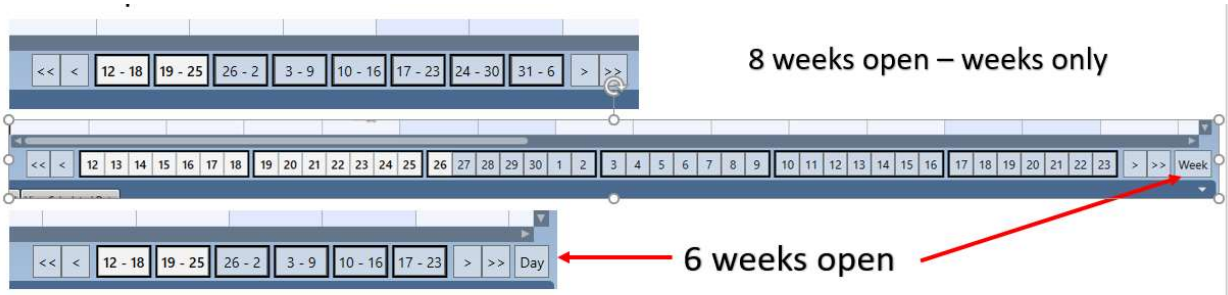


If you need an activity code added or inactivated, contact apiresourcegroup@duke.edu

If you get a new job code in your department your administrator will need to add the new position and put that position in a profile for your department. Otherwise the employees in the new job code can not be scheduled.

Jump to Specific Dates

- Use the new scroll map under the scroll bar to jump to a specific week in the schedule
- The numbers = dates
- Double arrows move by a week
- Single arrow moves by a day
- You can toggle between seeing weeks or days to jump to, if you have 6 weeks or less open



BOTTOM:

Coverage Set – represents how often you look at staffing needs. The most common is DEEN (D 7a-3p, E1 3p-7p, E2 7p-11p, N 11p-7a) but there are many more. Coverage set is not the same as SHIFT. If someone works a 7A (12 hours) shift they provide coverage for D and E1. If someone works 11A (12 hour shift) they provide coverage for .5 of D, E1 and E2.

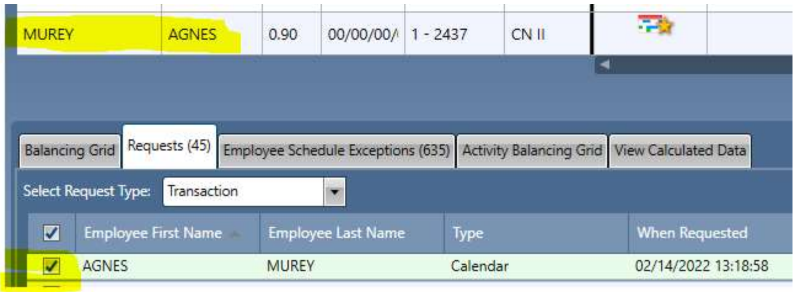
Profiles – allows you to group all the job codes that can perform a role into one. For instance, CNI, CNII, CNIII, CNIV, CNPRN, CNFP, CTL, TRVLRN can all be grouped into NSE. A job code can be in more than one profile. Profiles are not the same as job title. Profiles are the role being performed for the shift. If an RN is at the HUC desk today, they need to be in the HUC profile.

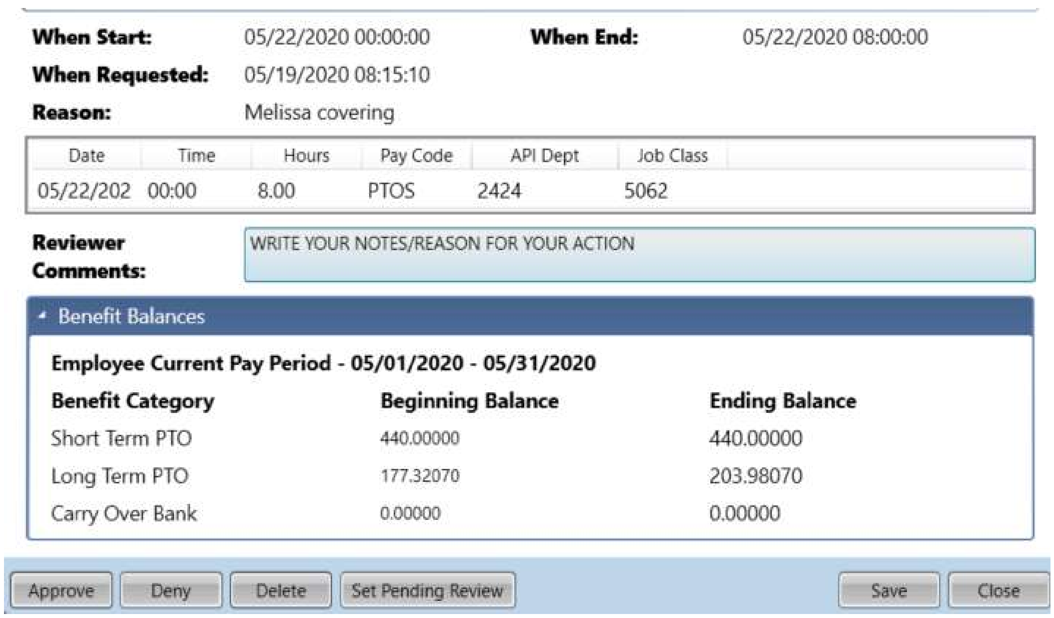
If you need to limit staff to a role and there isn't a job code you can use, an administrator can create a **station**. For instance, only a subset of your RNs may be CHarge. With a charge station you can identify which of the nurses can perform that role. Stations are attached to the profile by an administrator and to the individuals who are allowed to work that profile by the unit scheduler (see page 29).

Balancing Grid – compares your staffing template (which says how much coverage you need for each profile in each coverage period) to your schedule to tell you if you are staffed at target (gray), overstaffed (blue), or understaffed (red). If you do not have a staffing template, all will appear blue. Most inpatient areas have a staffing template.

For more information on changing the numbers on the staffing template, click here API DukeShift User Group Materials | Financial Services | Duke

Requests – Lists in order of receipt the pending PTO requests on the schedule. You can approve/deny the requests from this screen. Double click on a request to see the details. Approved requests will also show on the timecard – you don't have to do double work! If you check the box by an employee's name, the schedule will move to view that employee in that week.





Employee Schedule Exceptions – will alert you to any schedule rules not being met by an individual.

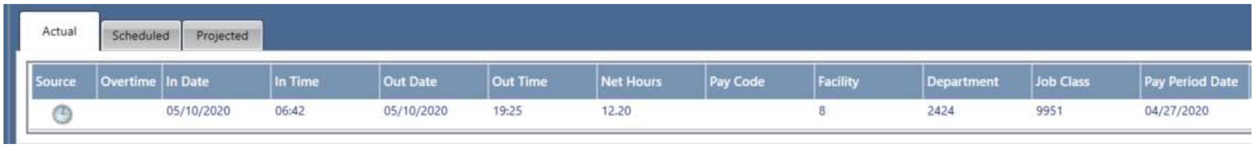
Minimum Approved Hours was not met for the schedule period = not working to their FTE

Position License Requirements not met for employee = the employee's license is expiring before the named date. A grace period allows you to enter the schedule in advance. If no license exists or the grace period has passed you will not be able to enter or update the schedule until the license is up to date in API. See page 29 to learn how to update a license record.

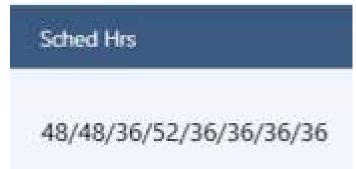
Minimum Weekend schedules not met for the Schedule Period = the employee is not working at least 24 weekend hours in a 4 week period (hospital requirement per policy)

Activity Balancing Grid -- compares your core staffing template (which says how much coverage you need for each profile for a specific activity code) to your schedule to tell you if you are staffed at target (gray), overstaffed (blue), or understaffed (red). If you do not have a core staffing template, all will appear blue. Areas such as ambulatory, procedural, OR, PACU, ED tend to use Activity Balancing Grids.

View Calculated Data – after a shift is complete, highlight the activity code on the top. You will see their swipes under the view calculate data tab. This information is read only – you can not edit it here.



Managing Overtime – API does have the ability to warn you that an individual is projected to be in OT for the week or pay period. However, at Duke we do not use API to calculate payroll – that is actually done in SAP. Therefore, that feature is not currently available to us. You can see that someone is scheduled over 40 hours under the Sched Hrs Column at the top of the schedule screen.



CUSTOM VIEW

Custom views are set by log in – changing your view won't change the view of others with access to the department.

Top

Click on any header in the dark blue to sort by that column.

Right click below the dark blue headers – you can group by Job Code or by None (then sort by Last Name if you want alphabetical). If you have a schedule group open, or you receive many floats, you can group by Home Dist(ribution) aka department. In SAP all employees are entered as Shift 1, so grouping by shift won't do anything.

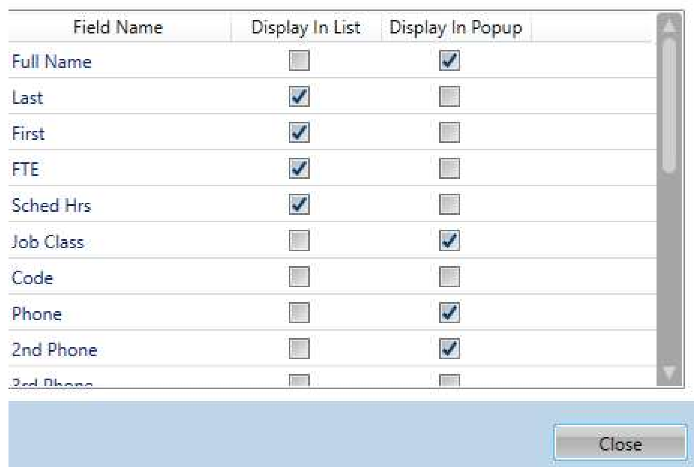
You can also click and drag the employee names into whatever order you want. Some like to put all their charge nurses together. Others like to put all the weekend option staff together.

Right click below the dark blue headers and choose Show/Hide Details. Here you can select which columns you want to see.

Recommended: Last, First, FTE, Scheduled Hours

If you have a lot of floats or DukeShifts, you might want Home Dist. If you aren't grouping by job class, but want to sort or know the job class, choose that.

You can click and drag the dark blue column headers into whatever order you want. You might want FTE next to the name, for instance.



What Else Will Right Click Do?

- Add employee does NOT let you type in a name – it pulls from a list of existing employees and you would need access to them
- Link to Employee – takes you to the employee's time card
- Create Employee Schedule – enter their rotation, if one exists

- Validate Employee Schedule – have system check for licenses, work stretch, etc. Any issues will list under the Employee Schedule Exceptions Tab in Balancing Grid Section
- Add Row Separator – used to say Add Blank Line

Don't get excited that you see an option to ADD Employee. This brings you to a screen where you select from existing employees – it is often used by float pools who are floating staff to a department. Same with Add Row Separator – that is all it will do. You can not type in a name on your schedule – you have to wait for SAP to add your new employees.

There are also many options for creating filters on the schedule. Filters could easily be taught in another class and have been covered at user group meetings. More information on filters can be found here. [API DukeShift User Group Materials | Financial Services | Duke]

Bottom

Under the Balancing Grid tab you can right click and Group by None, Coverage Period, Profile or Organization Unit (aka dept). Once you have selected your grouping, you can click and drag a coverage period or a profile (dark blue) into a new order. You can also click and drag the items under a dark blue header into a new order.

You can decide how you want to see the comparison of your staffing template to your schedule. Right click on the number (the default will be a fraction – what you have on top/what you need on bottom) and go to Format.

Coverage = how many you have

Need = how many your template says you want

Variance = the difference between coverage and need

Using the View Option on the Menu Bar

View>Highlight -- can spot activity codes that meet certain criteria or which codes were entered via self scheduling

View>Schedule Items – if you don't want to see something, uncheck the box. Most common is to hide alternate schedules

View>Coverage Sets – select a different set of coverage periods to view your staffing – a common one would be DN0700 to see in 12 hour coverage blocks.

Ideally after you set up your views to your liking they would remain that way every time you log in. Sadly, however, system updates and upgrades often cause the settings to revert to defaults.

If something is missing from your schedule screen, check the VIEW area. Maybe you are hiding something.

Enter Schedules

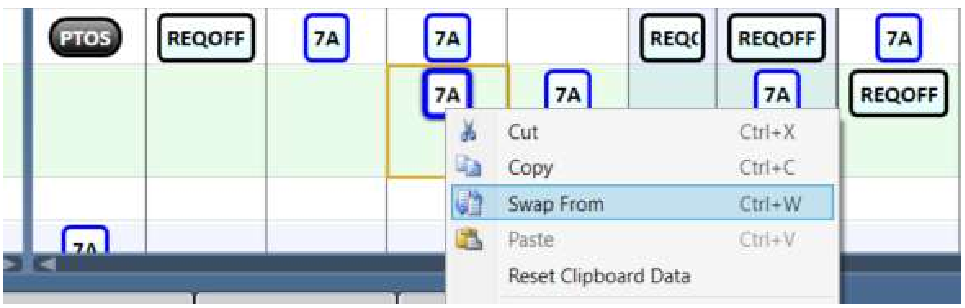
Manual Entry

Add – go to the cell and either double click to fill out the form (see page 6) or if you know the code you want, just type it in directly. Works for Activity Codes (Schedules) and Pay Codes (Calendars). You may need to change the profile when you enter codes in directly, as the default will be chosen.

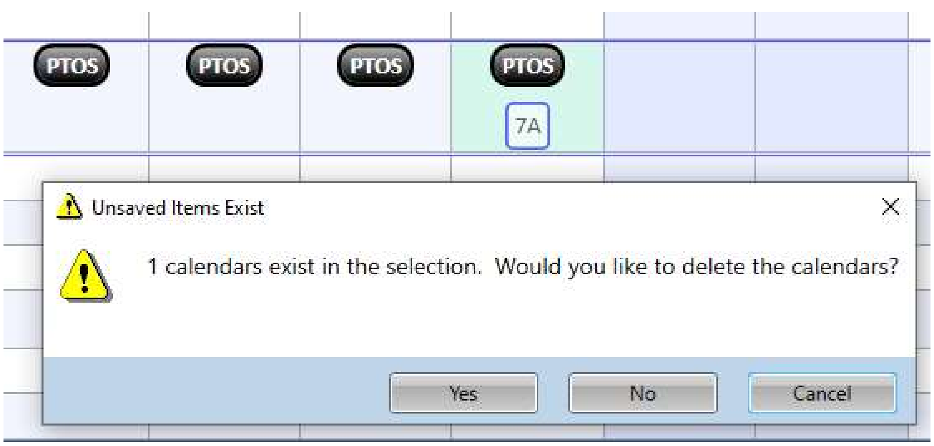
Copy -- click and drag a code to another cell. Remember, you are copying the entire schedule, not just the activity code. This includes the position, profile, any notes you entered. If you try to copy a schedule from an RN to an NA you will get a message that the NA does not have the license required to do work that schedule.

Move – Hold down the SHIFT key and drag to move a schedule to another day

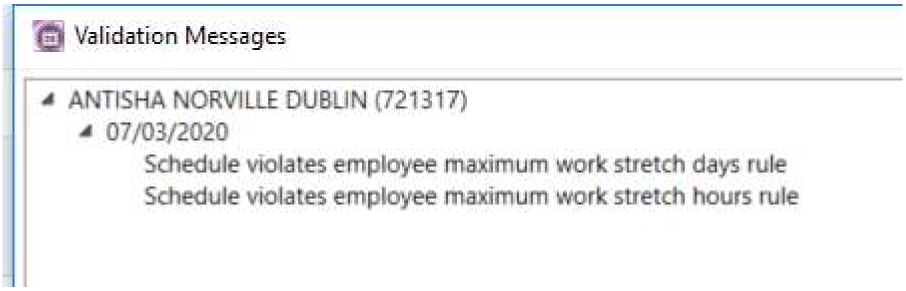
Make A Swap – right click on the code and choose Swap From. Right click on the cell where you want the schedule to go and choose Swap To

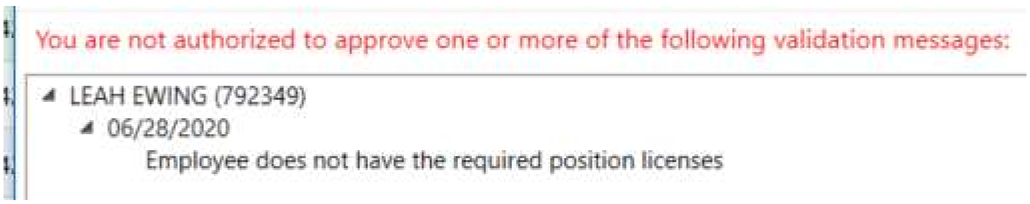


Delete – either right click and choose Delete or click on the code and type the delete key. If there is an activity code and a calendar (aka pay code) on the same date, you will be prompted to confirm if you want to delete the calendar.



Warnings – if you violate any schedule rules, such as exceeding the work stretch of greater than 60 hours in a row, you will get a warning. A scheduler can override all warnings EXCEPT missing position license by clicking Approve. See page 29 to learn how to update a license record.





<u>Rotations</u>

Aka tracks, core schedules or cyclical schedules. This means the individual works the same schedules over a set number of weeks.

Common uses of rotating schedules:

Departments open M-F for a set number of hours

Individuals working weekend option –enter the weekends as a track and fill in other days with either a manual or self scheduled entry

Departments where staff have assigned weekends -- enter the weekends as a track and fill in other days with either a manual or self scheduled entry

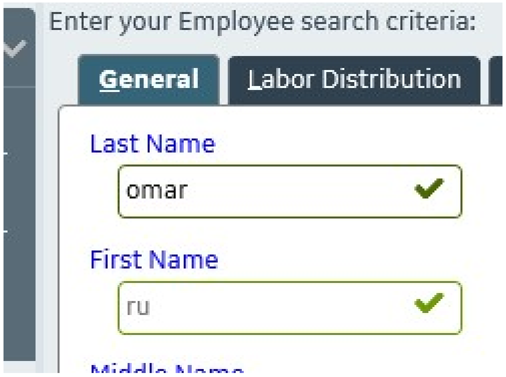
Any department that prefers tracks so that staff can always predict what their schedule is and make plans accordingly – changes can always be made for PTO and trades

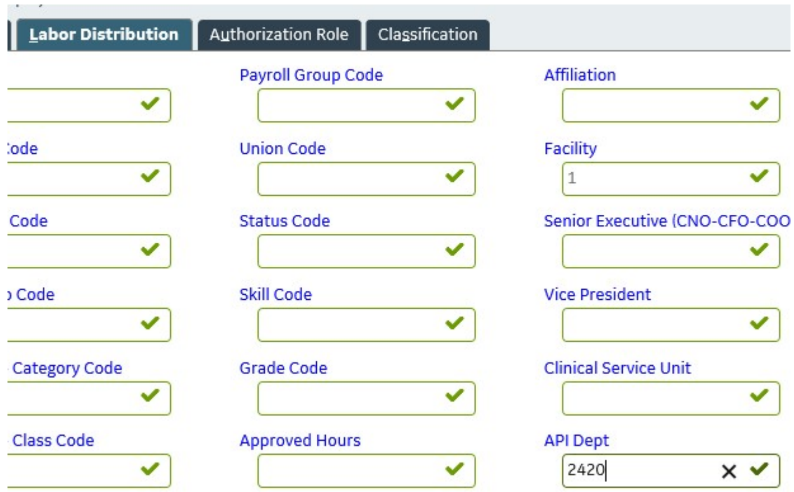
Create a Rotating Schedule for an Individual

Go to Employee

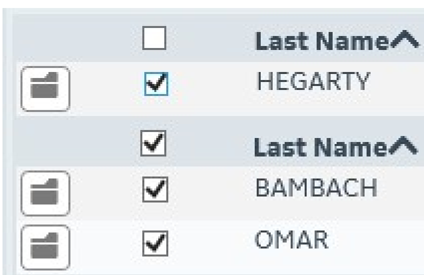
Click Search

You can either search for a specific employee or search for all the employees in your dept



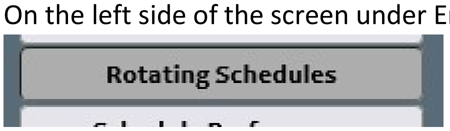


If you chose to search for a group, check the boxes next to the employees for whom you will add a rotation. That way you can scroll through them versus having to research each time.



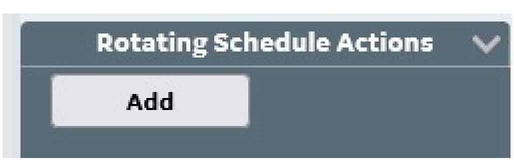
Click the folder on the left side to open the employee.

On the left side of the screen under Employee Sections, click on Rotating Schedules



If this is the first rotation, you will be told that Rotating Schedules do not exist for this employee.

On the left side under Rotating Schedules Actions click ADD



The Effective Date needs to be a MONDAY that starts a schedule period

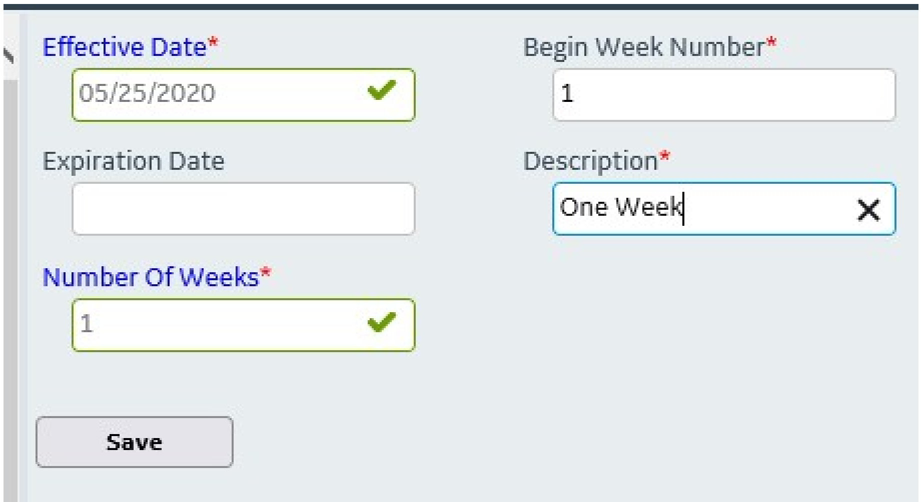
Only enter an expiration date when the rotation is no longer valid.

Number of weeks is how many weeks are in the rotation – NOT how many weeks are in the schedule period. If the staff member works the same thing every week, put 1. If they do the same thing every other week, put 2. If they work a set weekend out of every 4 weeks, put 4.

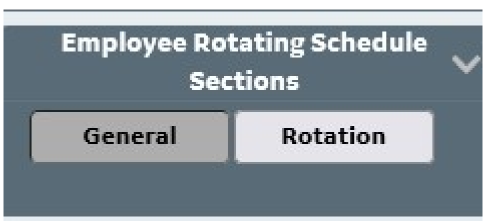
Description is required – give it a name, whatever you want.

Click Save

First example – One Week Rotations



A new button appears on the left under Employee Rotating Schedule Sections – Rotation. Click on Rotation



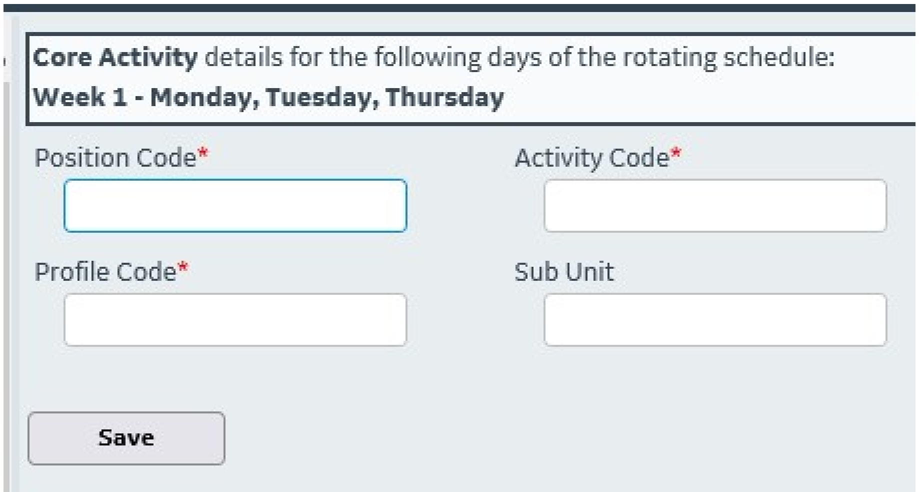
You get a one week calendar.

Highlight the days that the person is working the SAME schedule (if they work one shift Mon/Tue and another on Wed/Thu/Fri, you will complete in two separate steps).

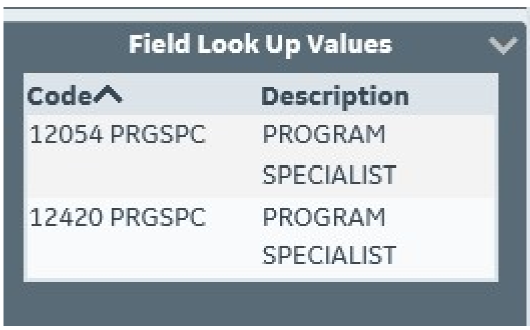
Hold SHIFT to highlight consecutive days and CTRL to highlight non-consecutive days. Monday, Tuesday and Thursday are highlighted below.

On the left under Employe Rotations Schedule Rotation Actions select Add Activity

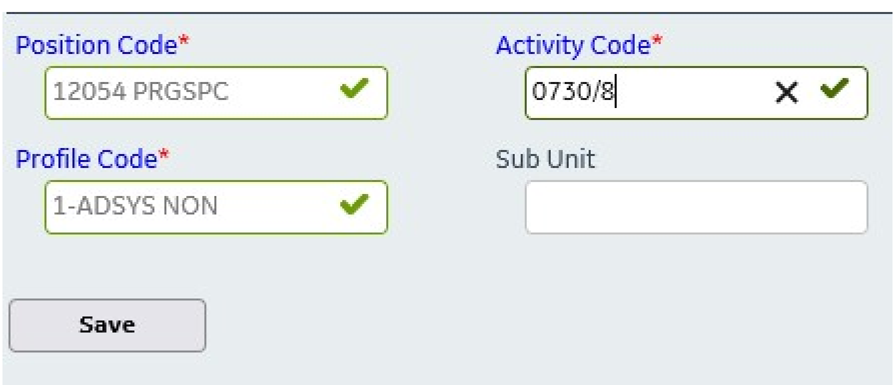
Now you will use the drop down options on the far right to fill in each box



Far Right – just click on your choice for Position Code, then move to Profile Code



When you are done, it will look something like this – keeping in mind that different types of departments have different positions, profiles, and activity codes.



Click Save and you will see the rotation on the 1 week calendar view

Repeat on other days if a different activity code is needed

OR

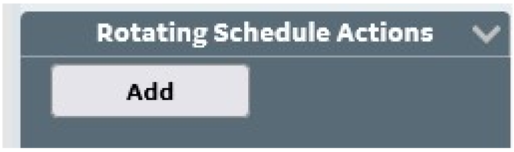
Move on to the next employee using the arrows under the Employee Navigator

EXAMPLE 2 – Working a set weekend out of every 4 weeks

On the left side of the screen under Employee Sections, click on Rotating Schedules (you may default to here if you are doing a group of employees) 

If this is the first rotation, you will be told that Rotating Schedules do not exist for this employee.

On the left side under Rotating Schedules Actions click ADD

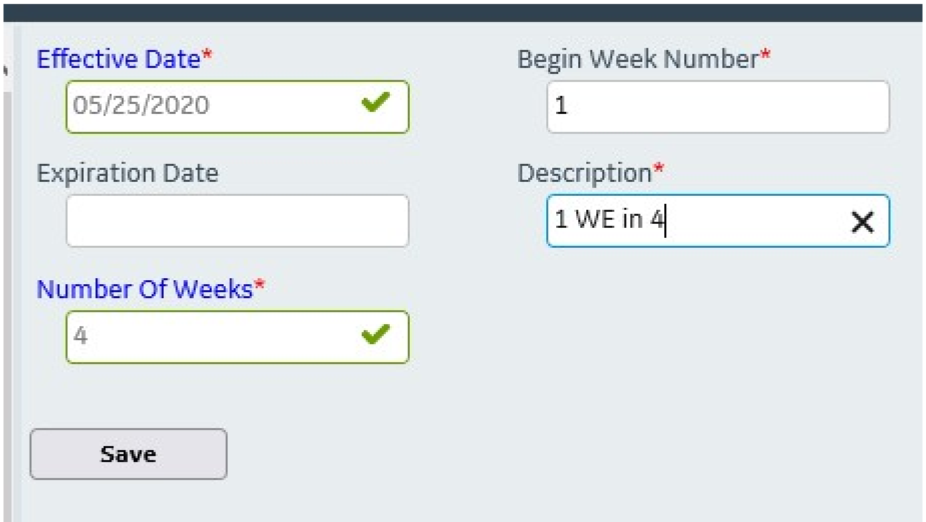


The Effective Date needs to be a MONDAY that starts a schedule period

Only enter an expiration date when the rotation is no longer valid.

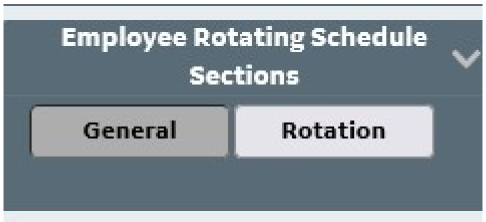
Number of weeks is who many weeks are in the rotation – NOT how many weeks are in the schedule period. If they work a set weekend out every 4 weeks, put 4.

Description is required – give it a name, whatever you want.



Click Save

A new button appears on the left under Employee Rotating Schedule Sections – Rotation. Click on Rotation



You will get a 4 week calendar. The key to this view is understanding that a rotation is CIRCULAR and not LINEAR. Duke pay periods and schedule periods start on MONDAY.

Therefore the First Monday is the first day of the rotations and the First Sunday is the LAST day of the rotation.

Week	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1	WE4						WE1
2	WE1						WE2
3	WE2						WE3
4	WE3						WE4

Hold down the CTRL key and click on the days that represent the weekend the employee works.

Then follow the steps as above to Add Activity.

Save at the end and move to the next employee.

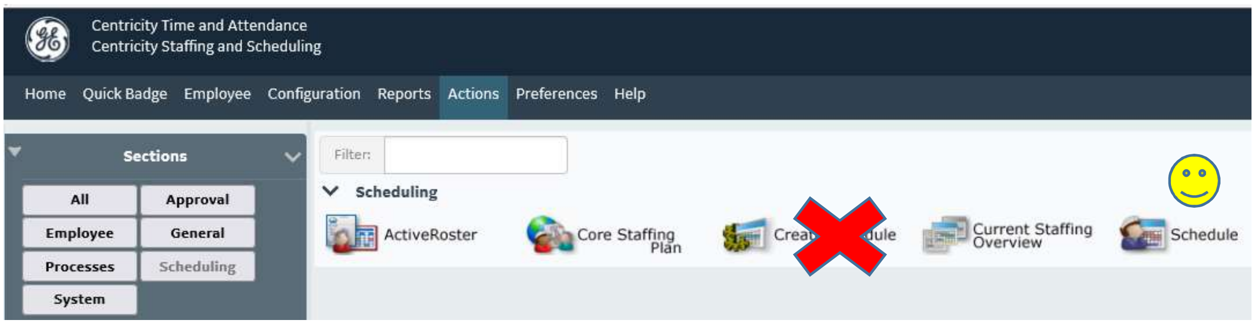
Putting the Rotations on the Schedule

The rotations do not fill in automatically – you have to tell the system to enter the schedules for each schedule period.

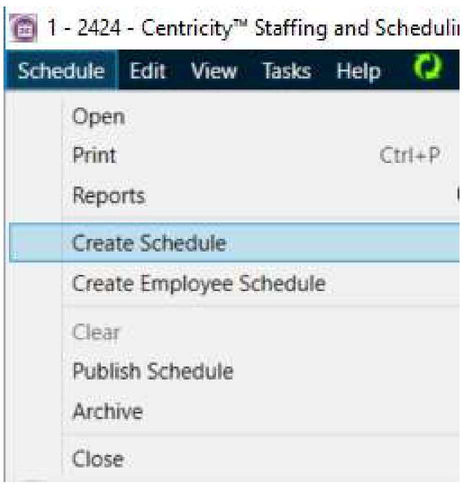
Why? Rotations might change. You might have new staff and need to add additional rotations. There may be PTO requests to handle first.

To put the rotations on the schedule first Open the Schedule screen by going to Actions>Schedule>Open Schedule

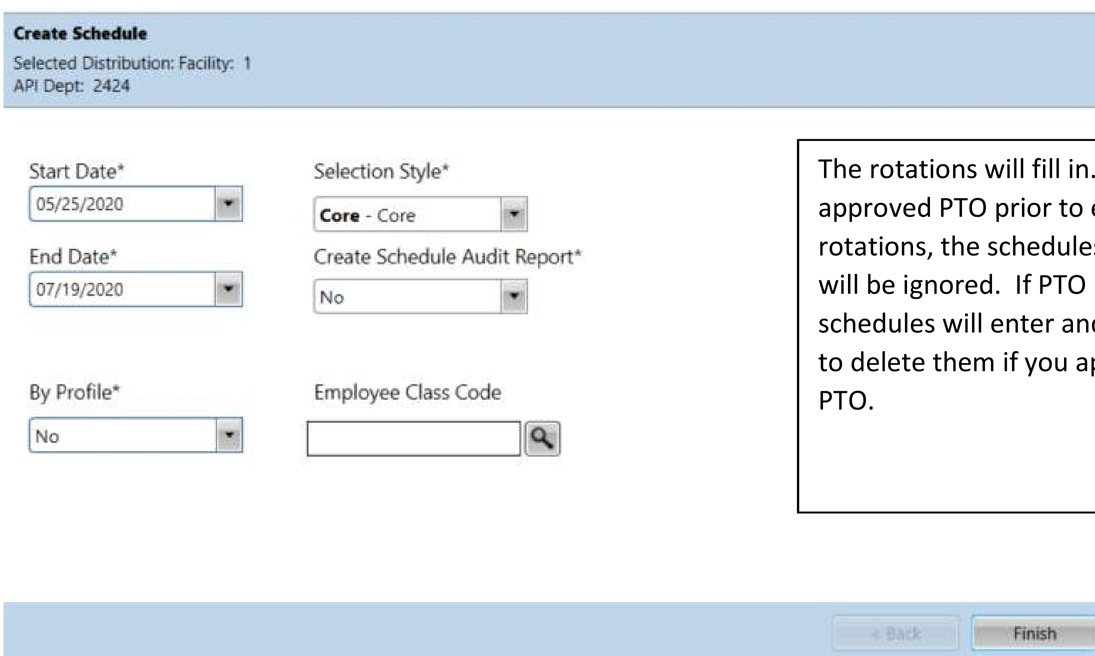
Remember, if you have already opened a schedule you will have a purple icon in your task bar



Go to Schedule on the menu bar and choose Create Schedule



You will get a Create Schedule Wizard dialog box. You can change you date range to be smaller than the opened scheduled, but not larger. Leave all the other fields as they are and choose FINISH.



The rotations will fill in. If you approved PTO prior to entering rotations, the schedules for those day will be ignored. If PTO is pending, the schedules will enter and you will need to delete them if you approve the PTO.

But what if they don't fill in? Try manually entering a schedule for the person – did you get a warning message? For instance, does the license need to be added for this employee? See page 29 for directions on how to update an employee license.

Did the employee have a job code change? If so, you will have to make a new rotation for them using the new position.

Still baffled? Contact an administrator or email apiresourcegroup@duke.edu

Self Scheduling

If your staff self schedules, the staff will enter their desired schedule, ideally based on some rules, and the scheduler(s) will 1)make sure the rules are enforced – did everyone schedule their required weekend, Mon/Fri, off shifts, etc? 2) make sure everyone is scheduled to their FTE or has PTO to bring them to their FTE and 3) make sure the schedule is balanced – you don't want to be overstaffed on Tuesday and understaffed on Wednesday, someone would need to be moved to bring balance.

You can divide your staff into Self Scheduling Groups. Groups can rotate as to which group self schedules first OR you can always have a specific group self schedule first, such as based on seniority. Work with an administrator if you would like to set this up for your department.

Directions for self scheudling
https://resources.finance.duke.edu/resources/training/api/secure/ssSelfScheduling.pdf

Self scheduling requires a Staffing Template – you have to tell the system how much coverage you need for each profile in each coverage period (Staffing Template) OR how many of each profile you need for each Activity Code in the default coverage period (Core Staffing Template). If no template is entered, the system sees that as having no needs and no one can self schedule.

If you are an overstaffed department you may need to open more slots than your staffing template allows. Talk to an adminsitrator, when staffing by coverage we can set up individual profiles to allow for overstaffing. We can also restrict profiles from self scheduling. Do not alter your staffing template for self scheduling. That template is used as the basis for many reports sent to senior leaders and it needs to be true to your budget and needs.

Prior to the opening of self scheduling, the manager or scheduling committee needs to do the following. Otherwise staff may have problems self scheduling.

1. Open the schedule in API. This will automatically enter the staffing template telling the system what self scheduling slots are available
2. Enter any rotations so that the staff with set schedules will be guaranteed their slots
3. Update licenses – staff can not schedule past the grace period or if the license is missing. See page 29 for directions on updating licenses
4. New hires/promotions – if your department uses stations and/or schedule groups they will need to be added to the (new) position. Administrators add individuals to schedule groups. Units can add their own stations to new employees – see page 30

This link gives the Self Scheduling Key Date for the hospital inpatient areas. Your facility/department may use a different calendar.

https://finance.duke.edu/systems/work/api/scheduling/managers/keydates

Publish Schedules

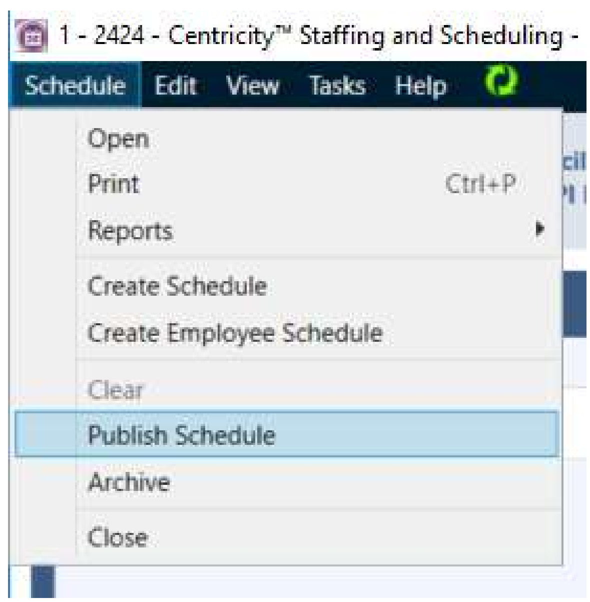
Schedule checklist:

1. All requested PTO has been addressed and awarded according to budget
2. All staff are scheduled to their FTE or work agreement
3. Indirect time is granted according to budget
4. Staff are in the correct profile. If an RN is working as Charge, change their profile to charge. If an NA/HUC is working as an HUC, change their profile to HUC.
5. Experience level is diverse on all shifts (don't have only the newbies working the holidays)
6. No double backs, shifts over 12 hours, or extended work stretch (five 12s or seven 8s in a row is the max)
7. Facility and unit scheduling rules are enforced
8. Seniority perks are affordable – if senior staff are exempt from weekends but you have vacancies and weekends are short, this is not an affordable perk
9. The schedule is balanced – no mix of overstaffed and understaffed days, if there are unit vacancies, the staffing gap should be even across the schedule period
10. Ideally overtime should be < or = to 3% and supplemental staff < or = to 5% of total scheduled hours.
11. After publishing the schedule, enter needed shifts into DukeShift (b4health)

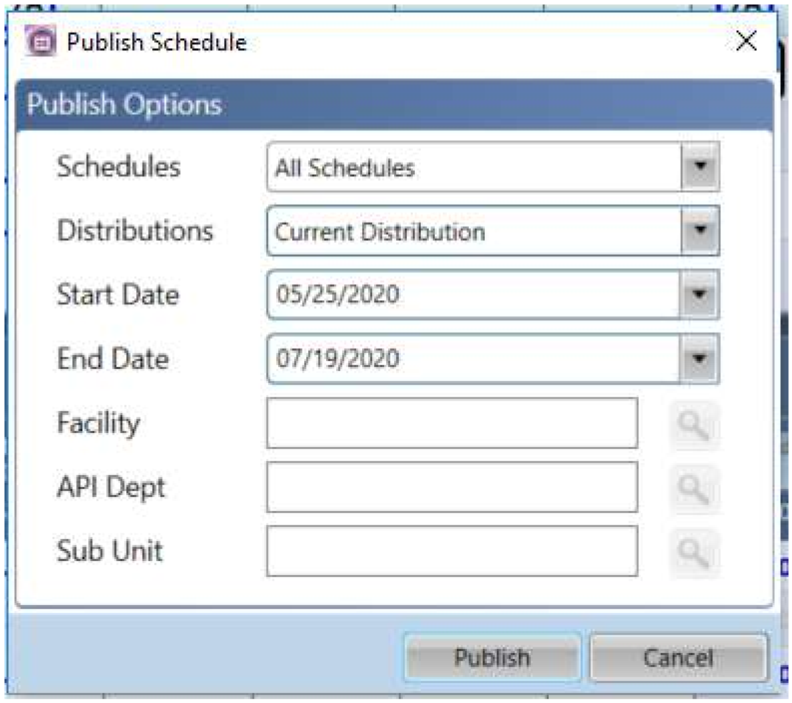
When the schedule is finished, Publish the schedule so that staff can see their schedule on their Monthly View Screen and Mobile APP.

Go to Schedule on the menu bar and choose Publish Schedule

The Publish Schedule dialog box appears.



Most of the time just leave as is and click PUBLISH. If you share scheduling responsibilties with someone else – for instance, if you schedule the RNs and NAs but someone else schedules the HUCs, use a filter to view only your staff (RNs/NAs in this example) and change the first drop down from All Schedules to All Visible Schedules.



SCHEDULE MAINTENANCE

Day to day there will be schedule changes, such as trades, floats, callouts, new hires/terminations, new LOAs (leave of absence). Once a schedule is published you can still make these updates on the main schedule screen following the directions under the Manual Entry section on page 11.

You can also use the Current Staffing Overview Screen for quick and dirty schedule maintenance.

CSO Schedule Maintenance handout

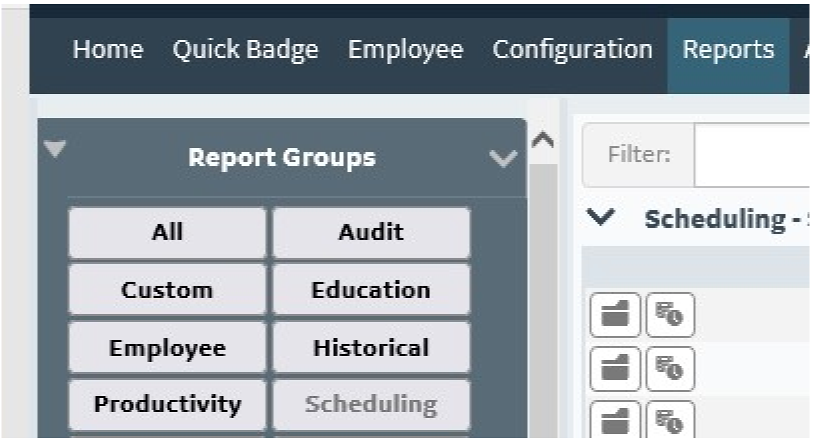
https://resources.finance.duke.edu/resources/training/api/secure/ssSchedMaint.pdf

REPORTS

Your ROLES determine which reports you can access.

See page 2 for the descriptions of ROLES. See handout in the above link to know if a report is part of Time and Attendance, Staff Scheduling, or EdTrack.

You will find many schedule reports under Reports>Scheduling and Reports>Custom



Try out different reports and rosters to see what works best for your department needs.

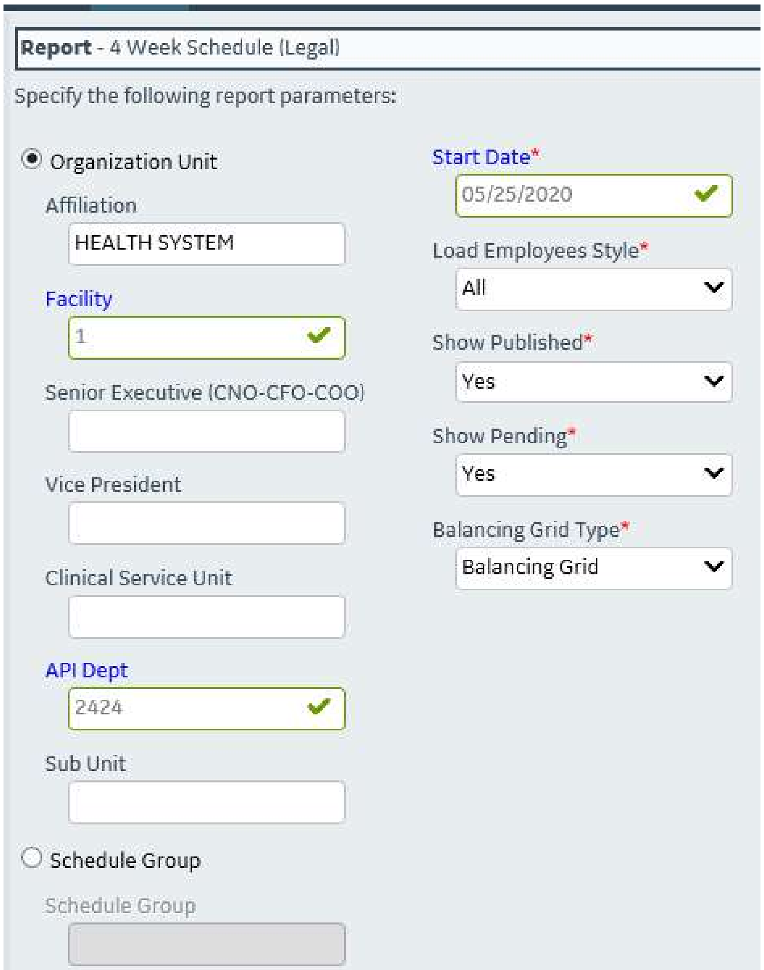
Below are a couple of common examples for setting up reports.

Link to handout Helpful Reports for Managers can be found here [API DukeShift User Group Materials | Financial Services | Duke]

You can also set up reports to be emailed to you automatically. Directions for doing that can be found here [API DukeShift User Group Materials | Financial Services | Duke]. Click on the document called Email Reports on a Set Schedule under the Links column at the top of the page.

It is highly recommended that you take some time to run various reports, play with the parameters, etc. to learn what they do and how they work. The best way to learn about reports is to run them. That’s how the APIResourceGroup learns about them.

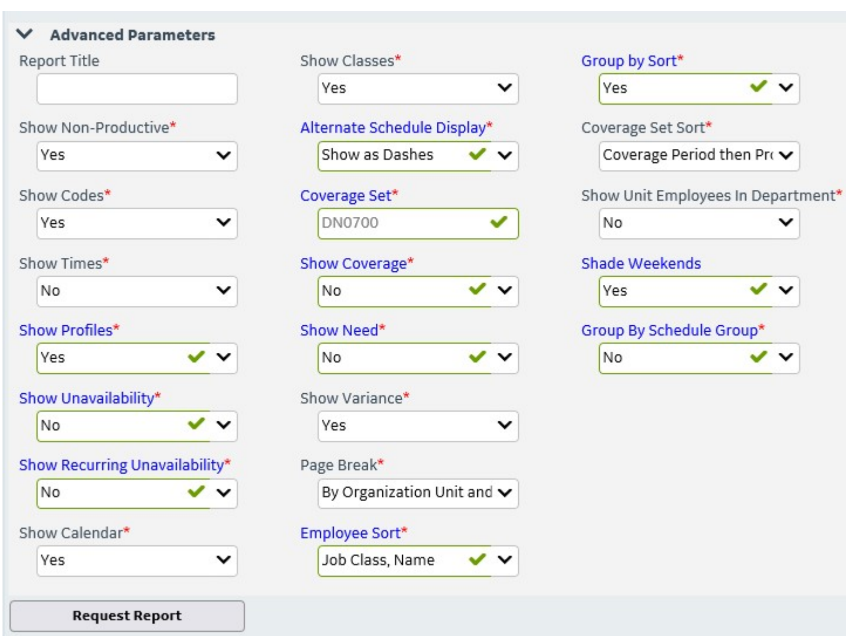
4 Week Schedule



Enter your facility and department – it should default if set up in Preferences

Start Date should be a Monday

Balancing Grid will be by coverage period, change to Activity Balancing Grid to see by Activity Code



Alternates as Dashes means you will see – (a dash) if they are scheduled, just elsewhere.

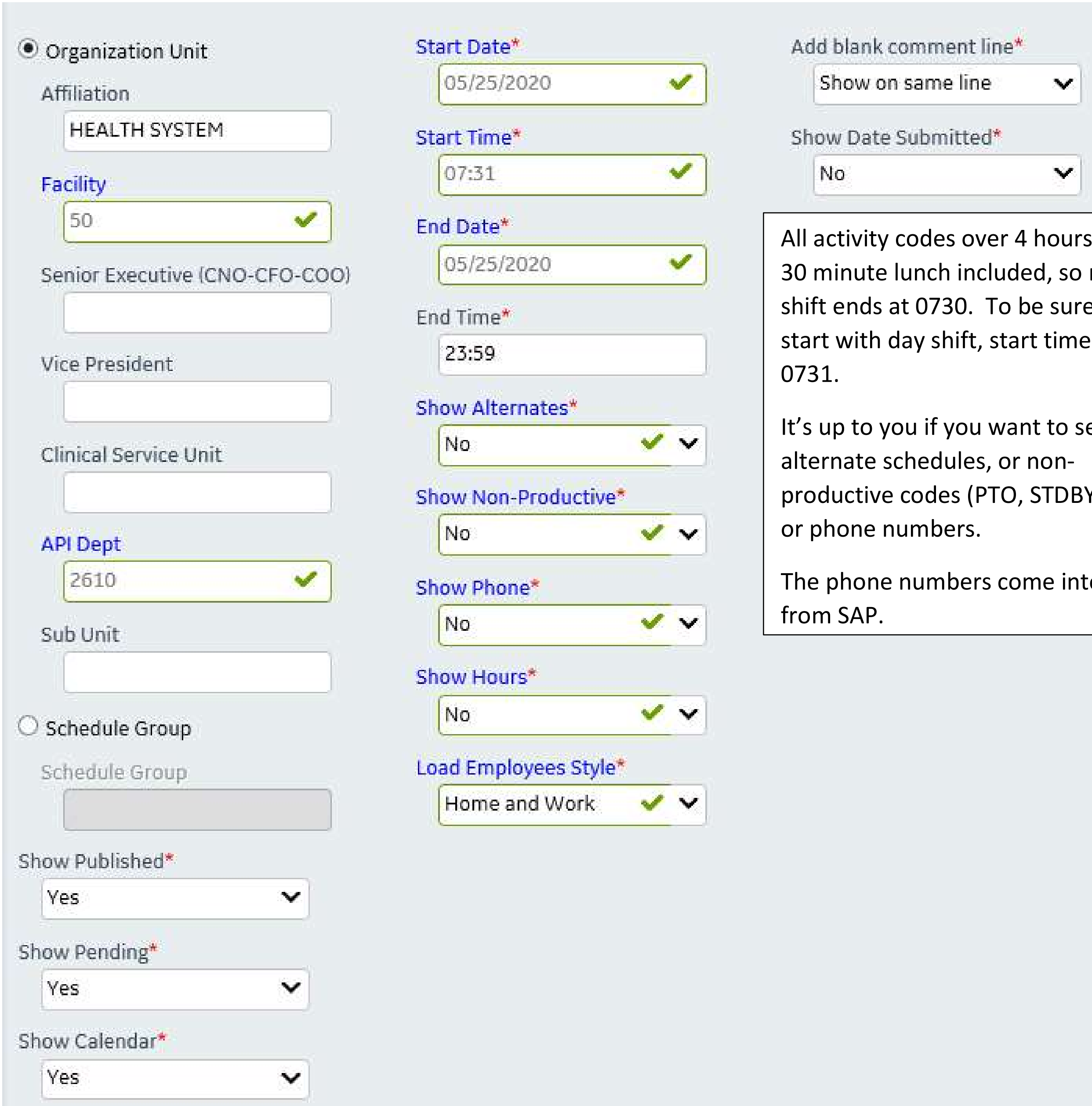
You can change the coverage period from the default, such as to DN0700

You don’t have to show variance either, but that is most popular

Shading weekends is popular.

Play with these parameters to see what works for your department.

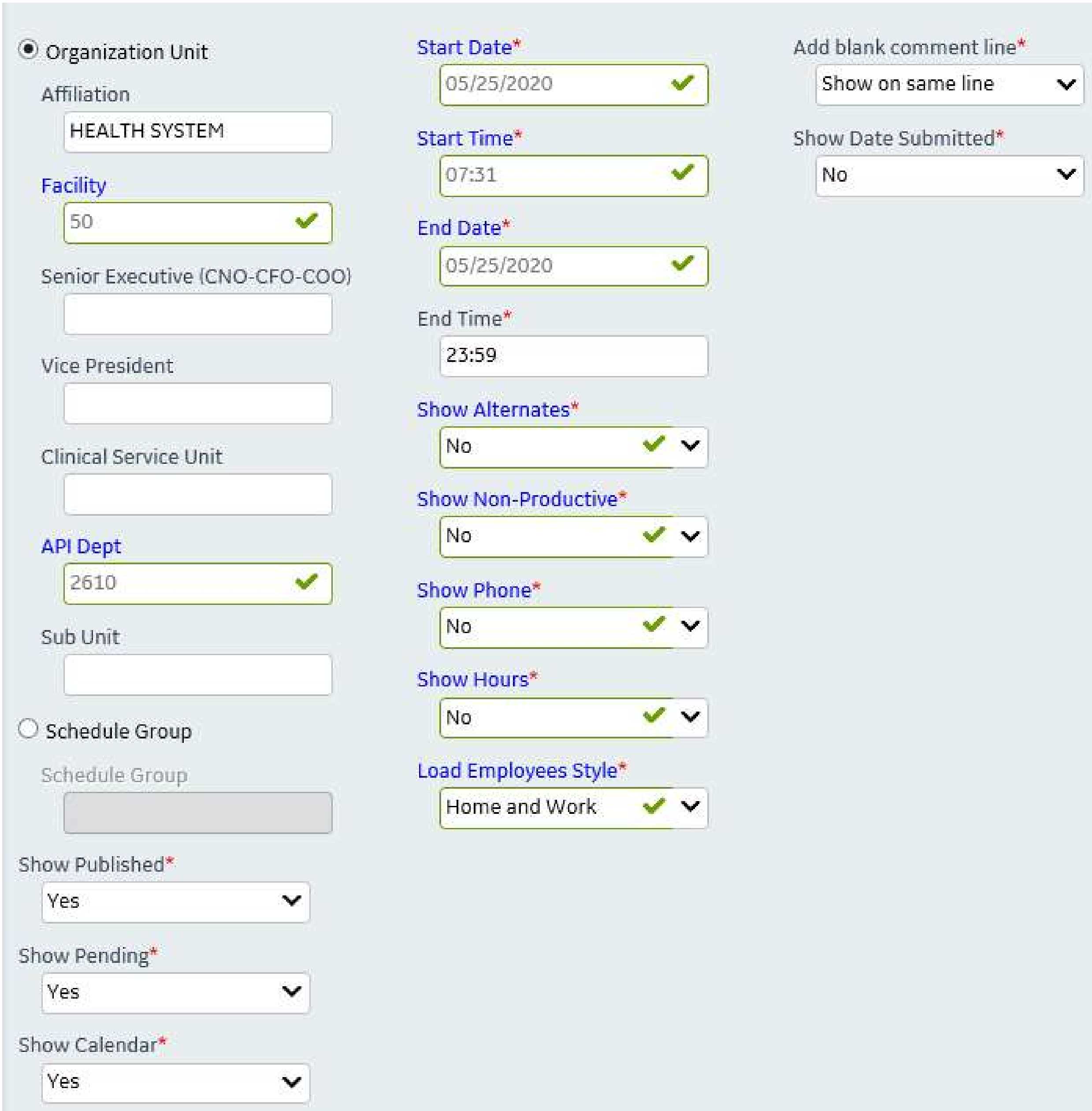
Daily Roster List with Notes



All activity codes over 4 hours have a 30 minute lunch included, so night shift ends at 0730. To be sure you start with day shift, start time is 0731.

It's up to you if you want to see alternate schedules, or non-productive codes (PTO, STDBY, JURY) or phone numbers.

The phone numbers come into API from SAP.



There are other daily rosters, including a 4 day roster (for weekend staffing) and 7 day rosters. Play with these and find what works.

SUMMARY OF SCHEDULER RESPONSIBILTIES

Schedule staff to their FTE

Change an employee's FTE in iforms if their schedule commitment changes
Ensure that PRNs are scheduled to their commitment

Schedule staff according to health system and unit based Staffing policy

Weekend rules
Off shift rules
Holiday rules
Maximum Workstretch

Schedule OT, premium shifts and incentive shifts according to budget

Create a balanced schedule

Approve existing PTO requests prior to publishing the schedule (Supervisor/Manager access required)

Publish the schedule 2 weeks in advance of the schedule start date

Keep staffing up to date (Schedule Maintenance) and in agreement with unit budget

Ensure that the profile on a schedule matches the role the employee will perform during that shift

Update licenses, rotations, and stations as appropriate for staff who have a position change (such as a promotion from CNI to CNII)

Expire rotations for transferring staff prior to their transfer

Remove schedules for transferring staff prior to their transfer

For Self Scheduling Departments:

Apply the staffing template to the open schedule period prior to self scheduling opening (simply open the scheduled period in API)

Ensure that licenses are up to date in API

Ensure that new hires have licenses, schedule groups or stations added, as appropriate -- page 30 has directions for adding licenses and stations

EVENT SUBSCRIPTIONS

Event subscriptions are subscriptions to receive email notifications.

Some have been set to mandatory at the health system level.

For instance, if you are a Time and Attendance Supervisor you will receive the following notifications via email:

When an employee has a calendar or clocking request status change

When an employee has an upcoming license expiration

When an employee cancels a class registration in EdTrack

When you have unapproved timecards close to the payroll close

As an employee will you be notified when

You have an approaching license expiration

Reminders regarding classes you are registered for in EdTrack

You also have the option to select additional Event Subscriptions.

Go to Preferences>Event Subscriptions to make your choices.

Example 1: A common request is to get an email letting you know when an employee has entered a PTO request.

Open the Employee Transactions

Find Employee Calendar Request and check the Email box

Employee Transactions

Code	Description	Portal	Email	Mandatory
CalReqStatChg	Employee Calendar Request Status Change			
Occurred		☐	☐	✔
ClkReqStatChg	Employee Clocking Request Status Change			
Occurred		☐	☐	✔
EmpCalReq	Employee Calendar Request Submitted			
Occurred		☐	☑	
EmpClkReq	Employee Clocking Request Submitted			
Occurred		☐	☐	

Example 2: Receive an email of who has time off next week

Open the Processes

Chose Employees with Time Off Next Week

Processes

Code	Description	Portal	Email	Mandatory
RptDataPrep	Report Data Preparation			
Success		☐	☐	
Failure		☐	☐	
SupEmpOffNextWk	Employees With Time Off Next Week			
Occurred		☐	☑	
TermProcessSup	Employee Termination Process (Supervisor)			
Occurred		☐	☐	

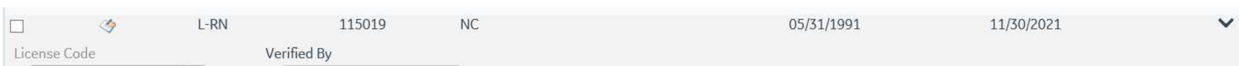
HOW TO UPDATE EMPLOYEE LICENSES

Under the Employee Tab, Search for the Employee (or from the schedule grid, right click and choose Link to Employee – then go back to the API screen and you will be on that employee)

Open the employee

Under Employee Sections, choose Licenses

If the license already exists, simply expand it using the arrow on the far right side.



Then update the expiration date, put in any notes, as appropriate, and save.

If the license does not exist, under ACTIONS click the ADD button

You get a blank form – fill it out and SAVE.

NOTE – if someone changes job roles, such as an NA becomes an RN, you need to DELETE the old license and ADD the new one. This is the only time we will have you DELETE versus inactivate or expire something in API. However, if you leave the old license there it will eventually show on expired license reports on the unit and system level.

RNs with an AD or DIP degree (2 year) have 5 years to get a BSN. They should have a license called BSN Due on their license record with an expiration date 5 years from their hire date.

Always keep a copy of the license in the employee's file.

HOW TO ADD AN EMPLOYEE STATION

Remember: A Station has to be added by an administrator. Then added to the Profile (administrator will do) and then on the employees (unit responsibility).

Under the Employee Tab, Search for the Employee (or from the schedule grid, right click and choose Link to Employee – then go back to the API screen and you will be on that employee)

Open the employee

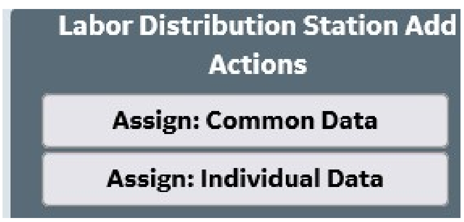
Under Employee Sections, choose Labor Distributions

Open the Labor Distribution that needs a station by clicking the folder on the left – most likely in primary department, but could be in an alternate department.

Click the Stations Button

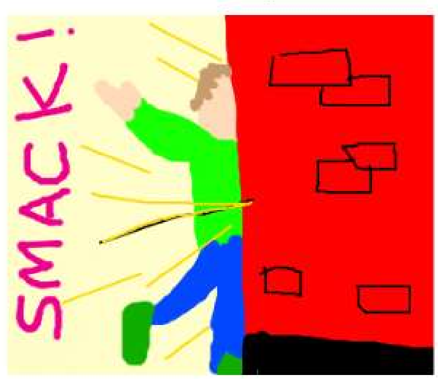
Click the ADD button

Click Search to get a list of options. Select the option you want, and choose Assign: Common Data



And be sure to click SAVE to complete.

When Payroll is LOCKED, NO ONE Can Update
a License, Station or Self Schedule Group



ADDITIONAL RESOURCES

Link to the API@Duke homepage

https://finance.duke.edu/systems/work/api

User Group meetings: Each month we meet via Zoom and in person to go over API news, tips and tricks, and answer your API questions. Calendar and documents from previous meetings available on the API@Duke website

Link to DukeShift for Managers webpage

https://finance.duke.edu/systems/work/api/dukeshift/managers

Overview of DukeShift – DukeShift/API interface on slide 14

https://finance.duke.edu/sites/default/files/DukeShift%20Overview.pdf

API TERMINOLOGY

POSITIONS- combination of facility/dept./job code. (12424CNI)

Licenses are attached at the position level. This is what makes the email reminders happen.

426764261 = DUCHollySprings CMA

PROFILES- a combination of like job codes. For example: CNI, CNII, CNIII, CNIV would all be a profile called 'NSE'. Profiles are set up on the staffing template to establish the staffing needs for the department

COVERAGE SET is a Breakdown of a 24 hr. period of the day for staffing needs. It can be used in re-evaluating staffing needs based on patient census and acuity and productivity. Coverage period does not equal shift.

D	8hrs	0700-1500	E	8 hrs.	1500-2300	N	8 hrs.	2300-0700
D1	4 hrs.	0700-1100	E1	4 hrs.	1500-1900	N1	4 hrs.	2300-0300
D2	4 hrs.	1100-1500	E2	4 hrs.	1900-2300	N2	4 hrs.	0300-0700

Each department is assigned a Coverage Set when first set up in API. The majority of inpatient depts. are set up as D, E1, E2, N.

Many schedule and roster reports can be assigned any coverage set for ease of viewing.

ACTIVITY CODES- abbreviations of shift times- include start time, length of activity, and shift coverage. Each different combination of a start time/length of activity needs a unique activity code. Activity code does equal shift.

Standard Activity Codes

7A	0700-1930				
7P	1900-0730				
11A	1100-2330				
D	0700-1530	D1	0700-1100	D2	1100-1500
E	1500-2330	E1	1500-1900	E2	1900-2300
N	2300-0730	N1	2300-0300	N2	0300-0700

Other activity codes would be the start time of the shift and how many hours. All codes over 4 hours have a 30 minute lunch built in.

0800/8 (0800-1630), 0830/8 (0830-1700), DS Duke shift activity codes

Color of shift- DAY-Blue EVE- Green NIGHT- Red

The color reflects which shift differential is paid when working the shift NOT the start time and time of the shift. The color coding is only a guide. Shift differential is paid when the majority of the worked hours occur on the off shift, therefore payment depends on calculated SWIPES not on SCHEDULES.

CALENDARS- benefitted time paid when not at work aka PAYCODES

PTO, FMLA

Jury Duty

Standby

SCHED

STAFFING TEMPLATES

The Staffing Template is based on the staffing budget of the dept. and indicates the baseline staffing needs by profile and coverage period.

A dept. may have more than one staffing template to specify different staffing levels for seasonal changes.

The view of the staffing template can be changed to see the coverage, need, fraction (coverage/need) or variance.

Balancing grid- staffing by coverage period (ie, shows staff by a ratio of hours covered in each coverage period and thus can be in fractions. For instance, if one person is scheduled 7a-11a and another is scheduled 9a-11a, the coverage for the 7a-11a block is 1.5).

Activity Balancing grid- staffing by activity code (ie, how many people in each profile are scheduled for a specific activity code.