

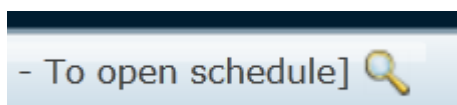
# Current Staffing Overview Screen for API Daily Maintenance

Open API

Go to Actions>Scheduling>Current Staffing Overview



The Current Staffing Overview Screen will open to your default department or schedule group (if you have one) OR you can click on to choose another department.



One nice thing is you can change the Coverage Set (use the magnifying glass) from the default DEEN to DN0700 (to view two 12 hour shifts of 7A/7P) or DEN0700 to view three 8 hour shifts. There are other options as well. My example will be DN0700.

If you leave Date blank, you will see the current date. You can also use the calendar icon to choose a date, or type in a date.

Once you have your settings where you want them, click OPEN.

Open Schedule

☒ Organization Unit

Facility\*

50

API Dept\*

2610

Sub Unit

☐ Schedule Group

Schedule Group

DUHSTAFFOFF SCH

Coverage Set\*

DN0700

Date

Open

Cancel

You will then see a summary for each shift showing how many total people you have in each profile in comparison to how many you need (this is pulled from the staffing template entered into API).

Most common profiles are Nurse, Aide, and UC. If you have a patient attendant, they will be counted as well.

Red number = under staffed      Blue number = over staffed      Gray number = staffed at target

◀ ▶ 12/18/2017

◀ ▶ 0700-1900

Facility	API Dept	Ratio	Census	HPPD	Nurse	Aide	UC	PTAT
▲ Coverage Period: 0700-1900 [12/18/2017 07:00]								
50	2610	1:1	0.00	-	7.00/12.00	5.00/4.67	1.00/2.00	0.00/0.00
▲ Coverage Period: 1900-0700 [12/18/2017 19:00]								
50	2610	1:1	0.00	-	7.00/10.33	4.00/4.00	0.00/2.00	0.00/0.00

To see details, click on the number for the shift and profile you want to see. For instance, if I want to see the names of the people working as a Nurse at 7A, click on the 7.00/12.00

Under the number you will see a details of where that total is derived (ie, if you have multiple profiles for Nurse, you will see how many are in each specific profile).

On the far right, you will see the names of the people scheduled for that shift.

◀ ▶ 12/18/2017

◀ ▶ 0700-1900

Employee Search

Schedule Notes

Facility	API Dept	Ratio	Census	HPPD	Nurse	Aide	UC	PTAT	Other	Indirect																																											
▲ Coverage Period: 0700-1900 [12/18/2017 07:00]																																																					
50	2610	1:1	0.00	-	7.00/12.00	5.00/4.67	1.00/2.00	0.00/0.00	0.00/0.00	0																																											
<table> <tr> <th>Profile</th><th>Coverage</th><th>Need</th><th>Variance</th></tr> <tr> <td colspan="4">▲ Coverage Period: 0700-1500 [12/18/2017 07:00]</td></tr> <tr> <td>50- CH MED</td><td>1.00</td><td>1.00</td><td>0.00</td></tr> <tr> <td>50- NSE 4-1</td><td>0.00</td><td>2.00</td><td>-2.00</td></tr> <tr> <td>50- NSE MED</td><td>6.00</td><td>8.00</td><td>-2.00</td></tr> <tr> <td>50-CH 4-1</td><td>0.00</td><td>1.00</td><td>-1.00</td></tr> <tr> <td colspan="4">▲ Coverage Period: 1500-1900 [12/18/2017 15:00]</td></tr> <tr> <td>50- CH MED</td><td>1.00</td><td>1.00</td><td>0.00</td></tr> <tr> <td>50- NSE 4-1</td><td>0.00</td><td>2.00</td><td>-2.00</td></tr> <tr> <td>50- NSE MED</td><td>6.00</td><td>8.00</td><td>-2.00</td></tr> <tr> <td>50-CH 4-1</td><td>0.00</td><td>1.00</td><td>-1.00</td></tr> </table>										Profile	Coverage	Need	Variance	▲ Coverage Period: 0700-1500 [12/18/2017 07:00]				50- CH MED	1.00	1.00	0.00	50- NSE 4-1	0.00	2.00	-2.00	50- NSE MED	6.00	8.00	-2.00	50-CH 4-1	0.00	1.00	-1.00	▲ Coverage Period: 1500-1900 [12/18/2017 15:00]				50- CH MED	1.00	1.00	0.00	50- NSE 4-1	0.00	2.00	-2.00	50- NSE MED	6.00	8.00	-2.00	50-CH 4-1	0.00	1.00	-1.00
Profile	Coverage	Need	Variance																																																		
▲ Coverage Period: 0700-1500 [12/18/2017 07:00]																																																					
50- CH MED	1.00	1.00	0.00																																																		
50- NSE 4-1	0.00	2.00	-2.00																																																		
50- NSE MED	6.00	8.00	-2.00																																																		
50-CH 4-1	0.00	1.00	-1.00																																																		
▲ Coverage Period: 1500-1900 [12/18/2017 15:00]																																																					
50- CH MED	1.00	1.00	0.00																																																		
50- NSE 4-1	0.00	2.00	-2.00																																																		
50- NSE MED	6.00	8.00	-2.00																																																		
50-CH 4-1	0.00	1.00	-1.00																																																		
▲ Coverage Period: 1900-0700 [12/18/2017 19:00]																																																					
50	2610	1:1	0.00	-	7.00/10.33	4.00/4.00	0.00/2.00	0.00/0.00	0.00/0.00	3																																											

Roster

Qualified Staff

Assign Compare

Coverage Period: 0700-1900

Facility : 50

API Dept : 2610

Profile Group: Nurse

Employee	Transactions
<input type="checkbox"/> DOWSE, BRENDA (919) 599-3797	<input checked="" type="checkbox"/> STDBY <input type="checkbox"/> 7A
<input type="checkbox"/> ASHRAFUDDIN, BEATRIZ (919) 572-0696	<input type="checkbox"/> 7A
<input type="checkbox"/> BRIDGES, LAURA-ANN (336) 583-6814	<input type="checkbox"/> 7A
<input type="checkbox"/> FLANCE, ANDREW (281) 543-5592	<input type="checkbox"/> 7A
<input type="checkbox"/> MASON, MARANDA (919) 495-2247	<input type="checkbox"/> 7A
<input type="checkbox"/> MIRZA, SEVDA (919) 465-2297	<input type="checkbox"/> 7A
<input type="checkbox"/> UDDIN, MD (919) 572-0696	<input type="checkbox"/> 7A


To change a schedule for a specific person, double click on their name.

You can FLOAT them to another department, change the activity code (ie, from 7A to C), replace the activity code with a calendar (such as STDBY or PTOU).

You can also add a note.

## Modifying Schedule/Calendar Transaction for BEATRIZ ASHRAFUDDIN


☒ Schedule ☐ Calendar

Activity Code\* 7A 

Original Source Manual

Current Source Manual

General


Date\* 12/18/2017 


Time\* 07:00


Hours/Units\* 12.00


Lunch Length (Hours)\* 0.50


Labor Distribution

Facility\* 50 

Position\* DRH2604 CN III 

API Dept\* 2604 

Profile\* 50-NSE SURG 

Sub Unit 

☒ Publish activity when saving

[Delete](#) Save Cancel

### FLOAT to another department

In the API Department field, change the 4 digit number to the number of corresponding department. If you don't know it, use the magnifying glass to search.

Verify that the Position and Profile fields are correct after you change the department. If not, use the magnifying glass to choose those items as well.

If you don't know the position of the nurse, choose CNII. If you don't know the position for the NA, choose NAI. This will prompt the system to verify that they have a valid license in API.

Click Save.

### Change Activity Code

Change the code in the Activity Code field to a new code. For instance, you can replace the 7A with a C, if you cancelled the person due to low census. Or change to a LE if they left early on their own accord.

Click Save.

### Add a Calendar – ie, STDBY or PTOU

Change the radio button on the top from Schedule to Calendar.

Use the magnifying glass to see the list of Calendar codes and choose either STDBY or PTOU

Enter the start time and the number of hours

Change the lunch length to 0 (no lunch for STDBY or PTO time).

Click Save.

### Create a Split Shift

Examples of a split shift

Employee works 8 hours in home unit, then floats to another unit for 4 hours (or visa versa)  
Employee is placed on STDBY for the fist 4 hours and is called in for the last 8 hours (or visa versa)

Let's float someone to another unit after 4 hours After the first 4 hours, call them back to their home unit.

Open the shift

Change the 7A to D1 (4 hours from 7a-11a)

<input checked="" type="radio"/> Schedule <input type="radio"/> Calendar	<input type="radio"/> Schedule <input type="radio"/> Calendar
Activity Code* <input type="text" value="7A"/>	Activity Code* <input type="text" value="D1"/>
Original Source <input type="text" value="Manual"/>	Original Source <input type="text" value="Manual"/>
Current Source <input type="text" value="Manual"/>	Current Source <input type="text" value="Manual"/>
TO	

Click Save.

Then put a check mark next to the person's name and click Assign.

Roster

Qualified Staff

Assign

Compare

Coverage Period: 0700-1900

Facility : 1

API Dept : 2560

Profile Group: Nurse

<input type="checkbox"/>	Employee	Transaction
<input checked="" type="checkbox"/>	HAUVER, JENI (F) (919) 672-9935	<div>D1</div>

A blank form appears where you can enter a new activity code (ie, 1100/8) and change the department.

If needed, use the magnifying glass to update the position and department.

☒ Schedule ☐ Calendar

Activity Code\*

General

Date\*

Time\*

Hours/Units\*

Lunch Length (Hours)\*

Labor Distribution

Facility\*

API Dept\*

Sub Unit

Position\*

Profile\*

Notes(0)

☒ Publish activity whe

Save

You will then have two activity codes for the person, the one with the dark line to the left is for the floated department.

NI (F)  
35

**D1** **1100**

Because floating someone for an entire shift will remove them from your roster and put them on the roster of the receiving unit, if you float someone at the start of the shift and you think you will need them back in 4 or 8 hours you have two options.

- 1) Float them for the entire shift and the receiving unit will float them back to you when you need them back
- 2) Go ahead and create new codes in 4 hour increments using the Assign Button and update them each 4 hours when you know where the person will be assigned.


You can use the same process if you put someone on STDBY at the start or end of the shift. Change the code (ie, 7A) to STDBY by changing the button at the top from Schedule to Calendar.

Then change the Pay Code from SCHED to STDBY


Update the start and end time and total hours, if needed.

Be sure to change the lunch length to 0.

☐ Schedule ☒ Calendar

Pay Code\*  

General

Date*	<input type="text" value="12/31/2017"/>	
Time	<input type="text" value="11:00"/>	
Hours/Units	<input type="text" value="8.00"/>	
Lunch Length (Hours)	<input type="text" value="0.00"/>	

You will see two codes, one reflecting time worked, and one reflecting STDBY.

VI (F)  
35

**D1** **STDBY**

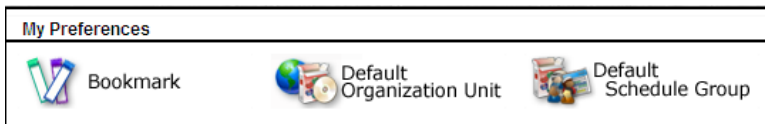
Schedule maintenance users have access to float to sister units only. If you find that you are having difficulty making an adjustment on the schedule, call the STAFFING OFFICE at 919-681-2474, press 6. They can enter any needed updates for you.

# APPENDIX

Schedule maintenance users have access to float to sister units only. If you find that you are having difficulty making an adjustment on the schedule, call the STAFFING OFFICE at 919-681-2474, press 6. They can enter any needed updates for you.

Setting a preference to default to your department or schedule group:

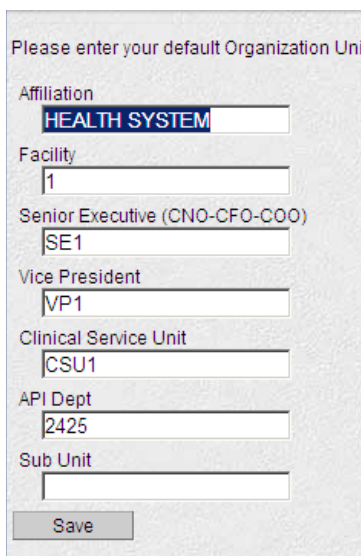
Go to the Preferences screen (icon is a paint brush and is the 7<sup>th</sup> icon on the top row). Choose Default Organization Unit.



The image shows a horizontal bar titled "My Preferences". Below the title are three icons with labels: a bookmark icon labeled "Bookmark", a globe icon labeled "Default Organization Unit", and a calendar icon labeled "Default Schedule Group".

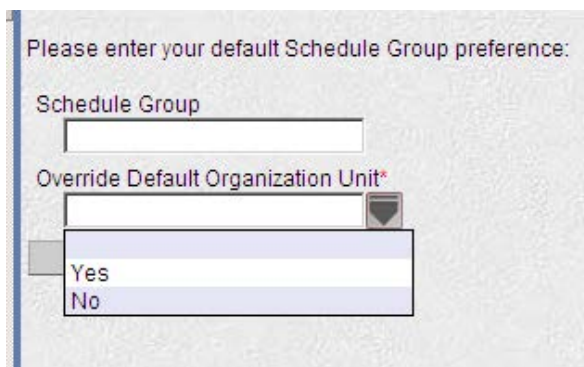
Complete the form with FACILITY and DEPT only (the rest fills in itself).

Facility numbers: DUH =1 DPC= 4 DRH = 50 DASC = 51 RAL = 60



The image shows a form titled "Please enter your default Organization Unit". It contains several text input fields with the following labels and values: "Affiliation" (HEALTH SYSTEM), "Facility" (1), "Senior Executive (CNO-CFO-COO)" (SE1), "Vice President" (VP1), "Clinical Service Unit" (CSU1), "API Dept" (2425), and "Sub Unit" (empty). A "Save" button is at the bottom.

If you need a default schedule group, click on Default Schedule Group under Preferences and complete this box:



The image shows a form titled "Please enter your default Schedule Group preference:". It contains a "Schedule Group" text input field, an "Override Default Organization Unit\*" text input field, and a dropdown menu with "Yes" and "No" options.

If you have a default Organization Unit (Department) and a default Schedule Group, choose Yes or No in the last field to tell the system which wins if a screen you open has fields to complete both.

For more information:

The Manager/Scheduler handout located at <http://finance.duke.edu/resources/training/api/secure/ssManagers.pdf>

Goes over the use of the main schedule screen. You can also perform Schedule Maintenance there.

Pages 13-17 are the most helpful to a Schedule Maintenance User.