

DUKESHIFT – for Float Pool and Staffing Office

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See also the Main Manager Guide	DukeShift for Managers Administrative Systems Duke

How to Make a Direct Staff (Pre)Assignment

Note that we do not assign patient attendants in DukeShift. Assign the NA to the float pool and the float them in API to the patient attendant assignment.

Adding Assigned Staff to Existing DukeShifts

1. Go to the Reconciliation Tab
2. Click on Reconcile/Edit Existing Shifts
3. Enter at least the date of the shift and the facility. You can also enter the department.
4. Choose the shift from the list.
5. Then go down the page to add the name of the staff member to whom the shift is assigned (for internal staff) or go down and add the name of the Agency first, and then the name of the staff member (for agency staff). It is important to enter agency staff after entering the agency name for correct reporting.

Additional Shift Comments

Reconciled?

Requests

Notes Legend
HS-Home System HF-H

Award Shift

Staff Professional: - Select Professional -

or

Agency: - No Agencies -

Professional: - No Professionals -

Wage Rate: - No Wage Rates -

For agency staff, choose the name of the agency first, then the name of the staff.

Reconcile/Save Shift Delete Shift Cancel Shift

6. Save the change by clicking the Reconcile/Save Shift button.
7. Scroll back up and find the drop down for Unfilled Reason.
8. The system (as of 5/26/2010) should enter the Unfilled Reason (ie – Filled by Float Pool, Filled by Agency) based on the primary job code of the employee you enter. However, you can manually change it, as appropriate.
9. Click the Reconcile/Save Shift button to record your changes.
10. You should double check that the shift was marked correctly by running the Report called Cancellation/Unfilled Reasons and verify that your shift is listed under the Filled by Internal Float Pool or Filled by Outside Agency section and NOT the Assignment Completed section.
11. Last step: The interface between DukeShift and ActiveStaffer will put the appropriate activity code in ActiveStaffer. For preassignments, this will be the regular activity code (ie, 7A, E) and NOT the DS activity code. If the system can not find a matching code, it will use GSA (general staffing assignment)

NOTE: You would follow the same steps to mark a shift filled internally as Unfilled-Hospital Filled or if you entered an shift as Employee Called Out. Remember, if you use Employee Called out, you must manually enter the PTOU code in API.

Create a DukeShift and the Assignment at Once

You have multiple options, but the easiest way to do this is to use the i-Schedule Screen

1. Click on the i-Schedule Tab
2. Enter the Facility and Unit you will create the DukeShift and make the assignment
3. Click on the date of the DukeShift you are creating
4. Once you click on a date you can either choose the Time Type (like an activity code in API) that already exists, or select Add Time Slot if you need to create a new one

i-Schedule - 2604 DRH-GENERAL SURGERY 6-3

Facility: Duke Regional Hospital
Unit: 2604 DRH-GENERAL SURGERY 6-3

Print Schedules
[Publish Schedules](#)
[Manage Publish Configuration](#)
[Manage Shift Time Types](#)
[Dynamic Master Schedule](#)
[Schedule By Professional](#)

Legend
Fully Staffed Has Vacancies Has Non-Published Shifts

Month: October 2021
Export Print

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26 ★ 1 Vacancy	27	28	29 ★ 2 Vacancies	30 Fully Staffed	1 ★ 2 Vacancies	2 ★ 2 Vacancies
3 ★ 4 Vacancies	4 Fully Staffed	5	6	7 Fully Staffed	8 Fully Staffed	9 ★ 2 Vacancies

Home > i-Schedule - 2420 Central Staffing office > Time Slots - 2604 DRH-GENERAL SURGERY 6-3 - 9/29/2021

Time Slots - 2604 DRH-GENERAL SURGERY 6-3 - 9/29/2021
[Back to i-Schedule - 2420 Central Staffing office](#)

Add Time Slot Copy Entire Day

TIME TYPE - 7A-7P: 7:00 AM - 7:30 PM
Facility: Duke Regional Hospital PROFESSIONALS VACANCIES
Unit: 2604 DRH-GENERAL SURGERY 6-3 ★ 1 - Nurse

TIME TYPE - 7P-7A: 7:00 PM - 7:30 AM
Facility: Duke Regional Hospital PROFESSIONALS VACANCIES
Unit: 2604 DRH-GENERAL SURGERY 6-3 ★ 1 - Nursing Care Assistant

5. Then choose the green Choose Professional Button, by clicking on the PLUS sign
6. If the person you want is in a different department, be sure All Units is selected at the top.

Add Time Slot - 10/6/2021 | 7A-7P: 7:00 AM - 7:30 PM
[Back to Time Slots - Training Unit - 10/6/2021](#)

Facility: Training Facility
Unit: Training Unit
Time Type: 7A-7P: 7:00 AM - 7:30 PM
Selected Professionals: (Choose Professional) +

- Use the row of the alphabet to move to the last letter of the person's name. When you find the name on the list, click Select. This will create a shift if one did not exist OR fill the person into an existing shift matching their job role (ie, RN, NA, HUC). You do have to chance to update the automatic selections, if needed.

https://www.dukebid4health.com/HospitalAdmin/ScheduleLite/NurseSelectList.aspx?nologo=true&orig=UC

Select Professional

Unit: **- All Units -**

Care Types: Available Items

- Adult
- Adult Critical Care
- Adult Hem/Onc
- Adult Med/Surg
- Adult Med/Surg Step Down
- Ambulatory (ASC or DASC)
- Ambulatory (DHBC)
- Ambulatory (DPC)

Add -> Chosen Items

<- Remove

Available Nurse Only? ☐

A B C D E F **G** **H** I J K L M N O P Q R S T U V W X Y Z

EC - Expired Credential Records per Page

Record (1..50) of 1217

Name	Job Code	Position Type	Care Types
KIM HA Select	4024 - CLINICAL NURSE II	Nurse	Adult Med/Surg Step Down, DUH
KIMBERLY HA Select	4067 - FOOD SERVICE ASSOCIATE	Non-Clinical	
THOMAS HAAB Select	4231 - CLINICAL NURSE, PRN	Nurse	
SHANE HAAG Select	5402 - CLINICAL SERVICES NURSE II	Nurse	

How to Reassign Staff

For instance, if someone is assigned in 2100 and reassigned to 6300 later.

- Open iSchedule - go to the facility and department the person is assigned in now
- Click on the vacancy count for the day you are looking for.

Home Create a Shift Search **i-Schedule** Reconciliation My Messages System Config Reports

Home > i-Schedule - 2420 Central Staffing office

i-Schedule

Facility: Duke University Hospital

Unit: 2420 Central Staffing office

Print Schedules

- » Publish Schedules
- » Manage Publish Configuration
- » Manage Shift Time Types
- » Dynamic Master Schedule
- » Schedule By Professional

Legend: Fully Staffed Has Vacancies Has Non-Published Shifts

Month: April 2013

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
31 ★ 0 Vacancies	1 ★ 0 Vacancies	2 ★ 0 Vacancies	3 ★ 0 Vacancies	4 ★ -1 Vacancies	5 ★ 0 Vacancies	6 ★ -1 Vacancies
7 ★ 0 Vacancies	8 ★ 0 Vacancies	9 ★ 1 Vacancy	10 ★ -2 Vacancies	11 ★ 0 Vacancies	12 ★ 0 Vacancies	13 ★ 1 Vacancy
14 ★ 0 Vacancies	15 ★ 1 Vacancy	16 ★ 0 Vacancies	17 ★ 0 Vacancies	18 ★ 6 Vacancies	19 ★ 24 Vacancies	20 ★ 8 Vacancies
21 ★ 25 Vacancies	22 ★ 42 Vacancies	23 ★ 21 Vacancies	24 ★ 27 Vacancies	25 ★ 35 Vacancies	26 ★ 19 Vacancies	27 ★ 17 Vacancies
28 ★ 29 Vacancies	29 ★ 37 Vacancies	30 ★ 23 Vacancies	1 ★ 16 Vacancies	2 ★ 25 Vacancies	3 ★ 27 Vacancies	4 ★ 59 Vacancies

- Click on the time type (time type in DS = activity code in API) you want to change (highlighted below).

- Find the person you want to reassign and click on the Reassign button.

- Make the change on the pop-up form.

IF the new department already has an existing DukeShift to match it, the reassignment will fill in that existing shift. If not, a new shift will be created in that department.

The assigned staff will receive an email informing them of their assignment. If it is an agency staff member, the agency will receive the email. No one will receive an email of a cancelled shift, because a shift was not cancelled, it was modified.

How To Retract an Award Offer

If you have awarded a shift to a staff person and later decide that you do not want that staff person to work the shift (perhaps you realize they are not qualified or not oriented to your hospital), you can retract the award and reopen the shift for requesting.

1. Log into DukeShift
2. In the Quick Search section of the My B4Health screen, enter the shift ID number OR search for the employee by their Last Name and then choose the shift from the results.

3. The View Shift screen will appear next. The second section of that page lists all the employees who requested the shift AND will say AWARDED SHIFT in red next to the employee's name to whom you granted the shift.
4. Click on the button that says Cancel Shift Award.

Agency/Professional	Request Date	In Overtime	Notes	Award Request
106 - NURSING CARE ASSISTANT II)	11/24/2008 8:45:22 PM		HS, PT	AWARDED SHIFT

5. The screen will refresh and the Cancel Shift Award button is replaced with a button that says Re-Open Requesting. If you want to allow others to request that shift, click on this button.

Agency/Professional	Request Date	In Overtime	Notes	Award Request
4106 - NURSING CARE ASSISTANT II)	11/24/2008 8:45:22 PM		HS, PT	Award Bid/Request

6. Notice that the person to whom you originally awarded the shift will still be listed as a requestor, so don't make the mistake of awarding the shift to them again!
7. You can also send an email to the person that was cancelled explaining the reason – ie, "Since you are not oriented to work at X hospital, I had to retract your award of this shift. If you are interested in being oriented here, please contact the Float Pool manager at your hospital".

8. IF you are retracting a preassignment (either here or on the reconciliation screen), you need to EMAIL affected manager. They do NOT get an email from the system that you retracted the shift, and may still be expecting this employee to work unless you notify them directly of the change. If they are an agency employee, notify the agency as well.

NOTES:

Remember that you can see where an employee is eligible to work by looking at her care types. You can see the care types under their name in the Requests list and you can see more details by clicking on the employee's name and looking at their full profile.

Requests					Cancel Shift
Agency/Professional	Request Date	In Overtime	Notes	Award Request	
024 - CLINICAL NURSE II) Adult Med/Surg, DRH	11/18/2008 9:28:26 PM	✓	HF, PT	Award Bid/Request	

Professional Profile		» Edit
Professional ID:	0327749 ELPA0001	
Home Region:	Raleigh/Durham	
Home System:	Duke Medicine	
Home Facility:	Durham Regional Hospital	
Home Unit:	2604 DRH-GENERAL SURGERY	
Position Type:	Nurse	
Care Types:	Adult Med/Surg, DRH	
State Licenses:	NC	

Understanding the DukeShift Interface w API

DukeShift talks to API. API does NOT talk to DS. Always make changes in DS first and let DS change API. If you change API first, then change DS, DS is going to 'undo' what you did in API.

How does DukeShift communicate?

- a. If the DukeShift was awarded via regular request, award, accept process
 - i. the shift is marked in DukeShift as ASSIGNMENT COMPLETED
 - ii. and goes into API with the DS activity code. This is how the majority of AGENCY shifts are done as well as any awards that internal staff pick up as extra shifts.
 - iii. If there is not a DS code in the awarding department in API, the shift 'kicks out' and does not go into API. Julia, Charlene or Sharita can add the code for future, but the shift will have to be manually added.
 - iv. The person who created the shift (and anyone set up to receive copies of their emails) will receive an email that the shift is awarded.
 - v. The person requesting the shift receives emails that it is awarded
 - vi. If the unit cancels the shift, the person awarded the shift receives an email that it is cancelled.
 - vii. If the unit cancels the shift, DS removes the activity code from API.
 - viii. The interface does NOT add C or PTO codes. **They have to be manually added to API.**
- b. If the DukeShift is preassigned by the staffing office (Scheduler, Manager, Clin Lead, etc puts a staff member directly into a DukeShift.

- i. The shift is marked in DukeShift based on the job code of the employee assigned. I.e., Filled by Float Pool, Filled by PRN, Filled by Agency. If the job code is a regular job code, it will say Assignment Completed.
- ii. Preassigned shifts go into API as a normal activity code (7A, 7P, etc). If a shift is already there (such as a self scheduled shift) it is ignored and thus, must be removed manually.
- iii. If a normal activity code does not exist in the assigned department to match the start and end time on the DS code, GSA is used (general staffing assignment).
- iv. If there is not a GSA code in the assigned department in API, the shift 'kicks out' and does not go into API. Contact apiresourcegroup@duke.edu to request the activity code be added. Be sure to include the department number of the department needing the code.
- v. The person who created the shift (and anyone set up to receive copies of their emails) will receive an email that the shift is awarded.
- vi. The person requesting the shift receives emails that it is awarded.
- vii. If the person is moved or cancelled the person who created the shift does NOT receive an email. The logic of the program assumes that is the same person making the change. However, the employee will receive an email that they were moved or cancelled. NOTE: This confuses our managers and staff the most – if during the preassignment process multiple changes are made, a staff person received multiple emails and has to sort through them to determine the 'final' one and the affected unit only gets an email saying they were awarded someone. RECOMMENDATION is for the scheduler to use the printed Full Shift report to write down all the assignments, make moves, etc, and then enter into DukeShift to minimize changes done in the system. Also, staff should use API to determine their final schedule, and not rely on the DukeShift emails.
- viii. If the unit cancels the shift, DS removes the activity code from API.
- ix. The interface does NOT add C or PTO codes. **They have to be manually added to API.**

Additions, cancellations and changes should be made in DukeShift first, and API second, as the interface will change anything you do in API.

Currently patient attendant cases and orientation shifts are not tracked in DukeShift.

Running DukeShift Reports

Running reports in DukeShift is very easy. Go to the Reports Tab and choose the report you want.

Popular reports for our office are:

Full Shift Report: Lists every shift in the date range and its status (Open or Closed, Awarded or Not Awarded, how it is filled, and by whom it is filled). Use for reconciliation.

Cancellation/Unfilled Reasons Report: Summarizes how shifts are filled (by float pool, by PRN, Hospital Filled, etc) and also how many were callouts or cancels. Is used to determine if we are meeting our goal of filling 80% of the needs.

OA Report: Lists staff that requested to work for the selected the date but were not awarded shifts. Used to find staff that we may be able to call at the last minute to come in to work.

Daily, Weekly/Monthly Staff reports: Lists everyone who was awarded a DukeShift for the date range.

When you choose the report just fill in the form with date range, facility, dept, position, reason etc. and click on Run Report to preview it or Printable Version if you will want to print it.

Sending Emails via DukeShift

If you want to send an email to a group that is able to fill a need, you can do that via DukeShift. For instance, if you need an HUC tonight at Duke Raleigh, you can appeal to all the HUCs from Duke Raleigh who have DukeShift accounts.

1. Start at the My Messages Tab
2. Click on Send Message
3. Choose the facility – if you want them all from that facility, leave Home Unit set to All units. If you want a specific department, choose it from the drop down.
4. Choose the Position Type (ie, Nurse, NA, HUC)
5. Don't include agencies

Home | Create a Shift | Search | i-Schedule | Reconciliation | **My Messages** | System Configuration | Reports | Docu

Inbox | Sent Messages | **Send Message**

Home > Messages - Send Message

Messages - Send Message

[<<-Back to Home](#)

☒ Health Care Professionals ☐ Administrator Professionals ☐ Agency Only

Choose Message Recipients - Health Care Professionals

Professionals: (If none are selected, message will be sent to all Professionals)

Available Professionals

AARON, REBA (Non-Clinical)
 ABADIO-AMPONSAH, VALENTINA (Nurse)
 ABBOTT, EMILY (Nurse)
 ABBOTTS, MORGAN (Nurse)
 ABDALLAH, RASHID (Nurse)
 ABDEL-BAKY, HAGAR (Occupational Therapist II)
 ABDELRAHEIM, ROLA (Non-Clinical)
 ABDI, REBUMA (Nurse)

Add -> <- Remove

Chosen Professionals

Home Facility: Duke Raleigh Hospital

Home Unit: - All Units -

Position Type: **Available Position Types**

Computer Tech
 EKG Technician
 Electrophysiological Tech
 Emergency Department Tech
 EMT
 LABS
 Medical Assistant
 Monitor Technician

Add -> <- Remove

Chosen Position Types

Health Unit Coordinator

Wage Code: - No Wage Codes -

Include Agencies? ☐ Yes ☒ No

6. Leave Sent as Text Message to No. We do not use this feature.
7. Uncheck Include Your Contact Info, unless you want to receive email responses back.
8. Compose your message.
9. Click Send Message

Create Message

Send as Text Message? ☐ Yes ☒ No If selected 'Yes', the Message may only be 149 characters. The audience smaller b/c text messaging is only sent to those that have mobile phone number filled in.

Include Your Contact Info? ☐

Subject:

Message:

B I U abc Normal Font Size

If you would like to pick up an extra HUC shift tonight (insert date) or tomorrow (insert date), please call the staffing office at 919-681-2474. Press 5 to reach a staffing coordinator. |

body p

Send Message **Cancel**