DUKESHIFT OVERVIEW

This is an overview. For the full User Guide, go to
https://finance.duke.edu/systems/work/api/dukeshift/managers

If you see page numbers on a slide, it refers to the page where you can find more information in the User Guide

If you have questions about the Float Pool Pre-assignment process, please address them directly to the Float Pool

DukeShift Playground

- All manager/schedulers have access to the TRAINING area to create shifts

- All staff can see shifts created in Training and can request them

- Someone would have to play a manager and someone a staff member to play out the whole process

Create Shift

- Indicates Required Field

* Does not apply to Agencies

Facility: Training Facility •

Unit: Training Unit •

Position: Nurse • 2 » View Position

Health Care Professional only needs to have one skill in Skill Group to be able to request, is not required to meet the desired skill set.

Duke Shift Reminders (Details to Follow)

- Staff need active accounts to pick up shifts AND to be assigned shifts
- Schedulers need active accounts to create and award shifts
- The person who creates the shifts gets the shift related emails
- Emails can be unreliable – you can manage all of your shifts directly in the system (preferred)
- Staff access is universal
- Schedulers can restrict access to their shifts when creating them
- If your department uses API, the shifts will show up on the API Schedule with a DS activity code (ie, DSD/12)
- You can manually add any start and end time you want – if no matching activity code in API, you will see just DS
- Any department can run roster reports out of DukeShift
- Any department can view their awarded shifts in a schedule view on the ischedule screen
- You can AND SHOULD mark callouts in DukeShift as Employee Called Out

DukeShift Accounts

- Staff (Healthcare Professional) – pick up shifts
- Scheduler (Administrative Professional) – create and award shifts
- Dual – can do BOTH, will be prompted at log on which role they want to use

Login

» Login as Administrator

» Login as Health Care Professional

- Send account requests to apiresourcegroup@duke.edu

Create a Shift vs Dynamic Master Schedule (p. 4-9)

Create A Shift

- Create a Shift Tab
- Can add notes (ie, Incentive Shift)
- Can limit who can see the shifts
  - Ie, to your dept. only
  - To a specific job code
  - Can tier this
- Once one shift is made can copy to multiple dates

Create A Shift

You can manually enter any start/end time (p. 7)

Reminder – add the 30 minutes for lunch to the shift times

Shift Date	Status	Shift ID#
8/5/2018 7:00 AM 12 hrs.	A R	3734924
8/5/2018 7:00 PM 12 hrs.	N R	3714536
8/5/2018 7:00 PM 11.5 hrs.	N	3723925

Records per Page : 100

CORRECT

Shift Start Date:	08/05/2018		Time:	7:00 PM
Shift End Date:	08/06/2018		Time:	7:30 AM

INCORRECT

meet the desired skill set.

Shift Start Date:	08/05/2018		Time:	7:00 PM
Shift End Date:	08/06/2018		Time:	7:00 AM

Restricting Shifts (p7)

- You can limit who sees your shifts under Request Phase 1

- Home Unit only means only your staff can see the shifts
  - So float pool staff can not see them

- Home facility only means only staff at your facility can see the shfits
  - Float Pool staff are in facility 1

Position Type YES means only staff whose job code MATCH that position type can see the shifts

Note, NA/HUCs can see both but an NA will only see NA and an HUC will only see HUC

Secondaries whose primary job is different (ie, a staff assistant is picking up HUC) won't see the shifts if Position Type is YES.

If staff are not seeing your shifts, change this to NO and see if that fixes the issue

Create a Shift vs Dynamic Master Schedule

Dynamic Master

- iSchedule tab
- Can see a date range view
- Type in exact number you need on date/time
- Can quickly update numbers/cancel shifts
- See how the shifts are filled in a more global way

Dynamic Master

Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
8/1	8/2	8/3	8/4	8/5	8/6	8/7	8/8	8/9	8/10	8/11	8/12
		7P					7P		7P		
									7P	7P	7P
7P		7P			7P	7P					7A
							7A				
7P										7P	7P
	7A	7P			7A		7P	7P			

Schedule Summary		Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
▸ Add Shift Time Type		8/1	8/2	8/3	8/4	8/5	8/6	8/7	8/8	8/9	8/10	8/11	8/12
Nurse													
7A-7P - 7A		1/0	1/0	1/0	1/0	1/0	3/0	1/0	2/0	1/0			1/0
7P-7A - 7P		2/1	1/0	4/0	1/0		3/0	2/0	3/0	2/0	2/0	2/0	2/0

Schedule View in ischedule (p 6)

- Click the i-Schedule Tab
- Click on Dynamic Master Schedule

- Enter your facility and department
- Enter a start and end date
- Click Show Schedule

Schedule View

Print will export this view to Excel

Schedule Summary

	Mon 8/1	Tue 8/2	Wed 8/3	Thu 8/4	Fri 8/5	Sat 8/6	Sun 8/7	Mon 8/8	Tue 8/9	Wed 8/10	Thu 8/11	Fri 8/12	Sat 8/13	Sun 8/14
Health Unit Coordinator														
7A-7P - 7A					0/1	0/1	0/1					0/1	1/0	0/1
Nurse														
7A-7P - 7A	0/1	0/2	0/2	0/1	0/1	0/1	0/1	0/2				0/1	0/1	0/1
7P-7A - 7P	1/0	0/2			2/1	1/3	3/1	0/2	0/2	0/1	0/3	0/3	0/3	0/3
7A-3P - D														0/1
7P-11P - E2	0/1	1/0	2/0	0/2	0/1	1/0	0/1	0/1	0/1	1/1	1/1	0/1	0/1	1/0
8A/6 - 8A/6	1/0	1/0	1/0	1/0	0/1	0/1	0/1	1/0	1/0	1/0	0/1	1/0	0/1	0/1
Nursing Care Assistant														
7A-7P - 7A				0/1		1/0				0/1	0/1	0/1	0/1	0/1
7P-7A - 7P	0/1	0/1	0/1			0/1	0/1				0/1	0/1		
7A-3P - D	0/1	0/1	1/0	0/1	0/1	0/1	0/1	0/1	0/1	1/0	1/0	0/1	1/0	0/1
3P-11P - E	0/1	0/1	0/1	0/1	0/1	0/1	0/1	0/1	0/1	0/1	0/1	1/0	0/1	0/1

Modification of DukeShifts

If you used the Create a Shift Tab

And copied multiple shifts

You created a BATCH

Note – this does not apply to shifts created in iSchedule or on the Dynamic Master Schedule

DukeShift – BATCHED editing

- On home screen, search for shift number
  - If you don't know run Full Shift Report for dept to get a list. In reports tab
- Click on "View Details/Edit Shift"
- Just if you were creating a new shift, make your changes
  - Maybe change incentive status
  - Maybe update contact info
  - Maybe modify comments
- Click Save Shift
  - If the shift is part of a batch, a list of the shifts from the same batch will appear. You can then choose how and which shifts to update.

DukeShift – BATCHED editing

- "Update Batched Shifts" window pop-up will appear after saving shift
- You can choose options of how you want to edit the batch (if at all).
  - Example 1: If you want all BATCHED shifts to offer incentive to be "Yes"
    - Choose "Update all Shifts in Batch"
  - Example 2: If you want only certain shifts to offer incentive
    - Choose "Select Shifts to update"

Managing from DukeShift (p 2, 10-14)

- Using the HOME TAB
- Drill down to your department

- To review shifts with submissions (offers) click

- If it says Reviewed, someone has opened this offer already
- If it says New request, the offer is waiting for a response

Click on the item to Review, Award or Decline the offer

Who Gets the Email? (p. 3, 11-13)

SCHEDULERS

- Whomever created the shift, gets the email – even if that person no longer works in the department

- Each scheduler can name others to receive copies of their emails. This is manually done and needs to be manually undone if roles change

- Warning – Float Pool preassignments. Once an award is made, do not rely on emails for updates or reassignments

- Verify correct email address on your profile

- Look for emails in JUNK folder

STAFF

- Receives email if offer is made

- Receives nothing is no offer is made

- Receives a confirmation email when they accept an award

- Must enter their preferred email address on the profile themselves

Don't rely 100% on emails
The API schedule will update as all changes are made in DukeShift – API screens and daily rosters are better indicators of who you have for any shift

DukeShift Home screen and DukeShift rosters will also tell you what was the final result of assignments

Updating a Scheduler Profile (p. 3)

- Home Screen, Bottom Right

- Find Admin Links

- Click Administrator

Admin Links
- » Manage Positions
- » Administrator Professionals
- » Credential Print Sort
- » Manage Wage Codes
- » Change Profile

- Scroll through to find your name and click on it to open

- Verify your email address is correct, Send Messages to Email is checked and if you want anyone to receive copies, move their name from Available Admins to Chosen Admins

Email: rushdee.omar@duke.edu

Additional Message Receivers:

Available Admins
- Cari Banks
- PAMELA BASNIGHT
- RAMONA BASNIGHT
- RHEA BATTEN
- KATHERINE BECKER
- DONNI BECKSFORD

Add ->

<- Remove

Chosen Admins
- Julia Bambach

Send Messages to Email: ☑

API Interface (p. 13)

- If it is a regular shift award, the interface will use a DS activity on the schedule
  - DSD/12, DSE/8, DSN/12 are some examples
  - If a matching code is not found, DS will be used with brackets to indicate you need to hover/open to see start time
  - System assumes if the employee logged in, the employee is picking up the shift themselves
  - The shift status reads ASSIGNMENT COMPLETED

- If it is a preassignment AND the shift reads FILLED BY FLOAT POOL (or agency or PRN), the interface will look for a matching activity code
  - Will use a regular code, such as 7A, 7P, 0800/8
  - GSA = no matching activity code found
  - The system assumes if a scheduler logged in, the person is being assigned a regular working shift (not an extra) and will mark the shift filled by based on Job Code of the employee
  - If there are float pool staff who do not have a float pool designated job code, the shifts have to be manually updated to Filled by Float Pool
    - Otherwise will be treated as a regular shift and use the DS code

Enter a Callout (p 19-20)

- Go to the Reconciliation Tab
- Click Reconcile/Edit Existing Shifts
- If you know the shift number, search using that (Full shift report is great for this)
- Otherwise search for the shift by facility, dept date

Enter Call Out

- Change this

Reconcile/Billing

Wage Code:	- No Wage Codes -
Negative Hours:	☐ ?
Break Time:	30 ?
Filled/Unfilled Reason:	Assignment Completed

- To this

Reconcile/Billing

Wage Code:	- No Wage Codes -
Negative Hours:	☐ ?
Break Time:	30 ?
Filled/Unfilled Reason:	Employee Called Out

There is also a place to enter PUBLIC comments and a place to enter PRIVATE comments

Scroll down and choose Reconcile/Save Shift
Do NOT choose Cancel Shift

Reconcile/Save Shift

Other Items

- Creating Shifts – don't use ischedule (p 4-6)for incentive shifts because you can't enter notes. Use Create a Shift (p 7-9)

- You can retract an award offer and reopen the shift for others (p 14)

- Enter shifts RETROACTIVELY – see Direct Assignments (p 15-19)
  - Be sure all the dates are retro when you create a shift in the past
  - Shift sign up start, shift sign up end need to be in the past

DukeShift Reports (p 20-21)

- Daily/Weekly and Monthly Staff Reports – rosters of who have been awarded shifts
  - Doesn't include the reason (ie, Assignment Completed, Filled by Float Pool)
- Full Shift Report
  - Lists the shifts, their status (ie, unfilled, filled by float pool, assignment completed, employee called out, etc)
  - Will include names of assigned and names of requestors
  - Be careful – a name could be an award offer SENT but not ACCEPTED. Look at the status. Only Assignment Completed are FINAL.
- Non-Home Unit Report
  - To see where your home staff worked
  - Purpose, to help with payroll, make sure cost codes are correct

DukeShift policies

- In the online policy manual
- The User Agreement is available and agreed to on first log in
- The User Agreement is on the website
- The User Agreement is available in DS
- The Staffing Policy outlines requirements about competency and workstretch
- The Availability to Work policy addresses call outs (callouts for an agreed upon DukeShift is a call out!)
- Staffing Incentive policies change. While DukeShift may be the tool used to award incentive shifts, incentive shift policies are separate from DukeShift policies.
- The website summarize the policies
  - Staff website
  - http://finance.duke.edu/systems/work/api/dukeshift/index.php
  - Manager website
  - http://finance.duke.edu/systems/work/api/dukeshift/managers.php