

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 ▼ ● ⓘ [» 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



- 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

Facility:	Duke University Hospital	
Unit:	- Select Unit -	
Position:	- No Positions -	<small>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.</small>

Shift Start Date:	08/06/2018	Time:	10:22 AM
Shift End Date:	08/06/2018	Time:	10:22 AM

Number of Shifts to Post for this Date: 1

Date Requested:	08/06/2018	Time:	12:00 AM EST
Signup Start Date:	08/06/2018	Time:	12:00 AM EST
Signup End Date:	08/06/2018	Time:	12:00 AM EST

Request Phase 1

You may create a 'Request Phase 1' to limit the users that can request this shift initially before allowing all approved Health Care Professionals to request shift.

* Home System/Facility/Units:	<input checked="" type="radio"/> No Filter	<input type="radio"/> Home Unit Only	<input type="radio"/> Home Facility Only	<input type="radio"/> Home System Only
Position Type: *	<input type="radio"/> Yes	<input checked="" type="radio"/> No		
Include Agencies?	<input type="radio"/> Yes	<input checked="" type="radio"/> No		

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

Create Shift

● Indicates Required Field
* Does not apply to Agencies

Facility:	Training Facility	▼	●
Unit:	Training Unit	▼	●
Position:	Nurse	▼	● ?

[» View Position](#)

Time Type:	- Select Time Type -			▼	●		
Shift Start Date:	08/15/2022	📅	●	Time:	10:00 AM	🕒	?
Shift End Date:	08/15/2022	📅	●	Time:	3:00 PM	🕒	?
Number of Shifts to Post for this Date:		1		?			

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

Records per Page : 100 ▼			
	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

CORRECT

Shift Start Date:	<input type="text" value="08/05/2018"/>			Time:	<input type="text" value="7:00 PM"/>		
Shift End Date:	<input type="text" value="08/06/2018"/>			Time:	<input type="text" value="7:30 AM"/>		

INCORRECT

meet the desired skill set.

Shift Start Date:	<input type="text" value="08/05/2018"/>			Time:	<input type="text" value="7:00 PM"/>		
Shift End Date:	<input type="text" value="08/06/2018"/>			Time:	<input type="text" value="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 shifts
 - Float Pool staff are in facility 1

The screenshot shows a web form titled "Request Phase 1". Below the title is a descriptive text: "You may create a 'Request Phase 1' to limit the users that can request this shift initially before allowing all approved Health Care Professionals to request shift." The form contains three sections with radio button options:

- * Home System/Facility/Units:** Includes four options: "No Filter" (selected), "Home Unit Only", "Home Facility Only", and "Home System Only".
- Position Type: *** Includes two options: "Rad Techs Only?" (selected) and "No".
- Include Agencies?** Includes two options: "Yes" and "No" (selected).

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
7P-7A - 7P				2/1	1/0	4/0	1/0	3/0	2/0	3/0	2/0	2/0

Schedule View in ischedule (p 6)

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

The screenshot shows the top navigation bar with tabs: i-Schedule (highlighted in orange), Reconciliation, My Messages, System Configuration, Reports, and Documents. Below the tabs, the text "AL UNIT - 8300" is visible. On the left, there is a dropdown menu for "Hospital" and another for "UNIT - 8300". On the right, a sidebar menu is displayed with the following items: Print Schedules, Publish Schedules, Manage Publish Configuration, Manage Shift Time Types, Dynamic Master Schedule (highlighted in yellow), and Schedule By Professional.













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

The screenshot shows the "Dynamic Master - 2424 SURGICAL UNIT - 8300" form. It includes a "User Guide" link. The form has two main sections: "Facility" and "Unit". The "Facility" dropdown is set to "Duke University Hospital". The "Unit" dropdown is set to "2424 SURGICAL UNIT - 8300". To the right, there are "Start Date" and "End Date" fields, both set to "07/01/2022" and "07/28/2022" respectively. At the bottom, there is a "Show Schedule" button (yellow) and a "Publish" button (green). A red square icon indicates "Indicates Non-Published/Self-Schedule Request."

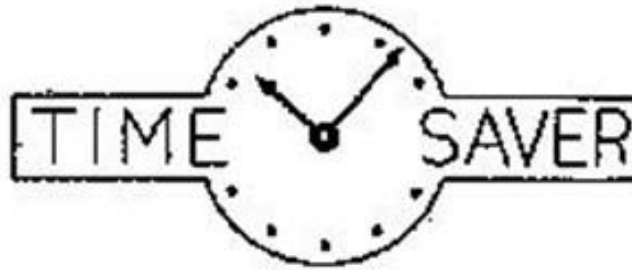
Schedule View

[Print](#) ☒ Include Agencies?

Print will export this view to Excel

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
 Add Professionals	8/1	8/2	8/3	8/4	8/5	8/6	8/7	8/8	8/9	8/10	8/11	8/12	8/13	8/14
Health Unit Coordinator														
 [Name]													7A	
Nurse														
 [Name]									8A/6	8A/6				
 [Name]			8A/6											
 [Name]						E2					E2			
 [Name]							7P							
 [Name]							7P			E2				
 [Name]					7P	7P	7P							
 [Name]		E2	E2				7P							
 [Name]					7P									
 [Name]												8A/6		
 [Name]	8A/6	8A/6						8A/6						

[illegible]



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.

The screenshot displays the DukeShift web application interface. At the top, there is a 'Quick Search' section with a text input field labeled 'Enter Shift ID#:' and a green button labeled 'Search Shift ID#'. Below this is a navigation bar with tabs: Home, Create a Shift, Search, i-Schedule, Reconciliation, My Messages, System Configuration, Reports, and Documents. The 'Reports' tab is selected, and a red arrow points from the 'Search Shift ID#' button to it. Below the navigation bar, the breadcrumb trail shows 'Home > View Shift'. The main content area is titled 'View Shift' and includes a link 'Back to Home' and a green button 'View Details / Edit Shift'. A red arrow points from the 'View Details / Edit Shift' button to the 'Additional Info' section below. The 'Additional Info' section contains several fields: 'Offer Incentive?' with radio buttons for 'Yes' (selected) and 'No'; 'Require Award Confirmation?' with a green checkmark; 'Shift Contact:' and 'Shift Phone:' with text input fields; and 'Shift Comments' with a text area. A message box at the bottom of the 'Shift Comments' section states: 'This shift qualifies for staffing incentive. To receive staffing incentive, the employee must also qualify'. At the bottom of the page, there are three buttons: 'Save Shift' (highlighted in yellow), 'Save as New Shift', and 'Delete'.

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”



b4health

Update Batched Shifts

☒ Update this Shift only (Shift #8958612)

☐ Update Shifts with date on or after Shift #8958612

☐ Select Shifts to update

☐ Update all Shifts in Batch

Submit

Select	Shift ID#	Shift Date
<input checked="" type="checkbox"/>	8958612	8/23/2021 - 7:00 AM (12.5 hrs.)
<input type="checkbox"/>	8958613	8/25/2021 - 7:00 AM (12.5 hrs.)
<input type="checkbox"/>	8958614	8/27/2021 - 7:00 AM (12.5 hrs.)
<input type="checkbox"/>	8958615	8/31/2021 - 7:00 AM (12.5 hrs.)
<input type="checkbox"/>	8958616	9/2/2021 - 7:00 AM (12.5 hrs.)

Managing from DukeShift (p 2, 10-14)

- Using the HOME TAB
- Drill down to your department



- To review shifts with submissions (offers) click

2601 DRH-TELE 5-2 (Unit)		
Closed Shifts - Not Awarded		83
Closed Shifts - Awarded		56
Award Offers		3
Shifts With Submissions		3
Shifts Open For Submissions		391
Scheduled for Submission		0
» Create a Shift		

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

Position
Nurse
REVIEWED
Nurse
REVIEWED
Nursing Care Assistant
REVIEWED
Nurse
New Request: 7/29/2022 11:02 AM
Nursing Care Assistant
REVIEWED
Nurse
New Request: 7/29/2022 11:04 AM

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 if 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:	<input type="text" value="rushdee.omar@duke.edu"/>	
Additional Message Receivers:	Available Admins	Chosen Admins
	<div><div>Cari Banks</div><div>PAMELA BASNIGHT</div><div>RAMONA BASNIGHT</div><div>RHEA BATTEN</div><div>KATHERINE BECKER</div><div>DONNI BECKSFORD</div></div>	<div><div>Julia Bambach</div></div>
Send Messages to Email:	<input checked="" type="checkbox"/>	

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

The screenshot displays the 'Reconciliation Search' interface, which is divided into two main sections: 'Retrieve Shift by Criteria' and 'Retrieve Shift by ID'.

Retrieve Shift by Criteria: This section contains several input fields for searching shifts based on specific criteria. The 'Shift Start Date' and 'Shift End Date' are both set to '08/01/2022'. The 'Facility' is set to 'Duke University Hospital'. The 'Agency' is set to '- All Agencies -'. The 'Unit' is set to '2424 SURGICAL UNIT - 8300'. The 'Professional' field is set to '- Select Professional -'. There is also an 'Agency Only?' checkbox which is currently unchecked. A green 'Retrieve Shifts' button is located at the bottom of this section.

Retrieve Shift by ID: This section is simpler, featuring a single input field labeled 'Enter Shift ID#' with the value '123456789' entered. A green 'Search Shift ID#' button is located to the right of the input field.

Enter Call Out

- Change this

The screenshot shows a web form titled "Reconcile/Billing". It contains the following fields:

- Wage Code:** A dropdown menu with the selected option being "- No Wage Codes -".
- Negative Hours:** A checkbox that is unchecked, followed by a green question mark icon.
- Break Time:** A numeric input field containing the value "30", with a green question mark icon below it.
- Filled/Unfilled Reason:** A text field containing the text "Assignment Completed". This row is highlighted with a yellow background.

- To this

This screenshot shows the same "Reconcile/Billing" form as the previous one, but with a different value in the "Filled/Unfilled Reason" field:

- Wage Code:** "- No Wage Codes -"
- Negative Hours:** Unchecked checkbox with a green question mark icon.
- Break Time:** "30" with a green question mark icon below it.
- Filled/Unfilled Reason:** "Employee Called Out". This row is highlighted with a yellow background.

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>