

DUKESHIFT OVERVIEW

- Today is not a full DukeShift Training Session, but if you have specific HOW TO questions, please ask them at the end
- If you have questions about the Float Pool Preassignment process, please address them directly to the Float Pool

Why did we purchase?

■ OPERATIONS

- *Ability to allow units to post schedule vacancies so that*
 - Staff could volunteer to work an extra shift
 - Float Pool could preassign staff to fill holes
- *API does have a module for this, at the time was overly complex and limiting*

■ REPORTING

- *Target to fill 80% of holes*
 - By staff picking up shifts
 - By Float Pool filling shifts
 - By internal floating
- *Trending of schedule vacancies*
- *Trending of internal floating*
- *Evaluate size of float pool/number of per diem staff*

TRAINING

- Old SWANK class is gone
- On our todo list to create an LMS class
- Lots of information available on the API@Duke website
- <https://finance.duke.edu/systems/work/api/dukeshift/index.php>
- Our team can help – Ellen Hegarty, Rushdee Omar, Julia Bambach

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.



POST SCHEDULE

Then create your DukeShifts



Create A Shift

- Create a Shift Tab
- It's a form – fill it out
- Be sure Shift End Date is at least 24 hours before the shift begins
- If a night shift, Shift End Date is the NEXT days date
- Shift end time should include the 30 minutes for lunch – ie a 7A shift ends at 7:30P
- Can add notes
- Can limit who can see the shifts
 - *ie, to your dept. only*
 - *Float Pool always sees all*
 - *To a specific job type*
 - *Can tier this*
- Time Type field has most standard times. If you need a non-listed time choose Non Standard Other (bottom of list) and enter the start and end time manually.

Create Shift

● Indicates Required Field
* Does not apply to Agencies

Facility:	Training Facility	
Unit:	Training Unit	
Position:	Nursing Care Assistant	» View Position

Time Type:	7A-7P: 7:00 AM - 7:30 PM	
Shift Start Date:	01/22/2020	Time: 7:00 AM
Shift End Date:	01/22/2020	Time: 7:30 PM
Number of Shifts to Post for this Date: 1		
Date Order Requested:	01/22/2020	Time: 12:00 AM EST
Signup Start Date:	01/03/2020	Time: 12:00 AM EST
Signup End Date:	01/22/2020	Time: 7:30 PM 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: No Filter Home Unit Only Home Facility Only Home System Only

Position Type: * Nursing Care Assistants Only? Yes No

Include Agencies? Yes No

Reminder, if manually adding time – 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: 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  

Once shift is made, can copy to multiple dates

Copy Shift to Additional Dates

Navigation: < << January 2020 >> >

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Copy Shift

Enter Additional Shift Information

1/27/2020

of Shifts

Signup Start Date

Signup End Date

1/29/2020

of Shifts

Signup Start Date

Signup End Date

1/31/2020

of Shifts

Signup Start Date

Signup End Date

Copy Shift

Create a Shift vs Dynamic Master Schedule

Dynamic Master

- iSchedule tab
- Can see a date range view
- In the Schedule summary 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

What's New on Dynamic Master?

- Shifts created Under Create a Shift now appear in the Dynamic Master Grid
- So, you will see a TOTAL of all needs, regardless of where you create the shift
- All assignments will appear on Schedule Grid and can be printed
- Non Standard Times are listed to – under Other. You would need to have another reference for exact time.

Schedule Summary				
	Mon	Tue	Wed	Thu
▸ Add Shift Time Type	1/20	1/21	1/22	1/23
Nurse				
Non-Standard Other - Othe			1/0	
7A-7P - 7A				0/2
7P-7A - 7P				
11P-7A - N				
Nursing Care Assistant				
7A-7P - 7A			0/1	0/2
Health Unit Coordinator				
7A-7P - 7A				
7P-7A - 7P			0/1	0/1

And it all shows on iSchedule

i-Schedule

Facility: Training Facility
Unit: Training Unit

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 January 2020

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

Jan 22 items – I added via Create a Shift

Jan 23 items – I added on the Dynamic Master Schedule

Reminder – only shifts created AFTER Dec 13 are impacted, we are in a transition period now

iSchedule view – Drill down on date

The screenshot displays the iSchedule application interface. At the top, there is a navigation bar with buttons for Home, Create a Shift, Search, i-Schedule (highlighted), Reconciliation, My Messages, System Configuration, Reports, and Documents. Below the navigation bar, the breadcrumb path is: Home > i-Schedule - Training Unit > Time Slots - Training Unit - 1/22/2020. The main heading is "Time Slots - Training Unit - 1/22/2020" with a back link "<<-Back to i-Schedule - Training Unit". Two green buttons are present: "Add Time Slot" and "Copy Entire Day". The interface shows three time slots, each with a table for facility and unit details, and a summary of professionals and vacancies.

TIME TYPE - 7A-7P: 7:00 AM - 7:30 PM	
Facility:	Training Facility
Unit:	Training Unit
PROFESSIONALS	VACANCIES
	★ 1 - Nursing Care Assistant

TIME TYPE - Non-Standard Other: 7:00 AM - 7:00 AM	
Facility:	Training Facility
Unit:	Training Unit
PROFESSIONALS	VACANCIES
👤 JENI HAUVER (Nurse)	

TIME TYPE - 7P-7A: 7:00 PM - 7:30 AM	
Facility:	Training Facility
Unit:	Training Unit
PROFESSIONALS	VACANCIES
	★ 1 - Health Unit Coordinator

Note – You can also create new shifts on this screen with the Add Time Slot or by clicking on a time slot already created.

You can also copy the needs for the entire day to another day.

API Interface

- 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*
 - *If staff is NOT Float Pool, Agency, or PRN, the system will use a DS code*

- 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*
 - *The MAs in the float pool do not have a FP MA job code and they will always have to manually updated to FILLED BY FLOAT POOL*
 - *Otherwise will be treated as a regular shift and use the DS code*

Who Gets the Email?

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 – this is not automatic nor does it download from API or SAP

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

- Home Screen, Bottom Right
- Find Admin Links
- Click Administrator Professionals
- 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

Admin Links

- » [Manage Positions](#)
- » [Administrator Professionals](#)
- » [Credential Print Sort](#)
- » [Manage Wage Codes](#)
- » [Change Profile](#)

Email:	<input type="text" value="rushdee.omar@duke.edu"/>						
Additional Message Receivers:	<table><tr><td>Available Admins</td><td></td><td>Chosen Admins</td></tr><tr><td><ul style="list-style-type: none">Cari BanksPAMELA BASNIGHTRAMONA BASNIGHTRHEA BATTENKATHERINE BECKERDONNI BECKSFORD</td><td><input type="button" value="Add ->"/> <input type="button" value="<- Remove"/></td><td><ul style="list-style-type: none">Julia Bambach</td></tr></table>	Available Admins		Chosen Admins	<ul style="list-style-type: none">Cari BanksPAMELA BASNIGHTRAMONA BASNIGHTRHEA BATTENKATHERINE BECKERDONNI BECKSFORD	<input type="button" value="Add ->"/> <input type="button" value="<- Remove"/>	<ul style="list-style-type: none">Julia Bambach
Available Admins		Chosen Admins					
<ul style="list-style-type: none">Cari BanksPAMELA BASNIGHTRAMONA BASNIGHTRHEA BATTENKATHERINE BECKERDONNI BECKSFORD	<input type="button" value="Add ->"/> <input type="button" value="<- Remove"/>	<ul style="list-style-type: none">Julia Bambach					
Send Messages to Email:	<input checked="" type="checkbox"/>						

Reconciliation /Reasons

FILLED SHIFTS

Assignment Completed – Staff volunteered and was awarded extra shift

Filled by Internal Float Pool – used when a preassignment given to someone with a float pool job code (ie, not MAs)

Filled by RSP, PRN – used when a preassignment is given to someone with a PRN job code

Filled by Outside Agency – used when a preassignment is given to someone from an agency when the AGENCY name is chosen

The screenshot displays the 'Reconcile/Billing' interface. At the top, there are fields for 'Wage Code:' (set to '- No Wage Codes -'), 'Billing Date:' (02/01/2018), 'Negative Hours:' (checkbox), 'Reconciled Shift ID#:', 'Break Time:' (dropdown), and 'Lock Edit:' (checkbox). The 'Filled/Unfilled Reason:' dropdown menu is open, showing a list of reasons. The 'Assignment Completed' option is highlighted in blue. Other options include 'Attendance issues', 'Cancelled due to Error', 'Employee Called Out', 'Failed Pre Assessment Testing', 'Failed to complete required compliance', 'Filled by Internal Float Pool', 'Filled by Outside Agency', 'Filled by RSP, PRN', 'Hospital Cancelled - Late', 'Hospital Cancelled - Low Census', 'Hospital Cancelled - On Time', 'Hospital Changed Mind', 'No Call No Show', 'No Need', 'Unfilled - Hospital Filled', 'Unfilled - No one Available', 'Unfilled - Unit Covered', and 'Unqualified candidate- Poor work Performance'. Below the dropdown is a 'Time Card:' field, a 'Shift Comments:' text area, and a 'Private Shift Comments' field. A 'Fax Coversheet' button is visible on the right side of the interface.

Reconciliation /Reasons

UNFILLED SHIFTS

Agency cancelled – Late used to indicate the agency owes a penalty – use On Time if cancelled on time

Hospital cancelled late – used if we owe inconvenience pay (on time, no IP pay)

Cancelled due to Error – you made a boo boo

Employee Called Out and No Call No Show

No Need = when they day came, the need no longer exists, ie, low volume, used if nothing is requested at bedflow, but shift exists

Unfilled-Hospital Filled – Internal Float

Unfilled-Unit Covered – unit called in staff to work, indicates OT potential or someone gave up their ID time

Unfilled – No one Available is the default if the shift is not filled in any way

The screenshot displays the 'Reconcile/Billing' interface. At the top, there are fields for 'Wage Code' (set to '- No Wage Codes -'), 'Billing Date' (02/01/2018), 'Negative Hours' (checkbox), 'Reconciled Shift ID#', 'Break Time', 'Lock Edit' (checkbox), and 'Time Card'. A dropdown menu is open for 'Filled/Unfilled Reason', listing various reasons such as 'Assignment Completed', 'Attendance issues', 'Cancelled due to Error', 'Employee Called Out', 'Failed Pre Assessment Testing', 'Failed to complete required compliance', 'Filled by Internal Float Pool', 'Filled by Outside Agency', 'Filled by RSP, PRN', 'Hospital Cancelled - Late', 'Hospital Cancelled - Low Census', 'Hospital Cancelled - On Time', 'Hospital Changed Mind', 'No Call No Show', 'No Need', 'Unfilled - Hospital Filled', 'Unfilled - No one Available', 'Unfilled - Unit Covered', and 'Unqualified candidate- Poor work Performance'. A 'Fax Coversheet' button is visible on the right side of the interface.

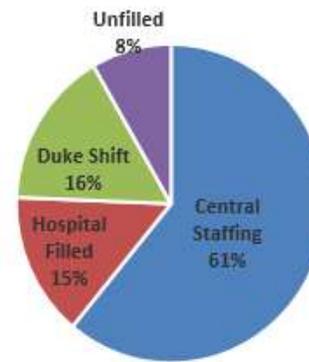
Reports Based on the Reconciliation Reasons

The staffing target is to fill 80% of the needs.

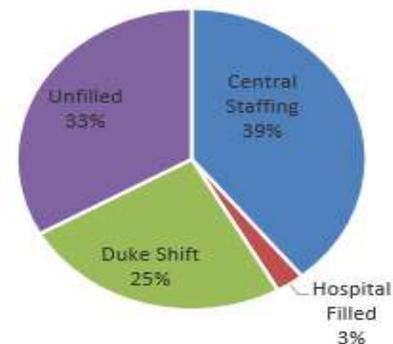
To see how we are doing, the staffing office reconciles DukeShifts based on assignments AND on what is reported in bedflow.

The better the information given to the staffing office and/or updated in DukeShift by the units, the more accurate this data will be.

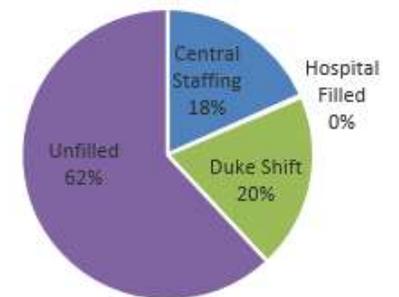
DRH Fill Percentages: Weeks 3/18- 3/31



DUH Fill Percentages: Weeks 3/18- 3/31



DRAH Fill Percentages: Weeks 3/18- 3/31



Dukeshift Reports

- 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)*
- Non-Home Unit Report
 - *To see where your home staff worked*
 - *Purpose, to help with payroll, make sure cost codes are correct*
- OA Report
 - *Lists people who requested but were not awarded shifts*
 - *ie, potential folks to call to ask to come in to work*
- Full Shift Report
 - *Lists the shifts, their status (ie, unfilled, hospital filled, etc) will include names of assigned and names of requestors*
 - *Best to see who has DS for cancellation of staff*
- Cancellation/Unfilled Reasons
 - *Breaks down how shifts were filled or not filled*
 - *Used for weekly scorecard, biweekly staffing report and some annual reports*
- Credential Expiration/Missed & Expirations
 - *Used to track licenses and life support and other requirements for contract staff*

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 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>*