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
- 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
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 day's date
- Shift end time should include the 30 minutes for lunch – i.e., a 7A shift ends at 7:30P
- Can add notes
- Can limit who can see the shifts
  - I.e., 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.
Reminder, if manually adding time – add the 30 minutes for lunch to the shift times

CORRECT

INcorrect
Once shift is made, can copy to multiple dates
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
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.

<table>
<thead>
<tr>
<th>Schedule Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>&gt; Add Shift Time Type</td>
</tr>
<tr>
<td>Nurse</td>
</tr>
<tr>
<td>Non-Standard Other - Other</td>
</tr>
<tr>
<td>7A-7P - 7A</td>
</tr>
<tr>
<td>7P-7A - 7P</td>
</tr>
<tr>
<td>11P-7A - N</td>
</tr>
<tr>
<td>Nursing Care Assistant</td>
</tr>
<tr>
<td>Health Unit Coordinator</td>
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<tr>
<td></td>
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</tbody>
</table>
And it all shows on iSchedule

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

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
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
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
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.
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
  - Manager website