Agenda

• Announcements/Reminders
  • Classes
  • Downtime
  • Self Scheduling needs templates
  • DS Mobile APP
  • When do class completions show in EdTrack?
  • Limiting access to employee addresses

• Work Force Management Survey summary

• A Closer Look: Filters
  • Time and Attendance Filters
  • Staffing and Scheduling Filters
  • Staff view filters
Just a reminder...

The Staffing Template Needs to be Applied Before Self Scheduling Opens
The DukeShift mobile app is live

For Staff – Not Schedulers
140 staff have logged in
211 shifts requested
93 awarded
## Education Transactions into API

<table>
<thead>
<tr>
<th>Sending System</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>LMS</td>
<td>Weekly (Fridays)</td>
</tr>
<tr>
<td>OESO</td>
<td>Weekly (Fridays)</td>
</tr>
<tr>
<td>HealthStream</td>
<td>Weekly (Mondays)</td>
</tr>
<tr>
<td>Outside Education</td>
<td>Bi-monthly (7th and 21st)</td>
</tr>
<tr>
<td>Clinical Labs</td>
<td>Periodically</td>
</tr>
</tbody>
</table>
Access to Employee Home Addresses

• Home addresses are PHI and also need to be protected for employee safety

• As of February, only Administrator roles, TA Approver and SS Supervisor Manager roles will have access to home addresses

• There is no API report for home addresses

• Request a report from HR

[HR Data Request Form | Human Resources (duke.edu)]
WFM Survey Results – 188 responses
<table>
<thead>
<tr>
<th>Please select all examples of how you currently use API Staffing and Scheduling:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Run other reports (91)</td>
</tr>
<tr>
<td>Self schedule (127)</td>
</tr>
<tr>
<td>View my schedule (151)</td>
</tr>
<tr>
<td>Update schedules for daily maintenance (74)</td>
</tr>
<tr>
<td>Create a unit schedule (87)</td>
</tr>
<tr>
<td>Run daily staffing reports (55)</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Below are items that users have said work well with the current API staffing and scheduling system. Please select the top 3 items that are most important to you to keep in a work force management system:</td>
</tr>
<tr>
<td>Able to be used outside of nursing (10)</td>
</tr>
<tr>
<td>Filtering ability (48)</td>
</tr>
<tr>
<td>Color coding for easier visualization (48)</td>
</tr>
<tr>
<td>License reminders (99)</td>
</tr>
<tr>
<td>Identify staffing gaps with staffing grids (75)</td>
</tr>
<tr>
<td>Self scheduling is easy (111)</td>
</tr>
<tr>
<td>Ability to create rotating schedules (44)</td>
</tr>
<tr>
<td>Audit history (39)</td>
</tr>
<tr>
<td>Daily rosters (51)</td>
</tr>
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<td></td>
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<td>Below are items that users have said are missing with the current API staffing and scheduling system. Please select the top 3 items that are most important to you to have in a work force management system:</td>
</tr>
<tr>
<td>Easy to adjust staffing templates (39)</td>
</tr>
<tr>
<td>Staff trading functionality (54)</td>
</tr>
<tr>
<td>Staff competency transparency (18)</td>
</tr>
<tr>
<td>Census data to adjust staffing needs (40)</td>
</tr>
<tr>
<td>Integration with personal calendars (ie, Google, Outlook) (67)</td>
</tr>
<tr>
<td>Productivity reporting (24)</td>
</tr>
<tr>
<td>Mobile app for scheduling (91)</td>
</tr>
<tr>
<td>Ability to add staff to scheduling groups at unit level (27)</td>
</tr>
<tr>
<td>AI to enforce PTO guidelines (49)</td>
</tr>
<tr>
<td>Ability to customize reports at user level (35)</td>
</tr>
</tbody>
</table>
Please select all examples of how you currently use DukeShift Staffing and Scheduling:

<table>
<thead>
<tr>
<th>Award shifts to staff (62)</th>
<th>Run reports (16)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post shifts for my unit (67)</td>
<td></td>
</tr>
<tr>
<td>Volunteer to work extra shifts (51)</td>
<td></td>
</tr>
<tr>
<td>N/A or Do Not Use (73)</td>
<td></td>
</tr>
</tbody>
</table>

Below are items that users have said work well with the current DukeShift staffing and scheduling system. Please select the top 3 items that are most important to you to keep in a work force management system:

| Awarded shifts are identified with their own code (31) | Reporting to keep up with S/I pay (24) |
| Can create several shifts quickly (74) |                  |
| Ability to fill staffing gaps without phone calls (54) |                  |
| Awarded shifts appear on schedule (113) |                  |
| Staff can pick up shifts outside of home unit (70) |                  |
| Ability to approve/revoke access for staff (24) |                  |
| Mobile APP for staff (45) |                  |

Below are items that users have said are missing with the current DukeShift staffing and scheduling system. Please select the top 3 items that are most important to you to have in a work force management system:

| Mobile app for schedulers (33) |                  |
| Use of AI to post needed shifts (50) |                  |
| Ability for staff to pick up a partial shift (72) |                  |
| Incentivization options connected to policy and time and attendance system (39) |                  |
| Mass communications to staff to advertise open shifts (55) |                  |
| Detailed team member profiles to indicate competencies (44) |                  |
| Posting staff availability along with unit need (53) |                  |
| Warnings and stops based on work stretch (42) |                  |
| Detailed unit descriptions (20) |                  |
| Warnings and stops based on license (30) |                  |
| Other, please specify (12) |                  |
Please select all examples of how you currently use EdTrack Staffing and Scheduling:

<table>
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<tr>
<th>N/A or Do Not Use (33)</th>
</tr>
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<tr>
<td>Register for classes (128)</td>
</tr>
<tr>
<td>Track unit based education (staff meetings, skills days) (63)</td>
</tr>
<tr>
<td>View my education transcript (140)</td>
</tr>
<tr>
<td>Monitor my staff’s education completions (81)</td>
</tr>
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<td>Run reports (86)</td>
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Below are items that users have said work well with the current EdTrack staffing and scheduling system. Please select the top 3 items that are most important to you to keep in a work force management system:

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<th>CE hours listed (89)</th>
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<tr>
<td>Ability to track unit based education and meeting attendance (46)</td>
</tr>
<tr>
<td>Class registrations show on schedule (105)</td>
</tr>
<tr>
<td>Employee transcript reports (120)</td>
</tr>
<tr>
<td>Online class registration (83)</td>
</tr>
<tr>
<td>Includes non-Duke classes (28)</td>
</tr>
</tbody>
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Below are items that users have said are missing with the current EdTrack staffing and scheduling system. Please select the top 3 items that are most important to you to have in a work force management system:

<p>| User interface should be simple (52) |
| Search/Filter options when looking for a record (53) |
| Report consistency when course numbers/titles change (65) |
| Manager dashboards for things such as class enrollments, certifications, clinical ladder, required education (82) |
| Report to say who has NOT completed a class (69) |
| Ability to build a required curriculum based on job role (45) |
| Email reminders for course completions (53) |
| Easy to follow class catalogue (47) |</p>
<table>
<thead>
<tr>
<th>Top 3 Have and Keep</th>
<th>API SS</th>
<th>DukeShift</th>
<th>API ET</th>
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<tr>
<td>1. Self Scheduling is easy (N=111)</td>
<td>1. Awarded shifts appear on schedule (N=113)</td>
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<td>2. License Reminders (N=99)</td>
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<td>3. Daily Rosters (N=51)</td>
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<td>2. Integration with personal calendars (ie, Google, Outlook) (N=67)</td>
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<td>3. Staff Trading Functionality (N=54)</td>
<td>3. Posting staff availability along with unit need (N=53)</td>
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Potential Systems

• Someone Reported Experience with
  • Qgenda
  • ShiftHound
  • ShiftWizard
  • Symp lr Cloud
  • UKG (aka Kronos)

• Also on the Marketplace
  • Allocate
  • CareWare
  • Palantir
  • SAP Workforce
  • SmartSquare

• Other
  • AMiON (on call schedules only)
  • Dossier