Agenda

• Announcements
  • PTOH Follow up
  • PF Follow Up
  • B4h improvement on Award to Other Shift
  • New WFM System Update

• A Closer Look:
  • APIResourceGroup vs Talent Care Services and payroll reps
  • Connection of TA, SS and CareHub Staffing Tile
Follow Up: PTOH

Use for new hires in 1st 90 days of hire

• To pay for a holiday where a department is closed

• To pay double time ½ on a holiday – no policy for this, but has been the practice

• Must have enough time in their starting STB and the time will be subtracted from the bank
Follow Up: Special Code PF Daily Hrs and Override Option

• When staff use special code 10 PF (PTO Fill) the system
  • Calculates how much PTO is needed to get the person to their max daily hours
  • Enters the PTO as PTOU
• Daily Hours are on the iForm and can be seen on the Time Card report

Use Override Code 9 to convert PF from PTOU to PTOS
B4h Improvement: Award to Other Shift

• A Duke user found that when they clicked Award to Other Shift they
  1) didn’t get the best choices first and 2) didn’t have a way to sort or
  filter to find the best choice

• The team submitted this to the vendor
What Happens Now

Shift is for April 30, 7A in Training Unit

Other 4/30 shifts appear first, for same time. 5/1 shift appears at bottom. If you need to change department or dates, you can use fields at the top. Same day and time for that department will show on top.
New WFM System Update
WFM Project Timeline

- May 1 – approve vendors to invite for demonstrations
- May 6-8 Tier 2 options presentations
- May 13-24 Vendor Demonstrations
- Choose top vendors
- Contract negotiations
- Implementation Kick Off

Timeline Update:
- May 1 – approve vendors to invite for demonstrations
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RFP Process

• 11 of 13 vendors responded to the RFP
• RFP Review Team evaluated April 22-26
• Tier II Demonstrations
  • Project leaders
  • May 6-8
• Vendor Demonstrations
  • Zoom
  • May 13-24

Top 6 Choices

• AMN Smart Square
• Health Stream (Shift Wizard)
• Palantir
• Qgenda
• RL Datix
• UKG Kronos

Not considering

• Care Systems
• Inovalon (Ability Smartforce)
• MakeShift
• symplr (API)
WFM Project Structure

Executive Sponsor
Terry McDonnell

Steering Committee

Implementation Oversight

Project Co-Leaders
Julia Bambach
Wendy Snider

Technical
Operational
System Build/Training
Communications
Steering Committee

• Chair: Terry McDonnell
• Project Leaders: Julia Bambach and Wendy Snider
• Members: Nursing, CEPD, HR, Finance, Business Transformation, Payroll, DHTS, ASM
• Leadership support and strategic direction
• Ensure alignment with organizational goals
• Key decisions regarding resources, changes, contingency plans
Implementation Oversight

- Chair: Sylvia Alston
- Members: Project Co-Leads, Chairs of each committee, representative from each facility
- Overview of planning and execution responsibilities
- Project plan, milestones, and deliverables
- Risk management and stakeholder communication
Technical

- Chair: DHTS and/or ASM leader
- Wendy Snider, Vendor technical representative, SMEs for integrations, as needed
- Integration of technology into Duke IT space
- Adherence to technical standards and best practices
- System analysis and integration planning
Operations

- Co-chairs: Julia Bambach
- Members: Staffing and Scheduling Council chairs and other representatives, representatives from non-nursing
- Ensuring WFM technology meets workforce needs
- System build guidance and policy development
- User feedback and change management
System Build/Training

• Chair: Julia Bambach
• Members: Operational team delegate(s), Trainers from vendor, TBD project resources to build/train
• System build completion and testing
• Training program development and delivery
• Ongoing support and user proficiency
Communications

- Co-Chairs: Wendy Snider/Jana Alexander
- Members: representative from each entity, operations team delegate, training team delegate
- Development of comprehensive communication strategy
- Project deliverables messaging and communication channels
- Training materials design and change management
API Resource Group@duke.edu

• Creates/removes TA and SS accounts, DukeShift accounts
• Build new departments
• Add people to schedule groups
• Create positions, stations, activity codes, staffing templates
• Help with reports
• Can answer most SS ?s and TA questions related to API

• Box is checked by both Talent Care Team and Staffing and Scheduling Team
• Not all payroll questions are API TA questions
  • Talent Care Center
  • Corporate Payroll
  • HR
• Liaison with API Technical team and vendor
Payroll Representatives

• Payroll representatives are by facility

• Liaison with
  • Corporate Payroll
  • API Technical Team
  • API vendor

• Removing the VA or SO special code from clockings
• Badge issues related to TA
• PTO balance
• PTO questions
• Matters related to paychecks
• Gross Adjustments
• Missing employees in API
• Removing employees in API
• FML dates
• Paid Parental Leave
Integration of TA/SS and CareHub
PTO, STDBY, JURY can be entered on either side – these are paycodes that pay the employee.
Activity Codes on Schedule Show as SCHED

SCHED is a paycode that doesn’t pay anything.
The Monthly View Screen Shows BOTH
Entering Floats

On the SCHEDULE options
• Use Schedule Screen
• Use Monthly View Screen
• Use Time Card Screen
• Use Current Staffing Overview Screen
• Need scheduling access to the dept

• On the Clockings
  • No access needed

Each is done separately
Float at clocking

• Changing the department code on the clocking determines which department will be charged for that labor time

• Use arrow to open clocking, update dept, save
Float Schedules

On Schedule Screen
Open Activity Code w/ a double click, change dept, save

On Monthly View Screen
Click the Schedule to open, change dept, save
Float Schedules

On the Time Card Screen
Use the arrow to open the SCHED
Change dept, Save

Note: on the time card side if you try to change an activity code on the form (below) it will show on the schedule side as SCHED.

On the CSO (Current Staffing Overview) Screen
Open the CSO for the desired day
Click the Role to open the list of those working today
Find the name
Open their schedule and update

This sounds like a lot, but if you are already in the CSO to enter multiple floats or other updates for the current shift, this is the fastest.

More detail on Schedule Maintenance User Guide:
ssSchedMaint.pdf (duke.edu)
CareHub Staffing Tile Reminders

- Future Data is based on the SCHEDULE (future includes the next 3 hour block of time)
  - Call outs entered by staffing office to help keep this updated
  - As soon as you know of schedule changes, update your schedule, including floats
- Current Data is based on the CLOCKINGs, including SPECIAL CODEs
  - Put good directions for floating and special code use at badge readers
  - Coach staff on correct swiping
  - Good written directions for staff are here: API Basics for Staff_2.pptx (live.com)