**Review Profiles**

The contract or contract batch creator AND anyone set up to receive copies of their emails, will receive a system generated email when a vendor enters a profile.

You can also review all submitted profiles from the Home Tab (see notes above).

Click on Contracts with Requests

<table>
<thead>
<tr>
<th>Contracts Summary - Per-Diem Shift Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duke Medicine (System)</td>
</tr>
<tr>
<td>Closed Contracts - Not Awarded</td>
</tr>
<tr>
<td>2</td>
</tr>
<tr>
<td>Closed Contracts - Awarded</td>
</tr>
<tr>
<td>3</td>
</tr>
<tr>
<td>Closed Contracts - On Assignment</td>
</tr>
<tr>
<td>3</td>
</tr>
<tr>
<td>Award Offers</td>
</tr>
<tr>
<td>2</td>
</tr>
<tr>
<td>Contracts With Requests</td>
</tr>
<tr>
<td>8</td>
</tr>
</tbody>
</table>

Note that when you see the list of all the contracts with requests, the Contract ID column will tell you which BATCH the request is in. You can also see if you looked at the request already (Reviewed) versus receiving a New Request.

Click on the contract ID number to see the submitted profile(s).

You have a lot of options from this screen.

Click on a contractor’s name to view their profile.
Award, Decline or Award to Other Contract. You want to get used to using the Award to Other Contract button because this will show you all the contracts in the batch and you want to be sure to fill all the hidden (hidden from vendors) ones first, and fill the master last.

To view the profile of an individual, click on that individual’s name

This box does NOT refer to the specific contract. Think of this as a prescreening tool. This is a general view that we have on this person in the event that they have 1) worked here before and we like them (check approved), 2) they worked here before and we are not interested in their return (check denied) or 3) they are new to us (check Under Review). You can select for ALL Facilities or individual ones. This in INTERNAL. Agency does not see.

The uploaded credentials are listed and can be viewed by clicking on a specific item or printed by choosing Print List or Print Credentials (will include the documents).
There is a section to enter Private Comments (only Duke sees) or Public Comments (agency can see). Under Public Comments list the current status – ie, sent to manager for review, Interview scheduled, Offer made, etc. which will give a date stamp. AND the agency can see so they can follow the progress of their candidate via the system (vs. via email). Each posted comment is time and date stamped and lists who posted the comment so that you can keep an open running communication on the status of candidate review.

The comment labels were not done in DEV for this screen shot, but this gives us the idea. The Contract Labor Team needs to make a list of the standard comments they will use and keep them consistent to maximize reporting and system communication to agency.

From this screen, you can Message the Agency (this will go through the My Messages Tab/System via b4health).

You can also forward the Profile to the manager.

When your forward a profile to a manager, the manager gets an email asking them to log into b4health to view the profile. This prevents accidentally emailing the SSN or other private info since the recipient is required to log in to see any confidential information. Our custom message has been added to the system.
Forward Profile

Note, the custom message was submitted by DUHS and created by b4health for our use. You can edit the custom message.

Can’t remember who you sent the profiles to?

Click on View Forward Log to get a time stamped list.

<table>
<thead>
<tr>
<th>Sender</th>
<th>Sent Date</th>
<th>Emails</th>
</tr>
</thead>
<tbody>
<tr>
<td>B4HEALTH ADMIN</td>
<td>1/24/2018 2:04:26 PM</td>
<td><a href="mailto:Julia.bambach@duke.edu">Julia.bambach@duke.edu</a></td>
</tr>
<tr>
<td>B4HEALTH ACCOUNT</td>
<td>11/2/2017 1:21:44 PM</td>
<td><a href="mailto:mike.wheeden@b4-health.com">mike.wheeden@b4-health.com</a></td>
</tr>
</tbody>
</table>
NOTE: Communication with Duke Managers on setting up interviews, whether or not to make an offer, etc. would remain the same.

Award a Contract (make an offer)

This is the Master Contract in the Batch.

Award submitted providers to other Contracts in the Batch using the ‘Award to Other Contracts’ button BEFORE using the Award Request button. Using the Award Request will close the Master Contract in the Batch once the awarded agency accepts the Offer.

You want to fill contracts that are ‘hidden’ from the vendors BEFORE filling the master contract.

So, unless this is the last contract to fill in the batch, to award the contract, click Award to Other Contract.

Contracts that MATCH the BATCH are listed at the top.

Notice, you can also choose to award a completely separate contract to this person as well, listed on the bottom.

Click Award, Fill out the Form, Click Complete Award
This will send your OFFER to the vendor. Just like with an individual per diem shift, the vendor still needs to accept the Award.

An email is generated to BOTH Duke and Vendor that an award offer has been made.

This is what the vendor sees:
NOW when the Agency clicks “Accept” they see

When the vendor responds to the Award an email is generated to BOTH Duke and Vendor. The message also appears under My Messages
**ACCEPTED AWARDS** – monitor for completed profiles, schedule orientation as currently doing

You can see accepted awards on the Home Tab Closed Contracts-Awarded.

**NOTES on DECLINING:**

You can choose a reason and make comments.

This is what the vendor sees:

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**AWARD AN EXTENSION**

Three ways to find a contractor to extend:

Home Tab> Batch Contract List>Choose an Awarded Shift
OR HomeTab> Traveler Last Name>Search Professionals

Once you have the professional open, click Contracts Awarded

Cross Country Staffing - Tracy Bennett

On the Home Tab, look at the Closed Contracts – On Assignment List.

Either way, you will eventually Open the Contract ID
Choosing Award an Extension will list all existing Open Contracts (LMCs) so that you can choose one. Items in the same batch will appear on the top of the list. However, if you want to have that person fill a contract in a different department, you can choose the open contract for that department as well.

When you click on Award, you will see the same form as if it was their first contract. Fill that out with all your notes in the Comments, and click Complete Award.
Please make any edits to the Start Date, End Date or Rate. Add any additional notes resulting from a Candidate Interview prior to sending this Award Offer. When the Agency Accepts this Award these details will be included and will serve as the Candidate Confirmation Letter. All details will be saved and recorded in the Contract Assignment Details.

| Start Date: | 05/27/2018 | | End Date: | 08/26/2018 |
| Rate: | RNSP3: $63.00 |
| Rate Differential: | $0 |

**Comment:**

Need to have 3 years experience and be willing to float to multiple MS units

Note: You can also award extensions from the Reconciliation Tab.
**REPORTS**

**Batch Contracts List** – Quick summary of where we are with filling traveler requests. Screen shots are from the test system and go back in time...

Under Date Range Relates To you have 3 options:

- Active Contracts during Period
- Contract Starts during Period
- Contract Ends during Period

You can filter by facility, but since we are naming our batches with facility first all items for each facility will group together is you choose Batch Name-Ascending or Batch Name-Descending in the Sort By: field.

You can choose a specific Position type (Nurse, NA, MA, Surg Tech, etc), or leave at Select Position Type to see all.

In the Sort By: field you can also sort by Date Created-Ascending or Date Created-Descending.

### Duke Medicine

**Batch Contract Report**

<table>
<thead>
<tr>
<th>Batch ID</th>
<th>Batch Name</th>
<th>Position Type</th>
<th>All</th>
<th>Awarded</th>
<th>Open</th>
<th>Closed Not Awarded</th>
<th>Date Created</th>
</tr>
</thead>
<tbody>
<tr>
<td>86</td>
<td>DUH 6W</td>
<td>Nurse</td>
<td>5</td>
<td>0</td>
<td>0</td>
<td>5</td>
<td>1/25/2018 8:28:27 AM</td>
</tr>
<tr>
<td>78</td>
<td>DUH4-1 10/1/17</td>
<td>Nurse</td>
<td>6</td>
<td>0</td>
<td>0</td>
<td>6</td>
<td>11/2/2017 1:11:10 PM</td>
</tr>
<tr>
<td>77</td>
<td>DUH4th 10/1/17</td>
<td>Nurse</td>
<td>5</td>
<td>1</td>
<td>0</td>
<td>3</td>
<td>10/31/2017 8:59:31 AM</td>
</tr>
<tr>
<td>81</td>
<td>DUHICU 11/15/17</td>
<td>Nurse</td>
<td>3</td>
<td>1</td>
<td>0</td>
<td>2</td>
<td>11/7/2017 12:18:28 PM</td>
</tr>
<tr>
<td>79</td>
<td>DUHOR 11/1/17</td>
<td>Nurse</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>11/3/2017 11:55:24 AM</td>
</tr>
<tr>
<td>82</td>
<td>DUHOR 12/10/17</td>
<td>Surgical Tech</td>
<td>6</td>
<td>1</td>
<td>0</td>
<td>5</td>
<td>11/7/2017 2:49:17 PM</td>
</tr>
</tbody>
</table>
Batch Details Report gives you more information on your progress filling traveler requests.
Contracts Report

This report has multiple possibilities. You can see ALL your contracts within a date range or set limits (filters), such as just show me Awarded contracts or just contracts with submissions. You can also choose to see all Active, or maybe just those ending in the date range (for instance, if you want to see to whom to reach out to regarding extensions).

Credential Expiration

Suggestions on using Filters:

You must choose which credentials you want to see on the report. Make sure the item you choose matches the DUKE preferred name for that item.

You can choose a specific position, such as Nurse, or leave blank for ALL.

To see all expired Credentials that have expired up to a certain date, leave the Expiration Start Date blank. Enter in the cutoff date in the Expiration End Date.

To see only the credentials that expire during a certain time frame, enter in the Start and End Date. Keep in mind this will not show the Credentials that have expired prior to the Expiration Start Date.

You can limit the list to current travelers by choosing a shift/contract start and end date range.
To see missing credentials, use the **Missing and Expired Credential Tracking Reports.**