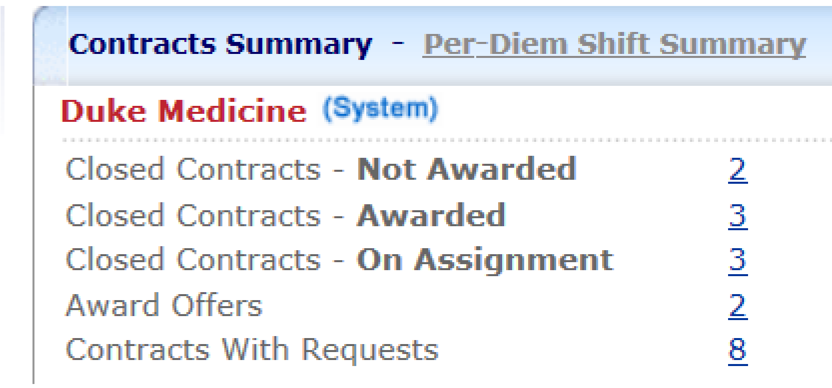
Review Profiles

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



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 an New Request.

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


Contracts With Requests : Duke Medicine (System)
<<-Back to Home

Legend
O Shift Open for Requests
N Shift Closed for Request, Not Awarded
C Shift Cancelled
A Shift Closed for Request, Awarded
S Scheduled for Request

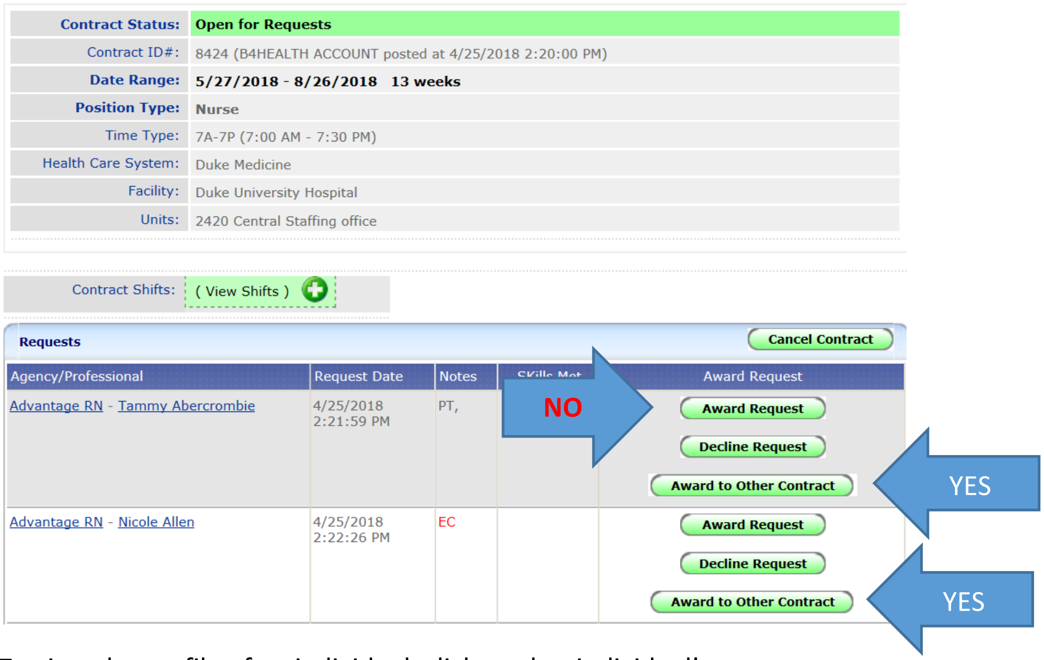
(2 Total Records)
Records per Page : 100

Position Type	Facility	Requests	Date Range	Status	Contract ID#
Nurse REVIEWED	Duke University Hospital 2420 Central Staffing office	2	5/27/2018 - 8/26/2018 7:00AM - 7:30PM	O	8424 Date Posted: 4/25/2018 2:20:00 PM
Nurse New Request: 6/9/2018 2:12 PM	Duke University Hospital 2420 Central Staffing office	3	5/27/2018 - 8/26/2018 7:00AM - 7:30PM	O	8425 Date Posted: 4/25/2018 2:20:00 PM

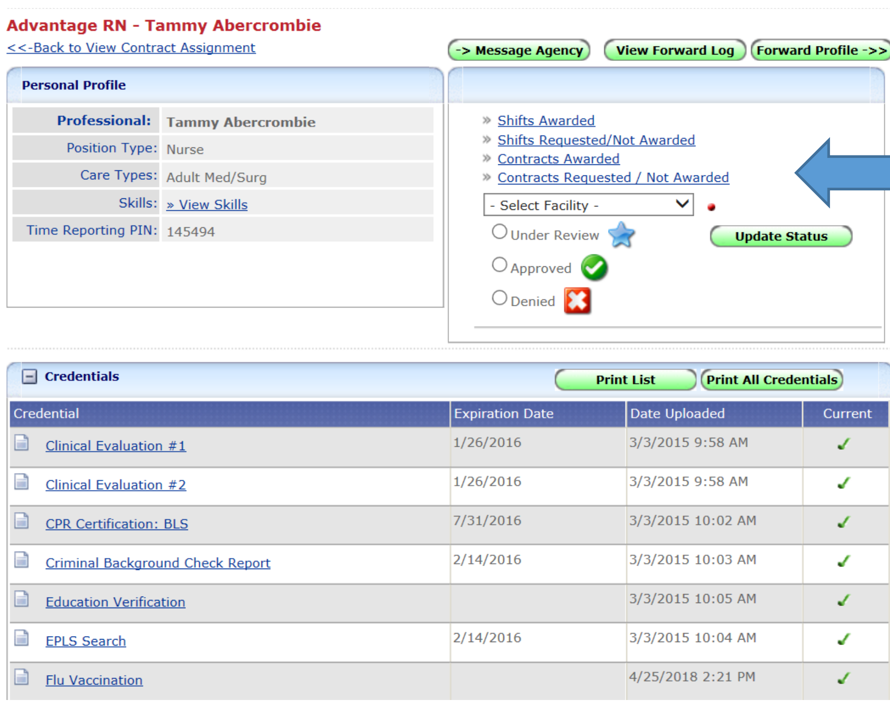
You have a lot of options from this screen.

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.

Duke Medicine Private Comments Print Comments » Add Comment

Date Posted	Posted By	Comments
2/18/2015 11:28:08 AM	**Nicole Mills**	**offer accepted DUKE RALEIGH** offer accepted DUKE RALEIGH
1/26/2015 11:15:22 PM	**Cleveland Sauls**	**STNM** STNM for review. DRAH FP Manager: Yolanda Smith

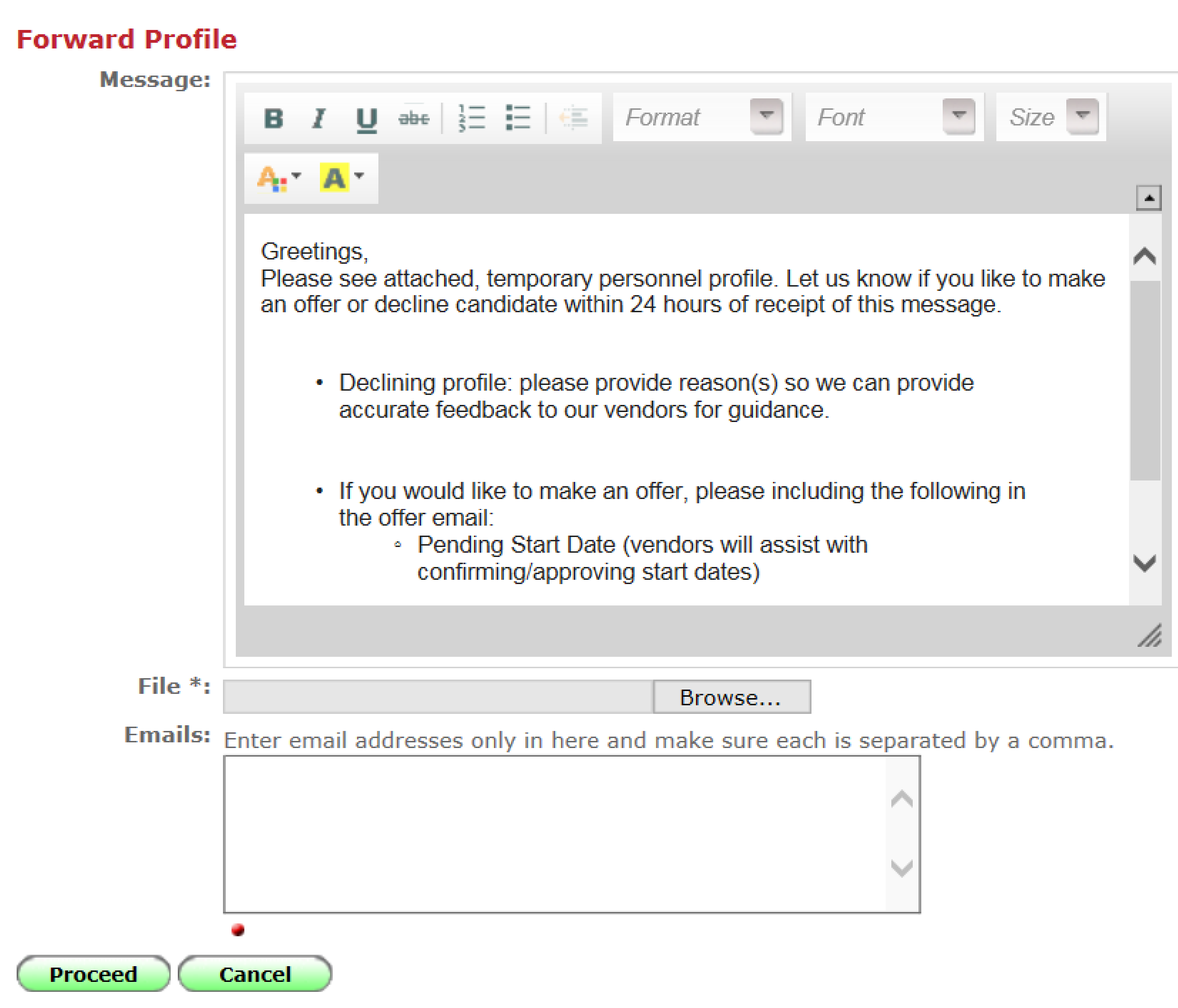
Agency Comments

(Currently no Comments)

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.

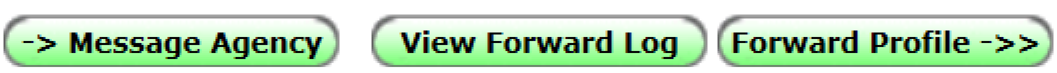
When your forward a profile to a manager, the manager gets an email asking them to log into b4health to view the profile. This prevents accidentally emailing the SSN or other private info since the recipient is required to log in to see any confidential information. Our custom message has been added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



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.



Sender	Sent Date	Emails
B4HEALTH ADMIN	1/24/2018 2:04:26 PM	Julia.bambach@duke.edu
B4HEALTH ACCOUNT	11/2/2017 1:21:44 PM	mike.wheeden@b4-health.com

NOTE: Communication with Duke Managers on setting up interviews, whether or not to make an offer, etc. would remain the same.

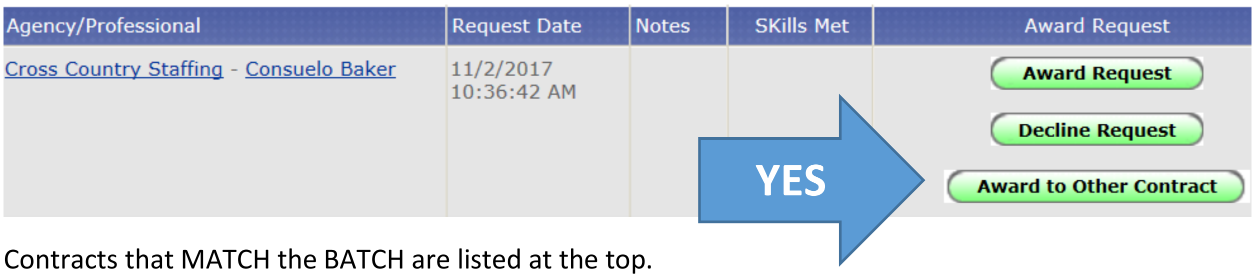
<u>Award a Contract (make an offer)</u>

This is the Master Contract in the Batch.

Award submitted providers to other Contracts in the Batch using the **'Award to Other Contracts'** button <u>BEFORE</u> 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.**



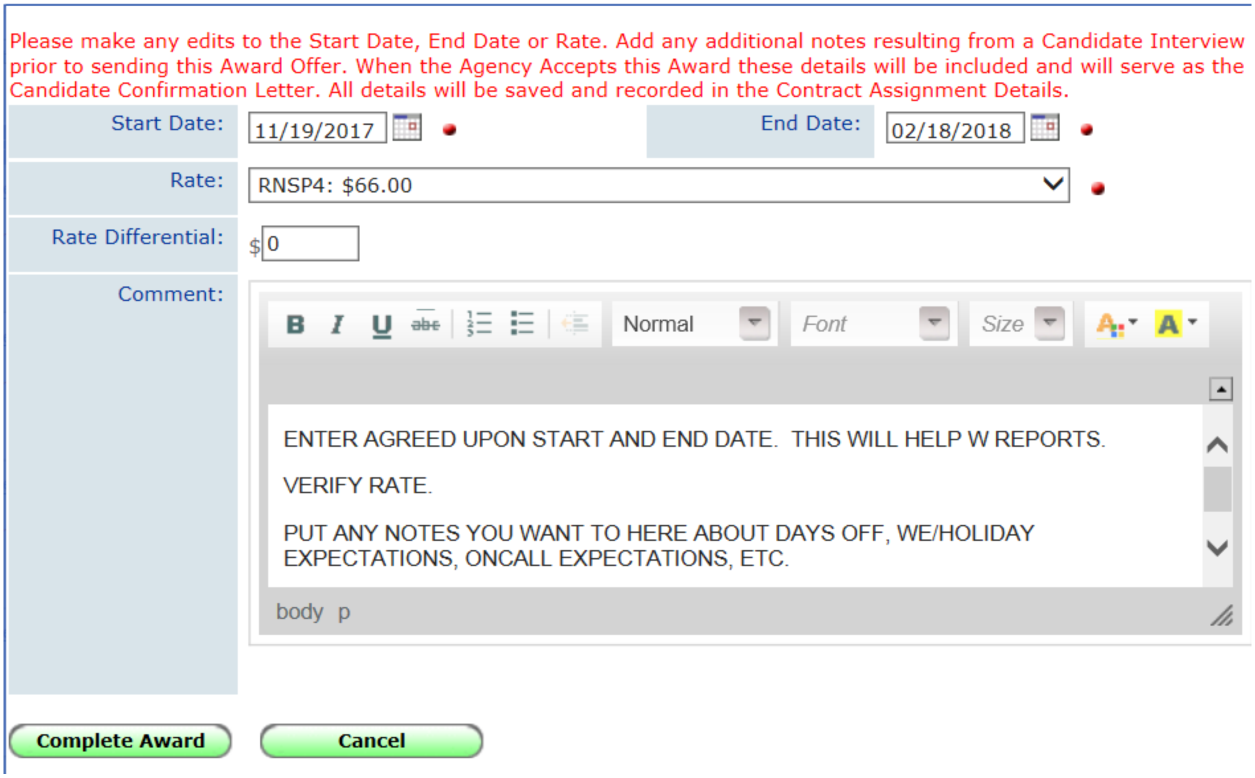
Agency/Professional	Request Date	Notes	SKills Met	Award Request
Cross Country Staffing - Consuelo Baker	11/2/2017 10:36:42 AM			Award Request Decline Request Award to Other Contract

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.

Nurse Batch Match	Duke University Hospital 2420 Central Staffing office	0	11/19/2017 - 2/18/2018 7:00PM - 7:30AM		7590 Batch: 77	View Details Award
Nurse	Duke University Hospital 2420 Central Staffing office	0	11/26/2017 - 2/25/2018 7:00AM - 7:30PM		7670 Batch:	View Details Award

Click Award, Fill out the Form, Click Complete Award

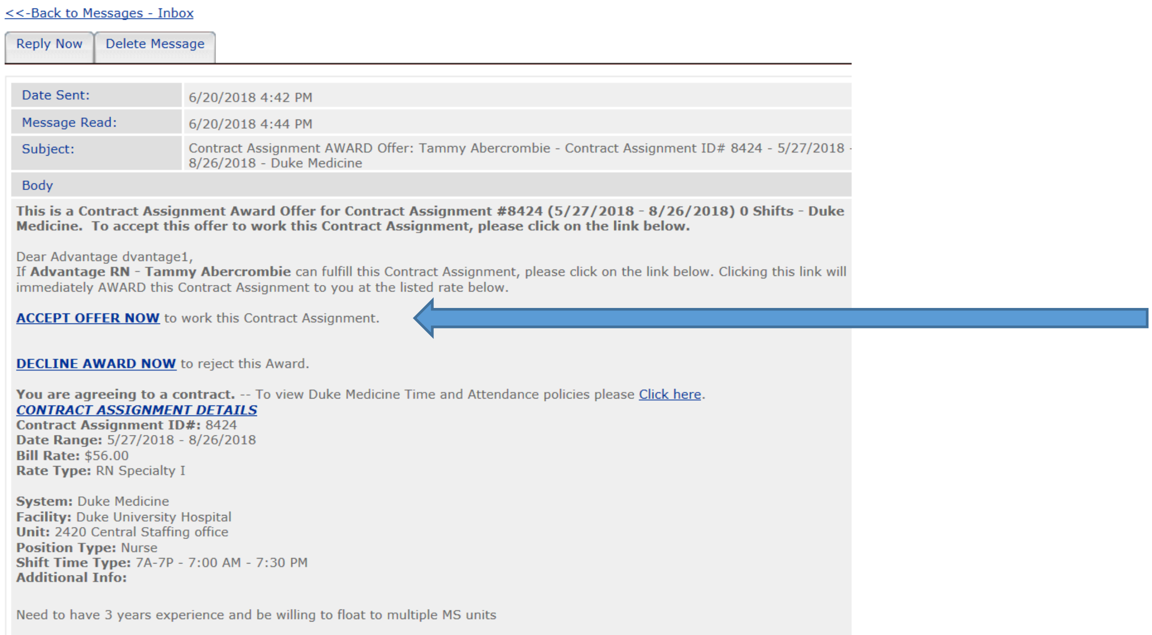


This will send your OFFER to the vendor. Just like with an individual per diem shift, the vendor still needs to accept the Award**.**

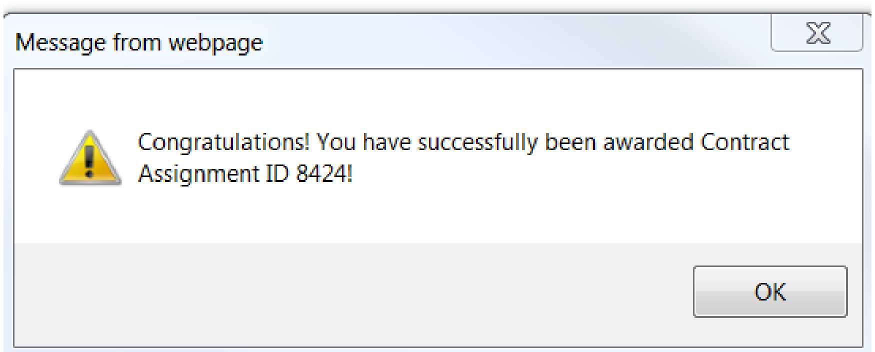
An email is generated to BOTH Duke and Vendor that an award offer has been made.

This is what the vendor sees:

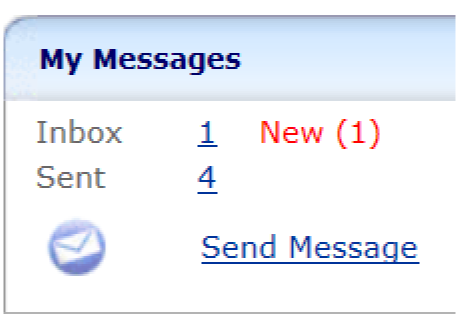
☐	B4HEALTH ACCOUNT	Contract Assignment AWARD Offer: Tammy Abercrombie - Contract Assignment ID# 8424 - 5/27/2018 - 8/26/2018 - Duke Medicine	6/20/2018 4:42 PM	6/20/2018 4:44 PM	8424



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

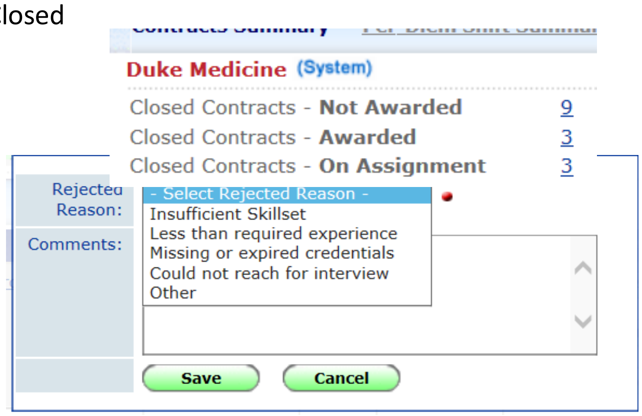


<u>ACCEPETED AWARDS –</u> monitor for completed profiles, schedule orientation **as currently doing**

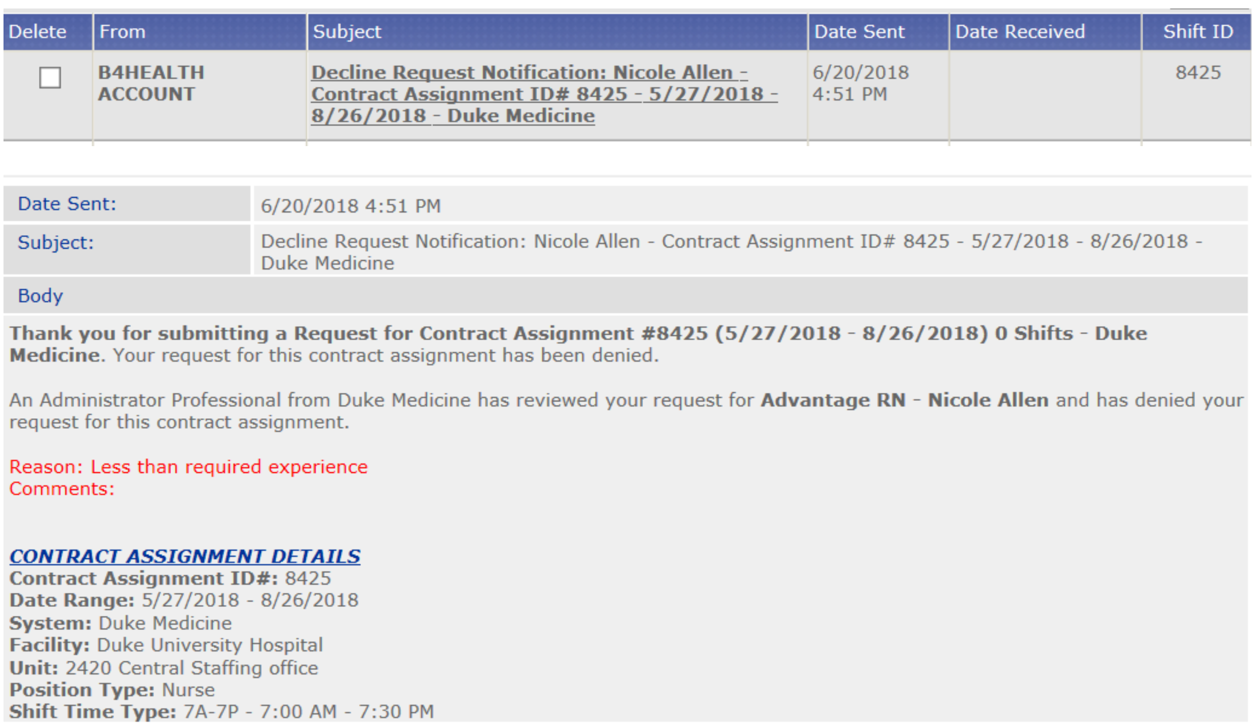
You can see accepted awards on the Home Tab Closed Contracts-Awarded.

NOTES on **DECLINING**:

You can choose a reason and make comments.



This is what the vendor sees:



Delete	From	Subject	Date Sent	Date Received	Shift ID
☐	**B4HEALTH ACCOUNT**	**Decline Request Notification: Nicole Allen - Contract Assignment ID# 8425 - 5/27/2018 - 8/26/2018 - Duke Medicine**	6/20/2018 4:51 PM		8425

Date Sent:	6/20/2018 4:51 PM
Subject:	Decline Request Notification: Nicole Allen - Contract Assignment ID# 8425 - 5/27/2018 - 8/26/2018 - Duke Medicine

Body

Thank you for submitting a Request for Contract Assignment #8425 (5/27/2018 - 8/26/2018) 0 Shifts - Duke Medicine. Your request for this contract assignment has been denied.

An Administrator Professional from Duke Medicine has reviewed your request for **Advantage RN - Nicole Allen** and has denied your request for this contract assignment.

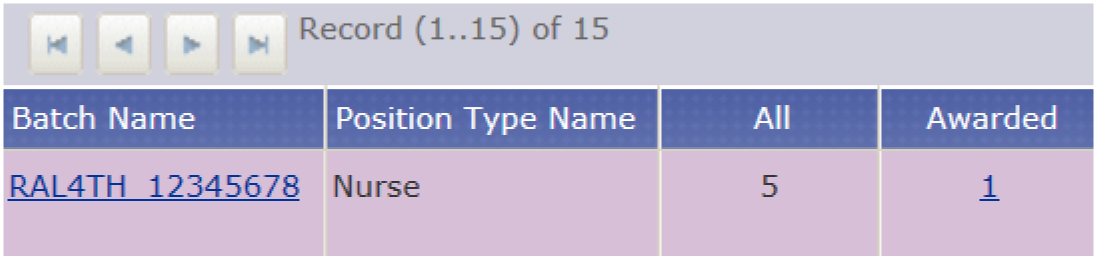
Reason: Less than required experience
Comments:

CONTRACT ASSIGNMENT DETAILS
Contract Assignment ID#: 8425
Date Range: 5/27/2018 - 8/26/2018
System: Duke Medicine
Facility: Duke University Hospital
Unit: 2420 Central Staffing office
Position Type: Nurse
Shift Time Type: 7A-7P - 7:00 AM - 7:30 PM

<u>AWARD AN EXTENSION</u>

Three ways to find a contractor to extend:

Home Tab> Batch Contract List>Choose an Awarded Shift

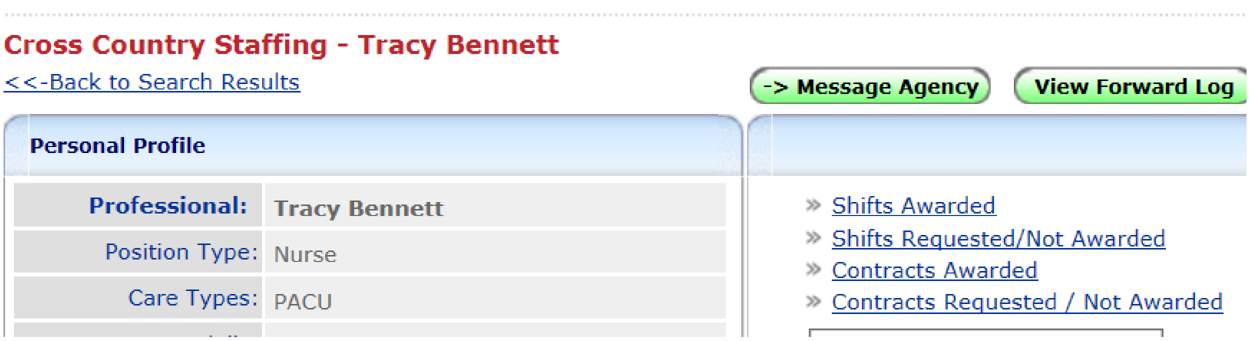


Record (1..15) of 15

Batch Name	Position Type Name	All	Awarded
RAL4TH 12345678	Nurse	5	1

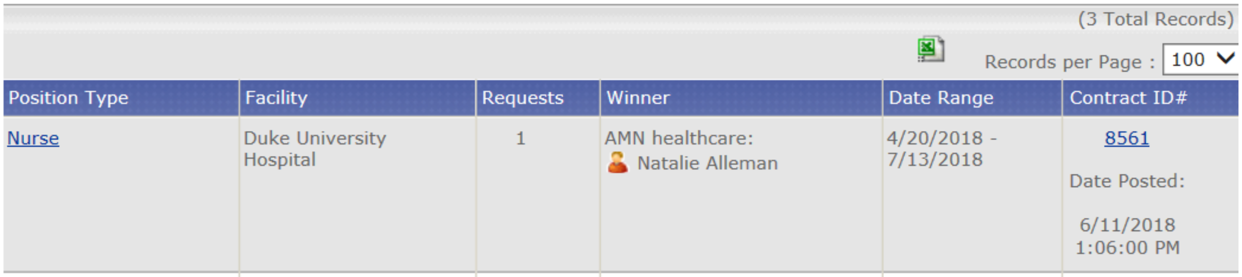
OR HomeTab> Traveler Last Name>Search Professionals

Once you have the professional open, click Contracts Awarded



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

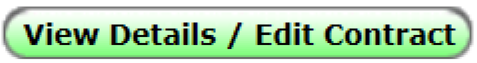
Either way, you will eventually Open the Contract ID



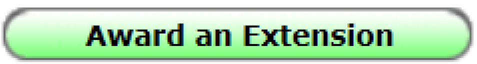
(3 Total Records)
Records per Page : 100

Position Type	Facility	Requests	Winner	Date Range	Contract ID#
Nurse	Duke University Hospital	1	AMN healthcare: Natalie Alleman	4/20/2018 - 7/13/2018	8561 Date Posted: 6/11/2018 1:06:00 PM

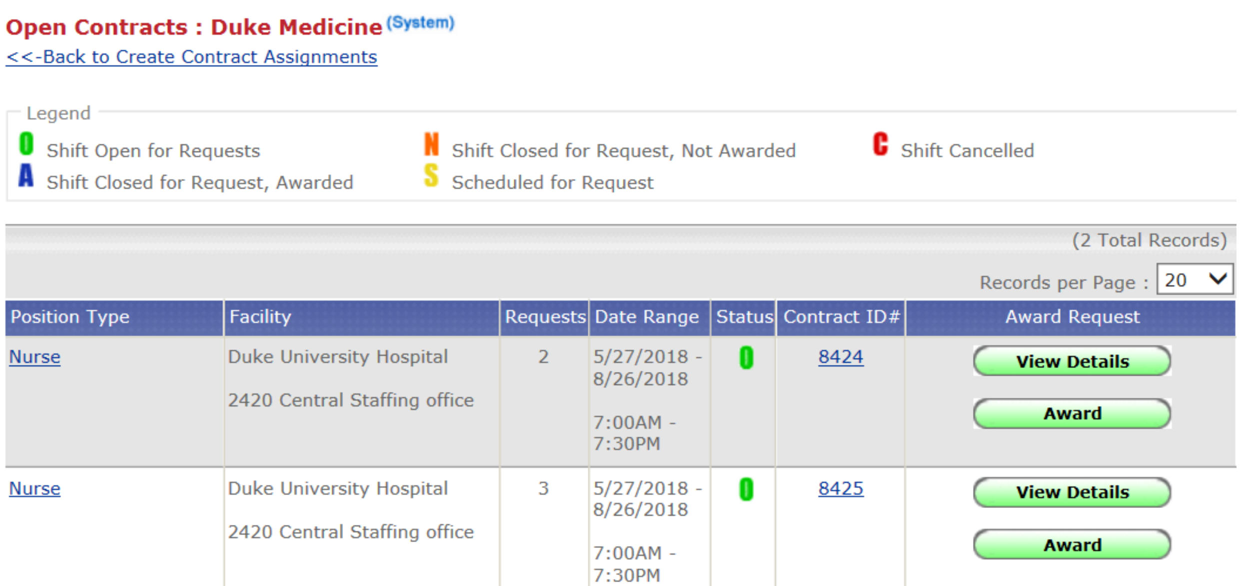
Choose



Scroll to bottom – Choose



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.



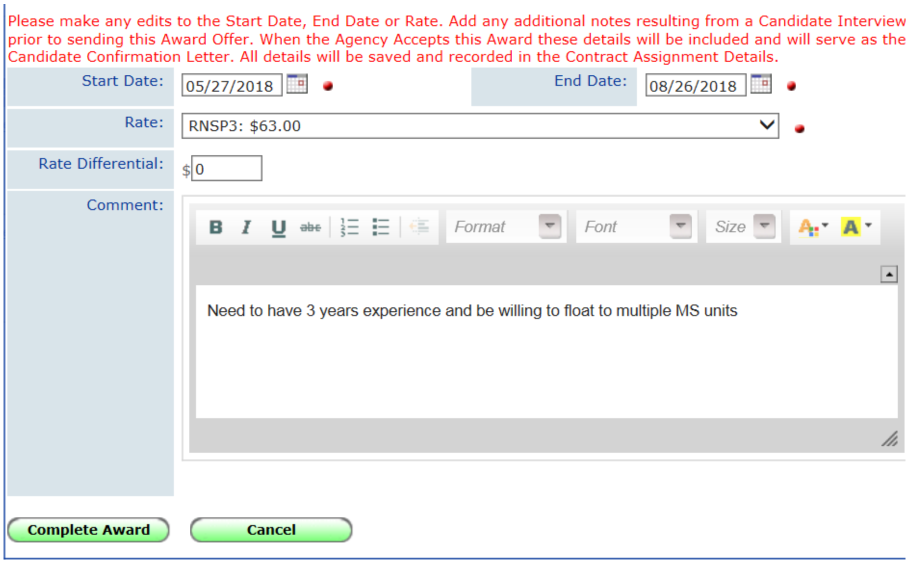
Open Contracts : Duke Medicine (System)
<<-Back to Create Contract Assignments

Legend
O Shift Open for Requests
A Shift Closed for Request, Awarded
N Shift Closed for Request, Not Awarded
S Scheduled for Request
C Shift Cancelled

(2 Total Records)
Records per Page : 20

Position Type	Facility	Requests	Date Range	Status	Contract ID#	Award Request
Nurse	Duke University Hospital 2420 Central Staffing office	2	5/27/2018 - 8/26/2018 7:00AM - 7:30PM	O	8424	View Details Award
Nurse	Duke University Hospital 2420 Central Staffing office	3	5/27/2018 - 8/26/2018 7:00AM - 7:30PM	O	8425	View Details Award

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.



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

REPORTS

Batch Contracts List – Quick summary of where we are with filling traveler requestsScreen shots are from the test system and go back in time…

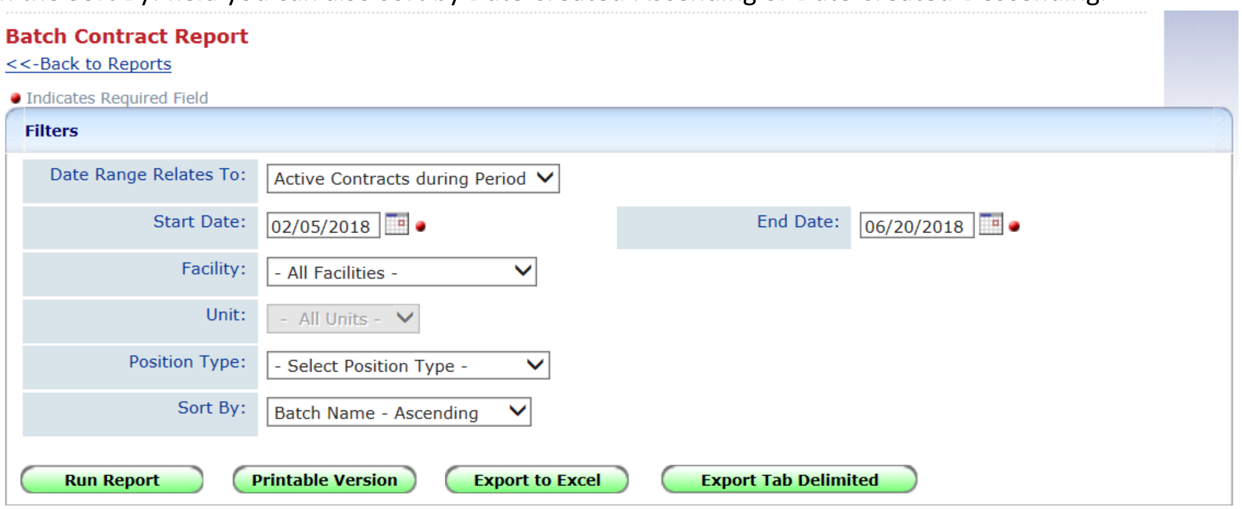
Under Date Range Relates To you have 3 options:

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.

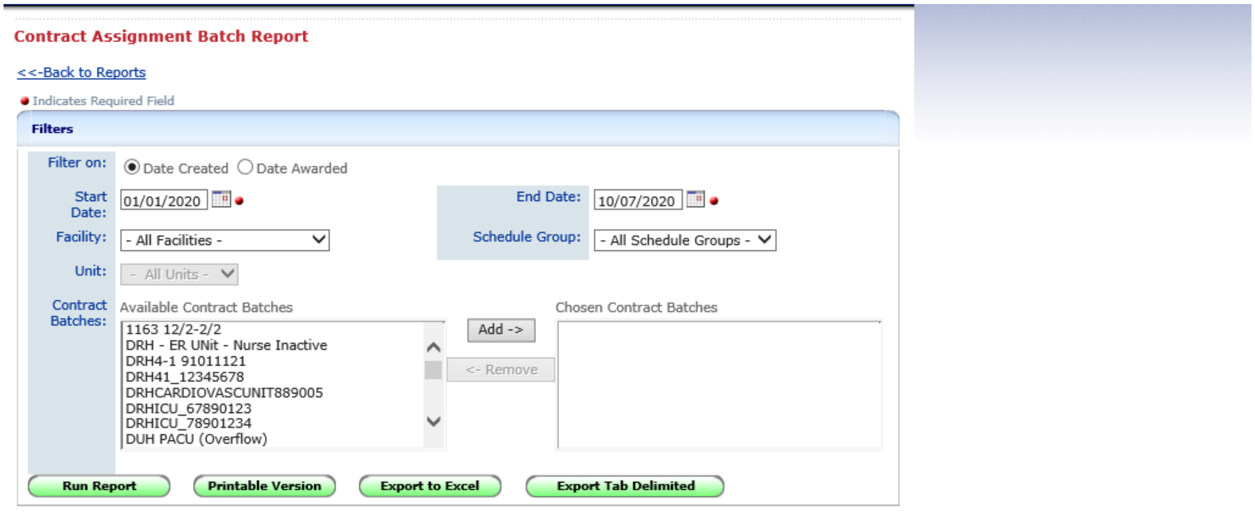


Duke Medicine — **Wednesday, June 20, 2018**

Batch Contract Report

Batch ID	Batch Name	Position Type	All	Awarded	Open	Closed Not Awarded	Date Created
86	DUH 6W	Nurse	5	0	0	5	1/25/2018 8:28:27 AM
78	DUH4-1 10/1/17	Nurse	6	0	0	6	11/2/2017 1:11:10 PM
77	DUH4th 10/1/17	Nurse	5	1	0	3	10/31/2017 8:59:31 AM
81	DUHICU 11/15/17	Nurse	3	1	0	2	11/7/2017 12:18:28 PM
79	DUHOR 11/1/17	Nurse	3	0	0	3	11/3/2017 11:55:24 AM
82	DUHOR 12/10/17	Surgical Tech	6	1	0	5	11/7/2017 2:49:17 PM

Batch Details Report gives you more information on your progress filling traveler requests


Contract Assignment Batch Report

<<-Back to Reports

Indicates Required Field

Filters

Filter on: Date Created / Date Awarded

Start Date: 01/01/2020

End Date: 10/07/2020

Facility: - All Facilities -

Schedule Group: - All Schedule Groups -

Unit: - All Units -

Contract Batches:

Available Contract Batches

1163 12/2-2/2
DRH - ER UNit - Nurse Inactive
DRH4-1 91011121
DRH41_12345678
DRHCARDIOVASCUNIT889005
DRHICU_67890123
DRHICU_78901234
DUH PACU (Overflow)

Add ->

<- Remove

Chosen Contract Batches

Run Report | Printable Version | Export to Excel | Export Tab Delimited

Contract Assignment Batch Report

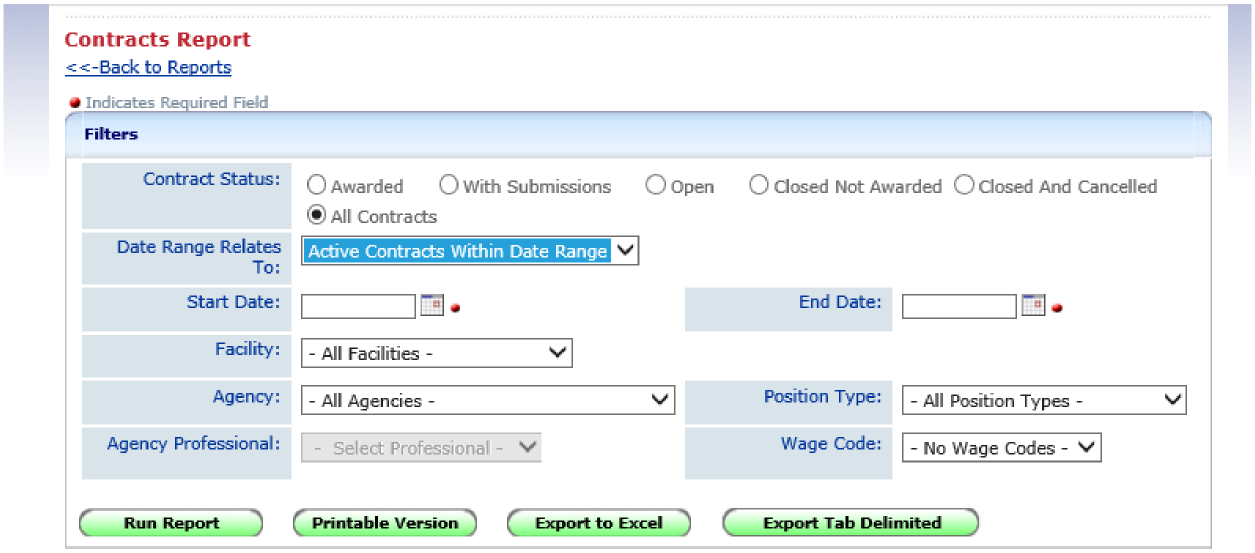
Wednesday, October 7, 2020
PWE: 1/1/2020 - 10/7/2020

DUH8E_12345678

Batch Name	Facility	Unit	Position Type	Agency	Days to Fill	# Days First Submission	DCSD Review	Manager Review	Offer Date	Award Accepted Date
DUH8E_12345678	Duke University Hospital	3129 8th East DMP	Nurse		0	0.01	0	0		
DUH8E_12345678	Duke University Hospital	3129 8th East DMP	Nurse		0	0	0	0		
DUH8E_12345678	Duke University Hospital	3129 8th East DMP	Nurse		0	0	0	0		
DUH8E_12345678	Duke University Hospital	3129 8th East DMP	Nurse		0	0	0	0		
DUH8E_12345678	Duke University Hospital	3129 8th East DMP	Nurse		0	0	0	0		
DUH8E_12345678	Duke University Hospital	2456 MEDICAL UNIT - 9100	Nurse		0	0	0	0		
DUH8E_12345678	Duke University Hospital	2456 MEDICAL UNIT - 9100	Nurse	Cross Country Staffing	0.04	0.01	0	0	10/07/2020 10:11 AM	10/07/2020 10:53 AM
DUH8E_12345678	Duke University Hospital	2456 MEDICAL UNIT - 9100	Nurse	Cirrus Medical Staffing	0.01	0.01	0	0	10/07/2020 10:04 AM	10/07/2020 10:04 AM
				DUH8E_12345678	**0.01**	**0.00**	**0.00**	**0.00**		

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:

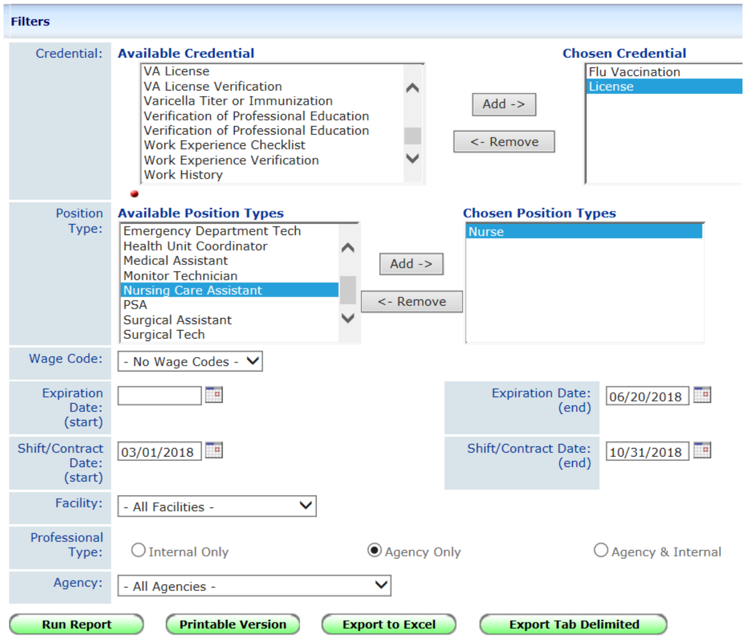
You must choose which credentials you want to see on the report. Make sure the item you choose matches the DUKE preferred name for that item.

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.**