



# 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
- [https://finance.duke.edu/systems/work/api/dukes\\_hift/index.php](https://finance.duke.edu/systems/work/api/dukes_hift/index.php)
- 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

**Create Shift**

● Indicates Required Field  
\* Does not apply to Agencies

Facility: Training Facility ▼ ●

Unit: Training Unit ▼ ●

Position: Nurse ▼ ● ⓘ [» View Position](#)

*Health Care Professional only needs to have one skill in Skill Group to be able to request, is not required to meet the desired skill set.*

# DukeShift EMPLOYEE WebPage

## Employee Eligibility Requirements

- Be an employee of company 30 (Duke Hospital), company 50 (Durham Regional Hospital) or company 60 (Duke Raleigh Hospital).  
*Please note that company 10 (School of Medicine, School of Nursing, PDC, DCRI and others) are not eligible.*
- Have successfully completed facility and department orientation
- Be free of corrective action
- Have approval of my primary department manager
- Ask my manager to submit an account form requesting my access
- My manager may remove my privilege to use DukeShift. Possible reasons include but are not limited to:
  - Failure to adhere to DukeShift policies and procedures
  - Allowing DukeShift awarded work shifts to interfere with my staffing obligations on my home unit
  - Being placed under corrective action

## Employee Responsibilities

1. I will swipe in and out at the badge reader to record my time using the DukeShift special code (12). If I am working outside of my home department, I will also float my time at the badge reader. If I need to adjust my time card, the request will go to my primary manager and not the manager of the DukeShift department.
2. I will select a DukeShift that matches my primary job code RNs may pick up RN shifts and NCAs can pick up NCA shifts. (*For more information on this requirement, review [this pdf.](#)*)
3. I will only select shifts in facilities where I have completed orientation and have computer access.
4. My DukeShift is considered a regular work shift. If I am tardy or call out, the occurrences will be treated in accordance of the Availability for Work policy.
5. I will adhere to the Staffing policy. I will not schedule myself for:
  - more than 16 hours in a row
  - more than four, 12 hour shifts in a row
  - more than seven, 8 hour shifts in a row
  - at least 8 hours between shifts
  - no more than 60 hours in a 7 day period

## Also see...

- [Staff User Guide \(pdf\)](#)
- [DukeShift User Agreement \(pdf\)](#)
- [Staff Frequently Asked Questions \(pdf\)](#)
- [HUC Availability Project: Eligibility and Directions \(pdf\)](#)
- [Entering Special Code AND/OR Float At Badge Reader \(pdf\)](#)

<https://finance.duke.edu/systems/work/api/dukeshift/index.php>

# DukeShift Manager/Scheduler WebSite

## Manager Responsibilities

### AWARDING SHIFTS

- Monitor the system for award offers and award shifts no later than 72 hours prior to the start of a shift
- Ensure staff external to his/her department has completed the required orientation and competencies needed for the work area. The department manager will ensure staff has an appropriate active license or listing to work in the department
- Document cancellations and callouts in the DukeShift and API systems just as you would regular shifts, per daily maintenance practice using the appropriate DukeShift codes
- Monitor and track preassignments from the Duke Clinical Staffing Office

### MANAGING STAFF THAT PICK UP DUKESHIFTS

- Request DukeShift accounts for employees
- Edit the API timecard for the worked DukeShifts
- Monitor the workstretch of the employee to assure that workstretch rules laid out in the DUH Staffing Policy are followed by the employee
- Monitor attendance to assure that the employee's callouts for DukeShifts are included when tracking the employee's overall attendance for the Availability for Work policy
- Address any performance issues that occur when the employee is working a DukeShift
- Revoke an employee's DukeShift account, as appropriate.

### Also see...

- [DukeShift Account Request Form](#)  
Managers: Completing a DukeShift account form means that you agree to monitor the employee's time in ReportXpress and work stretch in ActiveStaffer. It also indicates that you certify the employee is competent to work in the care types you indicate, is not under disciplinary action and is a good candidate for DukeShift.
- DukeShift How To's
  - [DukeShift to Staffing & Scheduling Interface](#) (pdf) (Last Revised: January 2011)
  - [How To Enter Preassignments](#) (pdf) (Last Revised: October 2013)
  - [How To Retract an Award Offer](#) (pdf) (Last Revised: May 2010)
  - [Reconcile Shifts](#) (pdf) (Last Revised: May 2010)
- [Manager Reference Guide](#) (pdf) (Last Revised: October 2013)
- [DukeShift for Managers](#) (pdf)

<https://finance.duke.edu/systems/work/api/dukeshift/managers.php>

Send account forms to our team – Rushdee Omar, Ellen Hegarty, Julia Bambach

# DukeShift Staffing Office WebPage

## ■ DukeShift And The Staffing Offices

The expectation is that clinical areas needing supplemental staffing support from a staffing office will enter their staffing needs in the DukeShift System. DukeShift is used by the Staffing Office to monitor staffing needs in the hospital or clinics supported by that office. The Staffing Office will preassign staff via DukeShift and reconcile DukeShift according to daily staffing decisions (such as after bedflow or as staffing office assignments change), as appropriate. The staffing office will also document per diem agency assignments in DukeShift. If you are a manager or scheduler who needs to enter staffing needs, please see the DukeShift for Managers page for more information.

### Staffing Office Responsibilities

- Enter preassignments of supplemental staff into existing shifts
- Enter open shifts for internal float pool, prns and per diem agency staff into the Dynamic Master schedule
- Delete unfilled shifts in the Staffing Office cost center daily
- Reconcile DukeShift to match staffing assignments made at bedflow and through out day, when the assignments are done via the Staffing Office
- Award per diem shifts in the DukeShift system
- Monitor compliance of per diem employees in the DukeShift system

Also see...

- [How to Enter Pre-assignments from the Staffing Office](#) (pdf)
- [Manager/Scheduler Guide](#) (pdf)
- [DukeShift for Staffing Coordinators](#) (pdf)
- [How To Retract an Award Offer](#) (pdf)
- [Two DukeShift Buttons to NEVER Press](#) (pdf)
- [Reconciling with Dynamic Master](#) (pdf)
- [How to Use the Reconciliation Screen](#) (pdf)

<https://finance.duke.edu/systems/work/api/dukeshift/staffofc.php>



The image features two large, thick black L-shaped corner brackets. One is positioned in the top-left corner, and the other is in the bottom-right corner, framing the central text.

# POST SCHEDULE

Then create your DukeShifts

# Create a Shift vs Dynamic Master Schedule

## Create A Shift

- Create a Shift Tab
- Can add notes
- Can limit who can see the shifts
  - *le, to your dept. only*
  - *To a specific job code*
  - *Can tier this*
- Once one shift is made can copy to multiple dates

## Create A Shift

The screenshot shows a web-based form for creating a shift. The form is divided into several sections:

- Facility:** Duke University Hospital (dropdown menu)
- Unit:** - Select Unit - (dropdown menu)
- Position:** - No Positions - (dropdown menu). Below this, a note states: "Health Care Professional only needs to have one skill in Skill Group to be able to request, is not required to meet the desired skill set."
- Shift Start Date:** 08/06/2018 (calendar icon)
- Shift End Date:** 08/06/2018 (calendar icon)
- Time:** 10:22 AM (time picker)
- Number of Shifts to Post for this Date:** 1 (input field)
- Date Requested:** 08/06/2018 (calendar icon)
- Signup Start Date:** 08/06/2018 (calendar icon)
- Signup End Date:** 08/06/2018 (calendar icon)
- Time:** 12:00 AM (time picker)

Below the form, there is a section titled "Request Phase 1" with the following text: "You may create a 'Request Phase 1' to limit the users that can request this shift initially before allowing all approved Health Care Professionals to request shift."

The "Request Phase 1" section includes the following options:

- \* Home System/Facility/Units:**  No Filter,  Home Unit Only,  Home Facility Only,  Home System Only
- Position Type: \***  Yes,  No
- Include Agencies?**  Yes,  No

# Create a Shift vs Dynamic Master Schedule

## Dynamic Master

- iSchedule tab
- Can see a date range view
- 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

## Dynamic Master

Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
8/1	8/2	8/3	8/4	8/5	8/6	8/7	8/8	8/9	8/10	8/11	8/12
		7P					7P		7P		
									7P	7P	7P
7P		7P			7P	7P					7A
							7A				
7P										7P	7P
	7A	7P			7A		7P	7P			





Schedule Summary													
	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	
▾ Add Shift Time Type	8/1	8/2	8/3	8/4	8/5	8/6	8/7	8/8	8/9	8/10	8/11	8/12	
<b>Nurse</b>													
7A-7P - 7A	1/0	1/0	1/0	1/0	1/0	3/0	1/0	2/0	1/0			1/0	
7P-7A - 7P	2/1	1/0	4/0	1/0		3/0	2/0	3/0	2/0	2/0	2/0	2/0	





# Reminder – add the 30 minutes for lunch to the shift times

Records per Page : 100

Shift Date	Status	Shift ID#
8/5/2018 7:00 AM 12 hrs.	A R	<a href="#">3734924</a>
8/5/2018 7:00 PM 12 hrs.	N R	<a href="#">3714536</a>
8/5/2018 7:00 PM 11.5 hrs.	N	<a href="#">3723925</a>





## CORRECT





Shift Start Date: 08/05/2018   Time: 7:00 PM  

Shift End Date: 08/06/2018   Time: 7:30 AM  

## INCORRECT

*meet the desired skill set.*

Shift Start Date: 08/05/2018   Time: 7:00 PM  

Shift End Date: 08/06/2018   Time: 7:00 AM  

# 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

**Admin Links**

- » [Manage Positions](#)
- » [Administrator Professionals](#)
- » [Credential Print Sort](#)
- » [Manage Wage Codes](#)
- » [Change Profile](#)

Email:	<input type="text" value="rushdee.omar@duke.edu"/>	<input type="checkbox"/>
Additional Message Receivers:	<b>Available Admins</b> <input checked="" type="checkbox"/> Cari Banks PAMELA BASNIGHT RAMONA BASNIGHT RHEA BATTEN KATHERINE BECKER DONNI BECKSFORD	<b>Chosen Admins</b> <input checked="" type="checkbox"/> Julia Bambach
Send Messages to Email:	<input checked="" type="checkbox"/>	

Buttons: Add ->, <- Remove

# 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

The screenshot displays a software interface titled "Reconcile/Billing". It features several input fields and a dropdown menu. The "Wage Code" is set to "- No Wage Codes -". The "Billing Date" is "02/01/2018". The "Negative Hours" checkbox is unchecked. The "Break Time" field is empty. The "Filled/Unfilled Reason" dropdown menu is open, showing a list of reasons, with "Assignment Completed" selected. The "Time Card" field is empty. The "Reconciled Shift ID#" field is empty. The "Lock Edit" checkbox is unchecked. A "Fax Coversheet" button is visible. The "Shift Comments" and "Private Shift Comments" fields are also present.

Field	Value
Wage Code	- No Wage Codes -
Billing Date	02/01/2018
Negative Hours	<input type="checkbox"/>
Break Time	- Select Filled/Unfilled Reason -
Filled/Unfilled Reason	Assignment Completed
Time Card	
Reconciled Shift ID#	
Lock Edit	<input type="checkbox"/>

- Select Filled/Unfilled Reason -
- Agency Cancelled – Late
- Agency Cancelled – On Time
- Assignment Completed
- Attendance issues
- Cancelled due to Error
- Employee Called Out
- Failed Pre Assessment Testing
- Failed to complete required compliance
- Filled by Internal Float Pool
- Filled by Outside Agency
- Filled by RSP, PRN
- Hospital Cancelled – Late
- Hospital Cancelled – Low Census
- Hospital Cancelled – On Time
- Hospital Changed Mind
- No Call No Show
- No Need
- Unfilled - Hospital Filled
- Unfilled - No one Available
- Unfilled - Unit Covered
- Unqualified candidate- Poor work Performance



# 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

The screenshot shows a web application interface for 'Reconcile/Billing'. The form includes several input fields and a dropdown menu. The 'Wage Code' is set to '- No Wage Codes -'. The 'Billing Date' is '02/01/2018'. The 'Negative Hours' checkbox is unchecked. The 'Break Time' field is empty. The 'Filled/Unfilled Reason' dropdown menu is open, showing a list of reasons with 'Assignment Completed' selected. The 'Time Card' field is empty. The 'Shift Comments' field is empty. The 'Private Shift Comments' field is empty. The 'Reconciled Shift ID#' field is empty. The 'Lock Edit' checkbox is unchecked. A 'Fax Coversheet' button is visible on the right side of the form.

Wage Code:	- No Wage Codes -	Billing Date:	02/01/2018
Negative Hours:	<input type="checkbox"/>	Reconciled Shift ID#:	
Break Time:		Lock Edit:	<input type="checkbox"/>
Filled/Unfilled Reason:	- Select Filled/Unfilled Reason - Agency Cancelled – Late Agency Cancelled – On Time <b>Assignment Completed</b> Attendance issues Cancelled due to Error Employee Called Out Failed Pre Assessment Testing Failed to complete required compliance Filled by Internal Float Pool Filled by Outside Agency Filled by RSP, PRN Hospital Cancelled – Late Hospital Cancelled – Low Census Hospital Cancelled – On Time Hospital Changed Mind No Call No Show No Need Unfilled - Hospital Filled Unfilled - No one Available Unfilled - Unit Covered Unqualified candidate- Poor work Performance		
Time Card:			
Shift Comments:			
Private Shift Comments			

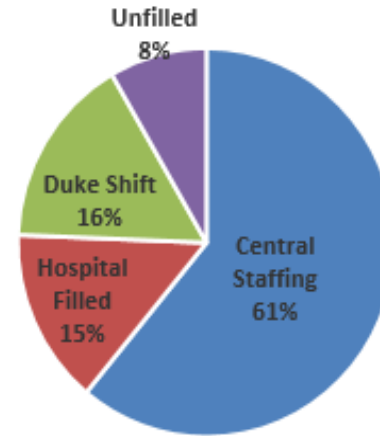
# Reports Based on the Reconciliation Reasons

The staffing target is to fill 80% of the needs.

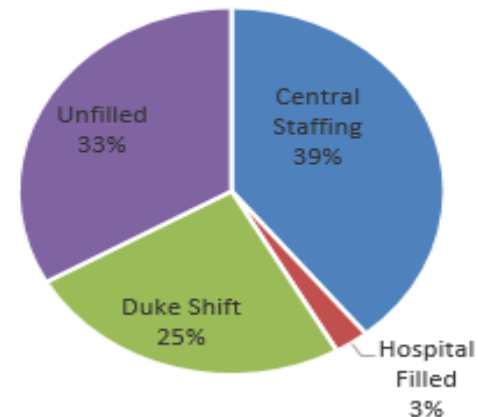
To see how we are doing, the staffing office reconciles DukeShifts based on assignments AND on what is reported in bedflow.

The better the information given to the staffing office and/or updated in DukeShift by the units, the more accurate this data will be.

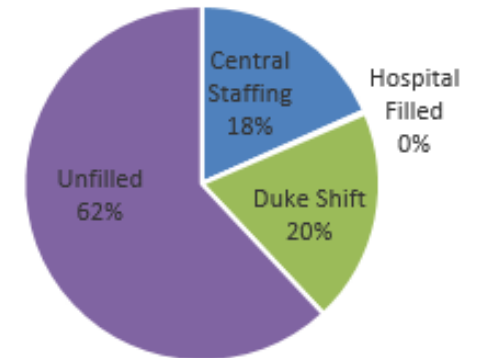
DRH Fill Percentages: Weeks 3/18- 3/31



DUH Fill Percentages: Weeks 3/18- 3/31



DRAH Fill Percentages: Weeks 3/18- 3/31



# 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*
  - *<http://finance.duke.edu/systems/work/api/dukeshift/index.php>*
  - *Manager website*
  - *<http://finance.duke.edu/systems/work/api/dukeshift/managers.php>*

