

## DUKESHIFT RECONCILIATIONS: STAFFING OFFICE

### Expectations:

- At the end of each day there should be ZERO shifts for the day marked Unfilled/No One Available
- At the end of each day there should be ZERO shifts for the day marked Filled by Float Pool, Filled by PRN, or Filled by Agency.
- All shifts should either be marked as one of the following:
  - Assignment Completed
  - Hospital Canceled
  - Employee Called Out
- Reconciliation should be done at least once a shift and as last minute changes occur

### Process:

#### I. DYNAMIC MASTER SCHEDULE

- Open DukeShift
- Click on the i-Schedule Tab
- Click on Dynamic Master Schedule
- Enter the appropriate Facility, Unit and Date Range
- Click on Show Schedule
- Scroll down to see the Schedule Summary
- The needs are displayed as a fraction – the top number is how many have been FILLED. The bottom number is how many needs exist. For example: 1/0 means 1 healthcare professional scheduled and 0 needs. A 1/2 means 1 healthcare professional scheduled and 2 remaining needs. Notice the needs are color coded in red. We want to change all of the BOTTOM numbers for the CURRENT shift to 0.
- Move the pointer to the lower right corner of the shift you want to change and double click. Don't click directly on the number. This will turn the bottom number from red to black and allow you to edit the number, changing it to a 0. Notice the black bottom number 1 on the 7A Nursing Care Assistant shift here.
- Change the bottom number to a 0 and move on



Schedule Summary							
Add Shift Time Type	Thu 9/22	Fri 9/23	Sat 9/24	Sun 9/25	Mon 9/26	Tue 9/27	Wed 9/28
<b>HUC</b>							
7A - 7A	1/0	0/1	0/1		0/1	0/1	0/1
D - D					0/1	0/1	0/1
E - E					0/1	0/1	0/1
N - N							
E4 - E4	0/1	0/2					
N4 - N4	0/2	0/2	0/2	1/0			
11A - 11A							
7P - 7P	0/1	0/1	0/1		0/1	0/1	0/1
<b>Nursing Care Assistant</b>							
7A - 7A	1/1	0/2	0/2	0/1	0/2	0/2	0/2
D - D	1/1	0/2	1/1	0/2	1/1	0/2	0/2
E - E	1/1	0/2	0/2	0/1	0/2	0/2	0/2
N - N		1/1	0/2	0/2	0/2	0/1	0/1
E4 - E4	0/1	0/2	1/1	0/2	0/2	0/2	0/2
N4 - N4					0/2	0/2	0/2
11A - 11A	0/1	0/2	0/2	0/2	0/2		
7P - 7P	0/2	0/1	0/2	0/2	0/2	0/2	0/2

- to the next shift to edit.
- If you get this warning message



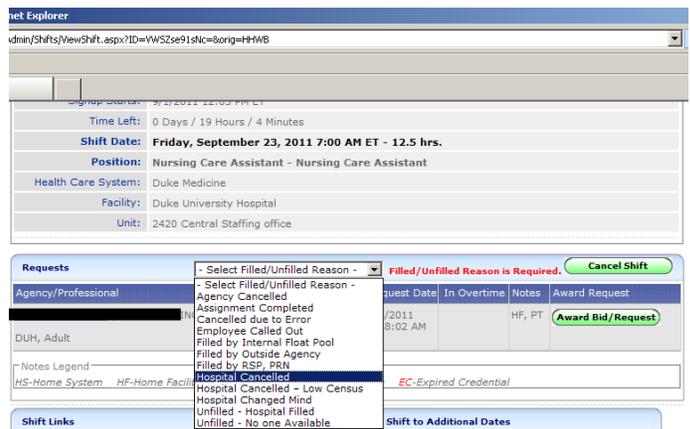
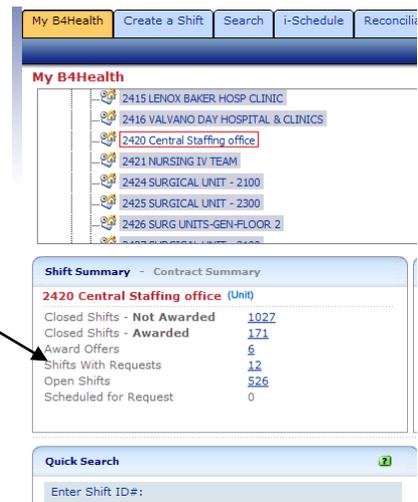
It means that some of the shifts were NOT cancelled because they have a request (person's name attached to the shift, waiting for an answer). You will have to go to the Reconciliation Tab to look for and reconcile these shifts.

- When you have finished the current shift, take a look at the previous day. If there are still any bottom numbers greater than ZERO, cancel these shifts as well.

## II. CANCELLING SHIFTS FOR LESS THAN 24 HOURS IN THE FUTURE THAT HAVE REQUESTS

You can be proactive and cancel shifts for tomorrow (less than 24 hours before the shift begins). If the shift has not been awarded to the requestor by that time, it is not going to be – at least not via the system. By going ahead and cancelling these shifts ahead of time, you will avoid receiving the warning message on the Dynamic Master Schedule that is shown above.

- Open DukeShift
- You will be on the My B4Health Tab
- Click on the plus sign next to your facility
- Click on the appropriate department
- In the Shift Summary Section, click on Shifts with Requests
- Click on the dark blue column heading for Shift Date/Time to sort the closest shifts to the top.
- If there are any shifts for the current day, open the shift by clicking on the Shift ID#
- In the Requests section you will see the name of the person who requested the shift as well as a green button that says Cancel Shift.
- Click on the Cancel Shift button.
- You will be asked to choose a reason – Choose Hospital Cancelled
- Then click on the Cancel Shift button again.



- Click on Back to Shifts with Requests to choose the next shift on the list, if appropriate. Be careful not to cancel shifts that are greater than 24 hours in the future.

### III. RECONCILIATION TAB

To double check that you haven't missed any shifts, that all shifts are marked with the correct reason and to correct any shifts that still are not reconciled correctly.

- Open DukeShift
- Click on the Reports Tab
- Click on the Cancellation/Unfilled Reasons Report
- Fill in the start date (one day before TODAY) and the end date (TODAY)
- Select the appropriate facility and Unit
- Click Run Report
- What to Look for
  - Are there any shifts under Filled by Float Pool, Filled by PRN, or Filled by Agency?
  - Are there any shifts under Unfilled No One Available?
  - If so, jot down their shift numbers or print the report
  - If not, you are done reconciling! ☺
- Click on the Reconciliation Tab
- Click on Reconcile/Edit Existing Shifts
- At the bottom of the form where it says Retrieve Shift by ID, enter the Shift Number of a shift on your list that needs to be corrected
- Click on Search Shift ID#
- Scroll down to the Filled/Unfilled Reason box
- Change the item in the box to Hospital Cancelled
- Go to the bottom of the form and click Reconcile/Save Shift
- If you have others to correct, go to the top of the form and click Reconciliation Search to go back to the screen where you can enter the next shift number.