HDO



Booked Long Term Order Rates Update

ShiftWise is pleased to announce the release of an exciting new feature!

• <u>Booked Long Term (LT) Order Rates Update</u> – Previously when a long term order was booked/filled, you were unable to update the rates without unbooking staff which changed the order booking status. Now if rates change sometime within the long term order duration, you can update rates without unbooking staff or affecting the order booking status.

NOTE: Only HDO users have the option/rights available to update booked LT order rates. Suppliers can be notified when changes are made to booked LT order rates and will be able to reference historical rates through the Event Log.

Effect on Timeslips

When rates are updated on a booked/filled long term order, timeslips in Open status that have no timeslip number/have not been edited will update to the new rate. Timeslips in Submitted, Approved, Disapproved, Pending, Disputed, Billable, Invoice and Open status that have a timeslip number will continue to include the rates prior to the update.

New Rights

- Orders Long Term: Update Booked Long Term Order Rates Enables users to update rates on booked LT orders.
- Notify · Orders: LT Order Rate Updated Allows users to be notified when booked LT order rates are updated.

NOTE: If you wish to have this feature enabled in your profile, you must contact your ShiftWise Account Manager for assistance. Once you have enabled your rights, follow the steps below to enable additional users.

Enabling Rights for Additional Users

- 1. Login to ShiftWise
- 2. Hover over Admin > User in the upper right then click List
- 3. Locate the user by clicking the First Letter of the users last name on the alphabet strip
- 4. Click **Edit** next to the user name
- 5. Click the **Rights** tab within the profile
- 6. Locate the right in the list. Rights are listed alphabetically.
- 7. Click in the **Checkbox** next to the right to populate a check mark
- 8. Click the **Update Rights** button to save

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New Notification

• LT Order Rate Updated – Notifies you when booked LT order rates have been updated. We recommend you enable this notification to ensure you do not miss changes to order rates. You will find this right in a user's profile in the User Notifications tab. Text notifications do not include rates.

Staff Orders	Email	Text	Home Page
Offer Updated by HDO:	✓		\checkmark
* Offer Updated by Staff:	\checkmark		\checkmark
Offer Comment Added By HDO:	\checkmark		✓
* Offer Comment Added By Staff:	✓		-
LT Order Rate Updated:			
* Staff Declined:	~		✓
HDO Declined:	\checkmark		-
* Staff Confirmed:	\checkmark	\checkmark	\checkmark
HDO Confirmed:	\checkmark		~
* Staff UnConfirmed:	\checkmark		~
HDO UnConfirmed:	~		~
* Staff Cancelled:	~	\checkmark	~
HDO Cancelled:	✓		✓

Updating Notifications

- 1. Login to ShiftWise
- 2. Click on your **Bold Blue Name** at the top of the page next to Welcome
- 3. Click the User Notifications tab
- 4. Scroll down to the Staff Orders section
- 5. Locate the right named: LT Order Rate Updated
- 6. Click in the **Email**, **Text** and/or **Home Page** checkbox to populate a checkmark depending on how you want to be notified
- 7. Click the **Update Notifications** button to save

Updating Long Term Order Rates:

- 1. Login to ShiftWise
- 2. Hover over Orders > Long Term, then click List
- 3. Locate the order you want to update rates for using the Search Filter
- 4. Click the **Blue Match** button to the right of the order

Long T	ong Term Order List												
Add C	Add Order Templates Refresh Hide Search												
Search.	Select the	appropriate se	arch criteria to narrow	your list results	Order:		Go						
Facility:	Facility: All 🔽 Status: Today Forward 🔽 Type: All												
Unit/Dept	t: All 🔽		Las	t Name:	Date	Specialty: All	and						
State:	Ali 🗸		Exte	nsions: All	v 544								
Prty?	XReq	Order	Facility	Unit/Department	State	Term Start	Term End	Shift	Туре	Specialty	Status	Match	Cancel
		5499831 Sched	Island East	ICU	OR	12/28/2015 Mon	3/28/2016 Mon	AM	RN	ICU	Filled Stern, Allison	Match	Cancel

5. In the Bookings section, click the **Change Rate** button in the Offer column. If a previous offer was made, the button will be named **View**.

Long Terr	n Order N	Aatch Refresh								
Details										
Order: Status:	5499831 Filled		Order Term:	12/28/2015 - 03/28/ 13 Weeks	2016		Type: Specialty:	RN		
Entry Date: Created by:	02/18/2016 Roger Brown		Expected Shift:	8.00 hr - AM Shift						
	donovan.her	nrich@shiftwise.com								
Facility: Unit:	Island East ICU									
Order Notes:									View Schedule	Return
Note Type:	Public O P	rivate								_
									Add No	te
Bookings										
Guaran	tee	Organization	Staff Name	Prior Visits	Avg Grade	Booking Status	Match	Verify	Offer	Cancel
		Surf City Personnel dhenrich@shiftwise.zzz	Stern, Allison	14		ВК	Exact	Ø	Change Rate	Cancel

6. In the Details section, click the **Edit** button to the right of the Bill Rate Standard rates

	Long Term Order — Shift Offer Close Window									
Details										
Order #:	5499831	Job Dates:	12/28/2015 - 03/28/2	016		S	Staff Name: Allison Stern			
Facility:	Island East	Unit:	ICU	Туре:	RN	Specialty: ICU				
	Weekday: AM PM				Weekend: AM	PM	NOC	Edit		
	Bill Rate Standard	\$65.00	\$65.00	\$65.00	\$65.00	\$65.00	\$65.00	Edit		
Bill Rate On Call \$0.0			\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Edit		

- 7. Enter the New Rates in all fields the new rates apply
- 8. Click the Update button

	Long Term Order — Shift Offer								
Details									
Order #:	5499831	Job Dates: 1	2/28/2015 - 03/2	28/2016	Staff Name:	Allison Stern			
Facility:	Island East	Unit: I	ICU Type: RN				Specialty:	ICU	
		Weekday: AM	РМ	NOC	Weekend: AM	РМ	NOC	Edit	
	Bill Rate Standard	66	66	66	66	66	66	Update Cancel	
	Bill Rate On Call	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Edit	

9. You can update the **Bill Rate On Call** rates as well if necessary. Do so by first clicking the **Edit** button to the right of the Bill Rate On Call rates.

	Long Term Order — Shift Offer										
Details											
Order #:	5499831	Job Dates: 1	2/28/2015 - 03/28	Staff Name: Al	Allison Stern						
Facility:	Island East	Unit: IC	ICU Type: RN			S	Specialty: ICU				
	Weekday: Weekend: AM PM NOC AM P						NOC	Edit			
	Bill Rate Standard \$66.00		\$66.00	\$66.00	\$66.00	\$66.00	\$66.00	Edit			
	Bill Rate On Call	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Edit			

- 10. Enter the New Rates in all fields the new rates apply
- 11. Click the Update button

	Long Term Order — Shift Offer									
Details										
Order #:	Order #: 5499831 Job Dates: 12/28/2015 - 03/28/2016 Staff Name: A									
Facility:	Island East	Unit:	ICU Type: RN				Specialty:	ICU		
-										
	Weekday: Weekend: AM PM NOC AM PM NO							Edit		
	Bill Rate Standard	\$66.00	\$66.00	\$66.00	\$66.00	\$66.00	\$66.00	Edit		
	Bill Rate On Call	10	10	10	10	10	10	Update Cancel		

- 12. In the Comment Log section, HDO users can add Comments as to why the rates were updated. This comment is viewable by Suppliers. Do so by typing your comment in the text box to the left of the Add Comment button.
- 13. Click the Add Comment button to save your comment

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Comment Log	
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	\sim
Rates updated per new agreement ×	Add Comment

14. Click the Close Window button in upper right

The **Change Rate** button will be yellow/orange indicating you have made a change to the offer screen.

Long Terr	n Order	Match Refresh								
Details										
Order:	5499831 Filled		Order Term:	12/28/2015 - 03/28/2 13 Weeks	016		Type: Specialty:	RN		
Entry Date: Created by:	02/18/2016 Roger Brow donovan.h	/n enrich@shiftwise.com	Expected Shift:	8.00 hr - AM Shift			opeciary.	100		
Facility: Unit:	Island East ICU	t								
Order Notes:	View Schedule Return									
Note Type:	Public O	Private								
									Add No	ote
Bookings										
Guaran	itee •	Organization	Staff Name	Prior Visits	Avg Grade	Booking Status	Match	Verify	Offer	Cancel
		Surf City Personnel	Stern, Allison	14		BK	Exact		Change Rate	Cancel

Event Log & Event Log Report Events Updates

When long term orders are booked/filled, you can now view the standard rates at the time of booking in the Event Log using the events below.

- Order Booked by HDO
- Order Booked by Supplier

Event Detail Examples:

Order Booked By HDO

Long Term Order #5815591, Facility: Island East, Unit: ICU, Staff: Bailey, Rice; Supplier: Surf City Personnel (Demo/QA Account), WeekdayAM: 65.00 WeekdayPM: 65.00 WeekdayNOC: 65.00 WeekendAM: 65.00 WeekendPM: 65.00 WeekendPM:

Order Booked By Supplier

Long Term Order #5846570 (Group Order 5815548), Facility: Island East, Unit: ICU, Staff: Bailey, Rice; Supplier: Surf City Personnel (Demo/QA Account), WeekdayAM: 0.00 WeekdayPM: 0.00 WeekdayNOC: 0.00 WeekendAM: 0.00 WeekendPM: 0.00 WeekendNOC: 0.00

When rates are updated, you can reference the updated standard rates in the Event Log using the new event below.

• Rates Changed For Booked Long Term Order by HDO

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Event Detail Example:

Rates Changed For Booked Long Term Order By HDO

Order #5499714, Facility: Island East, Unit: ICU, Staff: Alice Bromley, Supplier: Coral Staffing Network, WeekdayAM: 66.00, WeekdayPM: 66.00, WeekdayNOC: 66.00, WeekendAM: 66.00, WeekendPM: 66.00, WeekendNOC: 66.00

Generating the Event Log

- 1. Login to ShiftWise
- 2. Hover over Organization then click Event Log
- In the Events section, use the Events dropdown to select event(s) named: Rates Changed for Booked Long Term Order by HDO, Order Booked by HDO and/or Order Booked by Supplier.
- 4. Update the **Date Between** to capture when this event occurred
- 5. In the **Event Subject** section, fill in all fields possible
- 6. In the Recorded By section, remove your name if you did not perform this event
- 7. Select the **Organization** that performed the event from the Organization dropdown or leave at All if you are unsure
- 8. Click the **Go** button

TIP: There is also an **Event Log Report** button located on the right. If there is a long list, use the Event Log Report when you are looking for a specific event. This feature allows you to quickly scroll through the report rather than maneuver from one page to another.

If you would like to enable this feature, please reach out to your Account Manager or your ShiftWise 24/7 Customer Support Team for assistance.

Phone: 1-866-399-2220 Email: <u>support@shiftwise.com</u>