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

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:	✔	☐	✔
* Offer Updated by Staff:	✔	☐	✔
Offer Comment Added By HDO:	✔	☐	✔
* Offer Comment Added By Staff:	✔	☐	✔
LT Order Rate Updated:	☐	☐	☐
* Staff Declined:	✔	☐	✔
HDO Declined:	✔	☐	✔
* Staff Confirmed:	✔	✔	✔
HDO Confirmed:	✔	☐	✔
* Staff UnConfirmed:	✔	☐	✔
HDO UnConfirmed:	✔	☐	✔
* Staff Cancelled:	✔	✔	✔
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

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**.

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

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

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.

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

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

Comment Log

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.

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 WeekendNOC: 65.00

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**

ShiftWise Confidential & Proprietary Information

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**
3. 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: support@shiftwise.com