New Release: Reporting Fields Section, PO Number Requirement, PO Number on Order Detail Page & Rate Plan Category Auto Updates
Audience: HDO
Release Date: 6/2/16

ShiftWise is pleased to announce the release of FOUR new features!

- **Reporting Fields Section** - New Reporting Field Section including a 'Ready To Work Target Date' and 'Negotiated Start Date'.

- **PO Number Requirement** – HDOs can require users to include a Purchase Order Number when adding long term orders.

- **PO Number on Order Detail Page** – HDOs can now view the Purchase Order Number on the per diem and long term order detail pages.

- **Rate Plan Category Auto Updates Restriction –** Prevents per diem and long term order facility dropdown updates from auto updating the Rate Plan Category dropdown to [Standard].

Reporting Fields Section

The new Reporting Fields Section located within the Long Term Order Details popup is where you can document a **Ready To Work Target Date** and **Negotiated Start Date**. This is an opt-in feature. You need to contact your account manager or the 24/7 ShiftWise Support Team to have the feature enabled.

Note: *The data within this field is NOT included in reports but can be queried.*

- **Ready To Work Target Date –** The target date when all requirements need to be met and staff is ready to work.
- **Negotiated Start Date –** HDO and Supplier negotiated date when staff is expected to begin working.

Locating & Using the Reporting Fields Section

You will find the Reporting Fields Section within the Long Term Order Details popup. Follow the instructions below to locate.

1. **Login** to ShiftWise
2. Hover over **Orders > Long Term** then click **List**
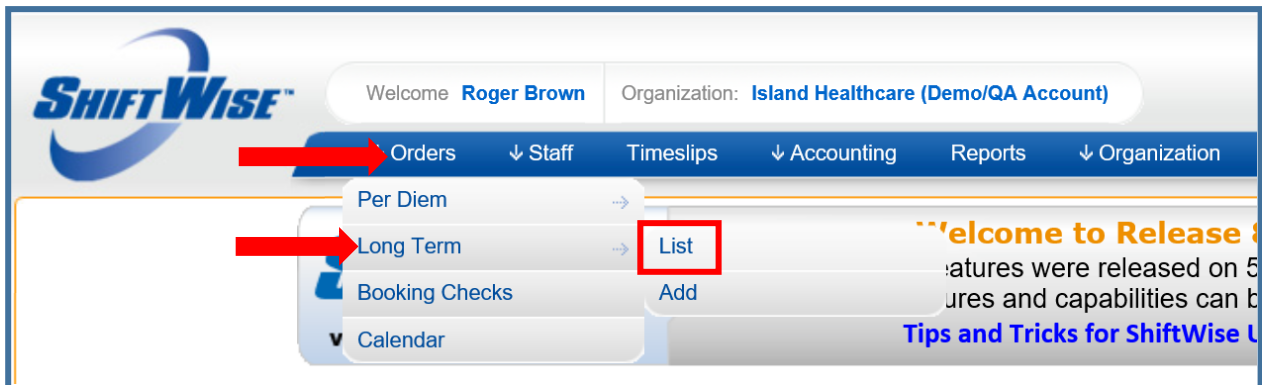
3. Click the **Order Number** next to the order you would like to add a Ready To Work Target Date or Negotiated Start Date for

4. In the **Reporting Fields** Section, use the calendar to populate a date

5. Click the **Save** button

Details:

- This feature was released disabled
- Reporting Fields Section only apply to long term orders, not per diem
- Field updates will not be included in the Event Log but will be logged for audit purposes
- Fields can be edited after saving
- Fields are only viewable by HDO users and MSP users that use an HDO login
- Reporting Fields are not included in any current report within ShiftWise, but can be queried

Purchase Order Number Requirement:

You can now require users to include PO (Purchase Order) Numbers when adding per diem and long term orders. The facility setting that applies to all users that have rights enabled to add orders. This is an opt-in feature. You need to contact your account manager or the 24/7 ShiftWise Support Team to have the feature enabled.

Locating and Using the Purchase Order Number Field:
1. **Login** to ShiftWise
2. Hover over **Orders** > **Per Diem** *or* **Long Term** > then click **List**
3. Click the **Add Order** button
4. The **P.O. Number** Field is located after the Cost Center Field

Purchase Order Number on Order Detail Page

Previously the PO (Purchase Order) number was not included on the order detail page. Now when a PO number is added to an order, the number will appear on the per diem and long term order detail pages.

Rate Plan Category Auto Updates Restriction:

Previously when HDO users updated the *Facility* dropdown when creating or editing an order, the **Rate Plan Category** would auto update to [Standard]. Now when users update the *Facility* dropdown, the **Rate Plan Category** dropdown will remain at the same setting prior to the facility update. This is an opt-in feature. If you would like to disable the Rate Plan Category from automatically changing to [Standard], you need to contact your account manager or the 24/7 ShiftWise Support Team to have the feature enabled.

Order Entry - Short Term (Per Diem)				
HDO:	Island Healthcare (Demo/QA Account)		Job Type:*	RN
Facility: *	Island East		Specialty: *	ICU
Unit/Department:*	Select Unit / 111990	Cost Center: / P.O. Number:	Alt. Job Type (Optional):	LPN
Date: *	5/22/2016	Guaranteed: * No	Alt. Specialty (Optional):	Select Alt. Specialty
Shift: *	AM	Duration: * 8 / Meal: *	Float Unit/Department:	M/S 4E
Shift Hours:	Select the shift hours from the dropdown to the below or, enter your hours below:		Quantity: *	1
		From: * 0700 / To: * 1530	Tier Structure: *	Nursing
Order Notes:	Please describe Orientation requirements or any additional information in the order notes.		Send Order To: *	Standard Tiering
			Priority Order:	☐
			On Call Order:	☐
			Rate Plan Category:	[Standard]
	Note Type: ● Public ○ Private		Set Rate?:	☐
	Add Note / * Adding Notes does not require updating the Order.		Update Order	
* Indicates required fields.				

Note: in order for this feature to work, Rate Plan Categories must be associated with the Facility selected when creating an order.

If you would like to enable any of these features or have questions, please reach out to your Account Manager or ShiftWise 24/7 Support Team for assistance.

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