



**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.

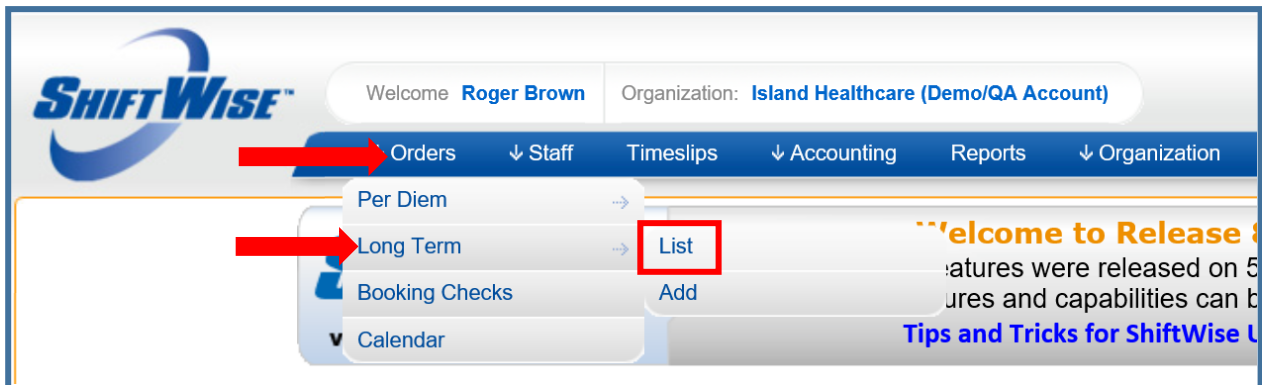
Note: *The data within this field is NOT included in reports but can be queried.*

- **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

The screenshot shows the 'Long Term Order List' page. At the top, there are buttons for 'Add Order', 'Templates', 'Refresh', and 'Hide Search'. Below these is a search bar with a 'Go' button. The search criteria include Facility, Unit/Dept, State, Status, Type, Last Name, Specialty, Extensions, and Date between. The table below has the following columns: Prty?, XReq, Order, Facility, Unit/Department, State, Term Start, Term End, Shift, Type, Specialty, Status, Match, and Cancel. The first row has the order number 6024817 highlighted with a red box. The second row has the order number 6019349.

Prty?	XReq	Order	Facility	Unit/Department	State	Term Start	Term End	Shift	Type	Specialty	Status	Match	Cancel
		6024817 Edit / Sched	Island East	ICU	OR	5/30/2016 Mon	8/29/2016 Mon	NOC	RN LPN	ICU ICU	Open	Match	Cancel
		6019349 Edit / Sched	Island East	ICU	OR	5/2/2016 Mon	7/25/2016 Mon	AM	RN	ICU	Pending	Match	Cancel

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

5. Click the **Save** button

Long Term Order Detail			
<b>Status</b>			
Order:	6024817	Entry Date:	05/12/2016
		Shift Date:	05/30/2016
Status:	Open	Priority/On Call:	
		Booked Staff:	
<b>Order Details</b>			
Facility:	Island East	Cost Center:	6767676
Unit/Dept.:	ICU	Guaranteed:	No
Float Unit/Dept.:			
Type:	RN		
Specialty:	ICU	Meal:	30
Alt Type:	LPN		
Alt Specialty:	ICU	Send Order To:	Standard Tiering
Created By:	Roger Brown	Tier Structure:	Nursing
Legacy Cancel/Guarantee -*			
* HDO reserves the right to cancel the guaranteed hours in the amount specified in this field			
<b>Reporting Fields</b>			
Ready To Work Target Date:	6/6/2016		
Negotiated Start Date:	6/7/2016		
			

### 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

**Add Order**

There were errors on the page:

- P.O. Number is required

Order Entry - Long Term (Contract)

HDO: Island Healthcare (Demo/QA Account) Type: \* RN

Facility: \* Island East Specialty: \* ICU

Primary Unit/Department: \* ICU Cost Center: 6767676 P.O. Number: \*\*

Alt. Type (Optional): Alt. Type

Alt. Specialty (Optional): Alt. Specialty

Contract Term: Start: \* 5/30/2016 End: \* 08/29/2016 Duration (Weeks): 13

Shifts: Schedule Calendar Meal: \* 30

Float Unit/Department: Select Float Unit

Quantity: \* 1

Expected Shift: \* AM Expected Shift Duration: \* 8

Permit Guarantee? No

Tier Structure: \* Nursing

Order Notes: Please describe Orientation requirements or any additional information in the order notes. [public]

Send Order To: \* Standard Tiering

Priority Order:

Rate Plan Category: [Standard]

Set Rate?:

Template Name: Save As Template

Create Order...

## 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.

**Per Diem Order Detail**

Print Page Close Window

Status

Order: 6024836 Entry Date: 05/24/2016 Shift Date: Wed 06/01/2016 Priority/On Call:

Status: Open Booked Staff:

Order Details

Facility:	Island East	Cost Center:	6767676
Unit/Dept:	ICU	Guaranteed:	No
<b>PO Number:</b>	<b>5523629-CCU#56</b>		
Float Unit/Dept.:		Shift:	AM
Type:	RN	Duration:	8
Specialty:	ICU	Meal:	30
Alt Type:		Shift Hours:	0600 - 1430 PDT
Alt Specialty:		Send Order To:	Standard Tiering
Created By:	Roger Brown	Tier Structure:	Nursing

## **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: From: \* 0700 To: \* 1530 Quantity: \* 1

Order Notes: Please describe Orientation requirements or any additional information in the order notes. Tier Structure: \* Nursing

Send Order To: \* Standard Tiering

Priority Order:

On Call Order:

Rate Plan Category: [Standard]

Set Rate?:

Note Type:  Public  Private

\* Adding Notes does not require updating the 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.

Phone: 1-866-399-2220

Email: [support@shiftwise.com](mailto:support@shiftwise.com)