



New Release: Booked Long Term Orders Update

Audience: HDO & Suppliers

Release Date: 2/22/16

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

- **Booked Long Term (LT) Order Rates Update** – 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:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Offer Updated by Staff:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Offer Comment Added By HDO:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Offer Comment Added By Staff:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
LT Order Rate Updated:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staff Declined:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
HDO Declined:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Staff Confirmed:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
HDO Confirmed:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Staff UnConfirmed:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
HDO UnConfirmed:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Staff Cancelled:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
HDO Cancelled:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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 Term Order List

Add Order Templates Refresh Hide Search

Search: Select the appropriate search criteria to narrow your list results Order: [] Go

Facility: [All] Status: [Order Forward] Type: [All]
 Unit/Dept: [All] Last Name: [] Specialty: [All]
 State: [All] Extensions: [All] Date between: 2/18/2016 [] and []

Prty?	XReq	Order	Facility	Unit/Department	State	Term Start	Term End	Shift	Type	Specialty	Status	Match	Cancel
		5499831 Sched	Island East	ICU	OR	12/28/2015 Mon	3/28/2016 Mon	AM	RN	ICU	Filed Stern, Allison	Edit	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 Term Order Match Refresh

Details

Order: 5499831 Order Term: 12/28/2015 - 03/28/2016 Type: RN
 Status: Filled Expected Shift: 13 Weeks Specialty: ICU
 Entry Date: 02/18/2016
 Created by: Roger Brown
 donovan.henrich@shiftwise.com

Facility: Island East
 Unit: ICU

Order Notes: Public Private View Schedule Return

Note Type: Public Private Add Note

Bookings

Guarantee	Organization	Staff Name	Prior Visits	Avg Grade	Booking Status	Match	Verify	Offer	Cancel
	Surf City Personnel dhenrich@shiftwise.zzz	Stern, Allison	14		BK	Exact	<input checked="" type="checkbox"/>	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 - 03/28/2016 Staff Name: Allison Stern
 Facility: Island East Unit: ICU Type: RN Specialty: ICU

	Weekday: AM	PM	NOC	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	\$0.00	\$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 Close Window

Details

Order #: 5499831 Job Dates: 12/28/2015 - 03/28/2016 Staff Name: Allison Stern
 Facility: Island East Unit: ICU Type: RN Specialty: ICU

	Weekday: AM	PM	NOC	Weekend: AM	PM	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 Close Window

Details

Order #: 5499831 Job Dates: 12/28/2015 - 03/28/2016 Staff Name: Allison Stern
 Facility: Island East Unit: ICU Type: RN Specialty: ICU

	Weekday: AM	PM	NOC	Weekend: AM	PM	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 Close Window

Details

Order #: 5499831 Job Dates: 12/28/2015 - 03/28/2016 Staff Name: Allison Stern
 Facility: Island East Unit: ICU Type: RN Specialty: ICU

	Weekday: AM	PM	NOC	Weekend: AM	PM	NOC	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

Comment Log

Rates updated per new agreement x 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 Term Order Match [Refresh](#)

Details

Order: 549831 Order Term: 12/28/2015 - 03/28/2016 Type: RN
 Status: Filled 13 Weeks Specialty: ICU
 Entry Date: 02/18/2016 Expected Shift: 8.00 hr - AM Shift
 Created by: Roger Brown
 donovan.henrich@shiftwise.com

Facility: Island East
 Unit: ICU

Order Notes: [View Schedule](#) [Return](#)
 Note Type: Public Private [Add Note](#)

Bookings

Guarantee	Organization	Staff Name	Prior Visits	Avg Grade	Booking Status	Match	Verify	Offer	Cancel
	Surf City Personnel dhenrich@shiftwise.zzz	Stern, Allison	14		BK	Exact	<input checked="" type="checkbox"/>	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 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**

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.

Supplier - Booked Long Term Order Rates Update

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

- **Booked Long Term (LT) Order Rates Update** – Previously when a long term order was booked/filled, rates could not be updated without unbooking staff changing the order booking status. Now, if rates change sometime within the long term order duration, HDO users 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 Right

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 24/7 Customer Support Team 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. You will find this notification 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:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
* Offer Updated by Staff:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Offer Comment Added By HDO:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
* Offer Comment Added By Staff:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
LT Order Rate Updated:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supplier Declined:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
* HDO Declined:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Supplier Confirmed:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
* HDO Confirmed:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Supplier UnConfirmed:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
* HDO UnConfirmed:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Supplier Cancelled:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
* HDO Cancelled:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
* Staff Reconfirmed To Order:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Updating Notifications

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- 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

Viewing Updated Long Term Order Rates

When rates are updated, you are able to view the new rates in the Offer. To view the new rates:

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

Prty?	XReq	Order	Facility	Unit/Department	State	Term Start	Term End	Shift	Type	Specialty	Status	Match	Cancel
		5499831	Island East	ICU	OR	12/28/2015 Mon	3/28/2016 Mon	AM	RN	ICU	Filled Stern, Allison	Match	

5 In the Booking section, click the **View** button in the Offer column.

Guarantee	Staff Name	Prior Visits	Avg Grade	Booking Status	Match	Verify	Offer	Cancel
	Stern, Allison	14		BK dhenrich@shiftwise.zzz	Exact	<input checked="" type="checkbox"/>	View	Cancel

6 In the Details section, you will see the updated rates in the Bill Rate Standard/Bill Rate On Call rate fields.

7 The Comment Log section will display **Comments** added by the HDO.

Item Description	Weekday:	PM	NOC	Weekend:	PM	NOC
Bill Rate Standard	AM	\$66.00	\$66.00	AM	\$66.00	\$66.00
Bill Rate On Call		\$10.00	\$10.00		\$10.00	\$10.00

Item Description	Amount	Rate	Add
			Add
Item Description	Amount	Rate	Delete

Comment Log
(02/18/16 1428 Pacific) Roger Brown : Rates updated per new agreement

8 Click the **Close Window** button in the upper right.

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 using the Event Log using the new event below.

- **Rates Changed For Booked Long Term Order by HDO**

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** the 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

If you would like to discuss this feature further, please reach out to your Account Manager or to our Customer Support team at:

Phone: 1-866-399-2220

Email: support@shiftwise.com