



HEALTHCARE | SHIFTWISE VMS COURSE OFFERINGS

Once your ShiftWise credentials have been verified, you can select one or more of the course offerings listed below when you access the Learning Center. Please contact your Account Manager for guidance, if needed. For your reference, Per Diem is abbreviated as PD, and Long Term is abbreviated as LT. This list spans 3 pages.

COURSE NAME	COURSE TOPICS
01) Introduction to the ShiftWise VMS	Introduction to ShiftWise and the VMS; Logging In and Navigating; Accessing and Modifying Your User Profile and Notifications; User Rights, Customer Support, FAQs, and Training
02) PD Orders List Page Overview	Introduction to PD and LT Orders; Layout of the Per Diem Orders List Page, Using Search Criteria to Locate PD Orders; Role of Order Statuses; Organization of List Information
03) PD Orders Adding Orders and Templates	Adding a PD Order – Methods and Fields; Data Dependencies; Public and Private Notes; Using Templates to Save Time; Role of Notifications in Order Creation
04) PD Orders Matching and Verification	Per Diem Order Match Page; Matching Staff, Verifying Credentials, and Confirming Orders; Accessing Pop-up Windows to View / Edit Data; Order Statuses and Verification Icons
05) Adding Group and Multiple PD Orders, Canceling All Orders	Adding Group and Multiple PD Orders; Canceling All Orders - PD and LT; Schedule Calendar; Reason Codes; Declining a Staff Member
06) LT Orders List Page Overview, Matching, and Editing	Definition of LT Orders; Layout of Long Term Order List Page; Differences Between PD and LT Orders on List Page; Schedule Calendar Tool; Adding and Confirming Orders

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07) LT Order Extensions, Booking Checks, and Calendar	Extending Long Term Orders; Booking Checks for All Orders; Orders Calendar; Narrowing Results with Search Criteria; Identifying Order Statuses with Color Key
08) Staff Overview, Matching, and Adding NCRs	HDO Functionality on Staff List Page; Staff Name and Match Button Colors; Adding No Client Return (NCR) to Staff Members; NCR Notes, Expiration Dates, and Restrictions
09) Timeslips List Page Overview	Timeslip List Page; Search Criteria; Timeslip Statuses; Role of HDO, Facility, and Unit Profiles; Helpful Tips to Save Time
10) Timeslips Approving, Editing, and Resolving Disputes	Differences in Timeslips for PD and LT Orders; Timeslip Edit Page; Resolving Timeslip Disputes; Keeping Shift Times and Bill Hours in Sync; Value of Notes when Editing
11) Accounting Invoice Approvals, Disputes, Memos, and Overtime	Accounting Menu Options; Invoice Pages – Invoice List, Preview Invoice, Invoice Memo List, Add / Edit Invoice Memo; Overtime Rate Rules; Role of Comments / Notes
12) Accounting Bill Rates, Groups, and Categories	Bill Rate Plans and Rules; Rule Modifiers, Overtime, Guarantee, and Cancellations; Rate Plan Groups, Categories, and Associations; Data Dependencies in Rate Plan Configurations
13) Accounting Adding Rate Plans, Cost Center Rights, and Account Codes	Methods to Create New Rate Plans; Cost Center Rights and Account Codes – Purpose and Options; Benefits of Utilizing Account Codes
14) Reports	Reports Page Layout; Role of Invoice Memos in Selecting Reports; Report Builder and Other Tools – Sorting, Filtering, Subtotaling, and Hiding Details; Report Formats

COURSE NAME	COURSE TOPICS
15) Organization Contacts and Event Log	Organization Menu; Adding and Editing Contacts; Benefits of Event Log; Supplementing Events with Notes
16) Administration User and Organization Profiles	Accessing, Creating, and Editing User and HDO Profiles; Information within Profile Tabs; Impact of Profile Configuration on Downstream Processing; Updating Existing Profiles
17) Organization Facility and Unit Profiles	Accessing, Creating, and Editing Facility and Unit Profiles; Comparing and Contrasting Different Profile Types; Relationship Between Tiers and Tier Structures; Roles of Types and Specialties in Unit Profiles; Importance of Update Facility and Update Unit Buttons