

Qualivis™

Practical Steps to Building an AI- Driven Open Shift Management Program

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Introduction



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Open shift management 101

What is open shift management?

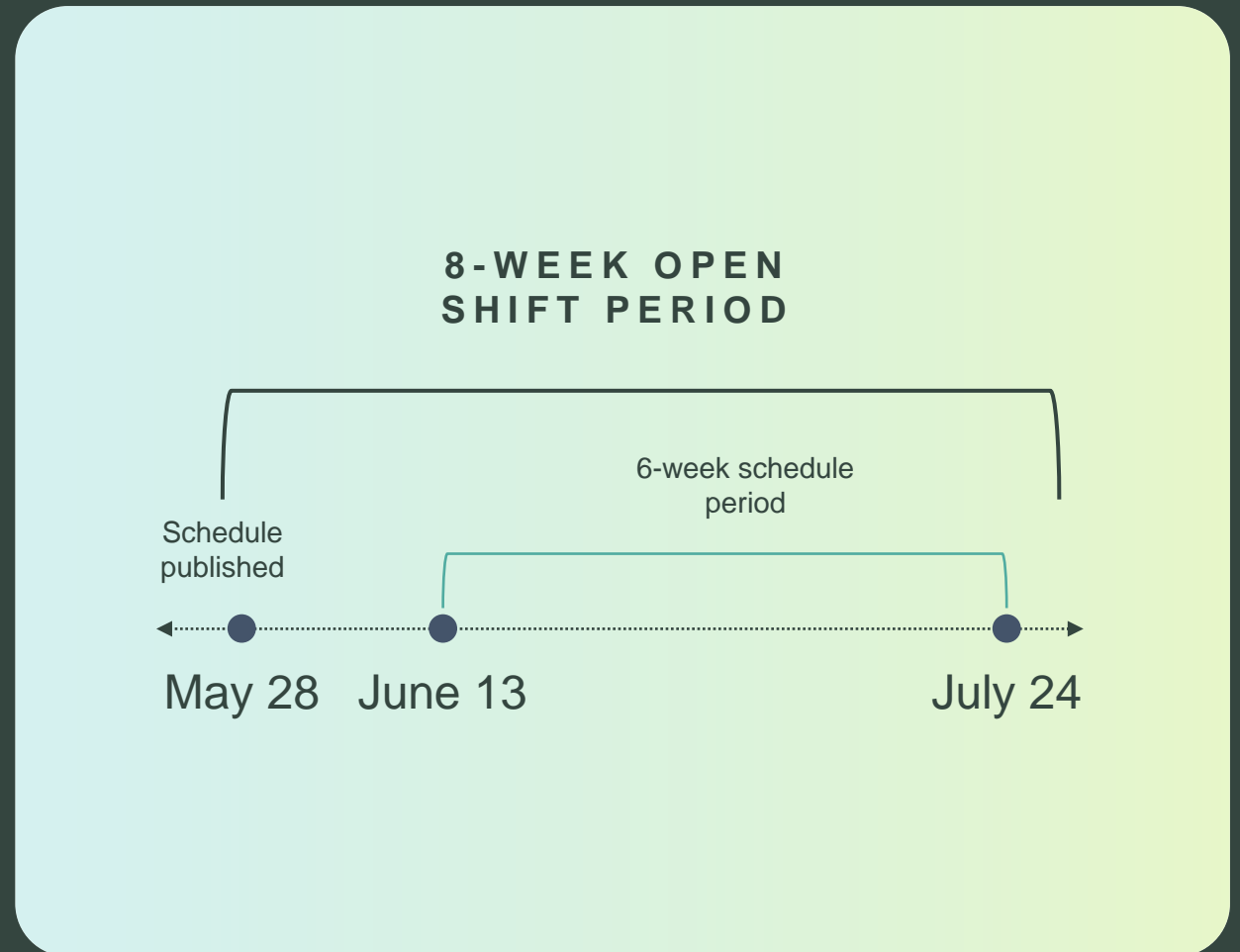
Open shift management

Management of unfilled shifts during an active schedule period; often tied to incentive programs



Basics of open shift management

- Cycle for open shift management depends on schedule length (4, 6 or 8 weeks)
- Open shifts offered in 4-, 8-, 10- or 12-hour segments
- Many programs:
 - Are managed in electronic scheduling system, email, paper or group text messaging
 - Visible to entire workforce or core only
 - Require manager approval
 - Include incentives for specific shifts



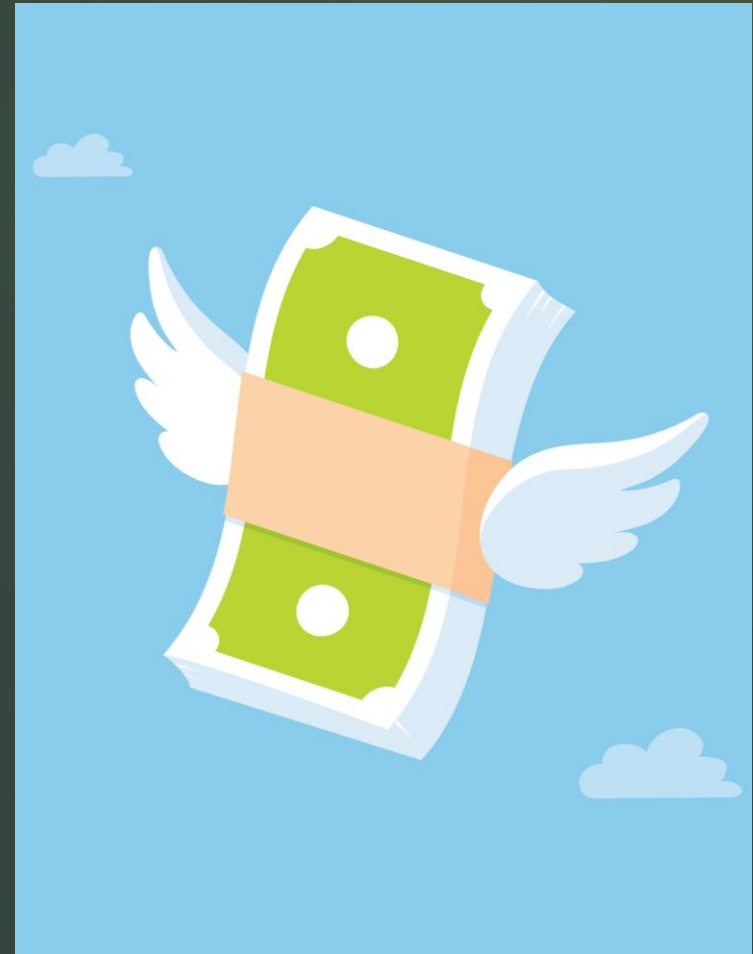
Open shift management challenges

Inadequate technology

Lack of systemization; inconsistent processes across units and facilities

Manual effort places high admin burden on team

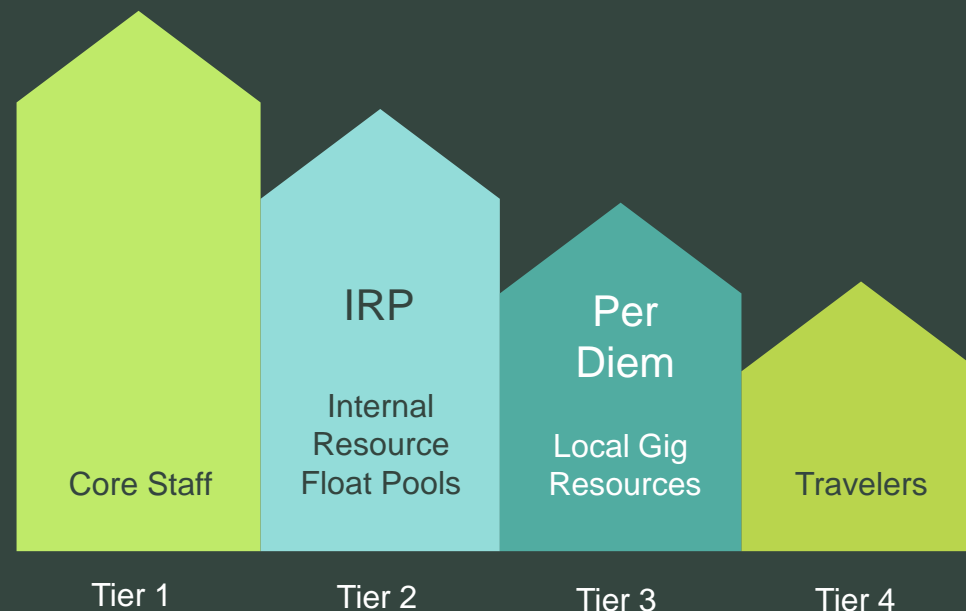
High/volatile labor costs for health systems



Characteristics of a best-in-class open shift management program

AUTOMATED, PROACTIVE AND COST-EFFECTIVE

- Designed at the **system level**
- Open shifts offered in **4-, 8-, 10- or 12-hour iterations**
- Open shifts are **visible to all qualified staff** (core, float pool, per diem and external workforce) and released in a tiered fashion
- **Auto-approve** open shifts
- Frontline clinicians **cannot cancel an open shift once claimed**



Layering of staff to meet your clinical, financial and operational goals

Open shift
management and
incentive programs
are intrinsically linked.



Types of incentive programs



Shift bid program

- Clinicians bid on open shifts within predefined price points
- Creates market competition driven from the frontline
- Requires technology to implement
- Success depends on self-motivated workforce



Tiered program

- Different pay levels based on staffing needs severity
- Example: Five tiers of pay during the pandemic
- Pay levels: \$12, \$25, \$35, \$50, \$75
- Higher vacancy percentage results in higher pay



Long-term program

- Monetary incentives that are paid after a clinician claims a set number of extra shifts in a schedule period.
- Example: Picking up six extra shifts in a 6-week schedule might result in a \$2,000 bonus, paid after the shifts are completed
- Relatively easy to administer and provide proactive coverage with stability



Proactive, time dependent program

- Incentivizes the workforce to claim shifts early
- Example: Offer higher level of incentive dollars earlier with the open shift posting
- Doesn't account for last-minute sick calls, changes in census fluctuations and the staff will hold out for higher levels of pay

Characteristics of a best-in-class incentive program

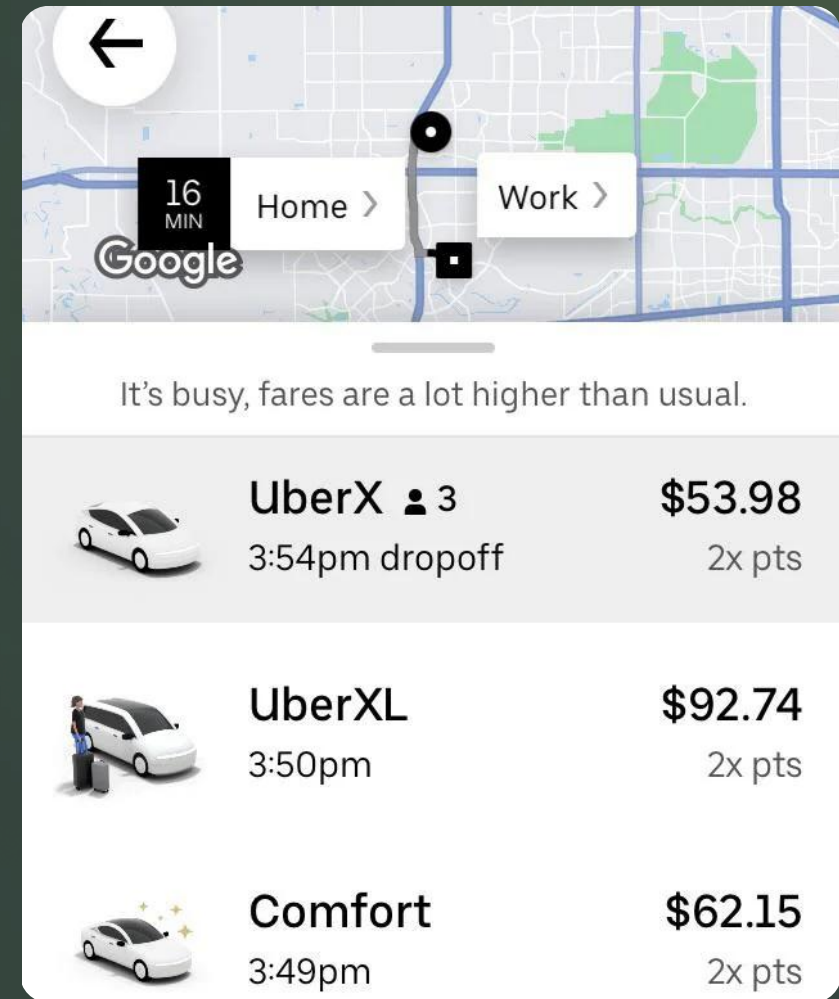
- Incentivized shifts are recorded in the electronic system
- Employees are eligible for incentivized shifts once their committed FTE is scheduled at the regular pay rate
 - Per diem employees must have 24 hours pre-scheduled time in a pay period before requesting an incentivized shift
- A committed open shift is subject to the attendance policy
- Any unscheduled time off within a pay period will result in forfeiture of incentive pay



Taking open shift
management to the
next level with AI

Introduction to dynamic pricing

- Dynamic pricing isn't new, but it's relatively new to healthcare
- Uses AI to automatically adjust pricing based on market conditions and supply and demand
- Everyday example: Ride-sharing services
 - The price of a ride goes up when there is a surge of rider requests (demand) but limited drivers (supply)



Dynamic pricing policy recommendations



Determine when open shifts are offered

Best practice: Offer shifts from the beginning of the published schedule



Determine eligibility of roles and FTE requirements

Best practice: Part-time and per diem staff should work at least 30 hours per week of non-overtime/standard pay before being eligible for incentive pay



Determine pay structure

Best practice: Use either a set amount or a tiered pay structure based on staffing thresholds and model variables



Set guidelines around penalties for frontline staff cancellations

Dynamic pricing policy recommendations



Set up a tiered structure for claiming open shifts

Best practice: Offer shifts to all available internal workforce (core, per diem, float pool) and let the model determine the rate based on staffing surplus or deficits



Identify clusters for staffing that share resources to ensure cross functionality



Allow auto-approval of claimed open shifts

To do dynamic pricing well, you need the support of open shift management technology.

About a Nurse



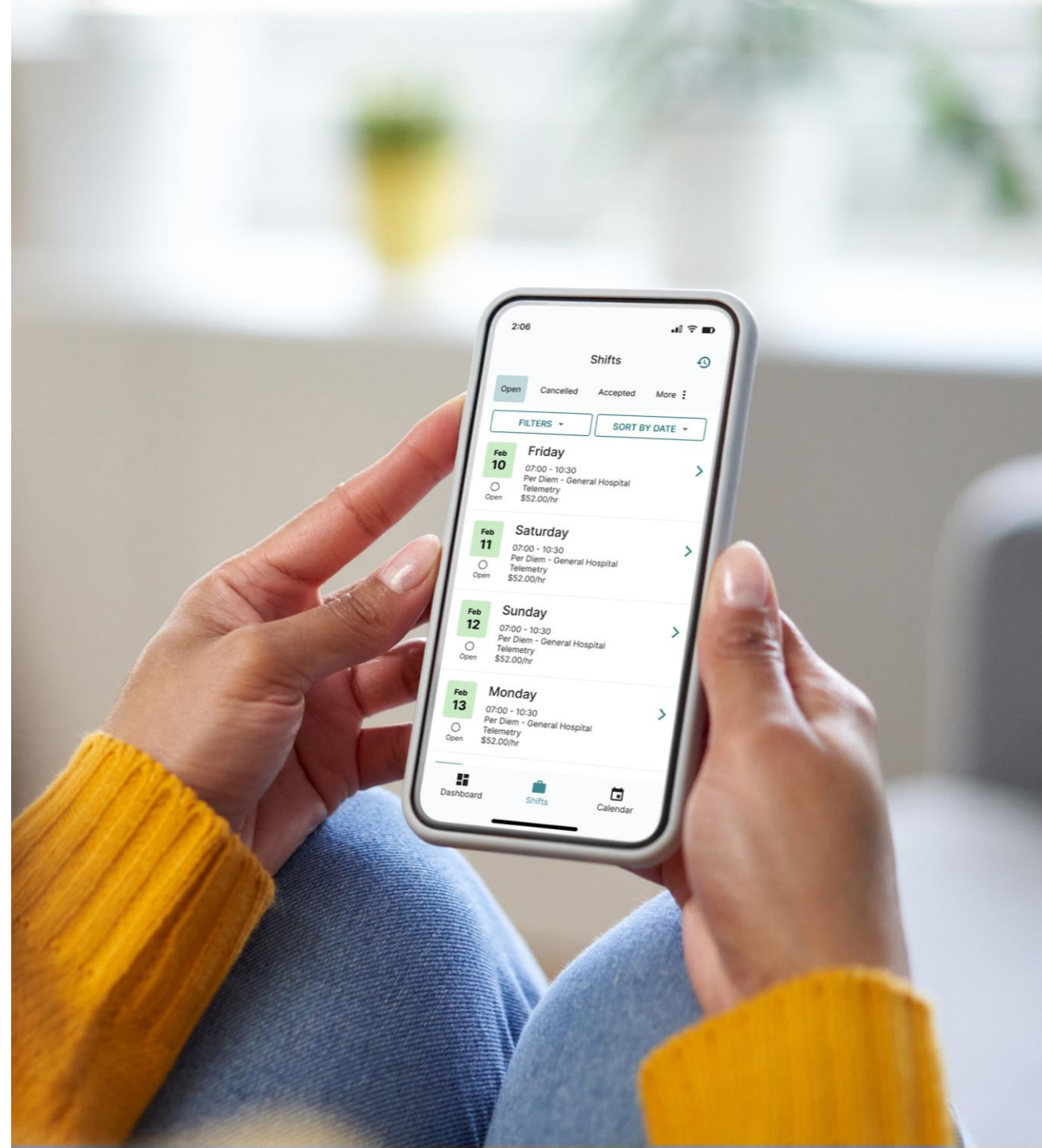
"I was going to ask how working with a severely limited staff was, but I think I can already guess."

Increasing flexibility with open shift management tech

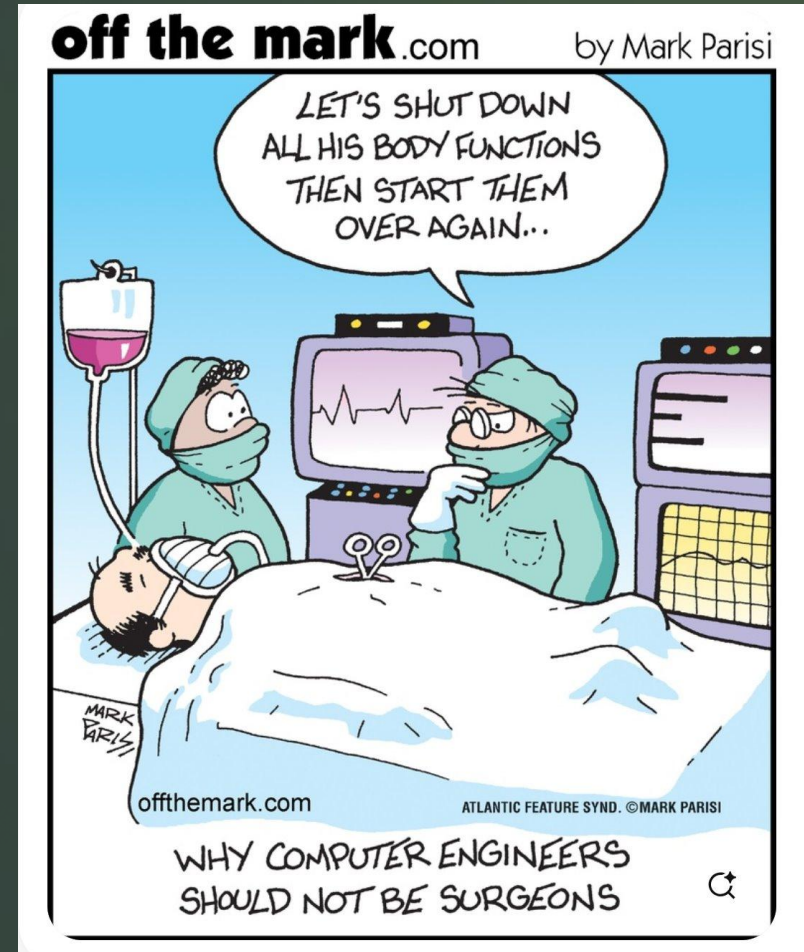
When evaluating open shift technology, look for tools that:

- App based
- Automated and bi-directional with schedule
- Proactive tiering
- Enhanced reporting capabilities

Your scheduling system should always remain the record of truth



But even if you don't use AI or technology, you can make your organization's open shift management programs more effective.



Strategic Plan

BUILD AN OPEN SHIFT PROGRAM

STEP 1

Assign a workgroup to design the new program

STEP 2

Assess your existing program

STEP 3

Create the business case by determining ROI

STEP 4

Approve the new/modified program

STEP 5

Update the policy

STEP 6

Configure technology to account for the new program and policy

STEP 7

Communicate & change management

STEP 8

Roll out the new program and monitor key metrics

Assessment Deep Dive

Posting open shifts

- When are open shifts posted?
- Types of open shifts (4, 8, 12 hours)

Access to open shifts

- Who can claim open shifts?
- Who can offer open shifts?

Location of open shifts

- Where are open shifts posted and claimed?

Existing tech usage

- How is existing scheduling technology used?
- Are there SMS capabilities?
- Is there automation? Could there be?
- How are incentive shifts being offered?



Creating the business case

Data needed to calculate ROI *(needed for each position group)*



Number of open shifts offered



Number of unfilled open shifts



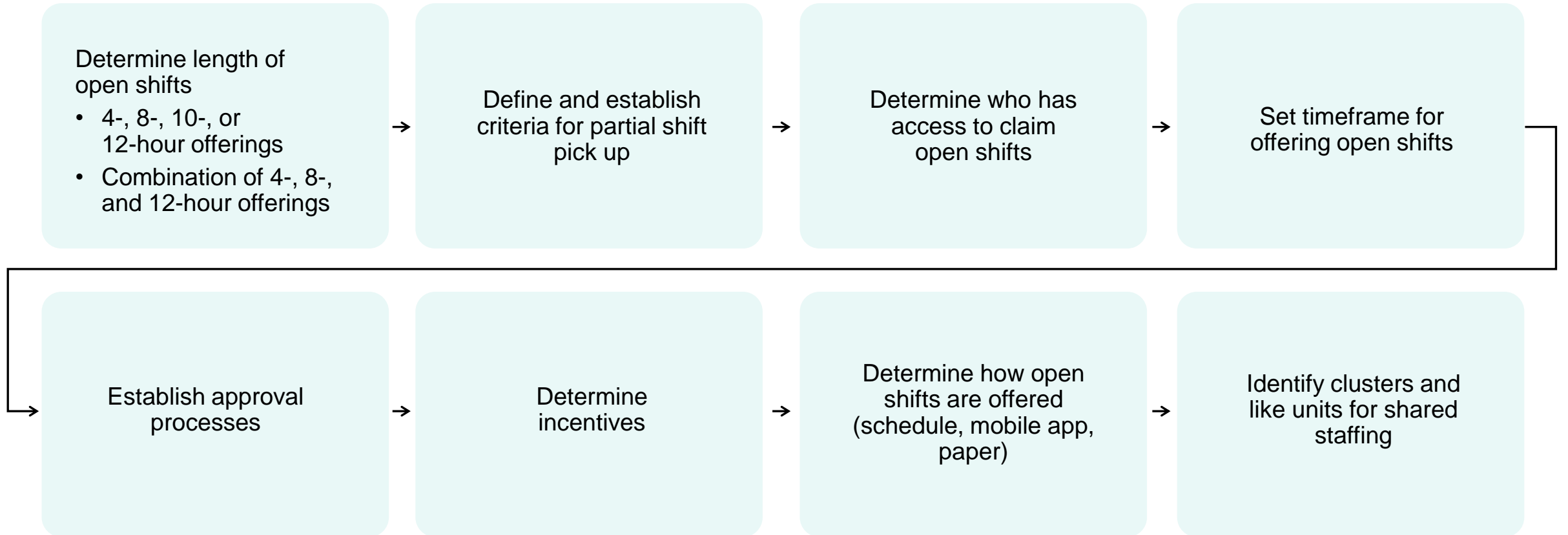
Incentive spending



Overtime spending by position group

Building Blocks

OPEN SHIFT PROGRAM



Rolling out a new program

Communication is key

- Use channels such as unit meetings, huddles, unit communication boards and emails
- Explain the program and note changes from previous

Monitor key metrics

- Unfilled shifts, incentive spending and overtime spending
- Qualitative surveys and feedback from users and leaders
- Link results back to ROI



Key action items

Open shift management is one of the costliest, but also overlooked, programs in health systems – but it's imperative to running your workforce

Your homework: audit your open shift management programs

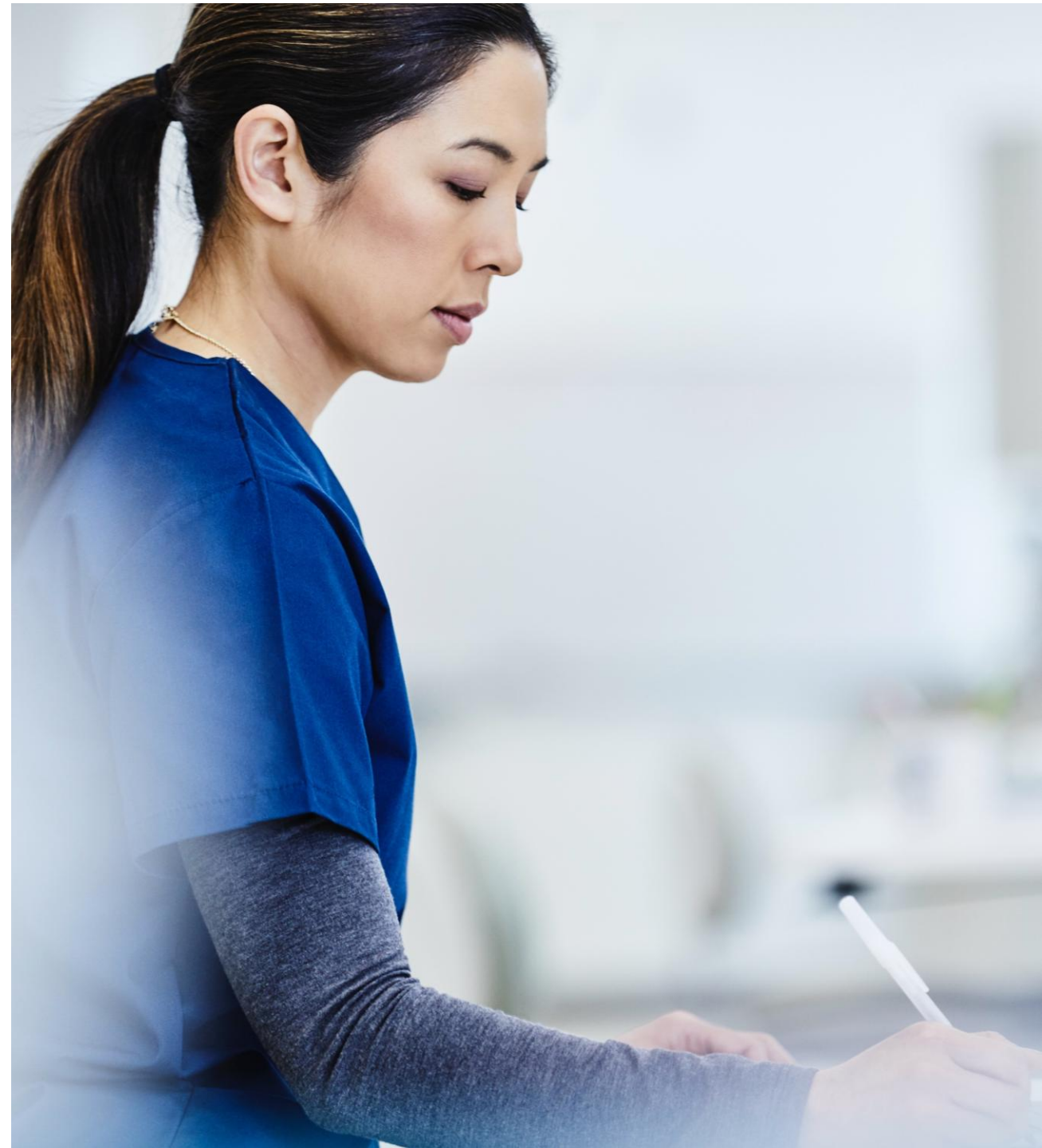
- Evaluate your policies and processes
- Find ways to modernize your programs
- Determine if AI/tech makes sense for your system



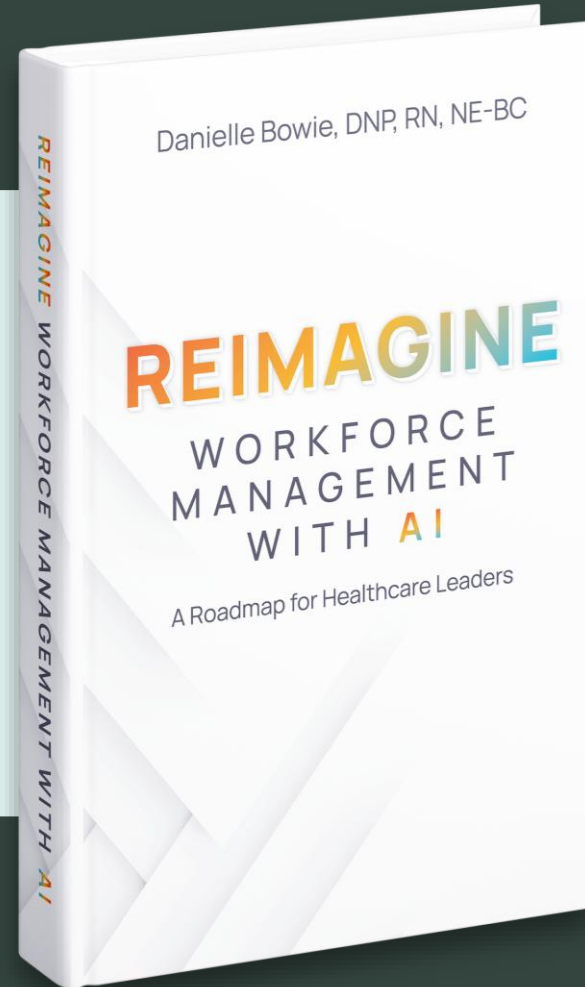
Incentivizing open shifts is a helpful strategy – but it shouldn't be your only strategy.

Final thoughts

- No single solution can tackle all workforce needs.
- Create dynamic, multi-faceted workforce strategies to navigate the complex demands of healthcare.
- Leverage data to continually refine and enhance strategies



Want to dive deeper into open shift management strategies?



Scan to read now!



Questions?