



Residency Platform FAQ

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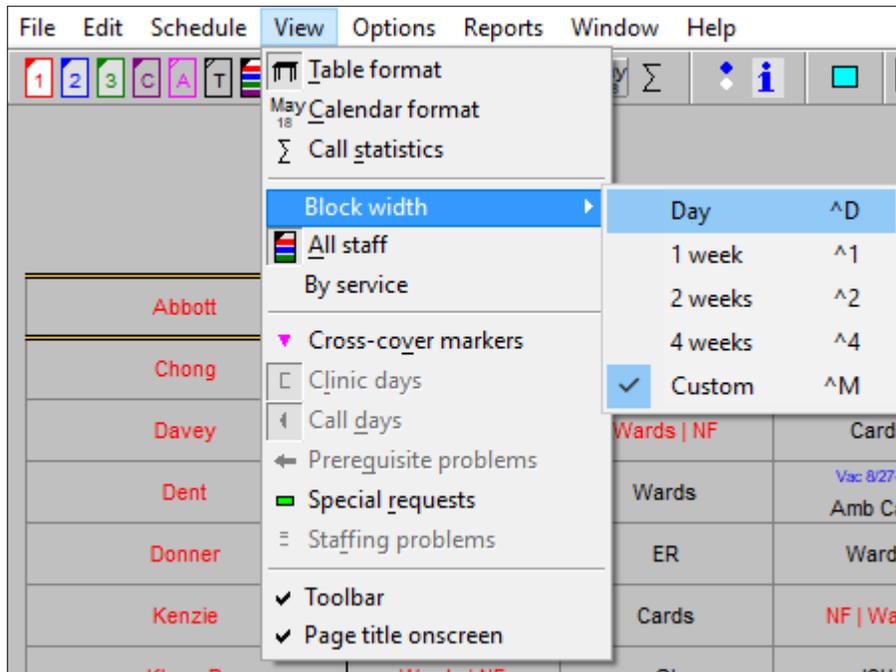
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Q1: Why are my block dates not appearing correctly on Amion if they are correct in OnCall?

A: When you are setting your block dates in OnCall, you need to ensure that your **All Staff** view is turned off. Then go to **View/Block Width/Custom**. The block dates listed on your first Staff Type page drive the dates seen for All Staff on Amion.com. To see other staff type block dates, you will need to select staff type from the All Staff drop down. **Refer to the [Set Block Dates help guide for further instruction](#).**

Q2: How do I schedule for one specific day rather than one block?

A: Change your Block Width to the daily view. Go to the **View** menu and select **Block width, Day**.



Q3: What are split dates and what do they do?

A: Split dates are for when a resident is on more than one rotation within a block period. The split rotations appear in red text separated by a vertical bar. The second half of the split begins on the Split Date set up for the block. In the sample below, resident Adams is on Cards from 7/1 through 7/13 and then on Endo from 7/15 through 7/27. **Refer to the [Split date help guide](#) for further instruction.**

		1 7/1-7/27 (7/14)	Infobox... Selection list
Adams	Ada	Cards Endo	Amb Care HO Pulm Cards Hol Rheum Clinic ICU test Consults ID Vac Elective Inpt Wards Endo Jeop ER Loa Geriatrics Neph GI NF HIV Outpt
Armstrong	Arm	Vac 7/22-7/27 Amb Care	
Carmichael	Carm	ICU	
Chambers	Cha	Wards	

Q4: Why is there different color text on the block schedule?

A: Blue = Exception Text, Red = Split Rotation.

If a person is on the same service for every day of a block, the rotation name appears in black text. If a person is on one service for the first half of a block and another for the second half, you will see a red split-block, such as ER | Vac. If a

person has any other mix of assignments in a block, the service the person is on the most shows in black text and other assignments in blue text at the top of the block cells.

Endo Pulm	Rheum	VA Wards	Green Wards
Rheum	HO ID	VA Wards	Vac 4/24-4/28 AC
Green Wards	Vac 2/27-3/3 AC	VA Wards	Endo Pulm

The split rotations appear in red text separated by a vertical bar. The second half of the split begins on the Split Date set up for the block. In the sample below, resident Adams is on Cards from 7/1 through 7/13 and then on Endo from 7/15 through 7/27. **Refer to the [Blue & Red Text help guide for further instruction](#).**

		1 7/1-7/27 (7/14)	Infobox... Selection list
Adams	Ada	Cards Endo	Amb Care HO Pulm Cards Hol Rheum Clinic ICU test Consults ID Vac Elective Inpt Wards Endo Jeep ER Loa Geriatrics Neph GI NF HIV Outpt
Armstrong	Arm	Vac 7/22-7/27 Amb Care	
Carmichael	Carm	ICU	
Chambers	Cha	Wards	

Q5: How do I add a service on the Call/Shift schedule?

A: Define which block service has Call or Shift work. Go to File/General Setup/Services. If the service you need is already entered in the list below, select it for editing. Above, click the dropdown selector to define the service as Call or Shift. (e.g., ICU day and night call is needed and ICU block service is already listed below).

If the new service needed is not based on a single block service but rather from multiple services, enter the name of the new call or shift service and select Call or Shift from the dropdown selector. (e.g., Night call staffed by any resident on an elective rotation and not on vacation). **Refer to the [Residency: General Setup help guide for further instruction](#).**

General setup

Services | Staff types | Staff | Requirements | Clinics | Finish | Block Dates | Assign rotations

Enter the names of your rotations: Ward, ICU, Elect, ... Don't worry about being thorough. You can add more rotations at any time.

Clear Add --> [Text Field] Shift 1 shift ?

Amb Care	Output	Shift
Cards	PTO	No call
Clinic	Pulm	Call
Consults	Rheum	Call Q1
Elective	TEST	QN avail
Endo	Vac	
ER	Wards	

Q6: Why aren't there staff names listed in my infobox Team Summary to select from?

A: Each Call service is tied to a service listed in the General Setup. Typically, a Call row in the schedule is tied specifically to a block rotation service. The Infobox Team Summary list shows residents assigned to the tied block rotation service. (e.g. ICU Night call is tied to the ICU block rotation. The Team summary shows residents on the ICU rotation for that date).

If your Infobox team summary list is empty, then you don't have any residents on the tied block rotation for that date. How to correct depends on the staffing criteria for the Call service in question.

⇒ **If anyone is available to work the call service as long as he/she is not on vacation:**

1. Click on the call service name on left-hand side of the call schedule.
2. In the Infobox window, check the box at the lower-left corner, "Anyone not on vacation is on-service & available." Note: Use the "Staffed by" box above in the Infobox window to define which staff type groups can work the call service.

⇒ **If the block rotation tied to the call service is incorrect and needs tied to a different block rotation:**

1. Go to File / General Setup / Services. Select the block service name from the list that the call service should be tied to and select "Call" from the dropdown selector. This places the block rotation on the call schedule.
2. Go to the Call schedule. Locate the block rotation name on the left and select it so it is highlighted yellow. In the Infobox window, setup the call service with the call name, pattern, staffed by, days of week, hours, # of call slots, etc. applicable to the service.
3. If you are doing this mid-year, copy the incorrect call service row assignments into the new, correct call service row. Right-click on the incorrect service name. Select, "Copy row/entire year." Then right-click on the correct service name. Select, "Paste entire year." If you are doing this at the beginning of the academic year, simply remove the incorrect row from the call schedule. Right-click on the incorrect service name. Select, "Remove row."

⇒ **If the call service is staffed by a few block rotations, but not all:**

1. Create a Staff-by rule to specifically define which block rotations staff the selected call service. (e.g., Night Call is staffed by PGY2 residents from ICU block rotation Mon-Fri, but staffed by PGY3 residents from any elective block rotation on Sat-Sun). **Refer to the [Staff-by Rule help guide for how-to instruction.](#)**

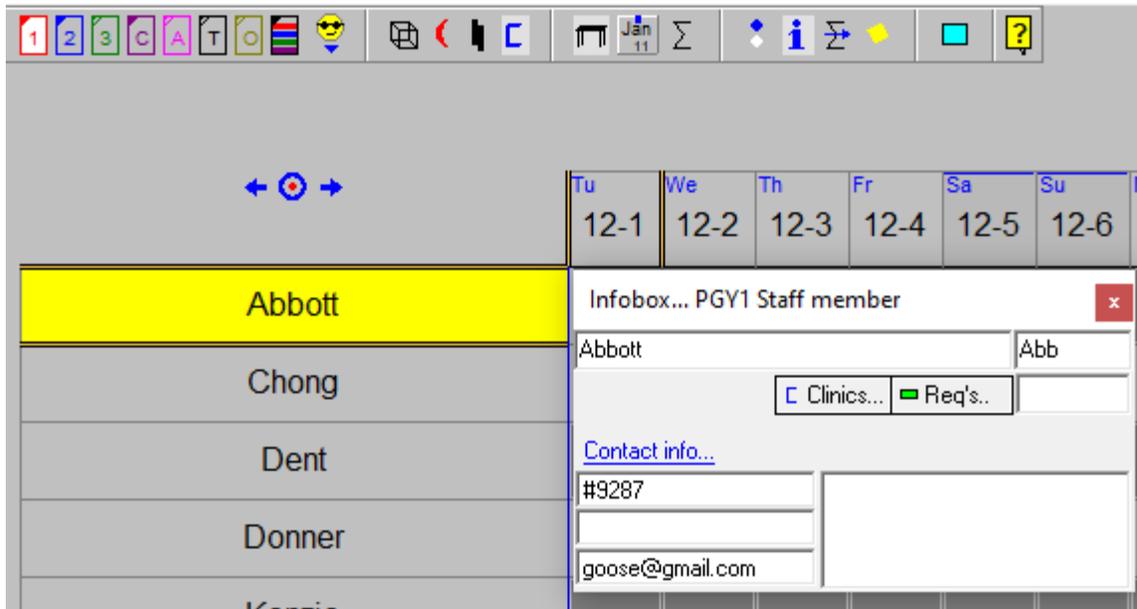
Q7: How do I add clinic assignments?

A: These can be added individually or by using our Add Clinic tool.

Individual Entry: Click on the AM or PM assignment cell for a resident. From the Infobox Clinic list, select the clinic assignment name to fill.

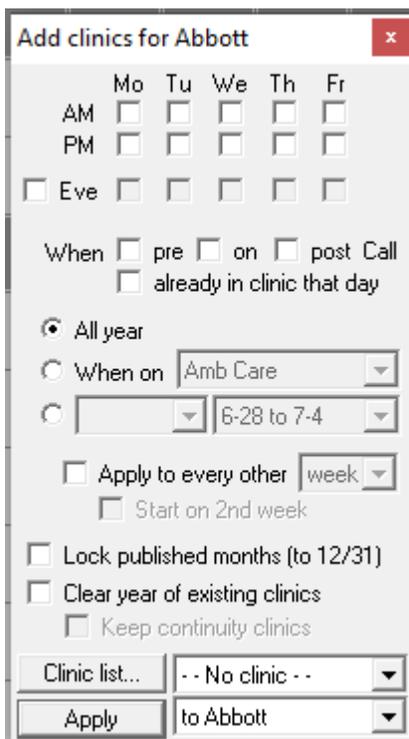
Add Clinic tool: Use this tool to assign continuity clinics and/or repeating clinic assignments based on block rotation.

1. Select a resident's name on the left-hand side of the clinic schedule. In the Infobox window, click "Clinics..."



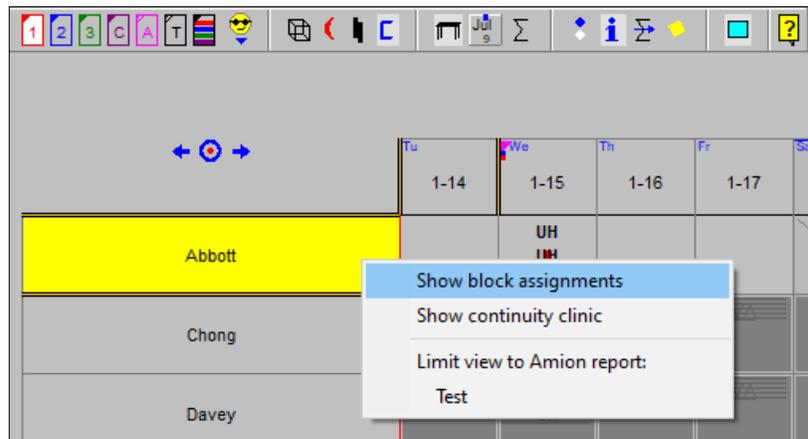
2. At the top, check the days and AM/PM sessions along the top that apply for the same clinic type/location.
3. In the middle of the window, select the duration: “All Year” for continuity clinics or “When on...” if clinic is based on a specific block rotation.
4. At the bottom lower-right corner, select the first dropdown selector and choose the clinic to assign. Then select the second dropdown selector and choose if this setup should apply to the selected resident, all residents belonging the selected staff type, or to all staff types in the schedule. Click “Apply.” (i.g., pick the “Apply to all PGY2s” if all PGY2s should get Fri AM Admin time).

Note: Each clinic will need to be added separately.



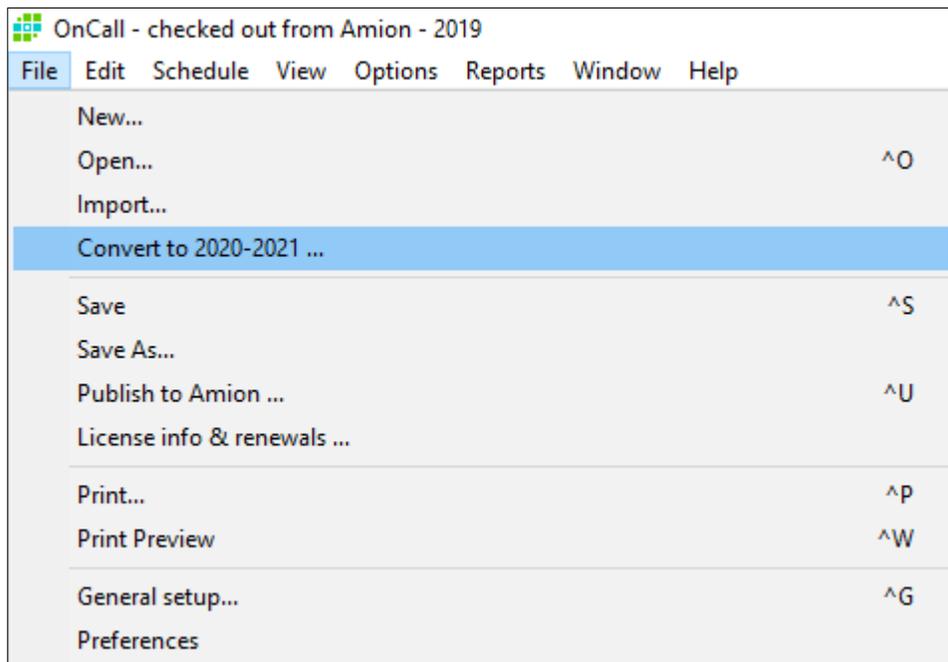
Q8: How do you show block assignments on the Clinic schedule?

A: Right click on a resident's name on the left-hand side of the clinic schedule. Select, "**Show Block Assignments.**"



Q9: How do I convert to a new academic year?

A: Go to the **File / Convert to YYYY-YYYY**. Refer to the [Convert to new year help guide](#) for further instruction.



Q10: Will converting to a new year delete/change anything on my previous year?

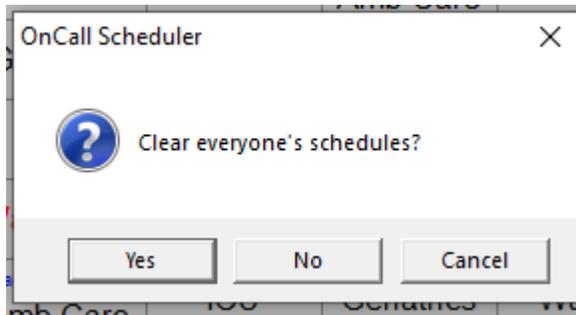
A: No, each academic year is a separate schedule file. The conversion creates a template for the next year and does not overwrite or affect your current year's schedule. The conversion saves you from having to re-enter all your staff, rotations, clinics, contact info, and other settings that remain the same each year.

Q11: After converting to the new year, how do I clear block assignments?

A: After converting the schedule to the new academic year, most resident schedules require admins to promote their residents to the next PGY level. When doing so, you'll have an option to clear everyone's schedules. However, if you don't need to promote the residents up a PGY level but still need to clear the old block assignments, you simply delete them from the schedule.

⇒ **Promote residents to next PGY level & clear block assignments:**

1. Before promoting, make sure your graduating class has been removed. Follow steps provided in Question 12 below.
2. Go to your PGY2 block schedule. Disable View All if resident names appear in color font. Select one of the resident's name on the left-hand side of the schedule.
3. Go to **Edit / Move all to** and select the senior page. You will then receive a prompt to clear their block assignments. Click **Yes** if you will be entering in new block schedules for the selected staff type. Continue advancing staff to new levels until you end up with a blank PGY1 block schedule.



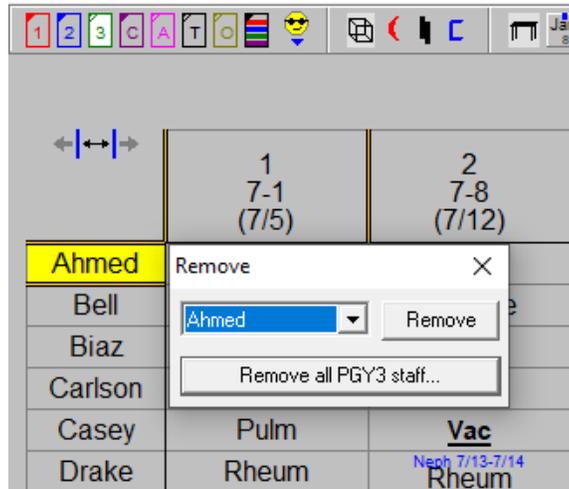
⇒ **Do not promote staff to next PGY level & clear block assignments:**

1. Select the first block assignment cell for the first person listed on the block schedule.
2. Hold SHIFT key and then select the very last block assignment cell for the last person listed on the schedule. When selected, the cells appear highlighted white.
3. Click "Delete" or "Backspace" key on your keyboard to clear.

Refer to [Convert to new year help guide](#) for further instruction.

Q12: After converting to the new year, how do I remove my graduating class?

A: Go to the senior block schedule and **disable the All staff view option**, if enabled. When viewing one group block schedule, the resident names appear in **black font only**. Next, select a resident's name along the left side of the schedule. Go to **Edit/Remove**. In the Remove Window, click **Remove all XX staff..** The XX representing the group you have in view. **Refer to [Convert to new year help guide](#) for further instruction.**



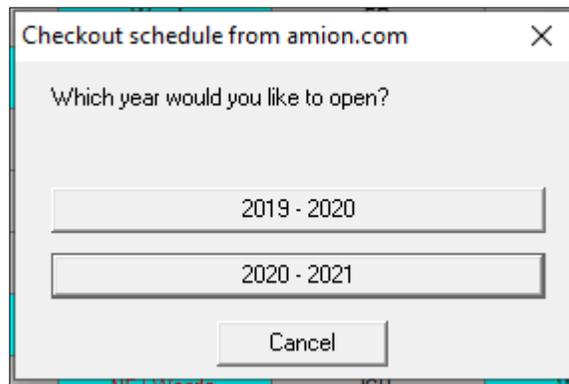
Q13: Once I convert my residency schedule to the new academic year, how do I navigate between years?

A: Each academic year is a separate schedule file. Once you've converted to the new year, publish the schedule to Amion so both files exist in Amion. Click the green lock icon before publishing to hide (lock) the new academic year schedule at Amion.com until ready to go live. Benefits of publishing the future academic year schedule before ready to go live:

1. Allows you to file-share among different workstations and/or admins.
2. Obtain online backups of the schedule.

To navigate between the two published schedules:

1. Go to **File / Open**. In the Open window box that appears, click the **Open from Amion** button in the lower-right corner. A prompt window will provide you the choice to open the current academic year or the next academic year schedule.



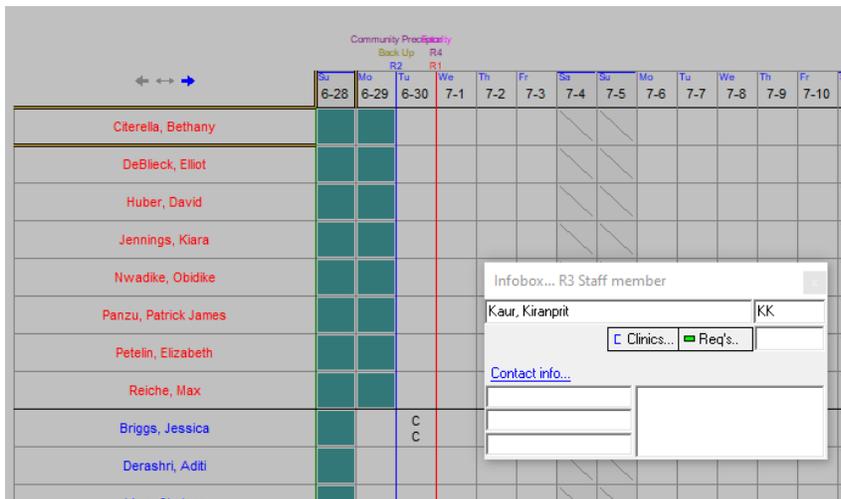
Note: The option to select a year appears through end of August. Afterward, access previous schedule files from your Amion Administrator page. Refer to the [Prior year schedules guide](#) for further information.

Q14: Why are some assignment cells in the Clinic schedule appear in teal color?

A: The dates in teal are outside of the group’s academic year start and end dates. (i.e. PGY3 block 1 date begins on 6-30, but PGY2 block 1 date begins 6-29).

If the dates appear incorrect, on the clinic schedule, correct the block dates on the block schedule.

Refer to the [Set/Correct block dates help guide for instruction](#).



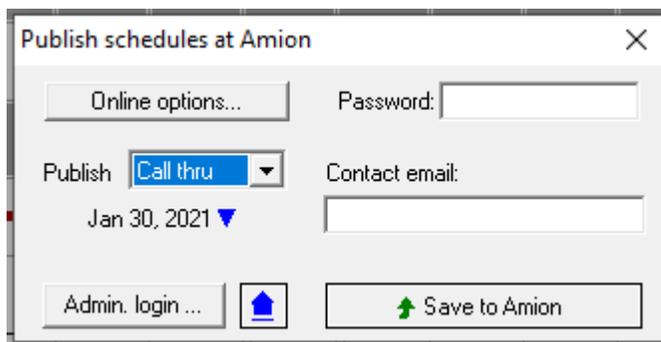
Q15: Where do the overlapping dates/assignments pull from on Amion?

A: They only overlap in the Who’s On list but can be confusing if you view a monthly grid since it shows assignments from both schedules. It is best to not have overlapping dates. Refer to the [Academic years overlapping dates help video for instruction](#).

Q16: Why aren’t my call assignments appearing at Amion.com?

A: There are several possibilities of why call assignments do not appear when viewing the schedule at Amion.com:

1. Check the publish thru date. End users may only see schedules up to the publish thru date set. Go to **File / Publish to Amion...** In the Publish window on the left-hand side, you have the option to publish Call, Clinics and Shifts to different dates. Refer to the [Publishing help guide for more details](#).



2. If call assignments are missing on the Who’s on page, but not from the monthly schedule page, then check to see if the call service row is set to be hidden.

Go to your call schedule and locate the call service row that is missing from the Who's on page. Is there a little gray triangle at upper left corner of the service name? If yes, it is hidden. **Right-click on the service name.** From the menu select **Include in Who's on list.**

Wards Resident	Ahm	Lar Amb	Cha Elect
Wards Intern	KhR	Liu	KhR
Night Float Resident	Arm	Arm	Arm
Night Float Intern	Min	Min	Min

Note: A red arrow points to a small gray triangle in the top-left corner of the 'Wards Intern' row. A yellow highlight box is placed over the 'Wards Intern' row with the text 'Not included in site-wide "Who's on" list'.

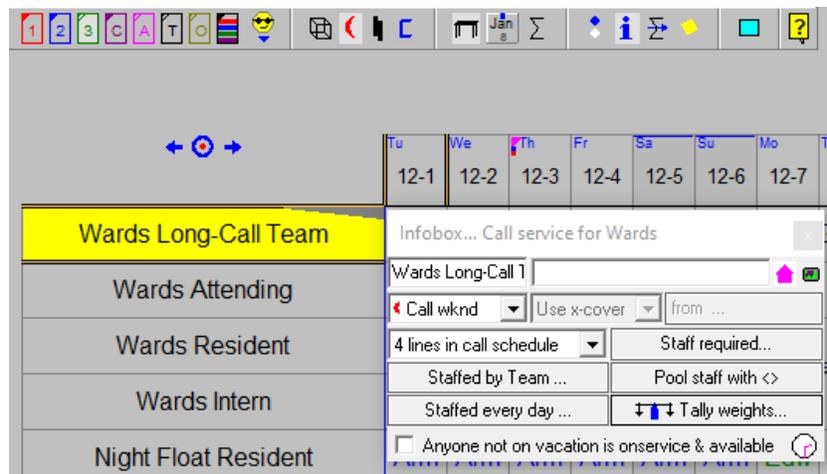
- If the call assignment appears in the Who's on list, but not in the monthly schedule page, then it is excluded from subset 1 in the Schedule Content window. Subsets allow you to break a large monthly schedule into smaller subset views. Subset 1 is the default view end users see first.

Go to your call schedule. Click the **Schedule Content icon from icon toolbar** above (blue and white dot on top of each other). In the Schedule Content window, select the **one blue dot icon** in toolbar for set #1. Below, excluded services appear in gray font and without a blue dot next to it. Select the excluded service to include in set #1. **Refer to the [Subsets help video](#) for further instruction.**

Q17: Can I add pass-off or static pager numbers for call services?

A: Yes, with service pager numbers enabled, the Who's on list displays the service pager number for contact instead of the assigned resident's personal pager number.

Go to your call schedule. Select the call service name on the left-hand side of the schedule. Locate the Infobox window. Click the **green pager icon** at upper-right corner. Enter the pager number and click **OK.**



Wards Long-Call Team pager #: X

If you reach the person on call via a static pager instead of the person's personal pager, enter the service pager number below.

At 'amion.com', people on Wards Long-Call Team will have the service pager listed next to their names instead of their personal pager numbers.