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Introduction

Creating Schedules
This document provides reference information about creating rotation, call and clinic schedules in OnCall. You will learn how to publish your schedules to the www.amion.com website which will allow residents, attendings and other staff to view schedules online.

Overview
The Amion Scheduler ("OnCall") is used to create rotation, call and clinic schedules. You can track duty hours, produce tallies and much more. This guide covers residency scheduling.
Please note: If you plan to include attendings in your residency schedule because they are providing support to residents you may add them as a service in your residency schedule. If you need a separate on call schedule for attendings, you will need a separate license and should use the calendar-year implementation of Amion.

Downloaded and install the scheduler to create a new schedule or retrieve an existing schedule. Refer to our Help Index and the order confirmation message you will receive from our online store.

Tutorials
Launch the Amion scheduler on your computer.
You can watch the self-running tutorials before creating your first schedule.

Note: Reference numbers displayed on screen shots relate to the instruction step number.
1. Select Help from the Browser menu bar
2. Select Contents
3. View the Residency Programs Overview, Block scheduling, Call and Clinic tutorials.

Note: The self-running tutorials can be stopped, continued or paused at any time.

Icons
OnCall has many Icons dependent upon the view. These icons are displayed when creating your block schedules. Click on the icons to display the following views:

Icon descriptions

• Hide the Toolbar

• Select the view by Staff Type: Chose from seven different colors to represent each of your staff types. Click on the following icon for this view.
  o A

    o Displays the icons for PGY2 through PGY5 for this example in their respective colors. You can view PGY2s only, PGY3s only, PGY4s only or PGY5s only by clicking on their respective numbered icon.

• View all Staff (toggle on and off) clicking on this icon.

• Select Schedule type by clicking on the following icons:
  o Block Schedule
  o Call Schedule
Select view format by clicking on the following icons:

- Table Format
- Calendar Format

Get Statistics or tallies for Call, Clinic and Duty Hours by clicking on this icon.

Get information about the schedule by clicking on the following icons:

- Schedule Content Infobox
- Highlight & Tally Cells that Match the Cursor Cell

Get help by clicking on this icon.

Create a New Schedule
Follow these steps from beginning to end in the order in which they are displayed and you will successfully create your Rotation, Call and/or Clinic schedules.

If there are features you don’t need (e.g. split dates in block schedules), skip the steps and move on to the next.

1. Find the OnCall software on your computer and open it.
2. Select Create a new schedule.
3. Select Yes – use an academic year, July – June, & block schedules.

A General Setup box will pop up after you click Select Yes – use an academic year, July – June, & block schedules.

General Setup

1. Select General Setup and the InfoBox will show.

Note: You must create the components of the schedule, such as services and staff types, before creating the schedule. You enter these in the General Setup box.

Services
Each service, or rotation, must be defined prior to using it in a schedule.

1. Click on the Services tab.
2. Enter the name of the service or rotation.
3. Determine if the service takes call and select call or no call in the box next to the service name.
   a. If no, click on the dropdown box to the right of where the service name is entered and select No call.
b. If yes, click on the dropdown box to the right of where the service name is and select Call or Variable call.

c. If yes, how many people will be on call for this service?
   i. Click on the drop down box to add up to 80 call lines.

**General Setup: Enter Service that does not take Call**

**General Setup: Enter service that takes call.**
The call displayed will have two people scheduled to cover call for this service.

**Staff types**
Staff Types refers to the type of individual who will be included in the schedule, such as:
1. Attending Physicians
2. PGY level (Post Graduate Year)
3. Physician’s Assistants (PA)
4. Nurses
5. Other healthcare professionals

**Enter Staff types**
1. Click on the Staff types tab.
2. Enter the staff type.
3. Select color for the staff type.
4. Save.
Staff types

Staff refers to the individuals who will be included in the schedule.
1. Click on the Staff tab.
2. Enter the staff name.
3. Select the appropriate staff type after you enter the last name and first initial.
4. Save.

Clinics

Enter your Clinics if you have any.
1. Click on the Clinics tab.
2. Enter a short form of the clinic name.
3. Save.
4. Click **Finish**.
   a. The initial setup for the schedule is complete and the block schedule prompt will display as shown as soon as you click **Finish**.

Note: Additional Services, Staff types, Staff and clinics may be added in the General setup Infobox at any time during the schedule creation process by selecting **File | General Setup**.
Block Schedules

The box displayed below will pop up after clicking Finish in the General Setup:

1. Click Go to first block schedule.

Go to first block schedule

Adjust Schedule Display

To adjust the schedule display, place your cursor on the dark lines around the first horizontal cell and the first cell in the first two columns.

Expand or contract the cells by placing your cursor on the dark black horizontal and vertical lines and drag with your mouse.
Set Rotation Dates
The screen below will display when you click on Go to first block schedule:

Set Rotation Block Dates

Things to consider before setting the rotation dates:

1. What is the begin date and the end date of each rotation?
2. Do these dates vary based on Staff Type?

How to Set Calendar Month Rotation Dates

1. Display All staff if All staff types have the same rotation dates.
2. Place the cursor in the date box above the schedule.
3. The Infobox will display.
   a. The Infobox for this schedule shows that for July, the rotation is July 1, 2004 through July 31, 2004.
   b. This schedule is set for 12 blocks.
Set up Calendar Month Rotations

1. Click on Staff Type icon (PGY5, e.g., as shown below).
2. Click on the All Staff icon to see all PGY5 staff.
3. Place the cursor in the date field and the Infobox will pop up as seen above.
4. How many blocks will the PGY5s have?
   a. For this example their rotations last three months so they will have four blocks in their schedule.
5. Change the blocks to 4 Custom blocks by clicking on the down arrow.
6. Look at the actual rotation dates. Are these correct?
   a. These dates need to be changed to meet the customized block dates.

How to Set Custom Blocks of Time
### Setting Custom Blocks

1. **Place the cursor in the date block that needs adjusting.**
2. **Click on the up or down arrows next to the beginning and ending dates and adjust the dates to meet your program needs.**
3. **Move to the next set of dates to adjust until you have set all of the dates.**
   - a. **Continue this process with all the staff types.**

### Adjusting the Dates on Custom Blocks

1. **Place the cursor in the date field and the Infobox will pop up as seen below.**
2. **Click on the up or down arrows next to split date and adjust the dates to meet your program needs.**
3. **There are now four blocks.**

### How to Customize Standardized Split Blocks

If residents sometimes spend half of the rotation block on one service and half on another, you can further customize your rotation blocks by defining the **Split Date** for each rotation period.

1. **Place the cursor in the date field and the Infobox will pop up as seen below.**
2. **Click on the up or down arrows next to split date and adjust the dates to meet your program needs.**
Assigning Services
Services can be assigned from the All Staff View or individual Staff Type view.
1. Place the cursor in a blank cell and the Infobox - Selection list displays list of services.
2. Select a service.
   a. The service will be applied to the spot the cursor is placed.

Select services from the Infobox by Staff Type

3. In this example, the PGY3 view was chosen and services were added to the individual PGY3s schedule. They have rotations based on the calendar months.
4. Vacations have been selected out of the Infobox and entered into the schedule.
   a. Dreier is on vacation 10/1 through 10/31.
   b. Reighley is on vacation 11/1 through 11/30.
**PGY3 Block Schedule Complete**

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</tbody>
</table>

### Split Shift

1. Place cursor in the cell where you want to setup a split shift.
   a. The Infobox will open.
   b. Determine which service will fill the first part of the rotation period and which service will fill the second half of the rotation period.
2. Hold down the “Ctrl” key on your keyboard and at the same time click on the two services in the Infobox with your mouse.
   a. Choose the services in the date order that the Staff member will be performing the services (the first half of the month is spent on ANGIO and the second half of the month is spent on CHEST).
3. The cell will display two services side by side and colored in red. A split shift will split the month based on the split date you set on your custom shifts. *(See “How to Customize Standardized Split Blocks” above.*) For this example, the resident is on Angio from 7/1/04 through 7/16/04 and then is on Chest from 7/17/04 through 7/31/04.
Creating a split shift

Create Cross Cover

Cross cover allows layering of primary and secondary assignments in the master schedule. The block schedule will display the primary assignments with the secondary assignments indicated by small markers in the corner of the cell.

Things to consider before setting cross cover:

- What specific services are cross-covered?
- Will all attendings for this service be on the cross covered service?
- Is the cross cover specific to an individual and not all physicians on the rotation?

Set up Preferences first so that the cross-cover markers will be displayed for those viewing the schedule online.

1. From the OnCall menu bar, Select File.
2. Select Preferences.

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Visit www.amion.com for online help & FAQs
3. Select **Web posting**.
4. Select **X-cover markers on block pages**.
5. Click **OK**.
   a. The markers will now be viewable by yourself and those viewing the schedule online.

---

### Setting Cross Cover Markers

- **Block headings**
- **Block schedules**
- **Calendar format**
- **Call scheduling**
- **Call tables**
- **Clinic scheduling**
- **Highlighter**
- **Online paging**
- **Online swap**
- **Printing**
- **Shift schedules**
- **System**

- **Web posting**
- **Apply changes**
- **4**

---

### How to set cross cover in OnCall

1. Make sure the primary service is entered in the block schedule and highlight this cell.
2. From the OnCall menu bar, click **Window**.
3. Select **Cross cover**.
4. The cross cover box immediately opens.
5. No Cross cover is currently set for NEURO, as NEURO is the highlighted service in this example.
6. Click on Setup and the Setup box pops up.

Cross cover box

7. All services are listed in the center column.
8. Select a service from the center column as the Rotation that offers xcover to staff.
9. Click on the left facing arrows to move the service NEURO from the center column to the left column.

Cross Cover

10. Select CT to xcover to NEURO.
11. Click on the right facing arrows to move the service CT from the center column to the right column.

Service moved to Left Column

12. Click OK to indicate that the physician working on the service NEURO cross covers CT.

Cross cover set up complete.

13. The box displayed in below pops up after clicking OK.
a. Notice that CT is set as the cross cover target; a small pink circle is the cross cover marker.

14. If the cross coverage applies to all staff working on the NEURO service, click on **Apply to all**.

15. Highlight CT.
   a. Apply to all...all NEURO
      i. Will this cross cover be applied to all NEURO staff in the schedule?
   b. Apply to all...Attending NEURO.
      i. Will this cross cover apply only to Attendings on the NEURO service?
         1. For this example, this cross cover will apply only to Attendings on the NEURO service.

16. Click **Attending NEURO**.

17. All **Attending NEURO** rotations have cross cover markers for CT.

18. Continue adding to the cross cover Setup box until all cross coverage is set.
Special Requests (Holiday, Family leave, Personal days...)

Things to consider before creating **Special Requests**:

1. You have four-color choices for special requests. Determine how you would best like to use these colors.
2. Examples of color use:
   - Choose **Green** for family leave.
   - Choose **Pink** for conferences.
   - Choose **Black** for board examinations.
   - Choose **Mustard** for vacation.

How to create **Special Requests** in OnCall

1. Place your cursor in the cell that spans the dates for the Special Requests.

**Preparing for Special Requests**

![Image of a cell in a schedule with a cursor indicating a request]

2. Right click on the highlighted block.
3. Select **Add a request**... from the menu.

**Turn Special Requests On**

![Image of a cell in a schedule with a cursor indicating a request]

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Visit [www.amion.com](http://www.amion.com) for online help & FAQs
4. The Special Requests setup box will display. A new request will be created for the date interpolated from the location of the cursor. If a request falls near the beginning of block 2, put the cursor near where the request will go before hitting the right mouse button.

5. Select one of the four colors by clicking on a colored quadrant of the color box.

6. The date for your new request is displayed. For this example, the cursor is placed in the center of the September block. The start date for the special request displays as 9/16/2004.

7. Enter the special request in the text field.
8. To Change Dates: Use the left and right horizontal arrows to move the begin date forward or backwards.

Forward and Backward Date Arrows

9. Use the up and down arrows to define the end date.

Up and Down Date Arrows

10. Special Requests do not have a separate save feature as the Special Request markers are created as you enter the date information.

Entering Physician Contant Info
1. Select the Block Schedule.
2. Click on a Staff member’s name.
3. Enter pager, Telephone number and Email address.
Create a Call Schedule
1. Open the block schedule.
2. Click on the red half moon symbol (Call Schedule).
3. The call schedule will list all rotations that were identified as taking call when the block schedule was created.
   a. Note: This example uses a different schedule from the previous pages for variety. For this example, the following services were assigned call:
      i. FM R1 with one call line in the schedule.
      ii. FM R3 with three call lines in the schedule

Service Names on Call Schedule
4. If desired, change the service names to match your call names.
   a. Place the cursor in the cell with the service name that will be changed to a call name and type the call name into the cell.
Enter Call Names

Enter Call Schedule Manually
5. Place the cursor in the first cell where you will enter a person to cover call.
   a. The Infobox lists available staff alphabetically.

How to Add Staff to Call
6. With the cursor in the blank cell, type in a few letters of the staff name as it is listed in the Infobox, or click the staff name from the Infobox list. The staff name will appear in the cell after you type a few letters. Continue adding staff until the call schedule is complete.

Adding Staff to Call
Set Shift Patterns to Schedule Call Automatically
If you have a call schedule that follows a specific pattern over a period of time, you can set this pattern rather than enter the call schedule manually.

1. Open the block schedule.
2. Click on the red moon icon to open the call schedule.
4. Click on Call & Shift Patterns.

Select Call & Shift Patterns

5. The Call & Shift Patterns box pops up.

Call & Shift Patterns box

6. Highlight the call name for which you will create a shift pattern in the call schedule.
7. Highlight pattern 1 and give it your pattern name by placing your cursor over the word Pattern 1 and keying your pattern name into the box (FMR3, e.g.).
8. Specify the period of time this pattern occurs (in this example, 16 days).
9. Now using Worker1, highlight the days that worker one’s pattern would be.
   a. Worker one works Wednesdays, Saturdays and Mondays.
   b. Worker2 works Tuesdays and Sundays.
   c. Worker3 works Tuesdays and Fridays.
10. Return to your call schedule and select the first call line that incorporates the pattern.
11. The Infobox provides the details of the call where Call & Shift patterns were set.
12. Assign the call pattern to the selected call service by clicking on the drop down box where the call patterns are listed in the Infobox.

13. Select the call pattern created for this call.

Assign the Call Pattern
14. Enter names in the call schedule. The first name entered will generate the pattern for that person based on the template you just created.

Call & Shift Patterns Set Automatically

15. Continue creating Call & Shift patterns and complete the call schedule.

Schedule Content Boxes
Schedule Content Boxes allow you to customize your view of Rotation, Call and Clinic schedules. This limits your view to a subset of the schedule without changing the schedule.

- For example: You want to create a Schedule Content box to view only the rotation schedules of attendings that typically work at one hospital. You may want one view of the Attending Staff type page that lists all attendings, one view that lists all attendings who rotate at the University Hospital, and one view of all attendings at Children’s Hospital.
- For example: You may want to create a Schedule Content view for PGY3s on a specific rotation that requires 360 evaluations of the PGY3s.

Things to consider before creating Schedule Content views:
- Why do you need a separate view than what is currently on your block schedule?
- What will you name the Schedule Content boxes?
- Will all physicians be included in your content boxes?
  - If not, be sure and exclude them from Schedule Content box list.

How to Create Schedule Content Boxes
1. Open the Rotation (Block) schedule.
   - Make sure the View All Staff button is not selected.
2. Click on View.
3. Toggle All Staff to turn it off.
Turning off all staff

4. Select the staff type for which you are setting the Content box by clicking on the Staff Type icon (types A, 5, 4, 3, 2, e.g.).
5. Click on Window.
6. Click on Schedule Content.
7. The Schedule Content box pops up after clicking on the word Schedule content in the drop down box.

Schedule content

8. Click on the second Icon from the left in the Infobox so that Show All (PGY3s) is selected.
9. Notice the eight combinations of dots on the right half of the Schedule Content toolbar. The first dot is your Block Schedule and should not be changed. You can create up to seven different views based on information from your completed Block Schedule.

10. Move to the second set of dots (2 dots) and click on this icon.

11. Review the content of the Schedule Content box and determine if you will remove any of the physicians in this list from the Schedule Content Box. Removing a physician from this particular page view does not remove the physician from the schedule.

12. Click on the physician's name you wish to remove and their name will be toggled off for this view.

13. Click on the Schedule Heading title at the top of the Block Schedule page. Highlight and delete the current schedule name. The 2 dots will not represent your Block Schedule so you will need to create a name for the new view.
14. Change the title of this schedule to reflect the subset you have created by typing directly over the name you just deleted. Name the new view by typing directly into the space you just deleted and for this example we will title the new Schedule content screen **PGY3 360 Evaluations**. The original schedule is still left intact and will be there when you click on the single dot.

15. You can toggle back and forth between these pages by clicking on the combination of dots. Continue to build up to eight views.

16. Schedule content boxes are also available in the Call schedule. Rather than selecting individuals by staff type, the Call Schedule Content box allows you to select different Call lines for different views.

**Clinic Schedule**

1. Open the Rotation (Block) schedule.
2. Click on the **Clinic Icon** (the blue C) in the OnCall menu bar.

3. Click on the staff name to whom a clinic will be assigned.
4. Click on the **Clinics** icon in the Infobox.
5. The red dots indicate Call scheduled.
6. Select the AM or PM icon, which opens the next box where clinics are added for the specific staff member.

7. Add clinics for staff member.
   a. Set AM, PM or Eve
   b. Designate if the clinic is All year or a specific time frame.
      i. If so identify When on All year.

8. Clear year of existing clinics: Warning: use this option only when setting up a clinic schedule.

9. Clinic list
   a. Click the drop down box for the Clinic List.
   b. If you did not enter clinics in the General Setup box prior to setting up clinics, a box will pop up telling you that there are no clinics entered. Click the OK button and General Setup will open for you to enter clinic names before going any further.

10. Select Clear & apply to apply your clinic schedule.
Tally
Tally will identify number of times on Call, in Clinic and duty hours for each month for the full year.
1. Open the Rotation (Block) schedule.
2. Click on the statistics icon.
3. Select Call, Clinics or Duty Hours in the drop down menu box and tallies will display.

Tallies

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