



Picis Orchestrator

USER GUIDE

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Intended Use: Picis Clinical Solutions software patient information system compiles an electronic medical record utilizing commonly available hardware, and is classified as a "medical device". A patient record is populated with information from various sources, such as healthcare professionals, medical devices connected to the system, and data that arrives via hospital and laboratory information systems. The application stores this information in a database, and it may analyze and/or display the data in different formats for evaluation by healthcare professionals for informational purposes. The product is intended for use by healthcare professionals.

HIPAA Compliance: Picis Clinical Solutions has put considerable effort into providing the capability to protect and audit access to patient personal health information in its products. It is highly recommended that those responsible for implementing the software fully utilize the delivered security functionality in order to ensure that only authorized users have access to the data. Picis Clinical Solutions supports configuration that will permit authorized users to restrict access to certain features and functions, to allow view-only rights to protected information and to define editing rights. Also, native audit features and reports can be utilized periodically in order to monitor changes or particular instances of access to data.

Caution: The data displayed on Picis Clinical Solutions applications are for informational purposes only. Picis Clinical Solutions recommends that users always refer to primary devices for diagnosis and treatment.

Hardware Requirements: Detailed hardware requirements are provided during the contract process. Please contact your System Administrator or Picis representative should you require additional information.

Nomenclature: The expressions "real-time data", "real-time variables", "real-time fluids" etc. are Picis expressions that refer to near real-time data collected from connected devices.



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Introduction

Facts Orchestrator Overview

Facts Orchestrator is a browser-based interactive application that can interface with all permeation systems to manually schedule surgery staff.

Using with...

Additional Facts Orchestrator modules under development by Facts include the following:

- A module for managing assets such as beds and OR equipment
- A log and instrument tracking module
- An implant and tissue tracking module

Facts Orchestrator can be used from any supported device (desktop, laptop, tablet, smartphone) etc that has a browser and is capable of connecting to the hospital's Facts Orchestrator server.

Key Features

- Staff scheduling: Import staff from an external system (temporarily), specify staff availability, assign staff to ORs using drag & drop, view staff monthly, quarterly, yearly and create scheduling conflicts with & print the staff schedule using them as focus or the date you want.

Introduction

Working with Pico Orchestrator

Architecture

The application has its own independent database and server and can be integrated with any external third party orchestration system or with any PaaS system running on Storage.

External integration is currently available for scheduling, routing and resource management interfaces. External integration is currently planned for scheduling interfaces.

Supported Browsers

The following browsers are currently supported:

- Google Chrome version 75 or higher

Supported Tablets and Smartphones

For this release, the full scheduling module is not supported on tablets or smartphones.

Supported Screen Resolutions

For full scheduling, the minimum supported screen resolution is 1024 x 1024 pixels.

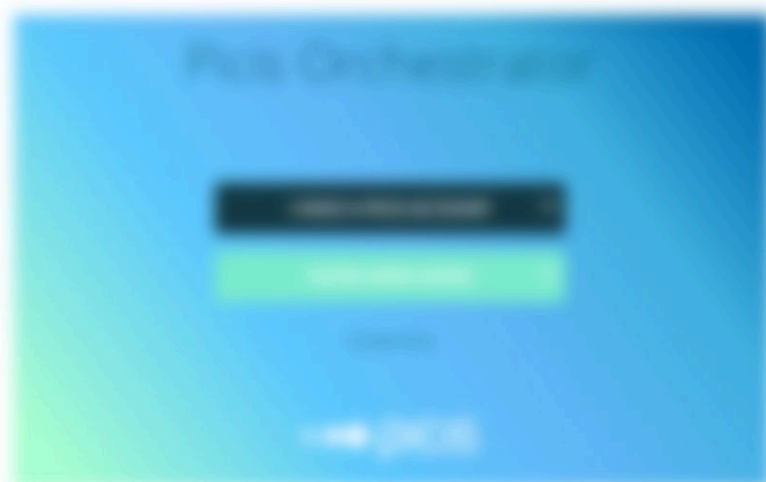
Working with Pico Orchestrator

Starting Pico Orchestrator

1. Open a web browser.
2. Access the URL address provided by your system administrator.

Introduction

Working with PaaS Orchestration

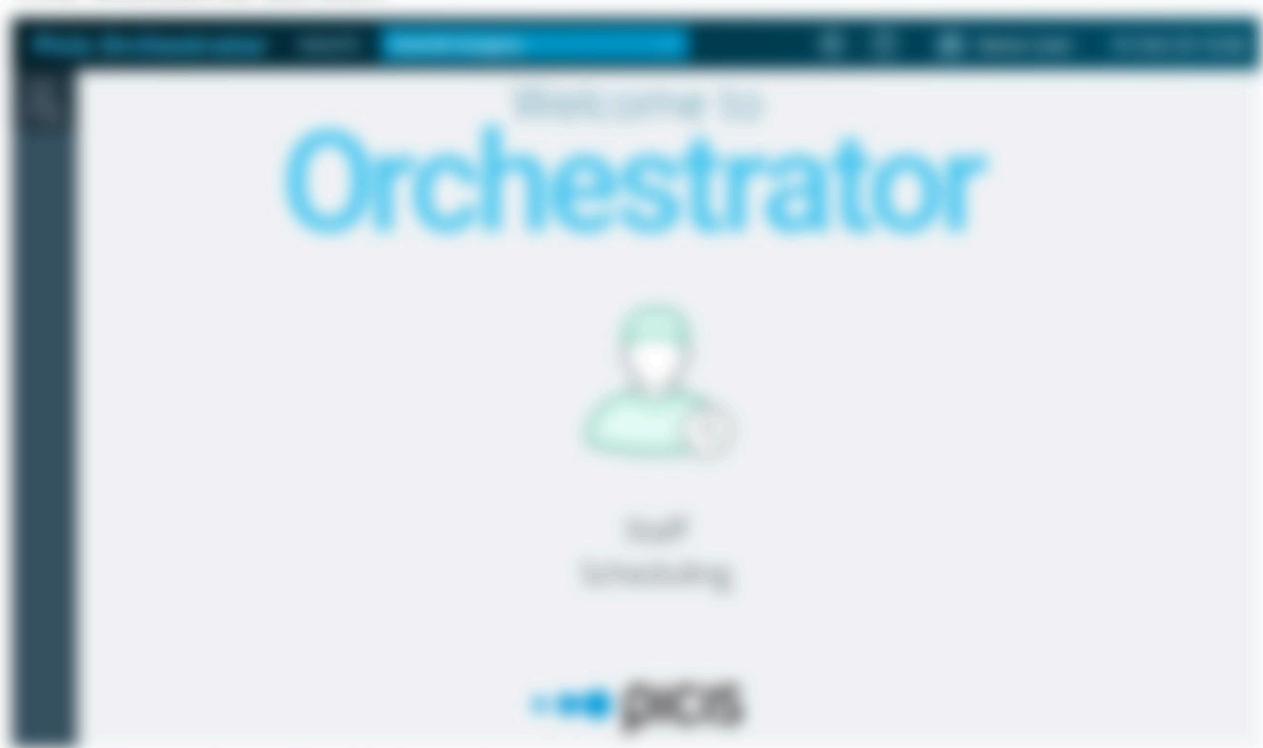


While your instructor is setting up and testing PaaS Orchestration, you may be shown this screen.

Users without a PaaS account can enter a demonstration mode. In demo mode, changes you make are not saved when you exit.

1. You **need** a PaaS account.
The login window appears.
2. Type a **Username** and **Password** that your **DEMO** is trying on.
The login screen appears.

The Welcome Screen



The Welcome Screen has the following components:

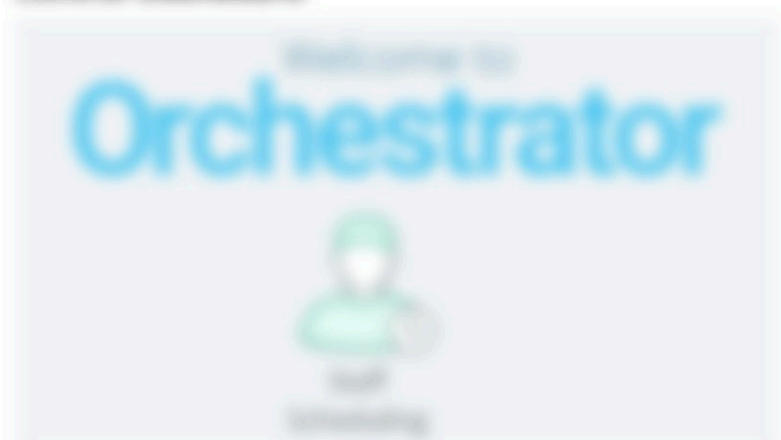
- A header
- A central dashboard
- A central sidebar

Header



The header provides the ability to change the facility, configure user details and self-administration, and log out.

Central Dashboard



The central dashboard provides a quick and easy way to access the module that you want to work with. After the initial release only the self-orchestrating module is available. After selecting a module, the central dashboard disappears and the module appears in its place. If you want again to work with another module, you can select it using the sidebar.

Sidebar



The sidebar is always available on the left of the main window. Click a button to open the associated module.

Selecting a Facility to Work With



- In the toolbar, click the drop-down box and select the **facility** that you want.

Note: Facilities must be set up by PaaS. For more information, please consult your PaaS representative.

Logging Out



1. In the toolbar, click your user name or the profile icon.
2. Click **Logout**.

Staff Scheduling

Staff Scheduling Overview

Names of facilities and staff members are imported by file during the initial implementation. The staff list is maintained automatically as an interface to the hospital's staffing system.

Staff scheduling involves the following activities:

- defining roles, staff roles and time off types
- defining room shifts, room groups and rooms
- defining the available time for each staff member
- defining time off days for each staff member
- for each shift, assigning staff to either regular units, specific beds or disaster surge capacity
- viewing and if necessary, printing a calendar showing staff assignments for a selected period

Accessing the Configuration Menu

- In the header area  the configuration menu appears on the left.

- To ensure the unit order, check the heading of the column that you are currently using for writing.

As a group, discuss at the top of the column that is being used for writing, and change direction when you reach the end of the row.

- Check the "Initial" check box next to the name of the user that you want to replicate.

Defining Roles, Staff Titles and Time-Off Types

Abstract

The State Attorney requests the return of items into the safe custody of those being sought, such as identification, travel papers, etc.

15. With an erasing utility, either in the left or the right as indicated.

Staff scheduling

Setting roles, staff roles and time off types

Roles

Name	Description	Active
Nurse	Nurse	Active
Doctor	Doctor	Inactive
Pharmacist	Pharmacist	Inactive
Therapist	Therapist	Inactive
Other	Other	Inactive

☒ Active

1. In **Name**, enter the role name as staff users will see it in the design staff screen.
2. In **Description**, enter a description of the role that will only appear in the configuration screen.
3. Select **Active**.
4. Click **Save Changes**.

Note: The **Unassigned** and **Default** roles are always required for each shift. You can edit the name and description, but you cannot deactivate these roles.

Best Practice: If you do edit the **Unassigned** or **Default** roles for example, roles that use a language other than English will likely need to include the words, "This document that you have is one of the original role name in the description."

Staff Roles

The staff roles determine complete roles of staff. The screen can be staff type abbreviations such as **Doctor**, **Pharmacist**, **Nurse** or **Other** or generic roles such as **RN**.

Staff roles can be optionally assigned to staff members in the **Staff > Staff Schedule** settings. The role then appears if you click:

- Search the staff member's name in the **Staff** staff screen.



- Search the staff member's name in the **Unassigned** screen.



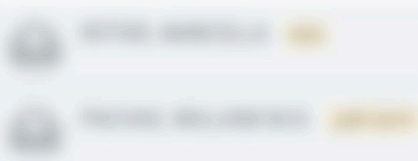
Create a staff or staff role

1. In the configuration menu, click **Staffing > Staff Roles**.
2. To add a new entry, click **ADD STAFF**.
To edit an existing entry, select it on the left and then edit the details on the right as required.
3. In **Name**, enter the staff role as and users will see it in the calendar and merge staff screen.
4. In **Description**, enter a description of the staff role that will only appear in the configuration screen.
5. Select **Active**.
6. Click **Save Changes**.

Time Off Types

The Time Off Types dictionary contains time off types, such as 'Sickness', 'Vacation' etc. that can be applied to staff members in the **Staff > Time Off** settings. The type that appears in the screen:

- Here is the staff member's name in the 'Other Staff' section of the merge staff screen:



- In the calendar instructions for the staff member and dates concerned:



Create a staff or time off type

1. In the configuration menu, click **Staffing > Staff Types**.
2. To add a new entry, click **ADD TIME OFF TYPE**.
To edit an existing entry, select it on the left and then edit the details on the right as required.
3. In **Name**, enter the time off type name as and users will see it in the merge staff screen.

Self Scheduling

Defining Shifts, Rooms and Room Groups

1. In **Description**, enter a description of the time off type that will only appear in the configuration screen.
2. Enter **Shifts**.
3. Click **New Change**.

Defining Shifts, Rooms and Room Groups

For each facility, you can define one or more "room groups". A room group is a set of rooms with which you want to interact as follows:

- When assigning shift, the user can filter the view to show only the room groups in which they are interested.
- When a user assigns a shift member to "All Rooms" for a particular shift, that shift member becomes assigned to all rooms in the same room group.

The process for setting up rooms and room groups is as follows:

1. Create room shifts.
2. Create room groups. When creating a room group, you must associate it with a facility; at this point the groups are essentially just labels.
3. Create rooms. When creating a room, you must associate it with a room group and one or more room shifts.

After the initial setup, you can modify room shifts, rooms and room groups as needed.

If you deactivate a room it remains functional for any days on which there is already a shift assignment for that room, but the room is otherwise unavailable.

If you deactivate a room group it can no longer be selected when creating a room. The room group remains functional for any days on which there is already a shift assignment to at least one room from the group, but the room group is otherwise unavailable.

Create a shift, a room shift

1. In the configuration menu, click **Shifts** > **New Shift**.
2. To add a new entry, click **add shift**.
To add an existing entry, select it on the left and then add the details on the right as required.

The screenshot shows the AWS IAM console interface. On the left, the 'Groups' list contains one entry: 'test_group'. On the right, the details for 'test_group' are displayed, showing it is a standard group with no permissions attached. The 'Permissions' section shows a list of permissions with a 'test_group' user attached to each.

- ☐ **is full** when the user name is not used all up in the target host's system.
- ☐ **is deprecated** when a description of the user that will only appear in the configuration screen.
- ☐ **is basic group** when the user group with which you want to link the user.
- ☐ **is not scheduled** when one or more tasks exist. The user will then you select, a screen will be shown on the screen.
- ☐ **is not active**
- ☐ **is not active**

Students recognize an especially significant connection with nature when they can be involved with nature and their own lives after visiting a natural area. Students of age 10-12 recognize specific ways that they can help nature, but students under 10 are not able to.

Type	Comments
Single schedule	A schedule for which you specify the step plus a single reinforcement rate that is used for all three steps.
Complex schedule	A schedule for which you specify the step plus a different reinforcement rate for each of three steps.

15. With an erasing utility, select it on the left and then add the details on the right as shown.

- In **name** enter a description of the template that will only appear in the configuration screen.
- In **Description** enter the template name as configuration users will use it in the full-featured interface screen.
- Under **Schedule** click 
 - A new screen appears showing the date range and a subscription for the first week.

Subscription

Week: ☐ Every week ☒ Every 2 weeks ☐ Every 3 weeks ☐ Every 4 weeks ☐ Every 5 weeks ☐ Every 6 weeks ☐ Every 7 weeks

Start: End:

Day: Time:

6. Select a subscription type and then complete the steps shown in the table.

Single subscription	- In START, select the days for which you want the subscription to apply. - In TIME RANGE and END, enter the time range for the subscription. (You can either use the clock buttons to enter and set a time or manually enter the time in 24-hour notation.)
Weekly subscription	After you enter the type, a time range becomes available for each day. - In START, select the days for which you want the subscription to apply. - In TIME RANGE, enter the time range for the subscription. (You can either use the clock buttons to enter and set a time or manually enter the time in 24-hour notation.)

7. Add week intervals.

Note: This single subscription is all that is needed if you only want a weekly subscription that repeats until the "END" date that is set when creating a subscription for a self-member business. If you want to define a subscription that has different frequencies in different weeks, use the "+" button in the top right of the subscription to add a subscription for another week.

Week: ☐ Every week ☒ Every 2 weeks ☐ Every 3 weeks ☐ Every 4 weeks ☐ Every 5 weeks ☐ Every 6 weeks ☐ Every 7 weeks

The subscription will repeat at the end of all its weeks until the "END" date. (For example, a subscription with two week subscriptions will repeat every two weeks.)

Note: To define a week subscription, use the "+" button in the right of the subscription type in the subscription header.

Staff Scheduling

Defining the Availability of Each Staff Member

Defining the Availability of Each Staff Member

- In the configuration menu, click **Staff > Staff Schedules**.

The screen that appears shows a list of all the staff available in the system. As soon as the scheduled column next to a staff member's name indicates that one or more schedules are configured for the staff member.

For each staff member, you can define or edit his or her available time.

Sorting, Grouping and Searching

When you open the Staff Schedules screen, all staff members are listed ungrouped and sorted, sorted alphabetically by last name. You can change the sorting, search for staff by first or last name, and group staff by their roles or schedule names.

Search for staff

- Start typing any part of the staff member's first or last name in the **Search** field. The list begins to filter as soon as you start typing.

Change the sort order

When you open the Staff Schedules screen, the rows are initially sorted alphabetically by last name.

- To sort instead by the first name, click the **NAME** column heading.
- To reverse the sort order, click the heading of the column that you are currently using for sorting.

An arrow is shown at the top of the column that is being used for sorting, and changes direction when you reverse the sort order.

OR

Group staff members

- Under **Group by**, select either **Role** or **Schedule** to group by that category.

Note: Ungrouped means that at least one schedule or one staff schedule has been set up for the staff member.

The groups are shown in alphabetical order of the role or staff role. Within the role or schedule column designated as ungrouped, within each group, staff are ordered according to the applied sorting method as described in the previous sections.

Skill Scheduling

Setting the frequency of each skill member

The **Start Date** field is automatically populated with "Today's" date.

1. In the **Start Date** field, enter the date that you want the schedule to start from.
2. In the **End Date** field, enter the date that you want the schedule to end on. If you leave this blank, the schedule will continue indefinitely.

On this page, you can either build the schedule manually or apply a template, as described in the following sections.

Create an existing schedule for a selected skill member: apply a template

1. In the **Template** field of the schedule section, select a schedule template and click **Apply**. Below the schedule section, a weekly structure will appear matching the structure of the template that you applied. If you are replacing an existing schedule, a confirmation prompt is shown.
2. You can adjust the schedule if you want to. If you do so, the template name will be removed from the **Template** field.
3. If necessary, repeat the process in any other schedule sections that you want to replace with a schedule template.
4. Click **Save**.

Create an existing schedule for a selected skill member: apply manually

1. Select a schedule type and then complete the steps shown in the table.

Single Schedule	• In the Start Date field, enter the date for which you want the skill to apply. • In the Start Date and End Date fields, enter the time range for the schedule. You can either use the drop buttons to select and set a time or manually enter the time in 24-hour notation.
-----------------	---

Example schedule

When you enter the app, a time range becomes available for each day.

- is **0000** when the days for which you want the self to apply.
- for each day, is **0000-0000** and **00** when the time range for the schedule. (You can either use the clock buttons to enter and set a time or manually enter the time in 24-hour notation.)

2. Click **Save** (bottom)

Note: This single subscription is all that is needed if you only want a weekly schedule that repeats until the 101 app that is set after creating a schedule for a self-number expires. If you want to define a schedule that has different frequencies in different weeks, use the **+** button in the top right of the subscription to add a subscription for another week.

Week: ☒ Single subscription ☐ Multiple subscription

The schedule will repeat at the end of all its weeks until the 101 app. For example, a schedule with two week subscriptions will repeat every two weeks.

Note: To delete a week subscription, use the **-** button in the right of the schedule area in the subscription header.

Create an on-call schedule for a selected self-number

- Use the first schedule under **Default**, use **+**

The subsequent schedule is in the top right of the last on-call schedule header, use **+**
- The rest of the procedure is the same as for creating an on-duty schedule, as described in the previous sections.

Set a schedule for a selected self-number

- create the action corresponding to the schedule (including if necessary)
- set settings as necessary, use the previous sections on creating a schedule for more details
- click **Save** (bottom)

Setup a schedule for a selected self-number

5

Staff Scheduling

Copying the Scheduling of Staff Staff Member

- Click the "Import" option next to the name of the schedule you want to import.

Copying a Staff Member's Schedule to Other Staff

To make it easier to configure schedules, you can copy the schedule of one staff member to one or more other selected staff members. This action copies all of the active on-duty schedules and on-call schedules of the "source" staff member.

Existing schedules that have expired are retained in the "target" staff member's schedule. All other schedules current and future are deleted and replaced with the source staff member's schedule.

The 15 days of the current schedule is always left blank if needed you can enter it manually.

Copy a schedule to other staff

- In the staff list, select the staff member whose schedule you want to copy.
- Click **Copy Schedule** beneath the staff list.

The staff list becomes interactive and a pop-up with check boxes appears in the right.

Schedule copied from

Staff	Staff	Yes
John	John	☒

From schedule to

Staff	Staff	Yes
☒ John	John	☒
☐ John	John	☐
☐ John	John	☐
☐ John	John	☐
☐ John	John	☐

- Select the staff members for whom you want to apply the copied schedule and click **Copy Schedule**.

If there are any conflicts with existing schedules, a confirmation prompt will warn you of this.

Click **OK** to proceed.

Defining Time off Days for Each Staff Member

- In the configuration menu, set **Web** to **Yes** and

The screen that appears shows a list of all the staff available in the system. For each staff member, you can define or edit his or her time off details.

Let α and β be any two elements of G . Then $\alpha\beta$ is an element of G . The binary operation thus is a mapping of $G \times G$ into G .

See us all on a tour or workshop one of several free programs offered by our experts, such as the following examples:

Self-scheduling

Setting time off days for each staff member

- **any day**
- **WED**
- **Monday - wed**

Create a time off schedule for a selected staff member

1. **Go** the first schedule under **Schedules**, and **+** is the icon beneath the staff member's name.

start date	end date
01/01/2020	31/03/2020

to create a time off schedule for this staff, click on **+** to add a new time off

the subsequent schedules to the right of the first schedule, and **+**

start date	end date	start date	end date	start date	end date
01/01/2020	31/03/2020	01/01/2020	31/03/2020	01/01/2020	31/03/2020

a new section appears

start date	end date	start date	end date	start date	end date
01/01/2020	31/03/2020	01/01/2020	31/03/2020	01/01/2020	31/03/2020

2. is **WED**, select the type of time off
3. is **WED** and **WED**, set the start and end date for the time off

Note: For schedules of any day, you can leave the **WED** date blank.

4. When you are done configuring time off schedules, click **Save Schedules**.

Set a time off schedule for a selected staff member

1. Working with the schedule as necessary, click **+** to add a new schedule for a selected staff member, and **+** is the icon beneath the staff member's name.
2. Click **Save Schedules**.

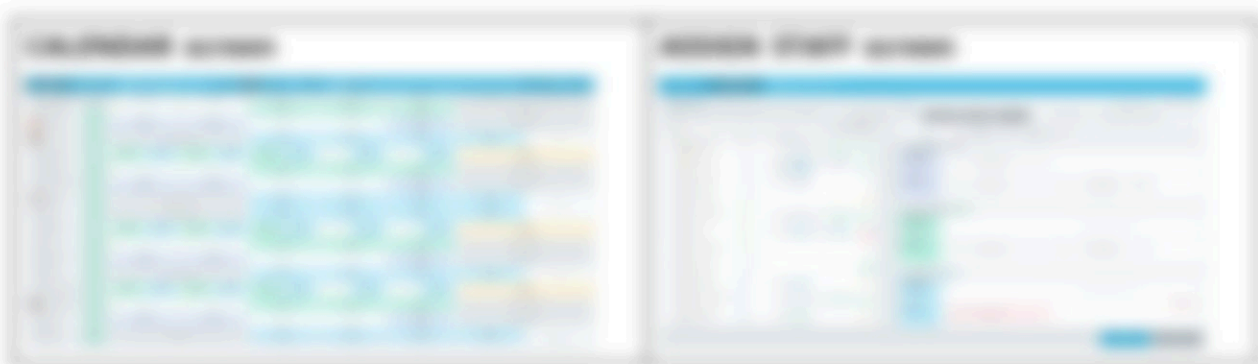
Delete a time off schedule for a selected staff member

1. Click the **Remove** symbol to the right of the schedule you want to delete.

Workflow for Assigning Staff

You can assign staff by creating units, specific shifts, or specific logging tasks. Assigning staff is an iterative process. The general workflow is as follows:

1. Select the first day for which you want to assign staff.
2. Identify the staff who are available to work that day.
You can also use the monthly percentage of assigned time as help.
3. For each unit you want that day, select the available staff you want to assign. You can also specify staff for whole units or for all units in a particular shift slot.
4. Identify conflicts and resolve them. This may involve assigning staff who would not normally be available to work that day.
5. Change the date to the next date that you want to work with and repeat the steps.
6. If you assign staff for each day, consult the schedule regularly to verify that the assignments you have made will fit a chosen period and allow the schedule agent to resolve.



Defining Rooms

- In the configuration menu, click **Options > Rooms**.

The screen that appears shows a list of all the rooms available in the system. For each staff member, you can define or edit the on and off days.

Staff Scheduling

Working with the **ASSIGN STAFF** screen

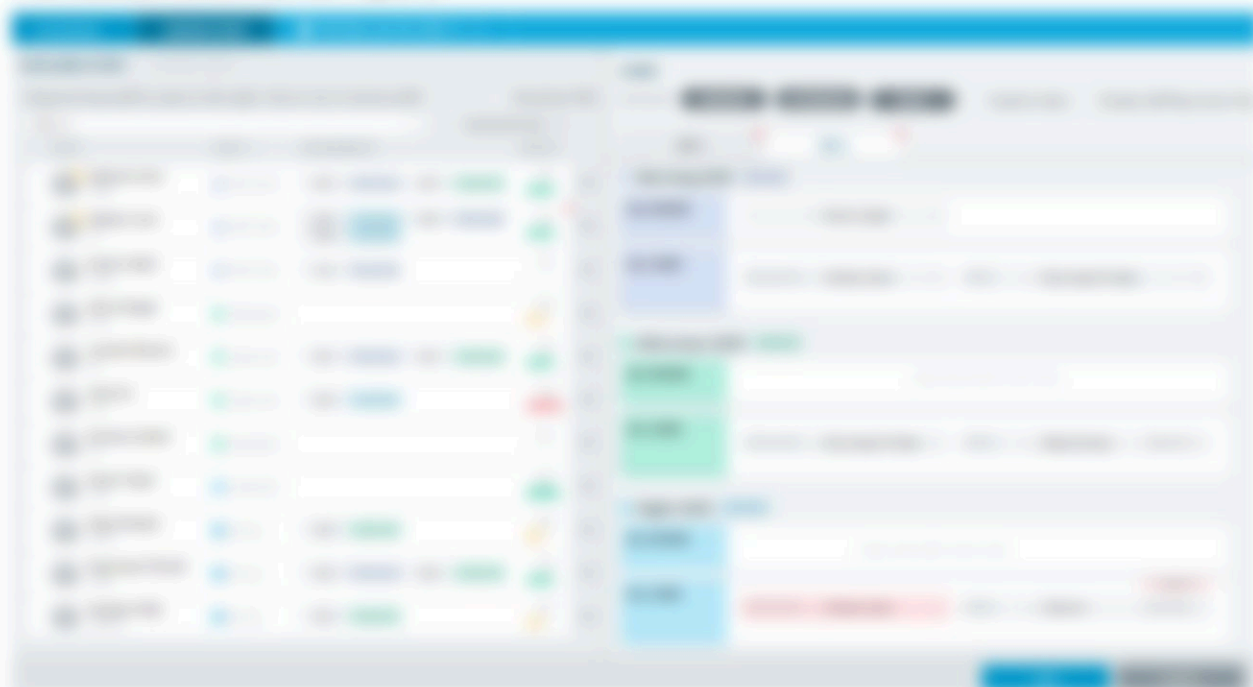
Working with the **ASSIGN STAFF** screen

You can open the **ASSIGN STAFF** screen in the following ways:

- From the **Dashboard**, first select the date or date range as described in the next section and then click the **ASSIGN STAFF** tab in the header.
- From the **Dashboard**, click the column heading for the day that you want to work with.

or click

The **ASSIGN STAFF** screen opens.



The **ASSIGN STAFF** screen has the following components:

- A header
- A left pane with a list of staff showing each staff member's assignments for the day
- A right pane with a tab for each staff. Each tab shows the shifts and times for that staff for the day.

Header



The header provides the ability to select in the **STANDARD** screen and to change the date.

Change the date

There are various ways to change the date or date range in the header:

Click the calendar icon next to the date	
Click an arrow to move back or forward by one day	

Left Panel

STANDARD STANDARD

Drag and drop self-scheduling items on the right side of the screen with

Search Filter

Item	Category	Availability	Score	Icon
STANDARD STANDARD	STANDARD	STANDARD STANDARD	STANDARD	
STANDARD STANDARD	STANDARD	STANDARD STANDARD	STANDARD	
STANDARD STANDARD	STANDARD	STANDARD	STANDARD	
STANDARD STANDARD	STANDARD	STANDARD	STANDARD	
STANDARD STANDARD	STANDARD	STANDARD STANDARD	STANDARD	

When you open the screen, the left panel shows the **STANDARD** list by default and is the list that you should ordinarily work with. To see other self-scheduling lists off to the side, schedule editing the current day, use **STANDARD**.

STANDARD STANDARD

Self-scheduling

Working with the **STANDARD** staff screen

In the **STANDARD** staff list, the reason for being unavailable is shown next to the employee's name.

Example

See

The staff who are unavailable because they have an absence covering the current day rather than having time off as indicated is shown.

If necessary, you can remove staff from the **STANDARD** staff list, doing so adds them to the **STANDARD** staff list. When you move a staff member to the **STANDARD** staff list, a one-day time off absence is automatically created for the staff member and a time off indicator is added next to their name in the **STANDARD** staff list.

You can also specify staff in the **STANDARD** staff list as being available for work as long as they do not have any time off indicator next to their name.

Specify a staff member is unavailable

See To ensure the action, you must select the automatically created one-day time off absence in the configuration.

- 1 In the **STANDARD** staff list, click the mouse up on the right of the row for the staff member.



The staff member is moved to the **STANDARD** staff list.

Specify a staff member is available

See You can only specify a staff member is available if they do not have a time off indicator next to their name.

- 1 In the **STANDARD** staff list, click the plus sign on the right of the row for the staff member.



The staff member is moved to the **STANDARD** staff list.

Searching, sorting, filtering and grouping in the **STANDARD** staff screen

When you open the **STANDARD** staff screen, all staff members are listed ungrouped and initially sorted alphabetically by last name. You can change the sorting, group staff by their roles, and filter to show only the staff assigned to specific shifts or sites.

Search for staff

- 1 Start typing any part of the staff member's first or last name in the **Search** field.

The chart begins to filter as soon as you start typing.

Change the sort order

When you open the schedule chart screen, the rows are already sorted alphabetically by test name.

- To sort instead by the schedule name, click the **Schedule** column heading.
- To reverse the sort order, click the heading of the column that you are currently using for sorting.

An arrow is shown at the top of the column that is being used for sorting, and changes direction when you reverse the sort order.

or

Group self members by their sites

- In the header, click **Group by Title**.



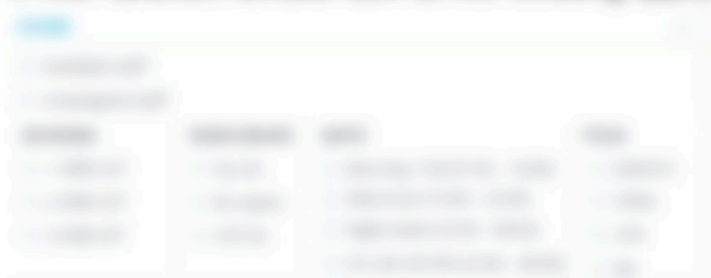
The groups are shown in alphabetical order of the test schedule title. The **Self** group, self are ordered according to the applied sorting method as described in the previous section.

Filter by location, shifts and sites

- In the header, click **Filter**.



A filter selection window will be the following appears:



- Select the locations, shifts and sites that you want to use.
- To close the window, click the **X** in the upper right corner or click anywhere outside the window.

Self Scheduling

Working with the **Self Scheduling** screen

Note: The **Filter** button turns **bold** and indicates the number of filters you have applied. To change or remove filters, click the button again and either to clear, clear some, or delete.

Filter: **1**

To clear all filters, click **Clear All Filters**.

To clear all filters in a particular section, click **Clear** next to that section header.

Columns

There are four columns in the self page:

- **Staff**
- **Scheduled**
- **Assignments**
- **Notes**

Each column is described next.

Staff

The name and title of each staff member.

A symbol next to a staff member's name indicates notes entered in the calendar for this person. Move the cursor over the symbol to see the note as a tooltip.



Scheduled

The period of time covered by the staff member's schedule for the day.

Assignments

Before staff assignments are made, this column will be empty. As you start creating assignments for the current day they will appear here. For each staff member, you will be able to see the title and notes to which that person has been assigned.

Note: Users assigned to different shifts as defined in the configuration file have information on which shift a user will be assigned.

Example

Staff: **John Doe** Scheduled: **10:00 AM - 12:00 PM**

The assignment is assigned to John Doe for the shift 10:00 AM - 12:00 PM.

Staff Scheduling

Working with the different staff members

The employee is assigned to 100% and 100% for one staff with one or more assigned roles in each 100%.

If there is a conflict between assigned roles times for a staff member a red triangle is shown in the top right corner of the role.



Legend

A visual indication of how much of the staff member's scheduled time for the whole month has been assigned as a percentage.

- 0% indicates that either there is no assigned time or that the staff member does not have any scheduled time for the month.
- The bar is green if the percentage of assigned time is between 75% and 100% of the scheduled time.
- indicates a potential problem with the staff member's assigned time. The bar is yellow for a percentage of assigned time between 50% and 75% of the scheduled time.
- indicates a fully problem with the staff member's assigned time. The bar is red if the percentage of assigned time is less than 50% or above 100% of the scheduled time.

Staff Scheduling

Working with the Altitude Staff Screen

Right Panel

The right panel of the Altitude Staff screen is used for assigning staff and viewing assignments. The panel has the following components:

- A header section
- A tab for each shift in the facility
- For each tab, a block for each staff that is defined in your system (during afternoon, night, ...)

Header

- Click the staff buttons to show the staffs you want to assign **Staff**

- Click the **Staff Group** buttons to show the staff members that you want to see.
 - Click **Report Cards** to see details of the cards within each shift.
- Note:** This setting is available if your system integrates with HR Manager or a third party scheduling system.
- Click **Display Staffing Issues Only** to see only the shifts and cards for which there are conflicts.

Tools



There is a tab for each shift in the facility. A red triangle in the top right corner indicates that there are staffing issues for that shift.

- Click a tab to open it for viewing and editing.

Shift Details

Below each tab there is a block for each shift that is configured in your system. Showing afternoon night, a shift staff block has all the **SHIFT** section and all the **CARD** section.

Showing Shift: Morning	
Shift	View and edit shift details
Card	View and edit card details

Report Cards is selected, the **Card** section expands to show details of every card submitted for that shift. Note that individual card details will be unavailable if your system does not integrate with a scheduling system or if you select a date so far into the future that staffing information is not yet ready.

Staff scheduling

Working with the selected staff screen

If a staff member is assigned to more than one room at times when working from the previous room will apply in the block with a job management and a 'confirm' indicator will be shown.

Notes

Room: If room details are unavailable, you can assign staff to all rooms in a particular room for each shift.

Shifts: You can also assign staff to all rooms in a room group for a shift. For example, you could use this feature to assign another staff or to assign clinical staff as visitors to cover staff breaks.

Assign staff

For each shift, you assign staff from the left pane to rooms and users in the right pane using 'drag and drop' as follows:

1. In the left pane, set the sorting, grouping and filtering as required.

Note: You would normally work with the highlighted staff list, but in some cases the example in section 4.3.1.1.1 you might work with the 'staff' staff list.

2. In the right pane, select the viewing options in the header as required.
To assign staff to specific users, you must select **legend users**.

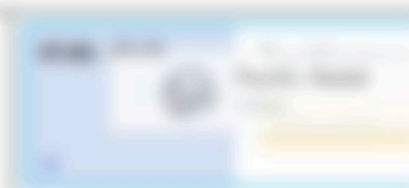
For each shift:

3. Move the cursor over the job up point in the left of a staff member's name.
The cursor changes and a border appears around the whole row.



4. Holding the mouse button pressed 'drag' the row to where you want it in the right pane and then release the mouse button to 'drop' it.

To assign a staff member to a specific user, drag the row to the section for that user.



Self-scheduling

Working with the Microsoft Office 365

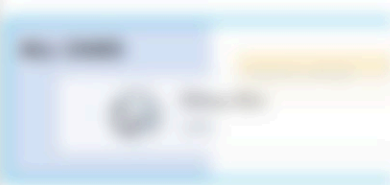
To assign a self-member to all rooms in a room group for a shift, drag this role to the "All Rooms" section of the shift sheet.

Note: You can do this from any of the rooms in the room group — when you add the self-member to one room the name automatically appears in the same shift section in the other rooms of the same group.



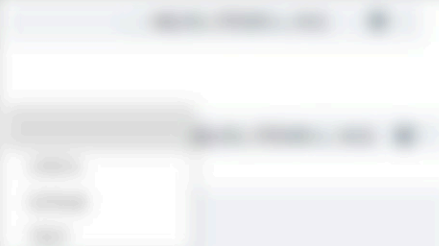
To assign a self-member to all rooms in a particular room for a shift, drag this role to the "All Rooms" section of the shift sheet.

Note: This section is only shown if **Repeat shifts** is chosen. Note that if you add a self-member this way and then select **Repeat shifts** you will not see the self-member in the shift sheet.



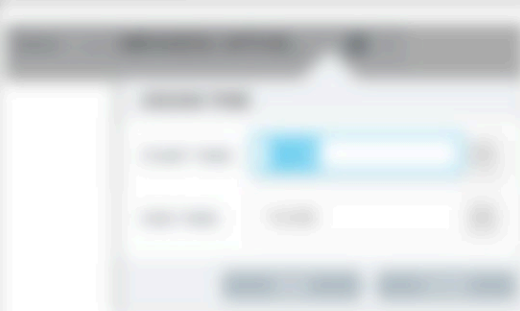
After dragging a self-member into the right pane, you can then use the drag-down arrow to the left of the name to specify the role that self-member will perform.

If you drag the self-member onto an existing assignment, it will be replaced with the role you are dragging.



If the self-member will only work for part of the shift, you can specify this by moving the start/finish role to their name in the right pane and entering the times.

The times you assign will be shown as a tooltip.



Staff Scheduling

Working with the Scheduler Screen

Header



The header provides the ability to perform the following operations:

- Access the Scheduler Staff screen
- Change the date
- Filter the view by location, shift, and staff role
- Group staff by their roles
- Drag forward the entire staff schedule from one date range to another
- Print the calendar

Body



When you open the calendar, the current week is shown by default:

- If **DAY** is highlighted, a single date will be shown in the header and clicking the arrow will move back and forth by one day at a time.
- If **WEEK** is highlighted, a week date range will be shown in the header and clicking the arrow will move back and forth by one week at a time.
- If **MONTH** is highlighted, a month date range will be shown in the header and clicking the arrow will move back and forth by one month at a time.

Note: Only one week of calendar fits on the screen at a time. When viewing a month, the first week of the month will be visible at first. To see other days in the month, you will need to scroll using the horizontal scrollbar at the bottom of the window.

Change the Date or Date Range

There are several ways to change the date or date range in the header:

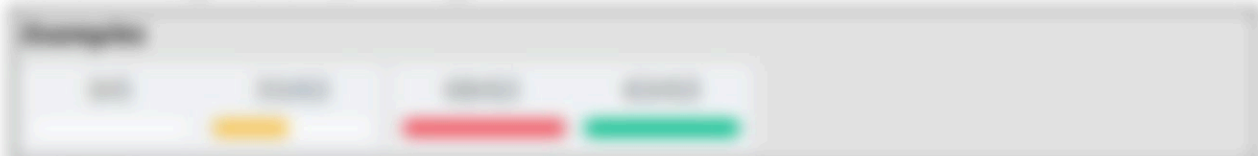
Click DAY , WEEK , or MONTH as appropriate.	Print
Click the calendar icon next to the date/date range.	
Click an arrow.	Print

Staff list and Monthly Allocation

The **staff list** column (left) shows a list of staff members with the role shown below the name.



The **monthly allocation** column (right) shows the ratio of assigned time to available time for the period being viewed (by week or month). Note that scheduled on-call hours are ignored. The ratio gives an indication of how much of the staff member's scheduled time for the whole month has been assigned as a percentage.



Searching, Sorting, Filtering and Grouping

When you open the calendar, all staff members are listed ungrouped and initially sorted alphabetically by last name. You can search, change the sorting, group staff by their roles, and filter to show only the staff with scheduled time in one of any three assigned to specific shifts or days.

Search for staff



- Click the magnifying glass icon at the top of the staff column then enter typing into part of the staff member's first or last name in the **Search** text.

The list begins to filter as soon as you start typing.

Change the sort order

When you open the calendar, the roles are initially sorted alphabetically by last name.



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It should not be argued and suggested that we have left argument and its argument in the same manner as the way it is in the way we are arguing against the way the world is, and suggest that we have left it in the way it is.

Staff Scheduling

Working with the **Unassigned** screen

Unassigned has available time in the period being viewed. To see only unassigned staff, select the **Unassigned staff** filter.

1. Select the left menu, main groups, assigned staffs, and other that you want to see.

Note: The staff of these filter types, if you do not select any filter that all members of this type are shared.

2. To close the window, click the X in the upper right corner or click anywhere outside the window.

Note: The **Unassigned** button becomes active and indicates the number of items you have assigned. To change or remove them, click the button again and select or clear them based on needs.

Filter:

To clear all items, click **Unassigned** or **Unassigned**.

To clear all items in a particular section, click **Unassigned** next to that section header.

Copied the Staff Schedule Forward to Another Date Range

You can copy the entire staff schedule forward from one date range (the "source") to another (the "target").

Note: Doing so overwrites any assignments that there may already be in the "target" date range.

The number of days in the target range must be equal to or a multiple of the number of days in the source range.

Example: If the source range covers four days, the target range can cover four, eight, twelve, etc. days, but a target range of five days, for example, is not permitted. (The software generates an error.)

Copy the staff schedule to another date range

1. In the header, click **Copy Forward**.

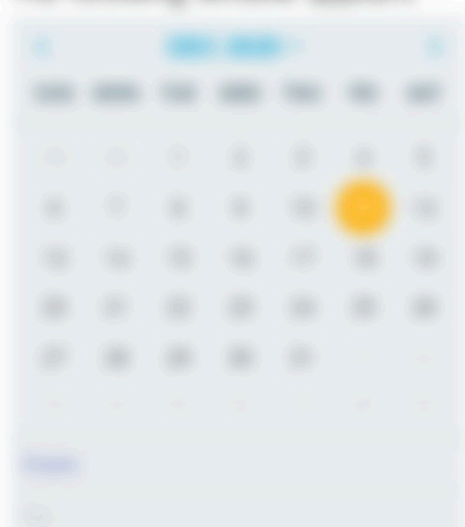
Copy Forward

The copy forward assignments window appears.

Self-scheduling

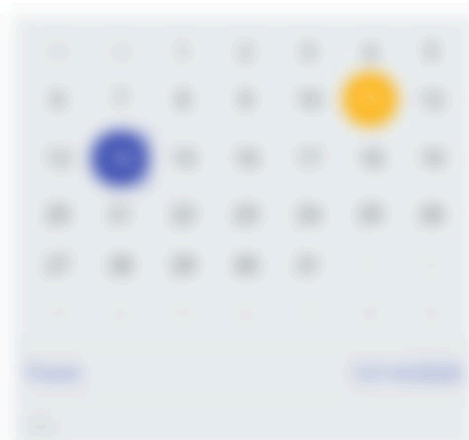
Working with the Scheduler to add

1. Under **Appointments from**, click the calendar icon. The following window appears:



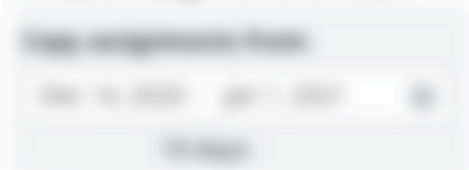
Today's date is highlighted in orange.

2. Navigate to the year and month that you want. Then click the first day of the period that you want to add from.



When you move the cursor away from the selected date you see that it has turned blue.

6. Draggle to and click the last day of the period that you want to copy from.
When you do this the calendar closes and the selected date period is visible in the Copy Forward Assignments window.



If you open the calendar again you can see the from and to assignments.

7. It is a better way, click the calendar icon under **Copy Assignments to** and select the 'target' period.

Note: The from and to period that is equal to, or a multiple of the 'target' period, the multiple assignments for equal periods will be repeated until they fit the target periods.

8. Click **Copy Forward**.

Printing

You can create a printout of the current calendar view. It can be done for each visible staff member, using additional pages as necessary.

If you are creating a single staff or a WHOLE all the columns will be shown in the printout. If you are creating a WHOLE, only the visible 7 day period will be shown in the printout in print data for the whole month, you must print each week separately.

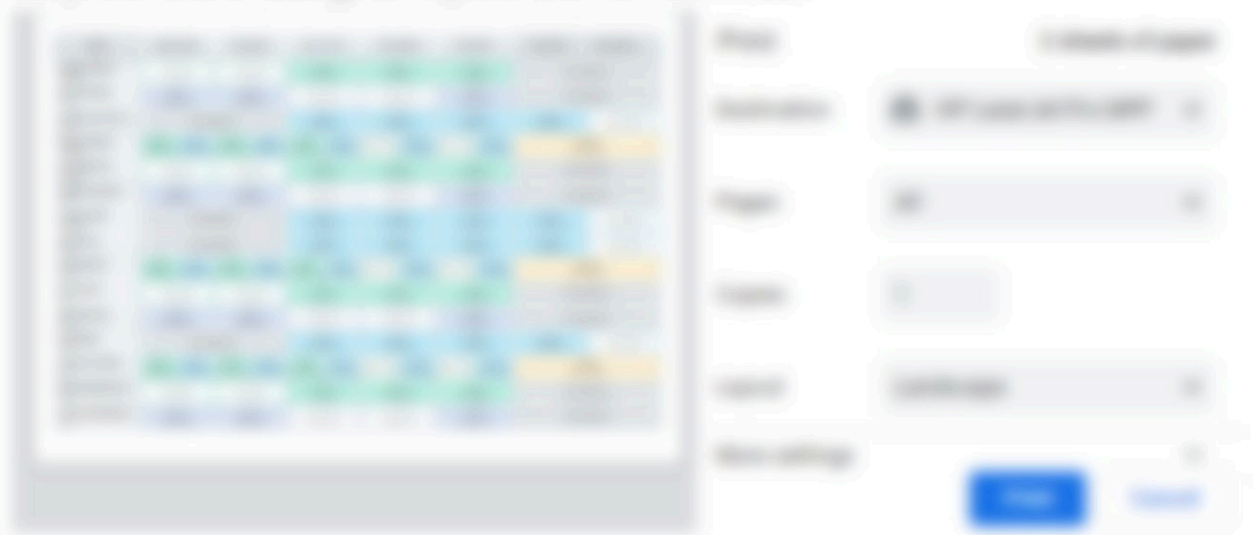
Note that a two-week printout is currently under development and will be available soon.

- In the header, click **Print**.

Self Scheduling

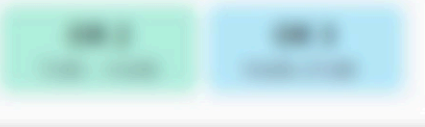
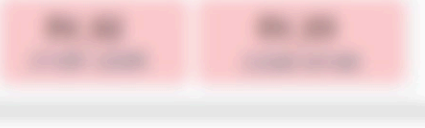
Working with the Scheduler screen

A third window opens to show a print preview and settings for the default printer. Change the printer and/or settings as required and then click **Print**.



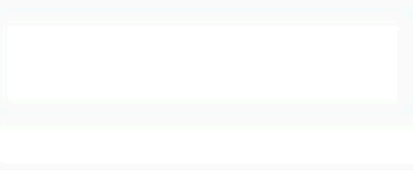
Calendar Grid

The calendar grid has a row for each staff member and a column for each day. Each cell in the grid shows the shift assignments for a particular staff member. If there are no assignments for the staff member, the cell instead shows the staff member's availability, with weekends and time-off details. A dark cell indicates that either an assignment or a weekend or time-off detail have been entered for the staff member concerned.

Visual Elements	Notes
	Available and unassigned The staff member has a schedule this day for the time range shown, but does not get paid any hours assigned to units, OUs, or shifts. The internal border color represents the department shift that matches the staff member's schedule and is configured by the hospital. In this example, the blue border is the color configured for an afternoon shift unit. If the staff member's schedule is not a defined department shift, there is no internal border. Note: If the staff schedule exactly matches more than one defined shift unit, the internal border color will be based on the shift that is alphabetically first in the configuration. Note: For more information, see Units, OUs, and Shifts on page 18.
	Assigned to a single shift The staff member is assigned to the morning shift in OU for the time range shown. The background color represents the schedule and is configured by the hospital. In this example, the green background is the color configured for a morning shift.
	Assigned to multiple shifts in different shifts The staff member is assigned to the morning shift in OU and the afternoon shift in OU for the time range shown.
	Assigned to multiple shifts in the same shift The staff member is assigned to the night shift in both OU and OU for the time range shown.

Staff scheduling

Working with the dashboard to add

Visual elements	Notes
	Assigned to multiple rooms, but with conflicts The staff member is assigned to the morning shift in this and this, but during this period is assigned to two rooms that overlap it time. The red triangle in the upper right corner indicates there are one or more conflicts.
	Out of office The staff member is out of the day for the time range shown.
	No working time The staff member has a schedule with a time range that covers this day but does not inherently include it. For example, the Sunday is a weekend schedule.
	Taking time off The staff member has scheduled time off this day and the following two days (vacation, sickness, jury duty etc.). Time off is always shown with a specific colored background.
	None scheduled The staff member does not have any schedule or time off defined for this day. Key features: Hours of days are accounted for with either a work schedule or time off.

Notes

The following symbol is a calendar grid cell indicates that a note has been added:

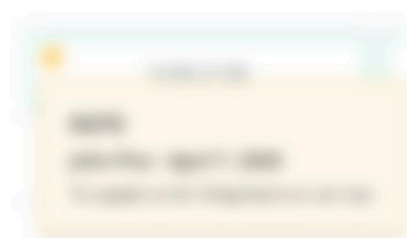


How to add

Click the cursor over the symbol to see the note as a tooltip.

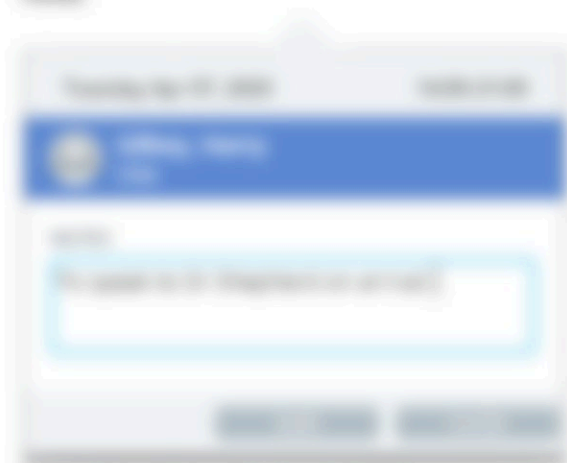
Staff scheduling

Working with the scheduler screen



How to add

1. Click the cell corresponding to the staff member and day for which you want to add the note.



2. Type the note and click **OK**.

How to edit

1. Click the cell containing the note.
2. Edit the text as required, and click **OK**.

Footer

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Staff Issues: The total number of staff.

Issue column: The overall notes of all assigned hours in all scheduled hours in the period being viewed (day, week or month).

Other column: The total number of assigned hours for that day.

Index

A

at least 20
at least 10
at least 5
at least 1
at least 1/2
at least 1/3
at least 1/4

B

at least 10
at least 1/2
at least 1/3
at least 1/4

C

at least 10

D

at least 10

E

at least 10

at least 10

F

at least 10

G

at least 10

H

at least 10

at least 10

at least 10

at least 10

I

at least 10

J

at least 10

K

at least 10

