

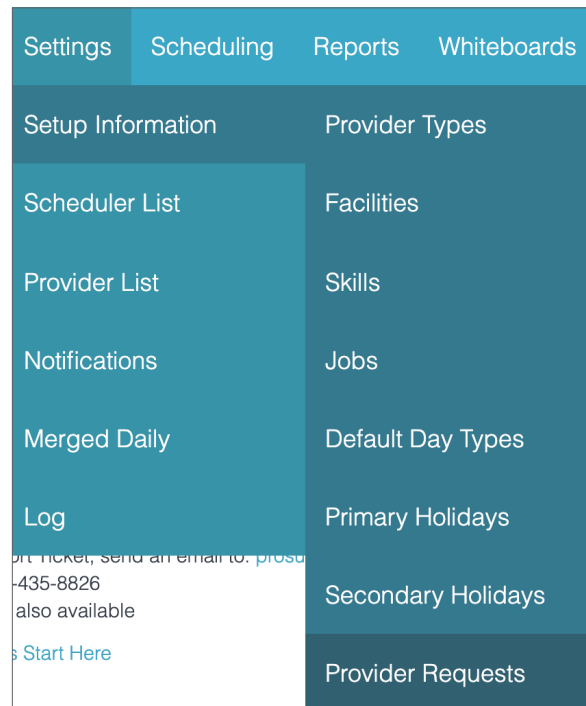
TigerConnect Physician Scheduling

Setting Up the Provider Request Area

Provider Request Area Setup

This is where you customize the Provider experience when they submit schedule requests (*time off, swaps, preferences, day off limits, automated responses Providers receive, etc*).

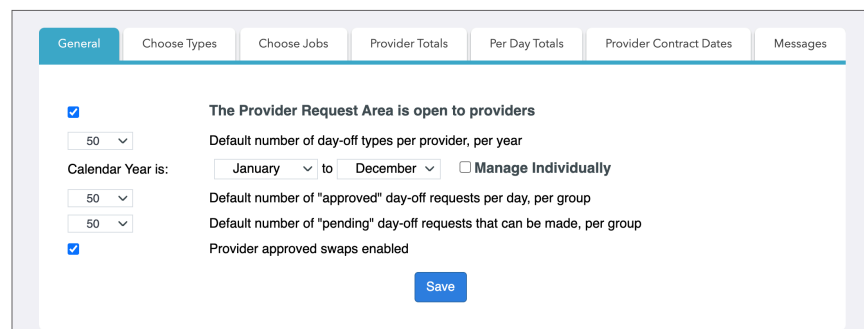
Settings > Setup Information > Provider Requests



General

To start, click on the General tab. Click Save to finalize any changes made.

- **The Provider Request area is open to providers** - allows Providers to submit their requests. Uncheck this box if you would like to temporarily turn off this feature (*e.g. building your schedule, request period blackout, etc*).
- **Default number of day-off types per provider, per year** - this number can be toggled for all Providers or individually in the Provider Totals tab.
- **Calendar Year is:** - a time frame for Provider's schedule requests. This is set to a full year by default for all Providers, though it can be customized per contract dates by choosing Manage Individually.
 - **Manage Individually** - allows Calendar Year to be customized per Provider.
- **Default number of "approved" day off requests per day, per group** - this number can be toggled for all Providers or individually in the Provider Totals tab.
- **Default number of "pending" day off requests that can be made, per group** - this number can be toggled for all Providers or individually in the Provider Totals tab.
- **Provider approved swaps enabled** allows Providers to swap between themselves without scheduler approval. Providers will need to approve the swaps before they are finalized. Schedulers still see all swaps, and all request types are archived.



The screenshot shows the 'General' tab of the 'Provider Request Area Setup' form. The form has several tabs: General, Choose Types, Choose Jobs, Provider Totals, Per Day Totals, Provider Contract Dates, and Messages. The 'General' tab is active. The form contains the following fields and controls:

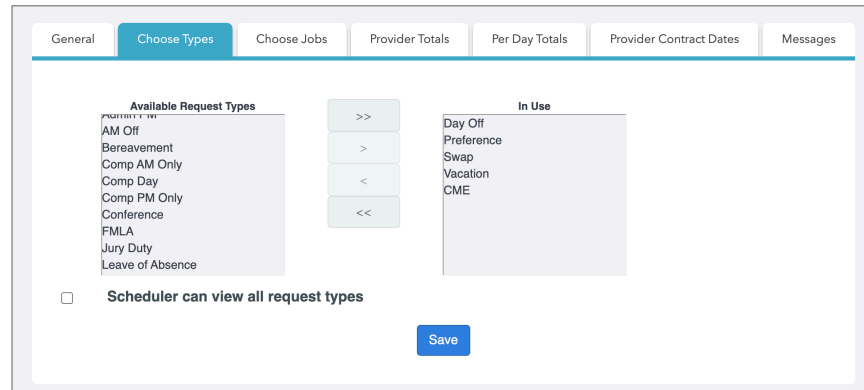
- The Provider Request Area is open to providers**
- 50 (dropdown) **Default number of day-off types per provider, per year**
- Calendar Year is: January (dropdown) to December (dropdown) **Manage Individually**
- 50 (dropdown) **Default number of "approved" day-off requests per day, per group**
- 50 (dropdown) **Default number of "pending" day-off requests that can be made, per group**
- Provider approved swaps enabled**
- Save** button

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Choose Types

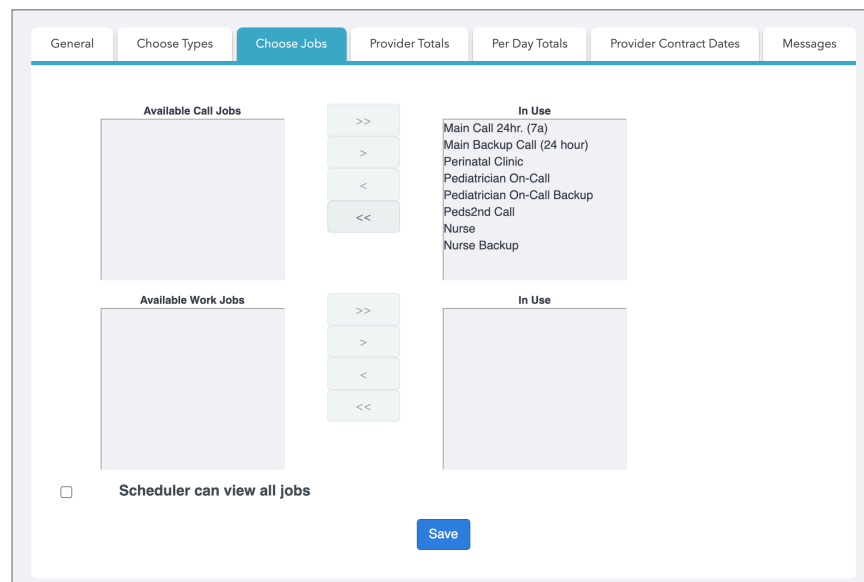
Next, select the **Choose Types** tab and move day off types from the **Available Request Types** on the left to **In Use** on the right. To gain the most from reports, be consistent with the day off types you choose (ex: use *vacation or PTO - not both*, etc) or your reports will be split between different days off that mean the same thing. Typically, the most frequently used are Swaps, CME, and possibly Day Off/Off Call in addition to Vacation/PTO. Click **Save**.



NOTE: By clicking *Scheduler can view all request types*, schedulers have the ability to override set day off types to manually enter special days off that do not occur as often (e.g. *Jury Duty, FMLA*).

Choose Jobs

Next, select the **Choose Jobs** tab, and make sure all available Call Jobs on the left are moved to the **In Use** section, so your providers can request/swap those shifts. Additionally, this allows Tally Reports to be populated for those Jobs. If any changes have been made, click **Save**.



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Provider Totals

These totals are the maximum amount per request type a Provider is allotted per calendar year. The request types will reflect which ones were chosen to be In Use in the Choose Types tab. The amount for each request type per Provider can be customized.

NOTE: Each Provider's calendar year may be different if Manage Individually was checked for the Calendar Year is: option in the General tab. This may be the case for organizations that track PTO by contract dates as opposed to the calendar year.

Provider	CME	Day Off	Preference	Swap	Vacation
Nicholas Bath	* 50	* 50	* 50	* 50	* 50
Michael Brown	* 50	* 50	* 50	* 50	* 50
Jim House	* 50	* 50	* 50	* 50	* 50
Faye Jaxson	* 50	* 50	* 50	* 50	* 50
Steve Louis	* 50	* 50	* 50	* 50	* 50
Nels Peterson	* 50	* 50	* 50	* 50	* 50
Christopher Pike	* 50	* 50	* 50	* 50	* 50
Patty Raines	* 50	* 50	* 50	* 50	* 50
Anthony Upton	* 50	* 50	* 50	* 50	* 50
Kyle Vanders	* 50	* 50	* 50	* 50	* 50
John Water	* 50	* 50	* 50	* 50	* 50
To Be Announced	* 50	* 50	* 50	* 50	* 50
Lucas Reyes	* 50	* 50	* 50	* 50	* 50

Save Reset to Default

Per Day Totals

These totals set the maximum amount of requests per type that can be made on any given day of the week and holidays. The number of requests for each day and request type can be customized. In the example below, approved vacation days are limited to 5 providers out on weekdays, and 3 on weekends and holidays and pending vacation requests are set to 6 on weekdays, 4 on weekends and holidays. When a provider goes to request a vacation day and the limit has been met for either total approved off or the total requested, they will be informed that the vacation threshold for this day has been met. Use the [Year View](#) button at the bottom to adjust for specific dates such as highly requested holidays.

Type	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Holidays
CME Approved	* 50	* 50	* 50	* 50	* 50	* 50	* 50	* 50
CME Pending	* 50	* 50	* 50	* 50	* 50	* 50	* 50	* 50
Day Off Approved	* 50	* 50	* 50	* 50	* 50	* 50	* 50	* 50
Day Off Pending	* 50	* 50	* 50	* 50	* 50	* 50	* 50	* 50
Preference Approved	* 50	* 50	* 50	* 50	* 50	* 50	* 50	* 50
Preference Pending	* 50	* 50	* 50	* 50	* 50	* 50	* 50	* 50
Swap Approved	* 50	* 50	* 50	* 50	* 50	* 50	* 50	* 50
Swap Pending	* 50	* 50	* 50	* 50	* 50	* 50	* 50	* 50
Vacation Approved	3	5	5	5	5	5	3	3
Vacation Pending	4	6	6	6	6	6	4	4

Save Reset to Default [Year View](#)

November 2021

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

November 26, 2021

Type	Approved	Pending
CME	* 50	* 50
Day Off	1	1
Preference	* 50	* 50
Swap	* 50	* 50
Vacation	2	3

Save

NOTE: We have found that most organizations will have allot more pending requests to have a "waitlist" for other providers in case someone changes their mind. Requests will have a time stamp which allows schedulers can use to base their request approvals.

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Provider Contract Dates

This area becomes editable if Manage Individually was chosen in the General tab for the Calendar Year is: section. If chosen, each Provider's calendar year can be set to different time periods.

Provider	Dates		
Nicholas Bath	January	1	to December 31
Michael Brown	January	1	to December 31
Jim House	January	1	to December 31
Faye Jaxson	January	1	to December 31
Steve Louis	January	1	to December 31

Message

This allows you to create an automated response to Providers indicating the status of their request. Everything about the message is customizable, with the exception of the bracketed areas as they populate the relevant data from your schedule.

- **Approved** - request has been approved.
- **Declined** - request has been denied.
- **Max Provider** - exceeded number of allotted days for that request type.
- **Max Pending** - schedule has exceeded the number of pending requests for that day.
- **Max Approved** - schedule has exceeded the number of approved days off for that day.
- **Area Closed** - informs the Provider that requests are currently closed.

General	Choose Types	Choose Jobs	Provider Totals	Per Day Totals	Provider Contract Dates	Messages
<div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc; padding-bottom: 5px;"> Approved Declined Max Provider Max Pending Max Approved Area Closed </div> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 5px;"> <p>Dear [provider_first_name],</p> <p>Your [request_type] has been approved for [request_dates]. We hope you enjoy your time off.</p> <p>[swap_detail]</p> <p>Provider Comment: [comment] ----- Scheduler Comment: [scheduler_comment]</p> <p>If you need assistance please contact your scheduler.</p> <p>Thank you</p> </div> <div style="text-align: center; margin-top: 10px;"> <input type="button" value="Save"/> </div>						

NOTE: Area Closed is used in conjunction with unchecking the box for The Provider Request Area is open under the General tab. If using this function, it is advised that you inform the staff of how long requests be closed and when they will be able to submit again.