

TigerConnect Physician Scheduling

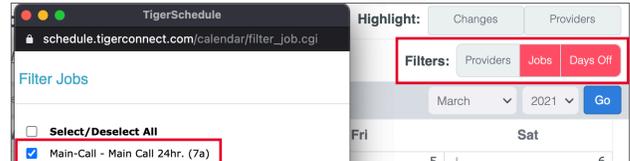
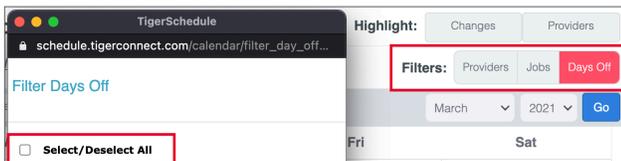
Template Scheduler

A template represents a scheduling pattern that is applied to a specific list of Jobs over a defined period of time, and results in a predictable and reproducible outcome of shift assignments.

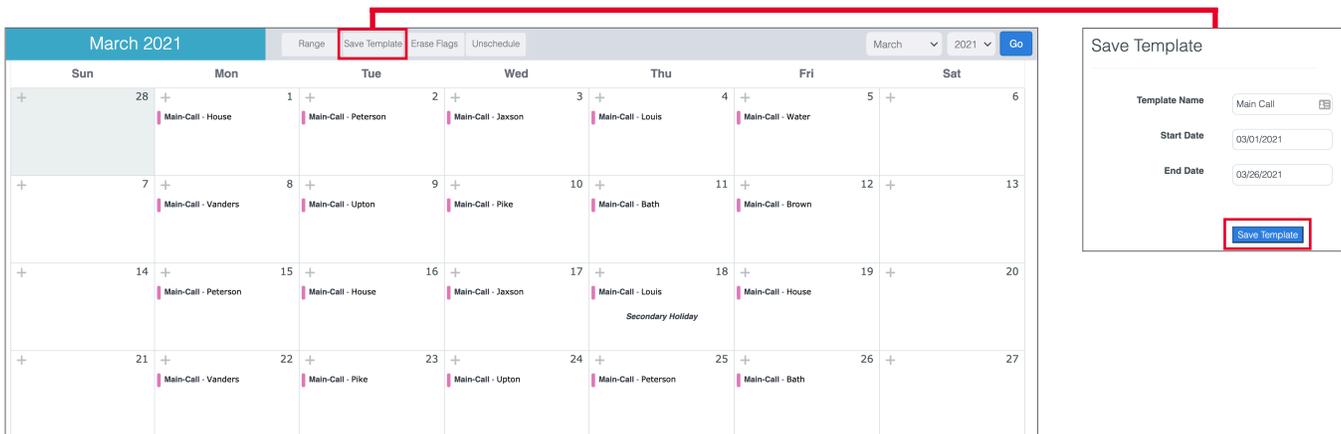
To create a new template, go to Manual Scheduler > Complete on your Dashboard to browse in month view and either create a schedule from scratch to use as a template, or base one off a current schedule.

Before saving a template, it is recommended to use filters to remove days off from view so they will not be saved in the template. Click Days Off next to Filters at the upper right corner of the screen and de-select all day off types.

If you are creating a template based on a particular Job, use the Jobs filter. Click Jobs next to Filters at the upper right corner of the screen and choose the Job in which to create a template from.

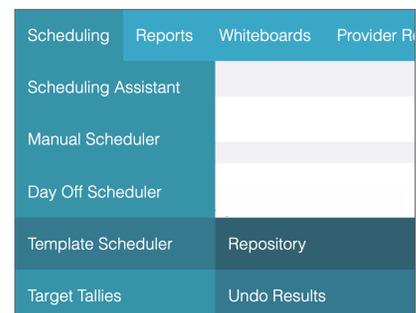


With the Filters applied, you should only see the Job you have isolated on the calendar. Choose your Start Date and End Date to pull data from and click **Save Template** to create a scheduling pattern that will be stored in the **Template Repository**.



Once a template has been created and you are ready to view or edit the template go to:

Template Scheduler > Repository



The **Template Repository** allows you to View, Rename, Clone or Delete these templates.

Template Name	User	Created At	Options			
Pediatrics	JSmith	04/07/2021 09:00 am	View	Rename	Clone	Delete
Nurse	JSmith	03/25/2021 10:12 am	View	Rename	Clone	Delete
Perinatal Clinic	JSmith	03/26/2021 09:33 am	View	Rename	Clone	Delete
Main Call	JSmith	03/25/2021 09:47 am	View	Rename	Clone	Delete
Rapid Response Team	JSmith	03/26/2021 10:08 am	View	Rename	Clone	Delete

TigerConnect Physician Scheduling

Template Scheduler

Clicking **View** in the **Template Repository Options** allows you to make edits to templates and apply them to future dates. Edit the template by adding in Jobs or Days Off, or remove any items by using the **Unschedule** button.

The screenshot shows the Template Scheduler interface. At the top left, there are three 'Options' panels, each with buttons for View, Rename, Clone, and Delete. The first 'View' button in the first panel is highlighted with a red box. To the right, there are two template windows: 'Template Jobs - Week 1 Day 3' and 'Template Days Off - Week 1 Day 3'. Below these is a main scheduling grid with columns for Sun, Mon, Tue, Wed, Thu, Fri, and Sat, and rows for days 1, 2, 3, and 4. Each cell in the grid contains an 'Edit: [Jobs] - [Days Off]' link. The 'View' button in the options panel, the 'View' link in the grid, and the 'Apply Template' button are all highlighted with red boxes. Red lines connect these elements, indicating the flow of the process.

Clicking on **Apply Template** allows you to apply this schedule pattern starting on a future date. Customizations include:

- Starting week and day that week starts
- Ending week and day that week ends
- How many times to repeat this template (up to 9 times)
- When you would like the template to take effect
- Preserve Holiday scheduling
- Days of the week to schedule

Click Apply Template and the schedule pattern designed will take effect on the chosen date.

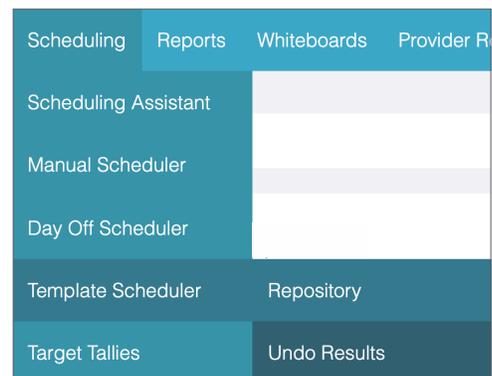
The screenshot shows the 'Template Scheduling' dialog box. It has a title bar with a close button. The main content area is titled 'Main Call'. Below this, there are several sections: 'Starting:' with dropdowns for 'Week 1' and 'Monday'; 'Ending:' with dropdowns for 'Week 4' and 'Friday'; 'Repeat this template pattern:' with a dropdown for '1'; 'Application Start Date' with a text input field containing '05/03/2021'; 'Holidays:' with radio buttons for 'Preserve Holidays' (selected) and 'Do Not Preserve Holidays'; 'Days of the Week' with a 'Select All' checkbox and individual checkboxes for Sunday, Monday, Tuesday, Wednesday, Thursday, and Friday (all selected); and a 'Saturday' checkbox (unchecked). At the bottom right, there is an 'Apply Template' button.

TigerConnect Physician Scheduling

Template Scheduler

If you have made an error in using the Template Scheduler, go to:

Template Scheduler > Undo Results



Click **View** next to the applied template that you wish to undo.

Undo Options

Radiology

Time	User	Dates	SA	Job	
03/25/2021 05:18	JSmit	05/03/2021 - 05/30/2021		Main Call	View

As a best practice, use Filters to narrow down the Job(s) you wish to undo from your Template Scheduling. Remove Days Off if you wish to preserve any that have been created, and isolate the Job(s) prior to choosing the date range you wish to affect. Click **Undo Schedule** when finished.

Current Schedule for **Radiology**

[Highlight](#)

Undo Template Scheduling.

From: May / 2 / 2021

To: May / 30 / 2021

[Undo Schedule](#)

Filters: Providers Jobs Days Off