

TigerConnect Physician Scheduling **Resident Scheduling**

This feature enables chief residents to build schedules from anywhere, reduces the time it takes to create annual resident schedules, and ensures compliance with rotation time requirements, keeping residents productive and prepared for their next rotation.

Follow the steps below to get started. If these features are not visible to you, please contact your organization's Account Manager to enable Resident Scheduling.

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Setting Up Your Resident Schedule

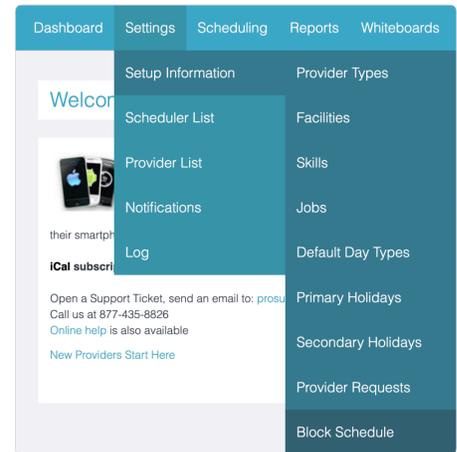
On your Physician Scheduling dashboard, go to:

Settings > Setup Information > Block Schedule

From here you will see the following sections:

- Staff Levels
- Rotations
- Annual Schedules
- Duty Hour Rules *(optional)*
- Provider setup

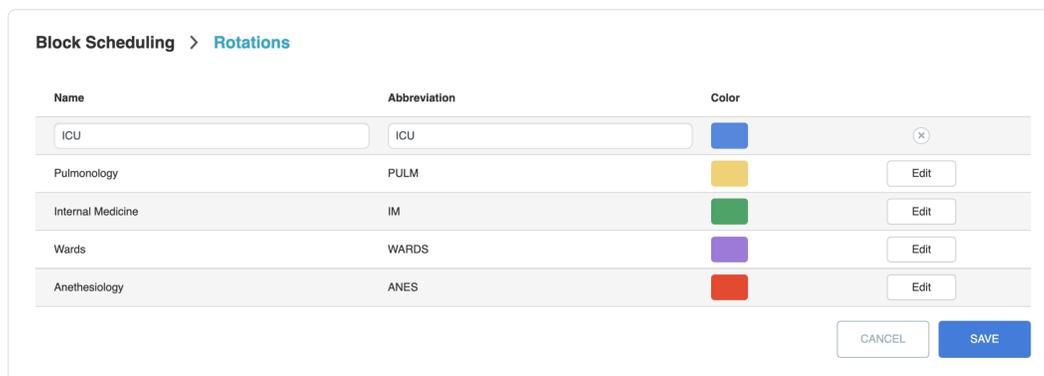
Click the button at the top right corner of each section to start customizing your setup.



Staff Levels - click **Edit** at the upper right corner of this section in Block Schedule setup and choose your staff levels (ex: select PGY1, PGY2, PGY3, PGY4 or create custom staff levels if needed).



Rotations - click **Edit** at the upper right corner of this section in Block Schedule setup, then type in the names of Rotations and choose the colors to represent each (ex: Internal Medicine, Pulmonology, Wards, ICU, etc).

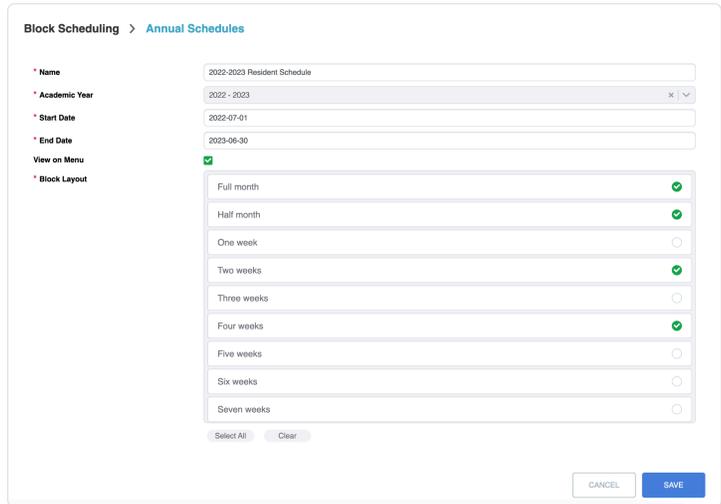


Setting Up Your Resident Schedule *(continued)*

Annual Schedules - click **Add** at the upper right corner of this section in Block Schedule setup. From there customize the following:

- Name the schedule (*usually the academic year*)
- Select the Academic Year
- Customize start and end dates (*if necessary*)
- Check View on Menu to have the schedule appear on your Scheduling Menu
- Choose the Block Layout (*typically Full Month, Half Month, 4 weeks, 2 weeks*)

NOTE: You can only have one Annual Schedule per academic year.



The screenshot shows the 'Annual Schedules' configuration page. It includes fields for Name (2022-2023 Resident Schedule), Academic Year (2022 - 2023), Start Date (2022-07-01), and End Date (2023-06-30). There is a 'View on Menu' checkbox which is checked. Under 'Block Layout', several options are listed with radio buttons: Full month (checked), Half month (checked), One week, Two weeks (checked), Three weeks, Four weeks (checked), Five weeks, Six weeks, and Seven weeks. At the bottom, there are 'Select All' and 'Clear' buttons, and 'CANCEL' and 'SAVE' buttons.

Duty Hour Rules *(optional)* - click **Add** at the upper right corner of this section in Block Schedule setup. From there choose the staff levels these rules apply to and use the Rule Builder to set your rules for Work, Rest and Frequency and Spacing. If desired, multiple sets of duty hour rules can be created to apply to different staff levels.

NOTE: Duty Hour Rules are optional and are best used with Daily Assignments.

Here are some example Rule settings:

Work

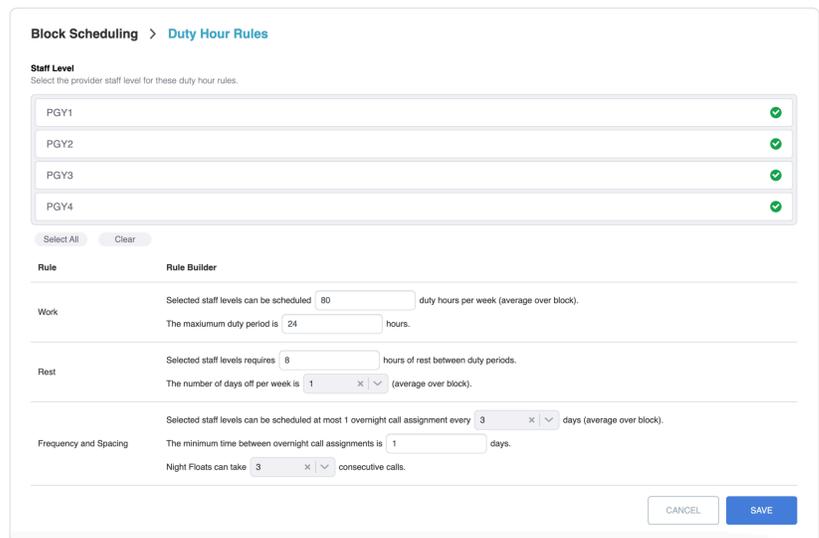
- 80 hours per week
- 24 hours max per period

Rest

- 8 hours between periods
- 1 day off per week

Frequency and Spacing

- 1 overnight call assignment every 3 days
- 1 day between overnight call assignments
- 3 consecutive calls for Night Floats



The screenshot shows the 'Duty Hour Rules' configuration page. Under 'Staff Level', PGY1, PGY2, PGY3, and PGY4 are all selected with checkmarks. The 'Rule Builder' section contains three rules: 'Work' (80 duty hours per week, 24 hours max duty period), 'Rest' (8 hours rest between duty periods, 1 day off per week), and 'Frequency and Spacing' (1 overnight call every 3 days, 1 day between calls, 3 consecutive calls for Night Floats). At the bottom, there are 'Select All' and 'Clear' buttons, and 'CANCEL' and 'SAVE' buttons.

NOTE: When utilizing Duty Hour Rules, only one rule is needed to enable this feature.

Setting Up Your Resident Schedule *(continued)*

Provider - click **Go** at the right side of this section in Block Schedule setup, then **Add** at the upper right corner in the Providers menu to access Add a Provider. From there create your Providers as you normally would in Physician Scheduling, either manually or via TigerConnect integration.

To learn how to **Add a Provider** in TigerConnect Physician Scheduling, [please review this guide](#).

TIP: When provisioning a Resident, **it is required:**

- To choose Resident as the Provider Type
- To fill out Staff Levels by Academic Year to match the tenure of the Resident

Providers [Add](#) [Delete](#)

Residency - General

Priority	Type	Display Name	Name		
1	Physician	JTiger	Johnny Tiger	Inactivate	Edit
1	Physician	LDemouser	Lucille Demouser	Inactivate	Edit

Add a Provider [Search Users](#)

Provider Profile

* **Priority:**

* **Provider Type:**

- ✓ Physician
- Physician Assistant
- Nurse
- Nurse Practitioner
- Resident
- Intern
- Student

* **User Name:**

* **Display Name:**

* **Email:**

* **Name:**

Patricia Aquino - Provider Properties

Staff Levels by Academic Year

Academic Year:

Staff Level:

[Add another academic year](#)

[Back](#) [Save](#) [Next](#)

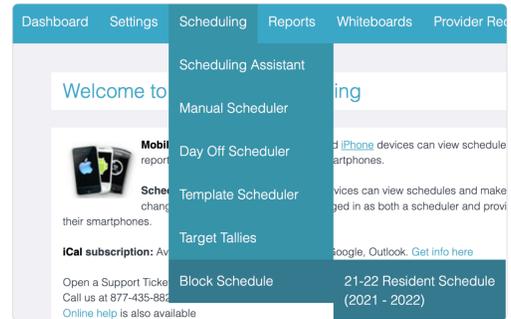
Designing Your Resident Schedule

Once your setup options have been completed, you can access your Resident Schedule here:

Scheduling > Block Schedule > [created Resident Schedule]

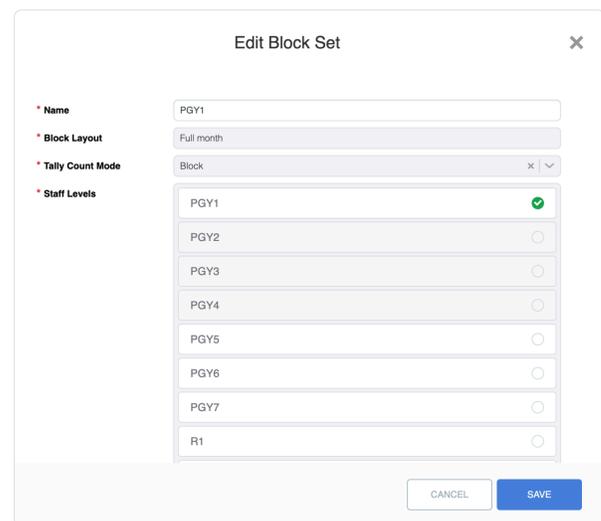
Click on the created Resident Schedule to start customizing:

- Block Sets
- Schedule - Rotations
- Tally Targets
- Daily Assignment Templates



Blocks - to set the length of a block set, click on the Blocks tab at the top of this screen and then click the **Add Block Set** button at the upper right corner. Here customize the following:

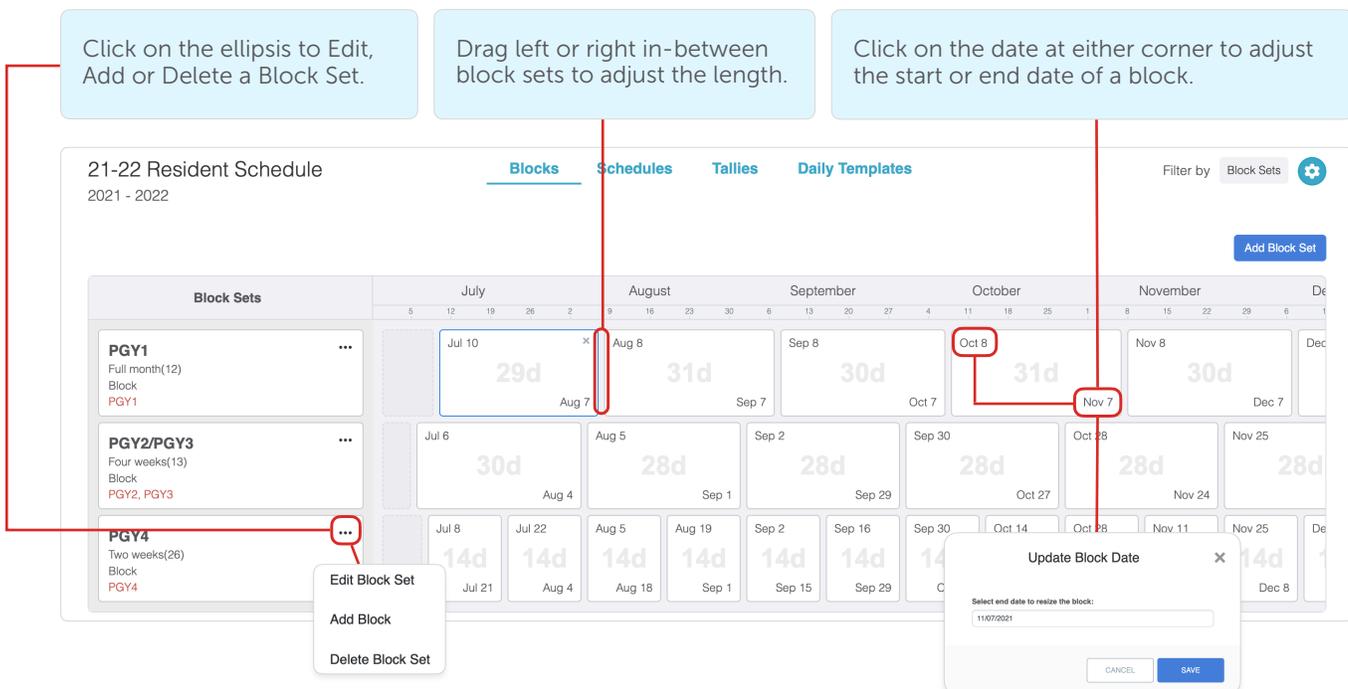
- Name - typically named the staff level year (ex: *PGY1, PGY2, PGY3, PGY4*)
- Block Layout - the length of each block set, which is typically full month for 1st years, four weeks for 2nd and 3rd years and two weeks for 4th year residents.
- Tally Count Mode - usually set to Block
- Staff Levels - which staff levels are applicable to this block set



Click on the ellipsis to Edit, Add or Delete a Block Set.

Drag left or right in-between block sets to adjust the length.

Click on the date at either corner to adjust the start or end date of a block.



21-22 Resident Schedule
2021 - 2022

Blocks Schedules Tallies Daily Templates

Filter by Block Sets

Add Block Set

Block Sets

PGY1
Full month(12)
Block
PGY1

PGY2/PGY3
Four weeks(13)
Block
PGY2, PGY3

PGY4
Two weeks(26)
Block
PGY4

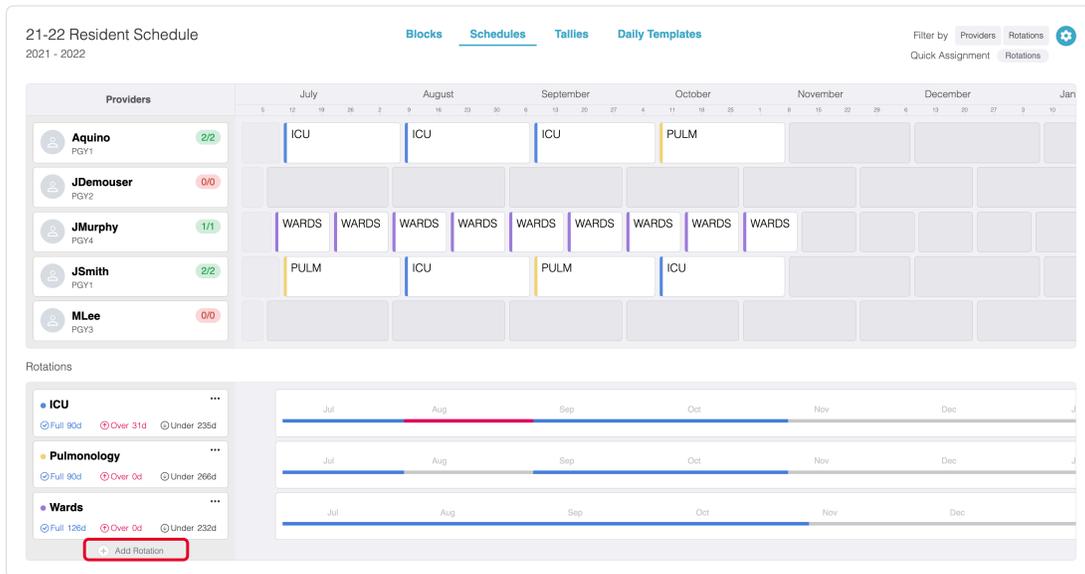
Update Block Date

Select end date to realize the block:

11/07/2021

Designing Your Resident Schedule *(continued)*

Schedules - to determine the schedule rotations of each resident, click on the Schedules tab at the top of this screen and then scroll down at the bottom left corner under Rotations to click the **Add Rotation** button. From there there customize the options for Rotation Name, Vacation Allowed, Staff Requirements and Block Sets.

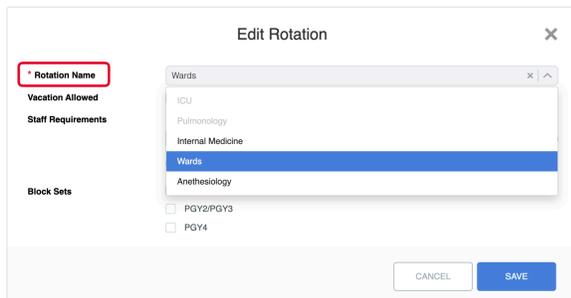


Rotation Name

Chosen from the rotations designated during setup.

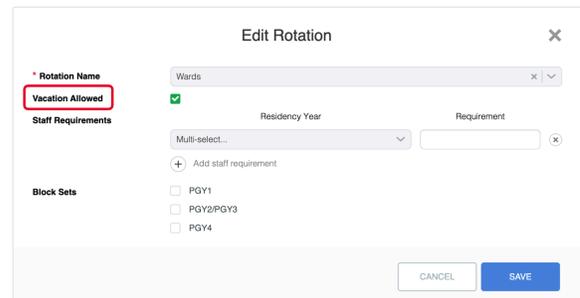
Vacation Allowed

Whether or not vacation is allowed for this rotation.



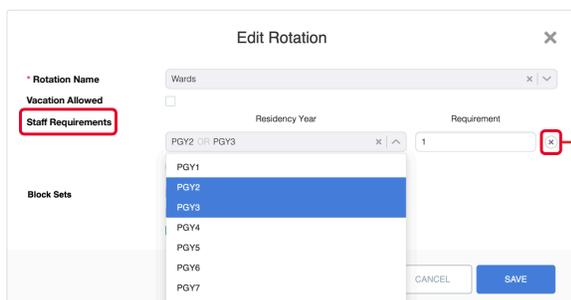
Staff Requirements (optional)

Which residency year and how many individuals daily are needed. Multiple residency years can be selected.

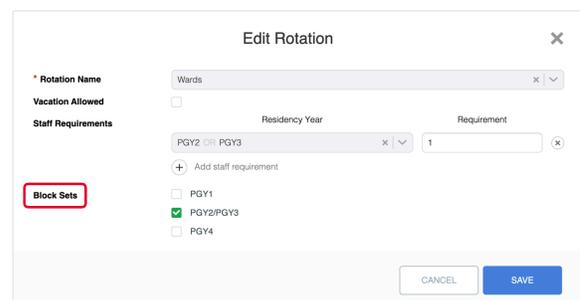


Block Sets

Which staff levels are eligible for this rotation.



TIP: If Staff Requirements is not being used, click the circle x button to remove it.



Designing Your Resident Schedule *(continued)*

Tallies - (*OPTIONAL*) to track the required schedule rotations of each resident, click on the Tallies tab at the top of this screen and then click the **Add Tally** button at the top right corner. From there, name your Tally, choose the Rotation(s) and select the Tally Targets to determine how many of this rotation each staff level needs to satisfy.

21-22 Resident Schedule
2021 - 2022

Blocks Schedules Tallies Daily Templates

Add Tally

Tally Name	Rotations	Tally Targets	
Combined Tally	<ul style="list-style-type: none"> Pulmonology ICU 	PGY2 (2) PGY1 (2)	Edit
Wards - PGY4	<ul style="list-style-type: none"> Wards 	PGY4 (1)	Edit

Edit Tally

* Tally Name: Wards - PGY4

* Rotations:

- ICU
- Pulmonology
- Wards

Select All Clear

Tally Targets: PGY4 x 1

+ Add tally targets

CANCEL SAVE

TIP: Multiple Tally Targets may be selected by clicking the circle + button to add tally targets.

Designing Your Resident Schedule *(continued)*

Daily Templates - (OPTIONAL) **Before adding Daily Templates**, it is highly recommended that you familiarize yourself with how to add Jobs to your schedule and how to schedule assignments.

Please review the following guides - [Adding Jobs](#) and [Manual Scheduling](#). You will need to have Jobs set up prior to utilizing Daily Templates.

If you need to assign multiple individuals to the same Job - **Check the box for Allow Multiple Assignments**. If you do not see this feature, please contact your TigerConnect Account Manager.

When creating a Job, enable the feature to **Allow Multiple Assignments**. Click Save and Next and continue with job setup.

A new section called **Staffing Targets** will appear at the end of job setup. Populate the Minimum, Ideal and Maximum number of individuals that will be scheduled for this assignment.

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Minimum	1	1	1	1	1	1	1
Ideal	2	2	2	2	2	2	2
Maximum	3	3	3	3	3	3	3

When using Manual Scheduler > Complete View, a Job with multiple seats assigned under Staffing Targets will populate multiple selections to be assigned to individuals.

Flag	Job	Job Time	Scheduled
☐	CLINIC AM	08:00 am-12:00 pm	Select a provider...
☐	CLINIC:PM	01:00 pm-05:00 pm	Select a provider...
☐	WORK JOB - Resident Clinic	08:00 am-05:00 pm	Select a provider...

Assignment	Staff Target	Scheduled
Assignment 1	•	JeffRes1M - Jeff Res1
Assignment 2	•	JeffRes2M - Jeff Res2
Assignment 3	•	Tester, J - Jeffrey Tester

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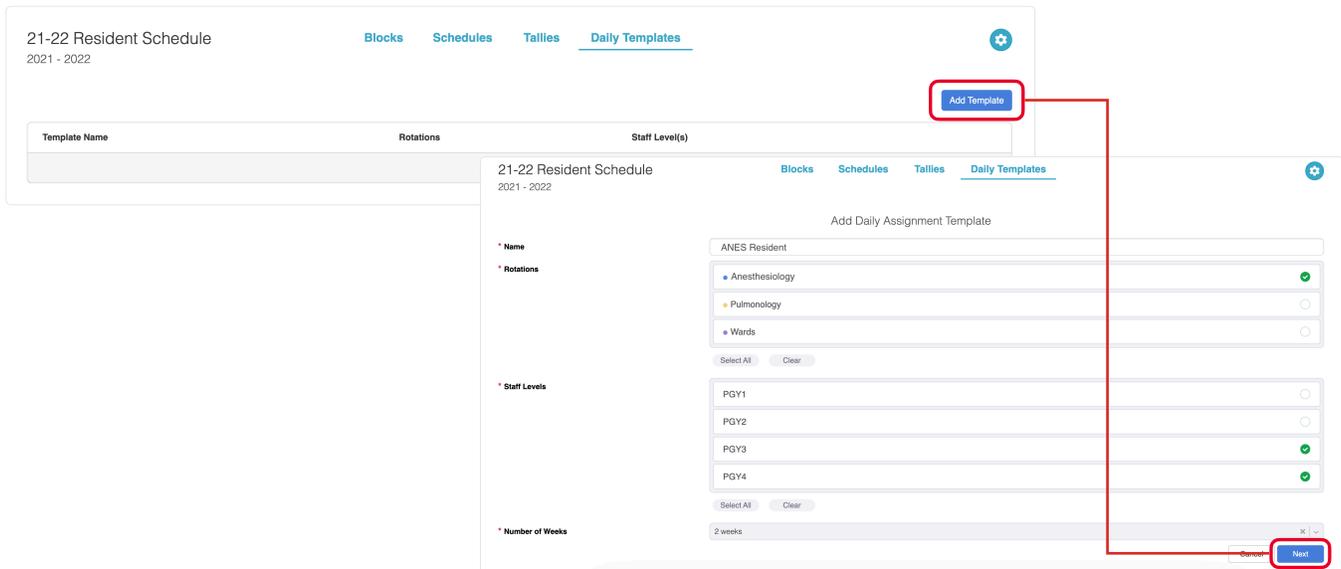
WJ_RES_CLIN - 3 Seats

- JeffRes1M
- JeffRes2M
- Tester, J

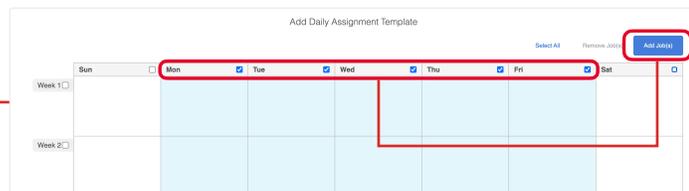
Designing Your Resident Schedule (continued)

To populate daily assignments based on the rotation schedule, click the Daily Templates tab at the top of the screen, then click the **Add Template** button at the top right corner. Name this Daily Assignment Template, choose the Rotations, the Staff Levels and Number of Weeks. Click **Next** when you are finished.

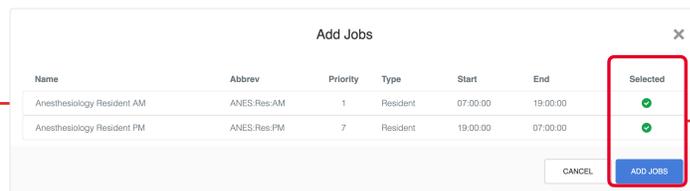
NOTE: When selecting the Number of Weeks, please choose an option that is typically one week longer than then length of your block to account for how your scheduled work week is set.



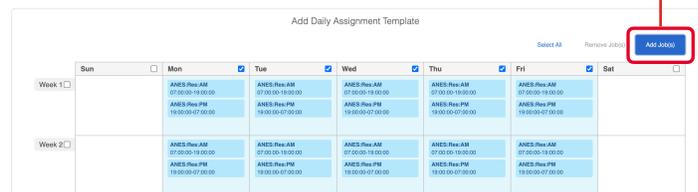
Choose the days to assign then click Add Jobs.



Select which Jobs and confirm your selection.



Name	Abbrev	Priority	Type	Start	End	Selected
Anesthesiology Resident AM	ANES-Res-AM	1	Resident	07:00:00	19:00:00	<input checked="" type="checkbox"/>
Anesthesiology Resident PM	ANES-Res-PM	7	Resident	19:00:00	07:00:00	<input checked="" type="checkbox"/>

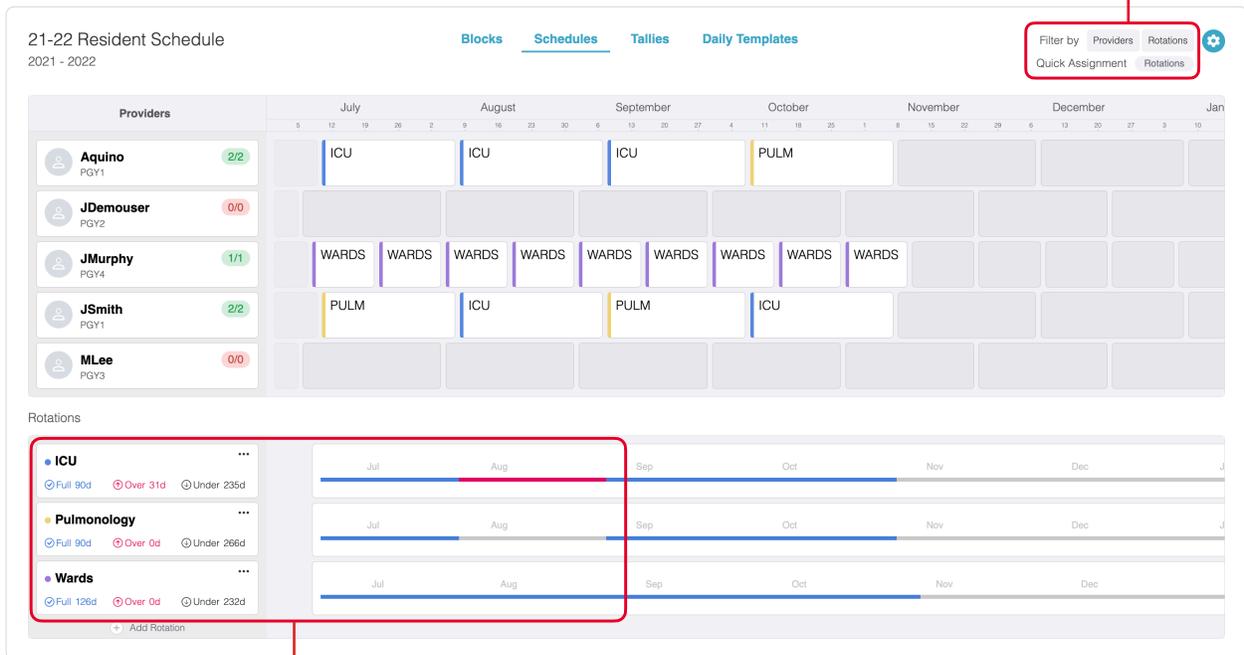


Populating Your Resident Schedule

Now that your Tallies and Daily Templates are set up, you are now ready start populating your Schedules. After setting up Blocks, Schedule Rotations, Tallies (*optional*) and Daily Templates (*optional*), go back to the Schedule tab and click on the empty grey boxes to the right of each Resident to begin populating your schedule. A pop-up for each block will appear allowing you to choose a rotation you just added.

At the upper right corner, you can filter your view to only display by specific Residents or Rotations.

Quick Assignment - Rotations allows you to highlight specific blocks. Click on it again and click **CLEAR** to remove this view. Please note that Daily Templates cannot be utilized with Quick Assignment.



The screenshot displays the '21-22 Resident Schedule' interface. At the top, there are tabs for 'Blocks', 'Schedules', 'Tallies', and 'Daily Templates'. A filter menu is open in the top right corner, showing options for 'Providers', 'Rotations', 'Quick Assignment', and 'Rotations'. The main area is a calendar grid from July to January. On the left, a 'Providers' list includes Aquino (PGY1, 2/2), JDemouser (PGY2, 0/0), JMurphy (PGY4, 1/1), JSmith (PGY1, 2/2), and MLee (PGY3, 0/0). Below the calendar is a 'Rotations' section with a list of rotation types: ICU, Pulmonology, and Wards. Each rotation type has a corresponding bar chart showing staffing levels across the months, with blue indicating full staffing, red indicating overstaffing, and gray indicating understaffing.

Under Rotations, staffing will be represented as **blue (fully staffed)**, **red (overstaffed)**, or **gray (understaffed)**.

Populating Your Resident Schedule *(continued)*

21-22 Resident Schedule
2021 - 2022

Blocks Schedules Tallies Daily Templates

Filter by Providers Rotations
Quick Assignment Rotations

Providers	July	August	September	October	November	December	Jan
Aquino PGY1 (2/2)	ICU	ICU	ICU	PULM			
JDemouser PGY2 (0/0)							
JMurphy PGY4 (1/1)	WARDS	WARDS	WARDS	WARDS	WARDS	WARDS	
JSmith PGY1 (2/2)	PULM	ICU	PULM	ICU			
MLee PGY3 (0/0)							

Rotations

- ICU**
 - Full 90d Over 31d Under 235d
- Pulmonology**
 - Full 90d Over 0d Under 266d
- Wards**
 - Full 126d Over 0d Under 232d

+ Add Rotation

When clicking on a block, you can select to a rotation to add.

Select Rotation

Patricia Aquino 11/8/2021-12/7/2021

Rotation	Tally Name	Tally Target	Tally Credit
ICU	Combined Tally	2 Blocks	3 Blocks
Pulmonology	Combined Tally	2 Blocks	1 Block

Select buttons are highlighted in red.

Apply Daily Assignment Template

Name	Date range	Rotation	Template
Patricia Aquino	11/8/2021-12/7/2021	ICU	-

Template Name: ICU Resident

Back, Select, Only Select Rotation buttons are highlighted in red.

If the Rotation has a Daily Assignment Template, you can select it and automatically populate this rotation's daily assignments during this time period.

Select Rotation

Patricia Aquino 11/8/2021-12/7/2021

Rotation	Tally Name	Tally Target	Tally Credit
ICU	Combined Tally	2 Blocks	3 Blocks
Pulmonology	Combined Tally	2 Blocks	1 Block

Select buttons are highlighted in red.

Apply Daily Assignment Template

Name	Date range	Rotation	Template
Patricia Aquino	11/8/2021-12/7/2021	Pulmonology	-

Template Name: ICU Resident

Back, Only Select Rotation buttons are highlighted in red.

NOTE: If a rotation is already staffed but does not have a Daily Assignment Template selected, you can add one after by clicking on the staffed rotation block.

Rotation Info

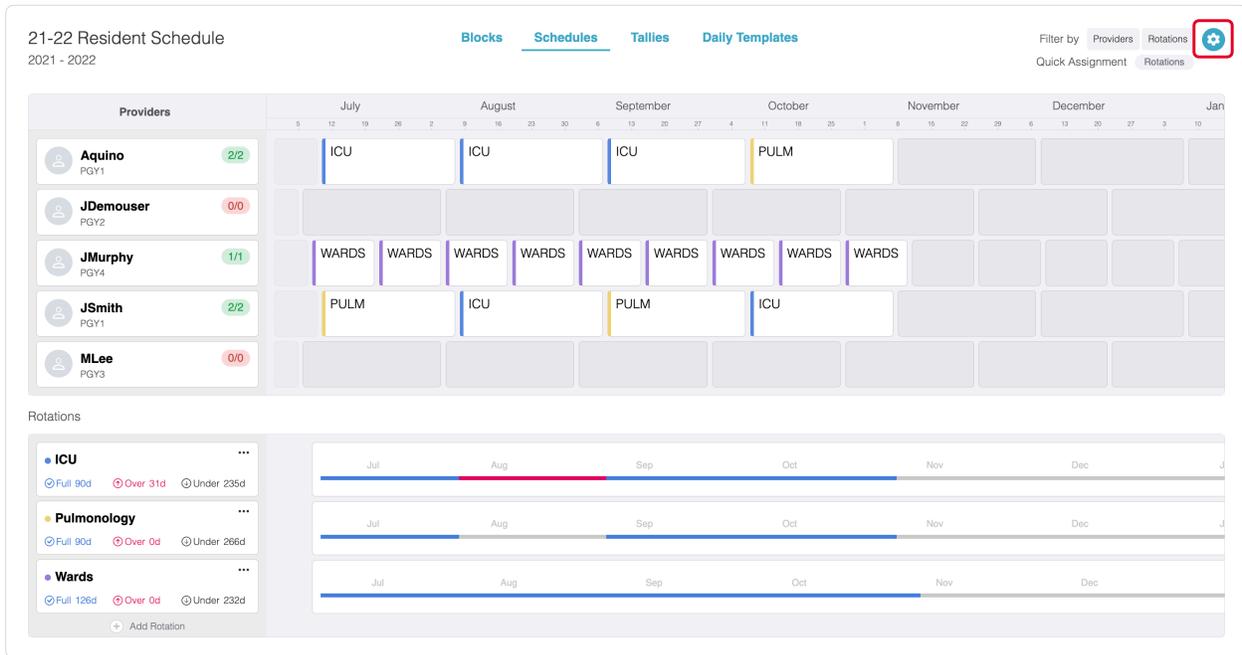
Patricia Aquino 9/8/2021-10/7/2021

Rotation	Tally Name	Tally Target	Tally Credit	Template
ICU	Combined Tally	2 Blocks	3 Blocks	Apply Template

DELETE, EDIT buttons are highlighted in red.

Rolling Over Your Resident Schedule

Annual Schedule Rollover - When you are ready to start setting up next year's Resident Schedule, click on the gear button at the top right corner to access this schedule's setting



21-22 Resident Schedule
2021 - 2022

Blocks Schedules Tallies Daily Templates

Filter by Providers Rotations 

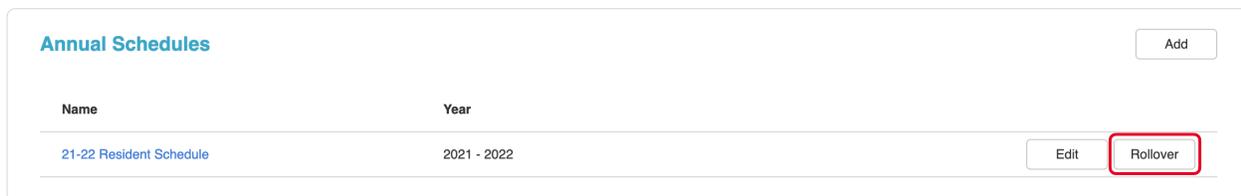
Quick Assignment Rotations

Providers	July	August	September	October	November	December	Jan
Aquino PGY1 2/2	ICU	ICU	ICU	PULM			
JDemouser PGY2 0/0							
JMurphy PGY4 1/1	WARDS	WARDS	WARDS	WARDS	WARDS	WARDS	WARDS
JSmith PGY1 2/2	PULM	ICU	PULM	ICU			
MLee PGY3 0/0							

Rotations

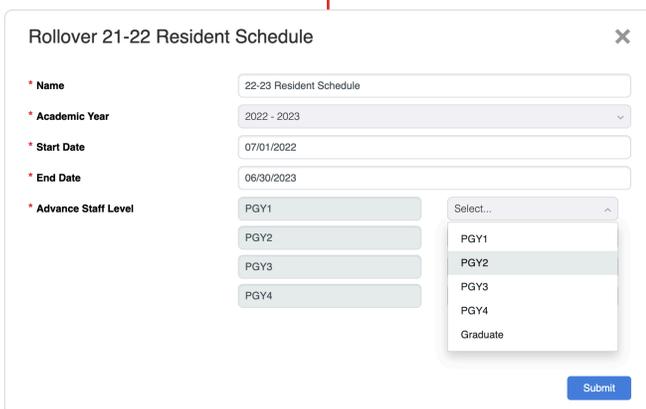
- ICU**
 - Full 90d Over 31d Under 235d
- Pulmonology**
 - Full 90d Over 0d Under 266d
- Wards**
 - Full 126d Over 0d Under 232d

Scroll down to Annual Schedules and click **Rollover**. From there, choose a name for next year's resident schedule and set the Academic Year, Start Date and End Date. Choose the progression of each resident year (ex: PGY1 > PGY2, PGY4 > Graduate, etc) and click **Submit**.



Annual Schedules Add

Name	Year	Edit	Rollover
21-22 Resident Schedule	2021 - 2022		



Rollover 21-22 Resident Schedule

* Name: 22-23 Resident Schedule

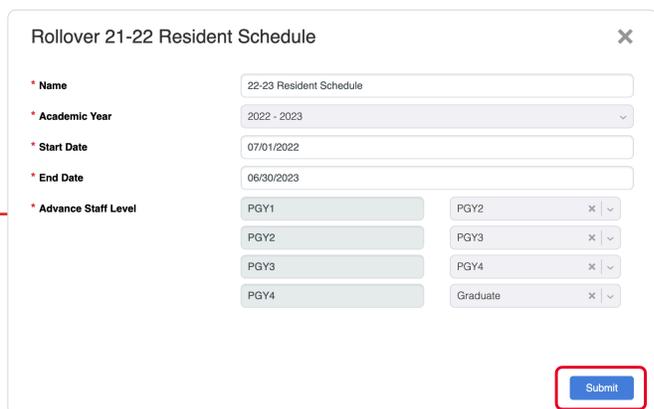
* Academic Year: 2022 - 2023

* Start Date: 07/01/2022

* End Date: 06/30/2023

* Advance Staff Level: PGY1, PGY2, PGY3, PGY4, Graduate

Submit



Rollover 21-22 Resident Schedule

* Name: 22-23 Resident Schedule

* Academic Year: 2022 - 2023

* Start Date: 07/01/2022

* End Date: 06/30/2023

* Advance Staff Level: PGY1, PGY2, PGY3, PGY4, Graduate

Submit

Rolling Over Your Resident Schedule *(continued)*

The following data is carried over to the next year:

- Rotations and staffing requirements
- Tallies
- Block sets
- Templates

It will also perform the following operations:

- Progress the academic tenure of residents to the next academic year. This creates a new staff level record for each resident for the next academic year, except for graduating students. The mapping of staff levels from one year to the next is configurable during the rollover process.
- Create blocks for each block set based on the start date of the next academic year. For example, if we rollover a 22-23 schedule that has a 4-week block set to a 23-24 schedule that starts on 7/3/2023, the rollover will create 13 4-week blocks beginning on 7/3/2023. The process of creating those block sets is saved by taking the data from last year's block sets your organization created from scratch.