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*).

Name	Abbreviation	Color	
ICU	ICU		۲
Pulmonology	PULM		Edit
Internal Medicine	IM		Edit
Wards	WARDS		Edit
Anethesiology	ANES		Edit



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 car	ו only	have	one	Annual	Schedu	le
ber aca	demic y	ear.					

* Name	2022-2023 Resident Schedule	
* Academic Year	2022 - 2023	×
* Start Date	2022-07-01	
* End Date	2023-06-30	
View on Menu		
* Block Layout	Full month	0
	Half month	٥
	One week	
	Two weeks	٢
	Three weeks	
	Four weeks	٢
	Five weeks	
	Six weeks	
	Seven weeks	
	Select All Clear	

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

PGY1	
PGY2	
PGY3	
PGY4	
Select All Clear	
lule	Rule Builder
Vork	Selected staff levels can be scheduled 00 duty hours per week (average over block). The maximum duty period is 24 hours.
lest	Selected staff levels requires 8 hours of rest between duty periods. The number of days off per week is 1 × V (average over block).
requency and Spacing	Selected staff levels can be scheduled at most 1 overnight call assignment every 3 × 1 ✓ days (average over block). The minimum time between overnight call assignments is 1 days. Night Floats can take 3 × 1 ✓ consecutive calls.

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 TypeTo fill out Staff Levels by Academic Year to match the tenure of the Resident	

Providers					Add	Delete
		Res	idency - General			
Priority	Туре	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:		E
* Provider Type:	✓ Physician	
* User Name:	Physician Assistant Nurse	
* Display Name:	Nurse Practitioner	
* Email:	Intern	
* Name:	Student	

Patricia Aquino - Provider Properti	es	
	Staff Levels by Academic Year	
		×
Academic Year:	2021 - 2022	~
Staff Level:	PGY1	~
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



	Edit Block Set	>
* Name	PGY1	
* Block Layout	Full month	
* Tally Count Mode	Block	× V
* Staff Levels	PGY1	0
	PGY2	
	PGY3	
	PGY4	
	PGY5	
	PGY6	
	PGY7	
	R1	
	R1	SAVE

 Click on the ellipsis t Add or Delete a Bloc	o Edit, k Set.	Drag bloc	left or k sets to	right in 5 adjust	-betwe the ler	en igth.	Click the s	k on tl start c	he date at or end date	either cc of a blo	orner t ck.	o adjus	st
21-22 Resident Schedu 2021 - 2022	le		Blocks	Schedule	es Talli	es Dail	ly Template	S			Filter by	Block Sets	Set
Block Sets	5	July	26 2	Augus 9 16	st 23 30	6 13	20 27	4	October	1 8 ·	ember 15 22	29 6	
PGY1 Full month(12) Block PGY1		Jul 10	2 9d Aug	Aug 8	31d	Sep 8		Oct 7	Oct 8 31d	Nov 7	, 30d	Dec 7	Dec
PGY2/PGY3 Four weeks(13) Block PGY2, PGY3	J.	ul 6 30	d Aug 4	Aug 5	3d Sep 1	Sep 2	Scd Sep 29	Sep 30	28d Oct 27	Oct 28 28d	Nov 24	Nov 25	
PGY4 Two weeks(26) Block PGY4	Edit Block Set	Jul 8 14d Jul 21	Jul 22 14d Aug 4	Aug 5 14d Aug 18	Aug 19 14d Sep 1	Sep 2 14d Sep 15	Sep 16 14d Sep 29	Sep 30	Oct 14 Update	Oct 28 No Block Date	x 11	Nov 25 14d Dec 8	De
	Add Block Delete Block Set								Select end date to resize the	CANCEL	SAVE		



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.

						2	
Providers	July	August	September	October	November	December	40
Aquino 2 PGY1 2	ICU	ICU	ICU	PULM	0 10 22 20	• • • • •	
JDemouser 0. PGY2							
JMurphy 12 PGY4	WARDS	WARDS WARDS WARD	S WARDS WARDS	WARDS WARDS WA	RDS		
JSmith PGY1	PULM	ICU	PULM	ICU			
B MLee O							
ations							
● ICU ② Full 90d ① Over 31d ③ Under 233	Jul	Aug	Sep	Oct	Nov	Dec	
● Pulmonology ⊘Full 90d ⑦ Over 0d ◎ Under 266	ul Lu	Aug	Sep	Oct	Nov	Dec	
Wards	•• Jul	Aug	Sep	Oct	Nov	Dec	

Rotation Name

Chosen from the rotations designated during setup.

	Edit Rotation	×
* Rotation Name	Wards	×
Vacation Allowed	ICU	
Staff Requirements	Pulmonology	
	Internal Medicine	
	Wards	
Block Sets	Anethesiology	
	PGY2/PGY3	
	PGY4	
		CANCEL SAVE

Staff Requirements (optional)

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

Vacation Allowed			
Staff Requirements	Hesidency Y	ear Hequ	urement
	PGY2 OR PGY3	× ^ 1	×–
	PGY1		
Block Sets	PGY2		
	PGY3		
	PGY4		
	PGY5		
	PGY6		
	PGY7	CANCEL	SAVE

Vacation Allowed

Whether or not vacation is allowed for this rotation.

	Eartholau			*
* Rotation Name	Wards			×
Vacation Allowed				
Staff Requirements	Residency Yea	r	Requirem	ent
	Multi-select	~		
	+ Add staff requirement			
Block Sets	PGY1			
	PGY2/PGY3			
	PGY4			

Block Sets

Which staff levels are eligible for this rotation.

Edit Rotati	on		
Wards			×
Residency Yea	ar	Requirement	
PGY2 OR PGY3	× ~	1	
+ Add staff requirement			
PGY1			
PGY2/PGY3			
PGY4			
	Wards Residency Ye PGY2 OF PGY3	Wards Residency Year PGY2 OR PGY3 ↓ Add staff requirement PGY1 ♥ PGY1 ♥ PGY1 ♥ PGY2 ♥ PGY2	Eait Hotation Wards Residency Year PGY2 OF PGY3 Add staff requirement. PGY1 PGY2 PGY1 PGY2 PGY1 PGY4



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.

1-22 Resident Schedule	Blocks Schedu	ules <u>Tallies</u> Daily	Templates	0	
Taliy Name Ro	otations	Tally Targets		Add Tally	
Combined Tally	Pulmonology ICU Wards	PGY2 (2) PGY1 (2) PGY4 (1)		Edit	
		* Tally Name * Rotations	Edit Tally Wards - PGY4 • ICU • Pulmonology • Wards		×
P: Multiple Tally Targets may clicking the circle + button	be selected to add tally	Tally Targets	PGY4	x ~ 1	×
yets.				CANCEL	/E



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 - <u>Adding Jobs</u> and <u>Manual Scheduling</u>. 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.	Properties Time and I * Name * Abbreviation * Priority Show Empty Assignments	Days	Day Types WORK WJ_RE	Re JOB - Ri S_CLIN	quired Skills	: E	nabled Provide	r Types	Linke	d Rotation	15			
	Link to Rotations @ Overnight Float Overnight Call Allow Multiple Assignments Tigerconnect Integration Tigerconnect Roles		Org Toker	1			Tag		Role Name					
			Add a B	ole			Please add at	least one	tigerconnect r	ole.				
									CA	NCEL	SAV	Æ	SAVE	AND NEXT
A new section called Staffing Targets will	Properties Time and D	Days	Day Types	Rec	uired Skills	E	nabled Provider	Types	Linked	Rotation	s Sta	affing	Targets	
appear at the end of job setup. Populate the	Sune	day	Monday		Tuesday		Wednesday		Thursday	F	riday		Saturday	
Minimum, ideal and Maximum number of	Minimum 1		1	~	1	•	1 ~		1	•	1	~	1	~
assignment	Ideal 2	~	2	~	2	~	2 ~		2	· .	2	~	2	~
	Maximum 3	~	3	×	3	×	3 ~		3	<u> </u>	3	×	3	~
												CANCEL	-	SAVE

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





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.

21-22 Resident Schedule Blocks	Schedule	es Tallies	Daily Template	28			Add T	œ mplate			
Template Name R4	otations		Staff Leve	el(s)							
		21-22 Resid	lent Schedule		Bloc	cks Schedule	s Tallies	Daily Templates			0
		* Name			ANES Besident	Add Daily	Assignment Temp	late			
		* Rotations			Anesthesiology						0
					Pulmonology						
					• Wards						
				5	elect All Clear						
		* Staff Levels			2014						
					PGY3						
					PGY4						
					elect All Clear						
		* Number of Weeks		2 \	reeks						x ~
											Cancel Next
Choose the days to assign then click Add Jobs.			Sun Week 1		Mon I	Add Da	Ved	Thu	Select A1	Renow Jab(n Add	
					Ad	dd Jobs				×	
Select which Jobs and confirm		Name		Abbre	ev.	Priority Type	Start	End	Selected		
vour selection.		Anesthesiology F	Resident AM	ANES	Res:AM	1 Residen	t 07:00:00	19:00:00	۰		
		Anesthesiology F	Resident PM	ANES	:Res:PM	7 Residen	t 19:00:00	07:00:00	•		
								CANC	ADD JOBS		
							Add Daily	/ Assignment Templat	e	Select Al	Ramove Job(s)
				Week 1	Sun	Mon ANES:Res:AM	ANES:Res:AM	Wed ANES:Res:AM	2 Thu C	2 Fri ANES:Res:AM	Z Sat
						07:00:00-19:00:00 ANES:Res:PM 19:00:00-07:00:00	07:00:00-19:00:00 ANES:Res:PM 19:00:00-07:00:00	07:00:00-19:00:00 ANES:Res:PM 19:00:00-07:00:00	07:00:00-19:00:00 ANES:Res:PM 19:00:00-07:00:00	07:00:00-19:00:00 ANES:Res:PM 19:00:00-07:00:00	
				Week 2		ANES (Res: AM 07:00:00:19:00:00 ANES (Res: PM 19:00:00:07:00:00	ANES:Res:AM 07:03:00-19:00:00 ANES:Res:PM 19:00:00-07:00:00	ANES:Res:AM 07:00:00-19:00:00 ANES:Res:/FM 19:00:00-07:00:00	ANES:Res:AM 07:03:00-19:00:00 ANES:Res:PM 19:00:00-07:00:00	ANES:Res:AM 07:00:00-19:00:00 ANES:Res:PM 19:00:00:07:00:00	

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 popup for each block will appear allowing you to choose a rotation you just added.



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



Providers	July	August	September	October	November	December	Jan
Aquino 2/2	5 12 19 26	2 9 16 23 30 ICU	6 13 20 27	4 11 18 25 1 PULM	8 15 22 25	9 6 13 20 27	3 10
JDemouser 0/0							
PGY2	WARDS WAR	RDS WARDS WARDS	WARDS WARDS	WARDS WARDS WA	RDS		
PGY4	PULM	ICU	PULM	ICU			
PGY1							
PGY3							
ations							
ICU	Jul	Aug	Sep	Oct	Nov	Dec	J
Pulmonology	Jul	Aug	Sep	Oct	Nov	Dec	J
• Wards		Aun			Nov		
Full 126d Over 0d Under 232d		nug	oop	001	107	500	
Sele	ect Rotation	×			Apply Daily Assig	gnment Template	×
Sele	ect Rotation	118/2021-12/7/2021		Name Patroia Aquiro	Apply Daily Assig Date range 118/2021-1297/2021	gnment Template Rotation Temp + ICU -	×
Sele icia Aquino tion Taliy Name Combined Taliy	CCT Rotation	118/2021-12/7/2021		Name Patrola Aquiro Template Name ICU Resident	Apply Daily Assig Date range 118/2021-12772021	gnment Template Retation Temp - ICU -	X late Seect
Sele licia Aquino tion Taliy Name Combined Taliy imonology Combined Taliy	CCT Rotation Tally Target Tally C 2 Blocks 3 Block 2 Blocks 1 Block	118/2021-12/7/2021 redit s Select Select		Name Patricia Agairo Template Name LOJ Rescient Back	Apply Daily Assig Date range 118/0021-12/70021	gnment Template Retation Temp - ICU -	X Iste Seect ty Select Hotation
Sele icia Aquino ton Tally Name Combined Tally monology Combined Tally	Tally Target Tally C 2 Blocks 3 Block 2 Blocks 1 Block	redit I 118/2021-12/7/2021		Name Patricia Agairo CU Rescient Dark	Apply Daily Assig Date range 118/0021-12/7/0021	gnment Template Retation Temp = 100 -	X Isle Sence by Select Relation
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Populating Your Resident Schedule (continued)



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

1 - 2022							Quick Assignment Rotations
Providers		July	August	September	October	November	December
Aquino PGY1	2/2	ICU	ICU	ICU	PULM		
JDemouser PGY2	0/0						
JMurphy PGY4	1/1	WARDS WARDS	8 WARDS WARDS	S WARDS WARDS	WARDS WARDS WAR	RDS	
JSmith PGY1	2/2	PULM	ICU	PULM	ICU		
MLee PGY3	0/0						
tions							
ICU)Full 90d ①Over 31d (••• D Under 235d	Jul	Aug	Sep	Oct	Nov	Dec
Pulmonology Full 90d ⑦ Over 0d 《	··· € Under 266d	Jul	Aug	Sep	Oct	Nov	Dec
			Aug			Nov	

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 Sc	hedules				Add
Name		Year			
21-22 Resid	ent Schedule	2021 - 2022			Edit Rollover
Rollover 21-22 Re	sident Schedule	×	Rollover 21-22 Res	ident Schedule	×
* Name	22-23 Resident Schedule		* Name	22-23 Resident Schedule	
* Academic Year	2022 - 2023	~	* Academic Year	2022 - 2023	~
* Start Date	07/01/2022		* Start Date	07/01/2022	
* End Date	06/30/2023		* End Date	06/30/2023	
* Advance Staff Level	PGY1	Select	* Advance Staff Level	PGY1	PGY2 × V
	PGY2	PGY1		PGY2	PGY3 × ~
	PGY3	PGY2		PGY3	PGY4 × V
	PGY4	PGY3 PGY4		PGY4	Graduate × ~
		Graduate			
		Submit			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.