



Physician Scheduling

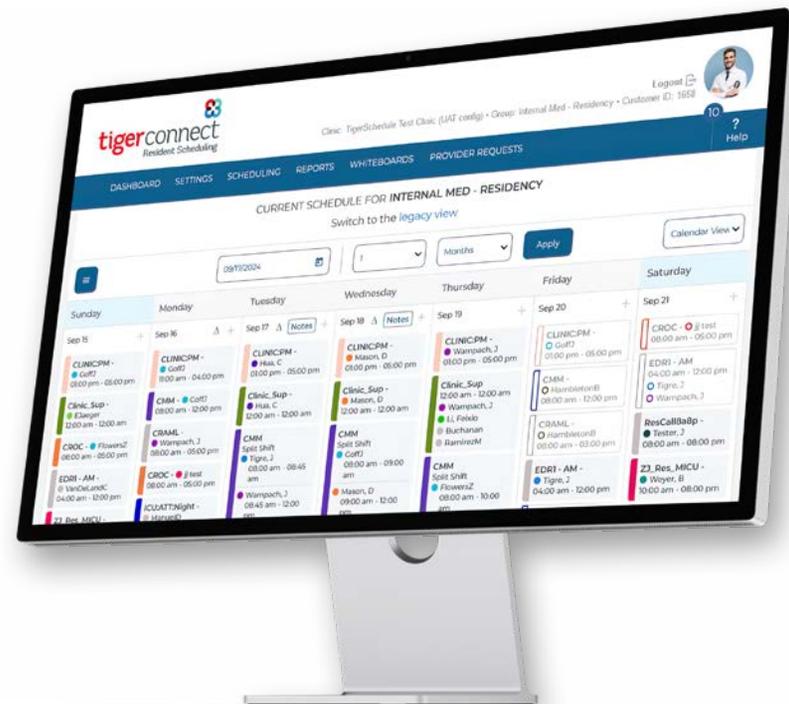
Calendar Overview



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Overview

The complete view is the go-to page for schedulers to review current schedules and manually create or edit assignments. It also allows you to manage Provider time-off requests and Calendar notes. The updated complete view of the Calendar introduces several enhancements designed to save time and improve the scheduling experience. Additionally, optional setup steps for Jobs and Providers unlock the full potential of the new Calendar features.

Set Up Jobs

The Calendar now includes three optional features for managing Jobs, available in the **Job Properties** tab. To access these features, go to **Settings > Setup Information > Jobs**. You can enable them when creating a new Job or editing an existing one.

*** Priority** 1

*** Default Job Time**

Days to Assign

Day	Start Time	End Time	Status
Sunday	10:00 am	08:00 pm	✓
Monday			○
Tuesday	10:00 am	08:00 pm	✓
Wednesday	10:00 am	08:00 pm	✓
Thursday	10:00 am	08:00 pm	✓
Friday	10:00 am	08:00 pm	✓
Saturday	10:00 am	08:00 pm	✓

Select All Clear

*** Job Type**

Color [Red]

Show Empty Assignments

Allow Multiple Assignments

Tigerconnect Integration

Tigerconnect Roles

Label	Org Token	Tag	Role Name
Please add at least one tigerconnect role.			

Set Start and End Times by Day

You can now set start and end times by day of the week. Use the **Clock** icon to set the Job's start and end times. After clicking the **Check** icon, the time fields will be hidden if selected. You can set times by day of the week, entering default times in the first row and adjusting them for specific days below. Uncheck the green checkbox for days when the Job is unavailable.

Customize Job Colors

You can now customize the color for each Job that will be displayed on the Calendar. Pick your preferred color from the color grid when adding a new Job or by navigating to the **Properties** tab of any existing Job.

Note: If you link the Job to a role in TigerConnect messaging, only one scheduled Provider will be assigned to the role.

The screenshot shows a window titled "Days to Assign". It contains a table with the following structure:

Day	Start Time	End Time	Availability
Sunday	10:00 am	08:00 pm	<input checked="" type="checkbox"/>
Monday			<input type="checkbox"/>
Tuesday	10:00 am	08:00 pm	<input checked="" type="checkbox"/>
Wednesday	10:00 am	08:00 pm	<input checked="" type="checkbox"/>
Thursday	10:00 am	08:00 pm	<input checked="" type="checkbox"/>
Friday	10:00 am	08:00 pm	<input checked="" type="checkbox"/>
Saturday	10:00 am	08:00 pm	<input checked="" type="checkbox"/>

At the bottom of the window are "Select All" and "Clear" buttons. A red dashed circle highlights the clock icon in the Monday row.

This screenshot is similar to the previous one but with a clock overlay. The clock is positioned over the Monday row, and its hands are set to 8:00 pm. A red dashed line traces a path from the clock icon in the Monday row to the clock overlay, and then continues to the "Check" icon in the Monday row. The "Check" icon in the Monday row is also circled with a red dashed line.

Allow Multiple Assignments

Jobs can now support multiple assigned Providers for a single shift. Check on the **Allow Multiple Assignments** property if you want to schedule more than one Provider in your Job on any day of the week. Once you enabled this property, you can also configure Assignment Requirements for the Jobs. The **Minimum** Assignments can be set up and used to fill any gaps in the Calendar. Additionally, it is important to limit the **Maximum** Assignments to prevent the scheduler from exceeding each user's defined settings.

Customize Provider Colors

You can now customize the color for each Provider that will be displayed on the Calendar. Pick your preferred color from the color grid when adding a new Provider, or by navigating to the **Properties** tab of any existing Provider. To add or edit Providers, navigate to **Settings > Provider List**.

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday
Minimum	2	1	1	1	1	1
Ideal	2	1	1	1	1	1
Maximum	3	1	4	1	4	1

Color  A color selection interface with a list of settings on the left and a color grid on the right. The settings are: 'Color' (with a blue square), 'Show Empty Assignments' (checked), 'Allow Multiple Assignments' (checked), and 'Tigerconnect Integration' (unchecked). The color grid is a 6x8 grid of various colors, with a blue square in the 4th row, 3rd column selected. A 'Customize' button is in the bottom right of the grid.

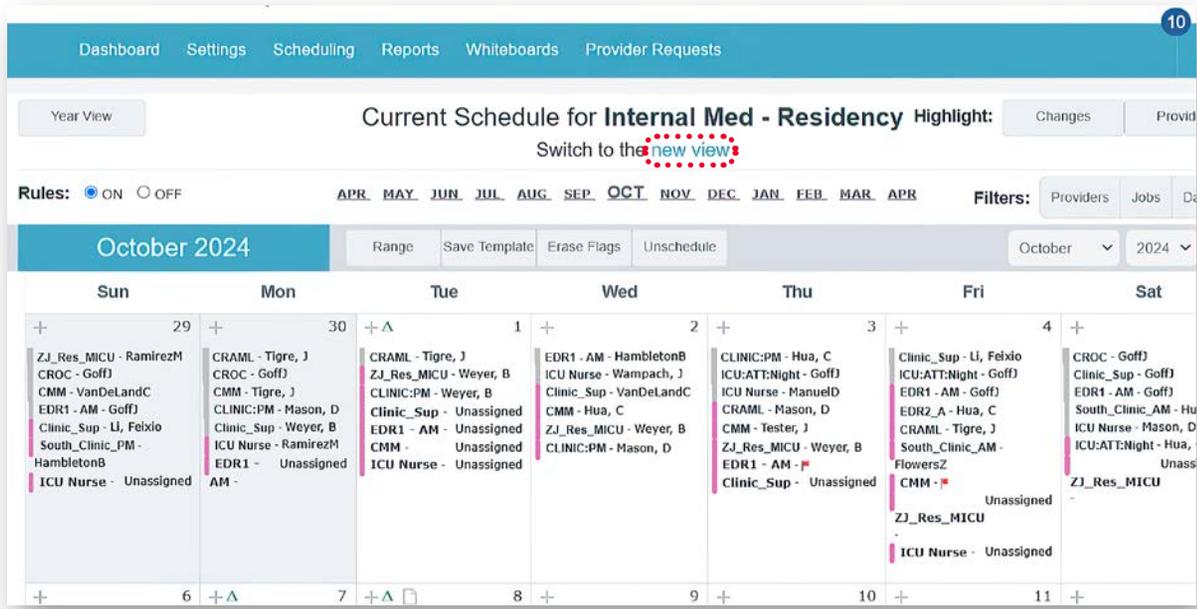


Fig 1

View Your Data in the New Calendar

TigerConnect's Calendar allows you to view Providers' weekly schedules, including their assigned shifts, approved days off and pending time off requests. To access the complete Calendar View, go to **Scheduling > Manual Scheduler > Complete**.

You can navigate to the New Calendar by clicking the link to switch to **new view**. (See Fig 1)

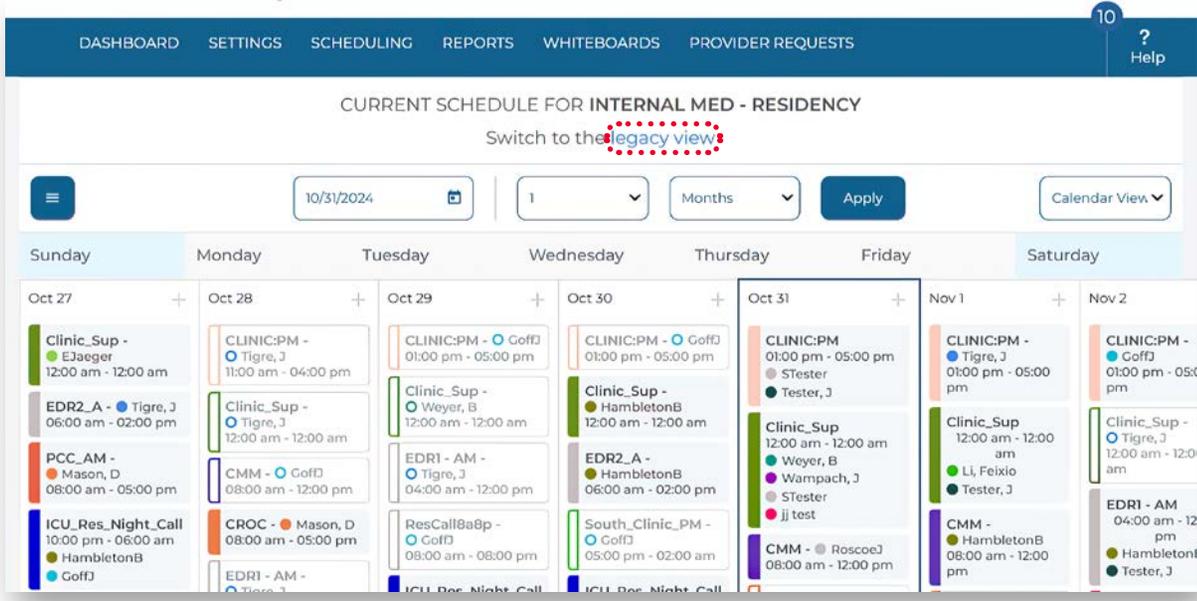


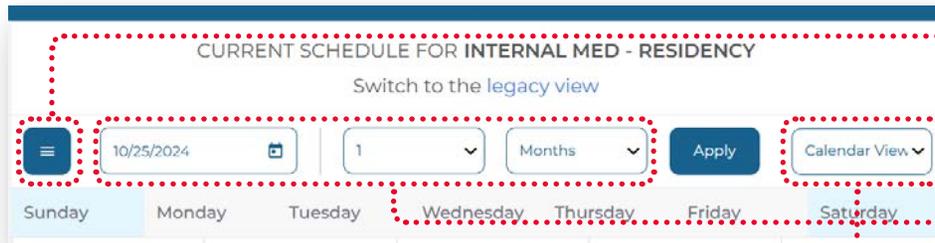
Fig 2

Your Calendar will display one month of data in Calendar View, starting from the current date. Unlike the **legacy view** Calendar, which always begins on the first day of the month, the new Calendar starts from the current date.

To access the Legacy Calendar, click **legacy view** in the header to switch views. (See Fig 2)

Calendar Header

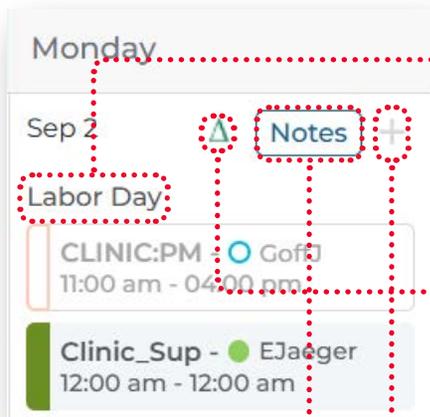
The Calendar Header remains fixed at the top of the page as the user scrolls vertically, and it includes the following features:



- **Left panel button:** Click this button to open the left panel, where you can manage filters, highlights, and settings. The panel also provides links for scheduling operations like range scheduling, template creation, undo scheduling, and erase flags.
- **Date selector:** This option allows you to view Calendar data from one day to 13 months.
- **View selector:** The Calendar View selector allows you to switch between Calendar View and List View.

Calendar View

On the Calendar View, each cell displays the 3-letter month abbreviation and day of the month on the left followed by additional elements:



- **Holidays:** They will be labeled with their respective names, for example Labor Day.
- **Track Changes:** A green triangle icon indicates any changes in the schedule for that day. You can click the icon to see the change that was made.
- **Notes:** The Notes icon will appear if any notes have been saved for that day. When you click this icon, you can view and manage notes for the selected date.
- **+**: To manage all assignments for a specific day, click on the + button to open the [Single Day Assignment Window](#).

Wednesday

Sep 25 +

- Clinic_Sup - ○ RamirezM
12:00 am - 12:00 am
- CMM - ● Wampach, J
08:00 am - 12:00 pm
- CROC
08:00 am - 05:00 pm
● ManuelD
● EJaeger
- IMB
Split Shift
● FlowersZ
12:00 am - 06:00 am
● VanDeLandC
06:00 am - 12:00 am
- ICU Nurse - ● Li, Feixio
10:00 am - 06:00 pm
- EDR1 - AM - Unassigned
04:00 am - 12:00 pm
- ZJ_Res_MICU - Unassigned
10:00 am - 08:00 pm
- RoscoeJ - adm
- PTO (Pending) - GoffJ

Assignments will appear below the header, organized by priority and abbreviation, showing Providers and split shifts. Job start and end times can be optionally displayed based on scheduler settings.

- **Draft assignments:** This assignment has an open left rail and a faded font compared to published assignments with circles on the Provider's color.
- **Published assignments:** It will display a filled left rail with circles in the Provider's color.
- **Multiple assignments:** Jobs that allow the multiple assignments will show each Provider working the Job on that day.
- **Split Shifts:** Displays each Provider assigned to the split. To learn about split shifts see the [Split Shift Guide](#).
- **Unassigned Jobs:** The Jobs marked with the **Show Empty Assignments** option will display if they are unassigned on the current date.
- **Approved Days Off:** Displays as a solid gray bar with the day off abbreviation.
- **Pending or Provisional Providers Requests:** Show as a faded bar with Provider and request type details, which you can click to **Approve** or **Decline** the request.

List View by Job and Provider

This **List View by Job** offers a spreadsheet layout. The header includes fixed day and date columns, similar to the Calendar View. You can click on the date string to access the Single Day Assignment window.

Jobs are listed in the fixed left column, ordered by priority and abbreviation, with assignments in the scrollable right area.

Each cell can contain the following content:

- **No Providers:** Jobs that can be assigned will show No Providers in faded text, which can be clicked to open the Single Assignment Window and assign a Provider.
- **Unavailable:** This label will be displayed on any date when the Job cannot be scheduled based on the Job setup.
- **Unassigned:** The Unassigned label will appear for Jobs that have the Show Empty Assignments feature enabled but have not yet been scheduled.
- **Assigned Jobs:** It will display Single, Multiple or Split assignments. Click on any assigned Provider name to access the [Single Assignment Window](#) and Edit, Delete or Publish an assignment.

Job	Thu Oct 3	Fri Oct 4	Sat Oct 5	Sun Oct 6	Mon Oct 7	Tue Oct 8
CLINIC-PM	01:00 pm - 05:00 pm Hua, C Mason, D STester	CoffJ 01:00 pm - 05:00 pm	Unavailable	01:00 pm - 05:00 pm Hua, C VanDeLandC	01:00 pm - 05:00 pm FlowersZ Hua, C	01:00 pm - 05:00 pm STester CoffJ
Clinic_Sup	No providers	Unassigned	Unavailable	12:00 am - 12:00 am FlowersZ FlowersZ Hua, C	FlowersZ 12:00 am - 12:00 am	Tigre, J 12:00 am - 12:00 am
CMM	FlowersZ 08:00 am - 12:00 pm	Unassigned	No providers	Unavailable	Li, Felixo 08:00 am - 12:00 pm	FlowersZ 08:00 am - 12:00 pm
CRAML	Mason, D 08:00 am - 05:00 pm	Tigre, J 08:00 am - 05:00 pm	jj test 08:00 am - 05:00 pm	Unavailable	No providers	No providers
CROC	No providers	No providers	CoffJ 08:00 am - 05:00 pm	Hua, C 08:00 am - 05:00 pm	Hua, C 08:00 am - 05:00 pm	No providers
EDRI - AM	Unassigned	CoffJ 04:00 am - 12:00 pm	CoffJ 04:00 am - 12:00 pm	04:00 am - 12:00 pm Tigre, J CoffJ	Tigre, J 04:00 am - 12:00 pm	Tigre, J 04:00 am - 12:00 pm
EDR2_A	No providers	No providers	No providers	CoffJ 06:00 am - 02:00 pm	No providers	CoffJ 06:00 am - 02:00 pm

This List View by Provider is available on the  icon on the left. Providers are sorted by priority and then by display name.

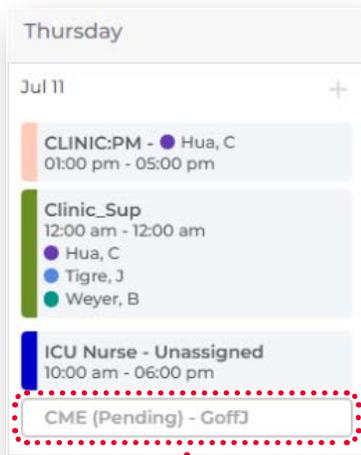
Each cell can contain the following content:

- **No assignment:** Click on any cell with the No Assignments label to open the [Single Day window](#) to create an assignment for the Provider.
- **Provider's assignments:** Display on any day they are scheduled. Click on any assignment to edit or delete it using the [Single Assignment window](#).

CURRENT SCHEDULE FOR INTERNAL MED - RESIDENCY
Switch to the [legacy view](#)

10/25/2024 | 1 | Months | Apply | List View

Provider	Fri Oct 25	Sat Oct 26	Sun Oct 27	Mon Oct 28	Tue Oct 29	Wed Oct 30
Li, Feixio	IMB 12:00 am - 12:00 am	Unavailable	No assignments	No providers	Unavailable	Unavailable
Wampach, J	No providers	Unavailable	No providers	No providers	Unavailable	Unavailable
Weyer, B	Z1_Res_MICU 10:00 am - 08:00 pm	Z1_Res_MICU 10:00 am - 08:00 pm South_Clinic_AM 06:00 am - 04:00 pm	No providers	No assignments	Clinic_Sup 12:00 am - 12:00 am	No assignments
HambletonB	ICU:ATT:Night 08:00 pm - 08:00 am	No providers	ICU_Res_Night_Call 10:00 pm - 06:00 am	Unavailable	ICU_Res_Night_Call 10:00 pm - 10:00 am	ICU_Res_Night_Call 10:00 pm - 10:00 am
Buchanan	CMM 08:00 am - 12:00 pm Clinic_Sup 12:00 am - 12:00 am	No providers	No providers	ICU_Res_Night_Call 10:00 pm - 10:00 am	No providers	Unavailable



Provider Request - GoffJ

[Request](#) [Conflicts \(1\)](#) [Details](#)

Request Status
Pending

Scheduler Comment

Request Type
CME

Rotations
● Cardiology(07/01/2024 - 07/12/2024)

Requested Days
Thursday, July 11th, 2024

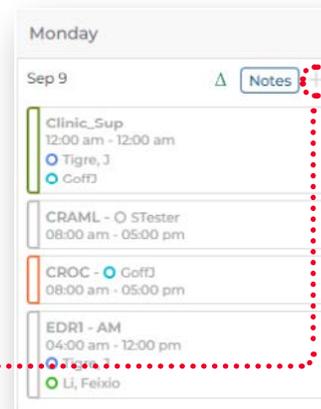
Provider Comment

Days Off and Provider Requests

Days Off and Provider requests will be displayed in the Calendar View and the Provider List View. Any day off or request (including swaps and preferences) with an approved, provisional, or pending status will be displayed. Pending and provisional requests can be opened in a form that will show any potential conflicts with the request and allow the scheduler to update the comments and status. Declined requests do not appear on the Calendar.

Notes

You can use notes to leave comments and information. You can create a new note by opening the [Single Assignment window](#) and clicking on **+** followed by **+Add Note** option.



Manual Scheduling | Monday, 09/09/24

+ Add Note Notify of Changes Track Changes

Job	Provider(s)	Shift Time	Splits	Max	Type	Flag	Status
CLINICPM	Multiple providers (0)	11:00 am - 04:00 pm	-	4	Work	🚩	...
Clinic_Sup	Tigre, J - Jorge Tigre	12:00 am - 12:00 am	-	1	Call	🚩	Draft
CMM	Select Provider	08:00 am - 12:00 pm	-	1	Work	🚩	...
CRAML	STester - Session Tester	08:00 am - 05:00 pm	-	1	Resident	🚩	Draft
CROC	Multiple providers (1)	08:00 am - 05:00 pm	-	2	Call	🚩	Draft
EDR1 - AM	Multiple providers (2)	04:00 am - 12:00 pm	-	2	Resident	🚩	Draft
EDR2_A	Buchanan - Jeff Res1	06:00 am - 02:00 pm	-	1	Resident	🚩	Published
ICU:ATT:Night	Multiple providers (0)	08:00 pm - 08:00 am	-	3	Call	🚩	...
IMB	Select Provider	12:00 am - 10:00 pm	-	1	Call	🚩	...
MICU R1	Select Provider	12:00 am - 12:00 am	-	1	Call	🚩	...

Monday

Sep 9 Notes

Clinic_Sup
12:00 am - 12:00 am
Tigre, J
Goff

CRAML - O STester
08:00 am - 05:00 pm

CROC - Goff
08:00 am - 05:00 pm

Note

This Note will appear on the Calendar when the Save Note button is clicked because I have "Show in Calendar" option checked below.

The **Notes** icon will appear in the Calendar header on any day with a saved note.

You can enter as many notes as you like for a single day. Notes can only include text and will appear on the Calendar if the **Show in Calendar** checkbox is checked.

Edit or **Delete** notes you already saved.

Cancel or **Save** notes you are adding or editing.

Notes | Monday, 09/09/24 X

This Note will appear on the Calendar when the Save Note button is clicked because I have "Show in Calendar" option checked below.

Show in calendar

Cancel Save Note

Saved Notes (1)

Name: Beatriz

This Note will not show on the Calendar because I did not check "Show in Calendar" option.

Edit Delete

Left Panels Controls

Filters allow you to display specific data items and hide others. Through the  button, you can apply filters by Jobs, Providers, and Days Off individually or by type. You can also highlight Providers and change the Calendar settings.

Once a filter has been applied, a filter icon will appear in the Calendar header to indicate the number of filters currently engaged. The scheduler can click on the filter indicator to open the left menu and view the count of records being displayed by each filter. To clear a filter and reset the Calendar to display all data, simply click the **X** button to the left of the filter name.

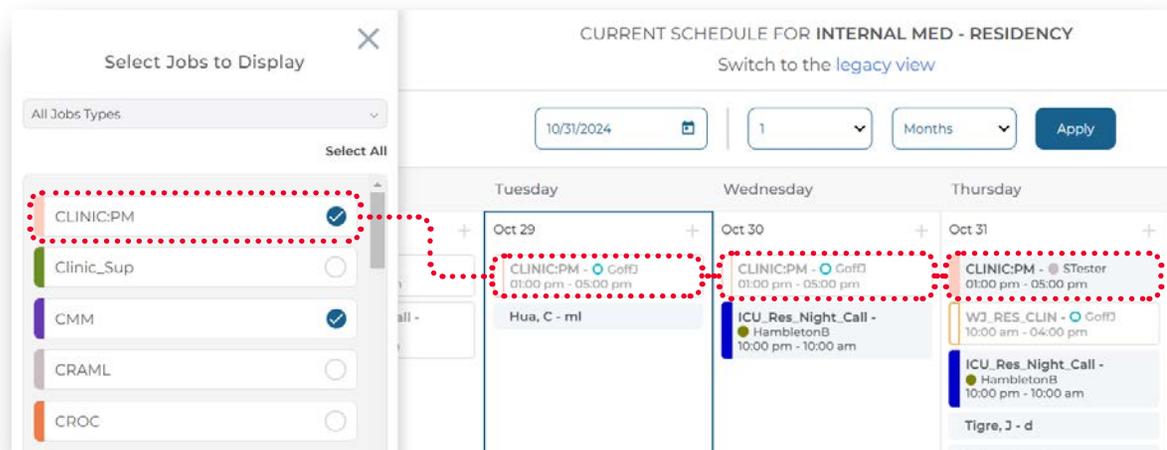


Filters

When a filter is applied, any records that are not checked in the list will be hidden in the display. The behavior is slightly different for each filter type and Calendar View.

Providers:

- Any unchecked assignments for Providers will not display on the Calendar View or List View by Provider.
- Any assignments for Providers that are checked will be displayed on Calendar. The scheduler can click on any filtered assignment to view the assigned Provider.



Jobs:

- Any unchecked Jobs will not display on the Calendar View or List View by Job.
- Any checked assignments for Jobs will be displayed on the Calendar. The scheduler can view any filtered assignments by clicking on them.

Days Off:

When using this filter any unchecked days off will be hidden on the Calendar or List View.

Missing Assignments:

By enabling the **Missing Assignments** filter, you can see where staffing is lacking. It only displays missing assignments for Jobs with the **Show Empty Assignments** function enabled.

Note: To display the Missing Assignments for Jobs you must check the Show Empty Assignments on **Properties** tab available on **Settings > Setup Information > Jobs**.

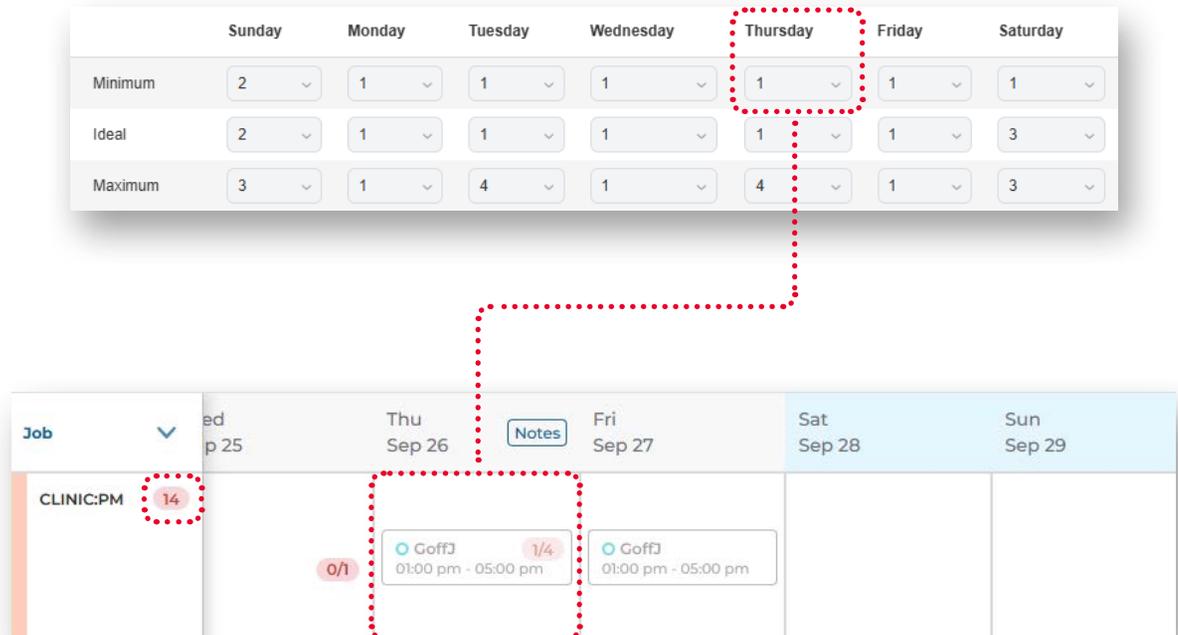
The screenshot displays a scheduling interface for 'INTERNAL MED - RESIDENCY'. On the left, a 'Filters' sidebar is open, showing 'Days Off (66)' and 'Missing Assignments' selected with red dotted boxes. The main calendar view shows dates from Oct 15 to Oct 24. On Oct 15, there are missing assignments for 'ZJ_Res_MICU - Unassigned' (10:00 am - 08:00 pm) and 'ICU Nurse - Unassigned' (10:00 am - 06:00 pm). On Oct 22, there is a missing assignment for 'ICU Nurse - Unassigned' (10:00 am - 06:00 pm). Other days show assigned shifts for 'CMM' and 'ICU Nurse'.

Day	Assignment	Time
Oct 15 (Tuesday)	ZJ_Res_MICU - Unassigned	10:00 am - 08:00 pm
Oct 15 (Tuesday)	ICU Nurse - Unassigned	10:00 am - 06:00 pm
Oct 16 (Wednesday)	CMM - Unassigned	08:00 am - 12:00 pm
Oct 16 (Wednesday)	ICU Nurse - Unassigned	10:00 am - 06:00 pm
Oct 22 (Tuesday)	ICU Nurse - Unassigned	10:00 am - 06:00 pm
Oct 23 (Wednesday)	CMM - Unassigned	08:00 am - 12:00 pm
Oct 23 (Wednesday)	ICU Nurse - Unassigned	10:00 am - 06:00 pm
Oct 24 (Thursday)	ICU Nurse - Unassigned	10:00 am - 06:00 pm

Highlightings

Use the Highlighting options to emphasize Providers, Changes or Understaffed Jobs. By using this filter, you can:

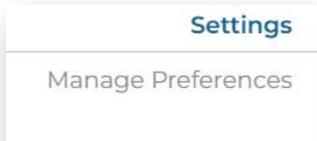
- Click the **Highlight Providers** option and select the Providers you want to highlight. You can optionally use the Provider Type filter to limit your selections.
- Enable the **Highlight Tracked Changes** option to highlight any assignments that have changed, which will be marked with the Green Triangle  icon.
- The **Highlight Understaffed Jobs** option is only available in the Jobs List View. Enabling this highlight will hide any Jobs that do not Allow Multiple Assignments. Any days that are understaffed based on the **Minimum** daily assignment requirement will be highlighted with a red bubble indicating the number of current vs minimum required assignments. Each Job on the left rail will show the total number of days in the selected date range that are understaffed and will adjust in real time as you make scheduling updates.



The screenshot illustrates the highlighting options in a scheduling interface. At the top, a table allows users to set Minimum, Ideal, and Maximum assignment requirements for each day of the week. The Thursday column is highlighted with a red dotted box, and a red dotted line connects it to a job card below. The job card shows a 'CLINIC:PM' job with a red bubble containing '14' in the left rail. The job card also shows a red bubble containing '0/1' on Thursday, Sep 26, and a red bubble containing '1/4' on Friday, Sep 27, indicating understaffing. The job card also shows a 'Notes' button and a 'GoffJ' provider assignment for 01:00 pm - 05:00 pm on both Thursday and Friday.

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Minimum	2	1	1	1	1	1	1
Ideal	2	1	1	1	1	1	3
Maximum	3	1	4	1	4	1	3

Job	Sep 25	Thu Sep 26	Fri Sep 27	Sat Sep 28	Sun Sep 29
CLINIC:PM	14	0/1	1/4		



Manage Scheduling Preferences

- Schedule in Draft Mode
- Display job times
- Apply scheduling assistant rules
- Compact List View
- Calendar View Start Day:

Enable validation criteria that will result in a provider being Unavailable for an assignment:

- Provider has A Conflicting/Overlapping Assignment
- Provider has A Conflicting Day Off

Settings

In **Manage Preferences**, you can customize display options. Each scheduler can configure and save their preferences independently in each of their groups.

- **Schedule in Draft Mode:** This option is only available in groups with Draft Mode enabled. If checked, all new assignments you create on the Calendar will be in Draft Mode. Uncheck this option to create new assignments in Published Mode.
- **Display Job Times:** Select this option to display Job start, end, and Split Shift times in both Calendar and List views.
- **Apply scheduling assistant rules:** Check this option if you would like to run scheduling assistant rules for new assignments you create on the Calendar.

Note: Check the [Getting Started with Rules](#) guide for a comprehensive guide on configuring the scheduling assistant.

- **Compact List View:** When this option is enabled, the Calendar will reduce the size of cells in List View and will not display the Unassigned and No Providers text in the cells.
- **Calendar View Start Day:** This option allows you to set the day on which you want the Calendar to start.

Provider Availability Validation Criteria

The bottom section allows you to control the Validation Criteria that will dictate if a Provider is available or unavailable for an assignment. Each option that you select will be applied to the list of Providers, and you will be able to view the reason(s) why a Provider is unavailable for a specific assignment. If you leave all of these unchecked, then every Provider will show as available for every assignment. View what each criteria mean below:

- **Provider has A Conflicting/Overlapping Assignment:** A Provider will be unavailable on days when they already have a published assignment.
- **Provider has A Conflicting Day Off:** A Provider will be unavailable on days when they are approved for a day off.
- **Provider Does Not have The Skills Configured For The Job:** A Provider will be unavailable for any Jobs that require a skill that the Provider is not configured to perform.
- **Provider Is not Enabled For The Job:** A Provider will be unavailable for any Job that is not checked in their list of Enabled Jobs in the Provider setup.
- **Provider Cannot Work With Restricted Co-Workers:** A Provider will be unavailable if any Provider on their restricted co-worker list already has a published assignment on that day.
- **Provider Is Working The Same Job On The Previous Day Or The Next Day:** A Provider will be unavailable so they cannot work the same Job two days in a row.

Calendar View Start Day Sunday

Enable validation criteria that will result in a provider being Unavailable for an assignment:

- Provider has A Conflicting/Overlapping Assignment
- Provider has A Conflicting Day Off
- Provider Does Not have The Skills Configured For The Job
- Provider Is Not Enabled To Work The Job
- Provider Cannot Work With Restricted Co-Workers
- Provider Is Working The Same Job On The Previous Day Or The Next Day

Schedule Management

This section describes tools to help you easily create and manage your schedules using the new Calendar.

Single Assignment Window

For a single assignment, you can assign a Job or Provider on the Calendar. To manage assignments, click any assigned or unassigned cell on the Calendar for the selected Job and date. This allows the scheduler to perform the following operations:

Edits: Create, Update or Delete an existing assignment.

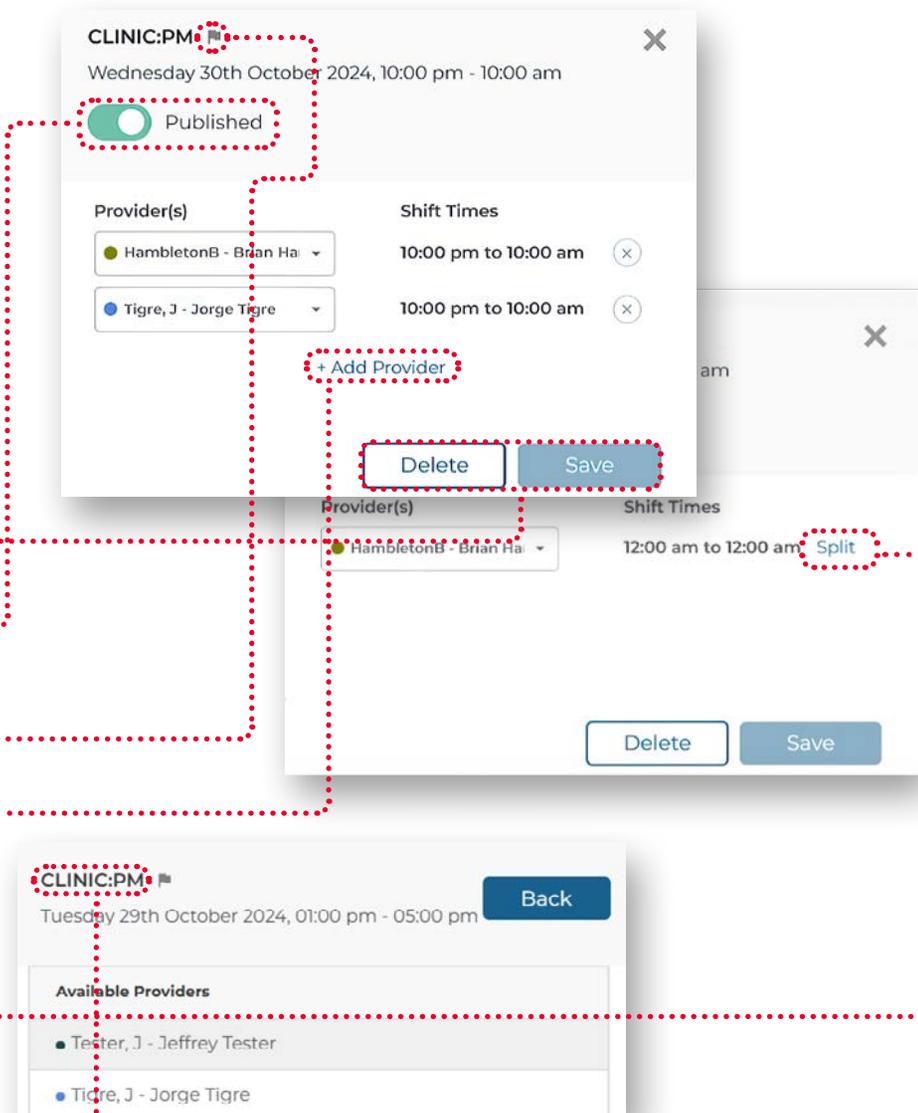
Unpublished/Published: View the published status and optionally toggle the status to publish a draft assignment.

Flags: Click on this icon to Flag  or Unflag any  unassigned Jobs as a reminder for schedulers to review.

+ Add providers: For Jobs that allow multiple assignments, you can add Providers up to the maximum configured for the day, as defined in the Job settings.

Split Shifts: You can split a single shift up to four times and optionally assign a fractional tally value to each split. Splitting is only available for published assignments that do not allow multiple Providers.

Job Name: Click the Job name to view the list of available and unavailable Providers, along with the reason(s) for their unavailability.



Single Day Window

You can schedule any available Job for the selected date. For Jobs allowing only one person per day, a select list for the Provider will appear. If multiple Providers are allowed, you will see the **Multiple Providers** option along with the number already assigned for that day. Check the elements from the Single day Window below:

+ Add Note: To know more about this functionality, check the [Notes section](#).

Job Name and Start Time support sorting.

For Jobs with multiple Providers, the text Multiple providers will display with the number of assignees. Click this text to expand the form and manage assignments. While the form is open, the **Save** button in the header is disabled. To re-enable the **Save** button, you must complete the assignment by clicking **Cancel**, **Apply**, or the **Multiple Providers** text.

Published assignments that do not allow multiple Providers can be split. Splits will display as **Split Shift** with the number of splits, which you can click to expand the form. To save the main form, you must click **Cancel**, **Apply**, or collapse the Split Shift form before the **Save** button is re-enabled. Refer to the screenshot below.

Note: Split Shifts are not supported for draft assignments.

Job	Provider(s)	Shift Time
CRAML	Tigre, J - Jorge Tigre	08:00 a
CROC	Multiple providers (1) >	08:00 a
EDRI - AM	Multiple providers (0) >	04:00 a
EDR2_A	Select Provider	06:00 a
ICU:ATT:Night	Multiple providers (0) >	08:00 p
IMB	Split shifts (3) >	12:00 a
MICU R1	Select Provider	12:00 a
ResCall8a8p	Select Provider	08:00 a

The screenshot shows a control panel at the top with two checkboxes: "Notify of Changes" and "Track Changes", followed by "Cancel" and "Save" buttons. Below is a table with columns: "Time", "Splits", "Max", "Type", "Flag", and "Status".

Time	Splits	Max	Type	Flag	Status
am - 05:00 pm -	1		Resident	🚩	Published
am - 05:00 pm -	2		Call	🚩	Draft
am - 12:00 pm -	2		Resident	🚩	Published
am - 02:00 pm -	1		Resident	🚩	
om - 08:00 am -	3		Call	🚩	
m - 12:00 am	3	1	Call	🚩	Published
m - 12:00 am -		1	Call	🚩	
am - 08:00 pm -	1		Resident	🚩	

Notify of Changes: Use this to select recipients for email notifications about the published changes you are about to save.

Track Changes: Check this box to log all changes to published events and display a green indicator triangle on the Calendar.

Cancel Button: Cancel all the changes on the form.

Save Button: Save all changes on the form.

Job Type and Published Status support filtering.

The icon menu offers the following actions:

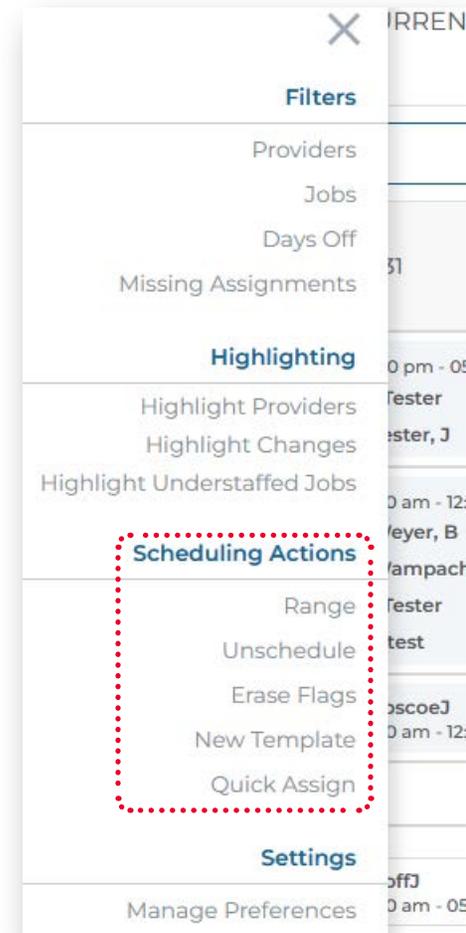
- **Clear:** Deletes all selected Providers for assignment. Note that you will still need to Save the form to commit the deletion.
- **Split Shift:** Expand the form to split a published assignment.
- **Publish:** Publish a draft assignment.

Flag or unflag an unassigned Job by clicking on the icon (save not required).

Scheduling Actions

This section describes tools to help you easily create and manage your schedules using the New Calendar:

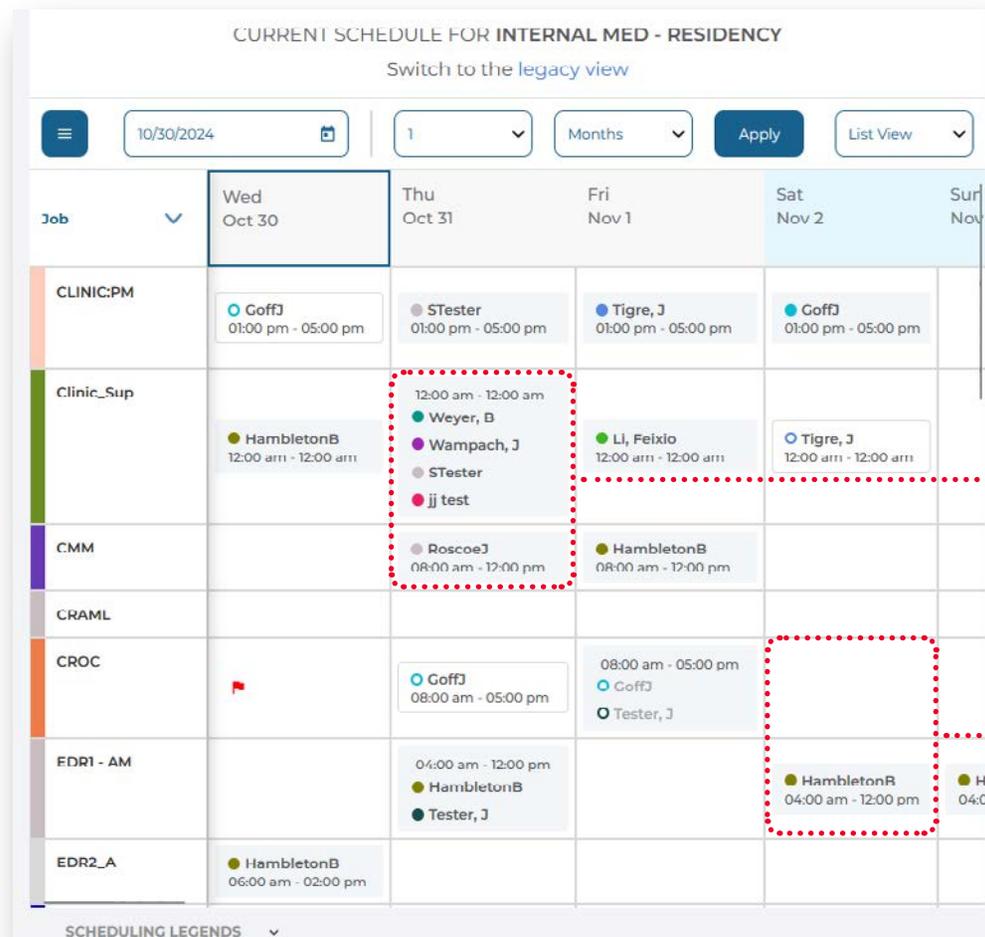
- **Range:** This option allows you to schedule a selected Job for consecutive days while still respecting daily Provider limits and constraints. Enter the **Start Date** and **End Date**, select the **Job** to schedule, and press the **Next** button to select a **Provider** to assign.
- **Unschedule:** This option allows you to unschedule multiple Jobs and Providers simultaneously, whether they are **Draft** or **Published** events. You can also **Preserve Holidays** or **Do Not Preserve Holidays** from the Calendar and select the **Days of the Week** between the specified **Start Date** and **End Date**.
- **Erase Flags:** By selecting this option, you can delete all flags on the Calendar for the specified **Start Date** and **End Date**, as well as for the selected Days of the Week, Holidays, and Jobs.
- **New template:** This option allows you to save and reuse a specific schedule, making it easier to replicate. To learn more about using Templates, refer to the [Template Scheduler Guide](#).
- **Quick Assign:** This feature allows you to rapidly create and delete assignments for a selected Job or Provider. Quick Assign is only available in the List Views. Refer to the Quick Assign section below for details.



Quick Assign

If you select **Quick Assign** while in the Jobs List View, the right panel will expand and list all Providers in the schedule. Click on the Provider you wish to use for the Quick Assign Mode:

- With a single click on any available and unassigned Job you can assign your selected Provider. If a Job allows multiple Providers and has not reached the maximum for the day, you can single click on the cell to add your Provider to the assignee list.
- Any existing assignments for your selected Provider can be single clicked to delete the assignment.



Change your selected Provider to Quick Assign Mode by clicking the **Change Quick Assign Provider** button.

As you are scheduling in Quick Assign Mode, the number of assignments you have created will be incremented.

Any assignments that violate your validation criteria will be listed in the Violations section. Each violation represents an assignment that your Quick Assign Provider is unavailable to perform based on your Validation Criteria settings. Expand the section to review each assignment that you made and the reasons that triggered the violation. Click the **Delete** option for any violation to immediately revert the assignment.

The screenshot shows the 'Quick Assign' interface. At the top, there is a 'SIDENCY' header, a dropdown menu, an 'Apply' button, and a 'List View' dropdown. Below this is a 'Quick Assign' section with a close button (X). The main area displays 'Quick Assign mode active for:' with a radio button selected for 'Tester, J' and a 'Change Quick Assign Provider' link. Below that, it shows 'Number of assignments' as '3'. A 'Violations (1)' section is expanded, showing a violation for 'CLINIC:PM Thursday 31st' with the reason 'Provider has a conflicting day off' and a 'Delete' button. An 'Undo All Violations' button is also visible.

Once you have finished your Quick Assign session, click the **X** button to exit Quick Assign mode. If you switch to another view, the Calendar will automatically exit Quick Assign mode.

Note: When Draft Mode is selected in your **Settings** all new assignments you create will automatically be in Draft Mode.

If you want to delete all assignments that are in violation, click the **Undo All Violations** button.