ONCALL SCHEDULER

The following guide will walk you through the basics of using the OnCall Scheduler to view, update, and change on call information.

VIEWING THE O/C

1 If the OnCall window is not already displayed (or has been closed), press Alt+C to open it.
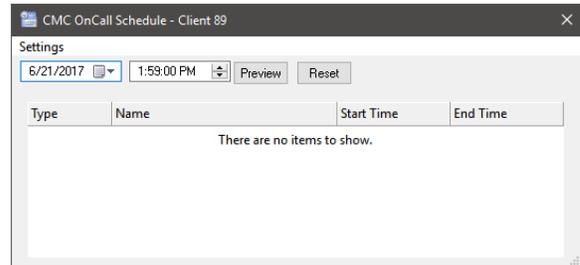
2 If you need to view the on call information for any time other than the present, use the date and time fields to specify the time needed, and click 'Preview'. Remember that most on call shifts don't start until the office closes, so during office hours the scheduler will often be 'empty' – if you need to see who will be on call that evening, you'll have to preview a time after the office closes.
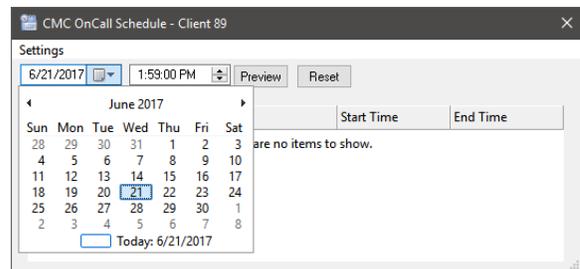
CHANGING THE O/C ("OTF" CHANGES)

1 On The Fly or "OTF" changes are necessary whenever the client notifies us of a change after the schedule has already been entered. To make OTF changes, select 'Assignments' from the Settings menu of the OnCall Scheduler window to open the Assignments window.
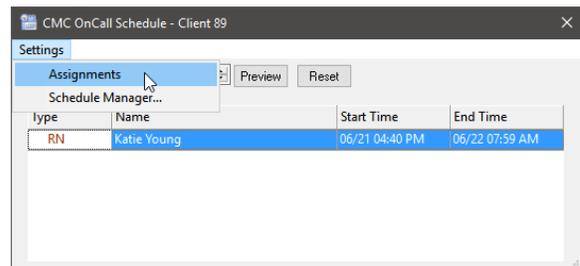
2 From the calendar in the center of the Assignments window, choose the day that needs to be changed.
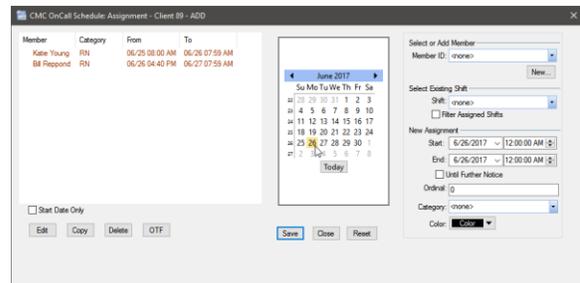
3 From the list of assignments in the left side of the Assignments window, choose the assignment that needs to be changed, and click the 'OTF' button. Be aware that every assignment that overlaps with that date will be shown in the list, so most days will have at least two people listed – the person that was on call before the office opened, and the person going on call when the office closes. Be sure to select the right one.
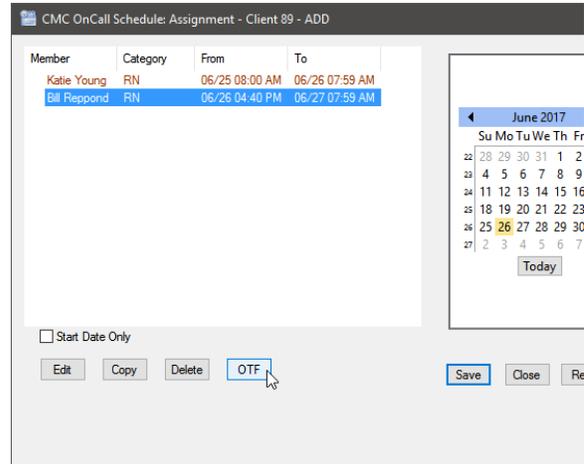
4 In the OTF window, select the new O/C from the Member list in the 'Covering' section, and enter your 'per' in the Notes field. If you need to adjust the time range (for instance, a doctor told you his PA was taking his calls for the next three hours only) you can do so. When you're finished, click OK, then click the 'Close' buttons in the OTF window and the Assignments window.
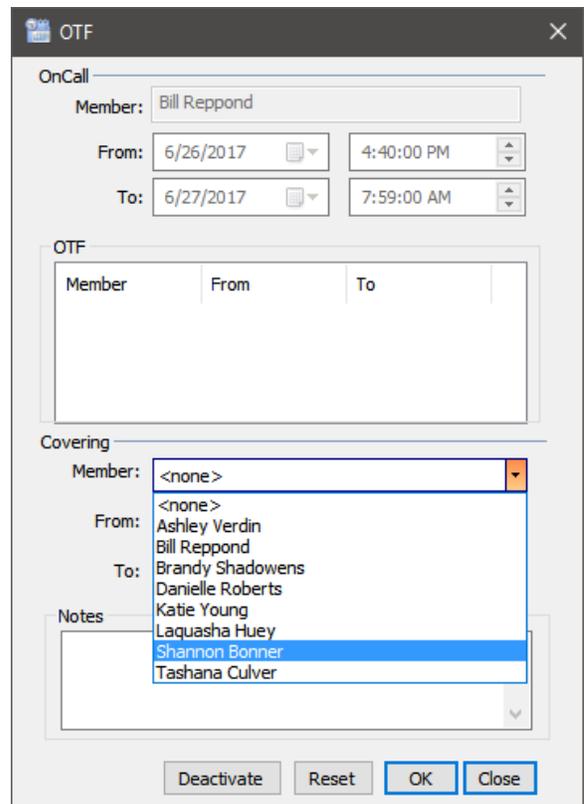
5 If you'd like to verify your change, select the affected time range with the preview function. Assignments that have been changed OTF will display with a blue box next to them.
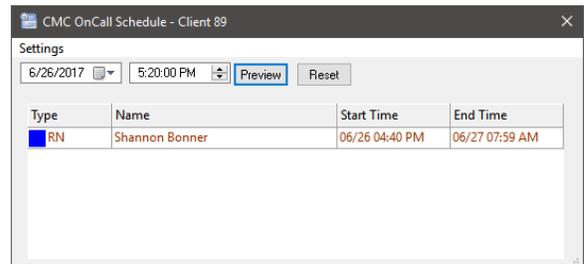
6 If you need to deactivate an OTF change (because, for instance, an OTF change was entered in error, or we find out later it was only for a short amount of time), follow steps 1 through 3 to open the OTF window, then select the OTF assignment from the OTF section, and click the 'Deactivate' button.

ENTERING THE O/C SCHEDULE

1 Once a month, or however often the client sends us an O/C Schedule, we'll need to enter it in the OnCall Scheduler. Open the Assignment window, and then from the calendar in the center, select the first date shown on the OCS they sent us.
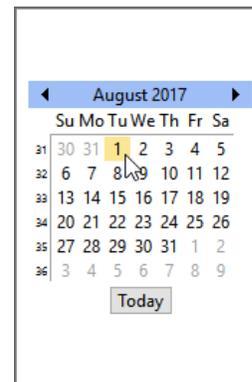
2 On the right side of the Assignment window, select the person that will be on call that day.

3 Then choose the shift they're assigned to – most clients will have only one shift, but accounts that have multiple on call categories that start and end at different times may have more than one.

4 If this client has multiple O/C categories (for instance, 1ST and B/U, PT and ALL OTHERS, or PARTS and SERVICE), be sure and select which category this person is on call for.

5 Click the 'Save' button. In the note box that appears, you can either enter 'per OCS', or leave it blank, then click 'OK'. Repeat steps 1-5 for each day represented on the OCS.