



EMERGHUB



ONCALL USER GUIDE

Overview

OnCall is EmergHub's schedule management feature that can be used to automatically reach the currently scheduled on call personnel at a facility, ensuring you have someone available to respond to emergencies at all times. If the on call staff member cannot be reached at any given time, a fallback number can be specified to provide users with assistance.

The OnCall feature allows you to create any number of contact groups and helps you to determine whether there are any gaps in your scheduling, providing alerts whenever there is no one scheduled for a particular shift. In the case of an illness or other unforeseen absence, the feature also allows you to override the current OnCall schedule to skip or replace that particular team member.

OnCall Dashboard

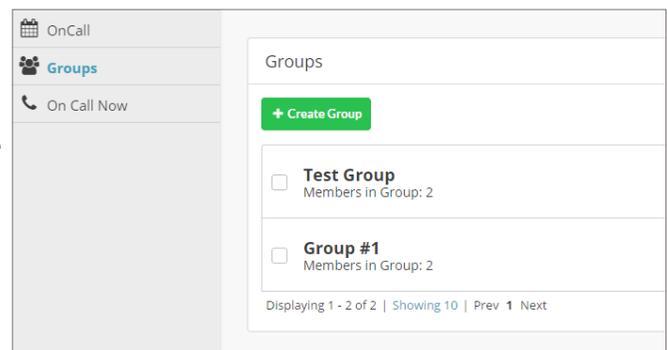
The OnCall Dashboard can be accessed through the top bar of the EmergHub platform in the Applications dropdown menu under OnCall. On the far left of the screen you will see a menu containing three different tabs that make up the module. OnCall is the first of these tabs. The OnCall page displays a calendar where you can see the scheduled on call shifts of your various personnel, with the ability to view the details of each shift and the staff member scheduled as well as the ability to schedule new members and override certain members' shifts if necessary.

Choose Group

When arriving at the OnCall page for the first time, you will see an empty calendar indicating that there are "No Groups Found." In order to view existing shifts, you must first choose an OnCall group.

A group is essentially an ensemble of staff whose members are required to be on call at the same facility or for the same event. **To choose a group to view the OnCall schedule for:**

- Locate the Choose a Group dropdown menu that appears at the top right corner of your screen, underneath the black toolbar
- Click on the dropdown which will bring up a list of all the groups that you have permission to view and/or edit the on call schedules for
- Select the group that you wish to view the schedule for and it will bring up a calendar with all of the scheduled shifts in that particular group



If there are no groups available in the dropdown menu, this means that you have not created any and there is no schedule to display. In order to create a group, you must proceed to the Groups tab that is located in the menu at the far left of your screen.

Please refer to page 8 for more information on how to create and manage your groups.

OnCall Calendar

After choosing a group from the dropdown menu, you will see the OnCall calendar appear on your dashboard. The OnCall Calendar provides you with a detailed view of each on call shift scheduled for each day and the staff members who are scheduled for those shifts. The calendar allows you to view the details of each shift and the scheduled on call staff member(s).

The OnCall calendar allows you to:

1 Switch Calendar Display Formats

The OnCall Calendar is able to display dates in three separate formats:

- **Month View:** With this option, the calendar will display date boxes for every day in a given month
- **Week View:** With this option, the calendar will display a breakdown every day of a particular week, hour by hour
- **Day View:** With this option, the calendar will display a breakdown of a single day, hour by hour

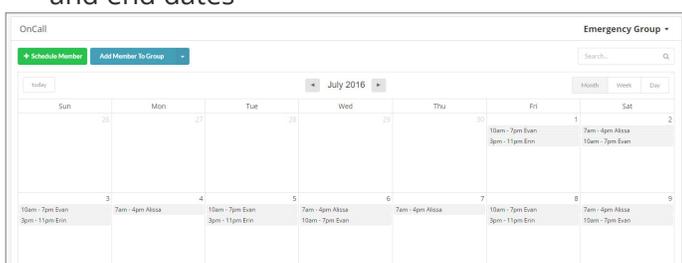
To switch between calendar display formats:

- Navigate to the top right-hand side of your screen directly underneath the search bar and above the calendar grid
- You will find three boxes displaying either Month, Week, or Day
- Click your desired option and the calendar view will automatically adjust to that format

2 View Different Timeframes

To view your on call shifts beginning on different dates than the ones currently displayed:

- Locate the current date selection at the top of the calendar grid in the middle of the page which will display either the month and year, the week range, or the specific day
- On either side of the current date selection you will see two gray arrow buttons
- Click on the left-hand arrow to switch to the previous date or date set
- Click on the right-hand arrow to proceed to the next date or date set
- This allows you to view past and future shifts' start and end dates



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3 Note the Colored Warnings

Each day block in the OnCall Calendar has been given a specific background color depending on the staffing level for that day. If there is a sufficient number of on call shifts scheduled for the day, according to the minimum and ideal staffing thresholds, the day block will be its normal white color.

However, if there is a shortage of on call staff on a particular day, the color of that day block will appear either yellow or red with a small exclamation point (!) in the top left corner of the block.

- **Yellow:** If a calendar day block's background appears yellow, this means that while the minimum on call staffing threshold has been met, the ideal number of scheduled on call personnel has not been met for that shift
- **Red:** If a calendar day block's background appears red, this means that there is neither the minimum or ideal number of on call staff scheduled for this date and that it is strongly recommended that at least the minimum staffing threshold be met

4 Search the Shift Schedule

If you wish to view the details of a particular shift:

- Use the search bar located in the top right-hand corner of the calendar, above the Calendar Display Format options
- Type in the name or title of the shift you wish to view in the search bar
- The results will begin to filter on the calendar automatically

5 Schedule a Member to a Shift

Scheduling members to on call shifts is an integral part of the OnCall module. **There are two ways to assign a member to a shift:**

- Schedule Member button
- Schedule by calendar day

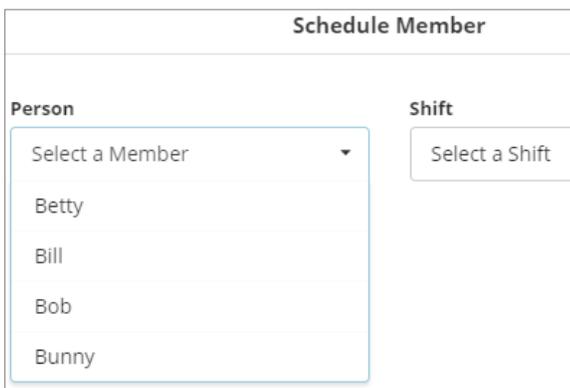
Schedule Member Button

To schedule a staff member for a specific on call shift:

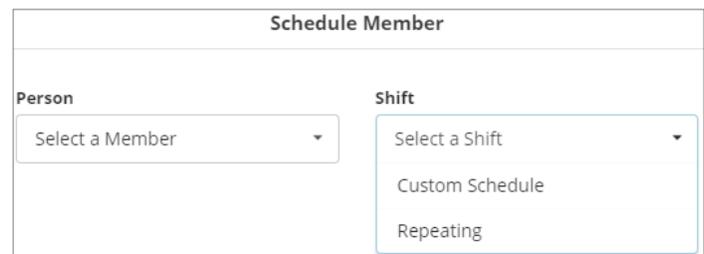
- Navigate to the top left-hand side of the OnCall Calendar screen where you will see the green Schedule Member button
- Clicking this button will open a sidebar on the right side of the screen
- Two dropdown fields requiring information to be selected will appear:

Person: By opening this dropdown menu, a list of available group members will appear allowing you to choose who you would like to assign to the shift

Shift: By opening this dropdown menu, options will appear allowing you to determine what kind of shift you would like to create: Custom Schedule, Repeating, or any shifts you have created specifically for this group



The screenshot shows a sidebar titled "Schedule Member". It contains two dropdown menus. The "Person" dropdown is open, displaying a list of names: Betty, Bill, Bob, and Bunny. The "Shift" dropdown is closed and shows the text "Select a Shift".

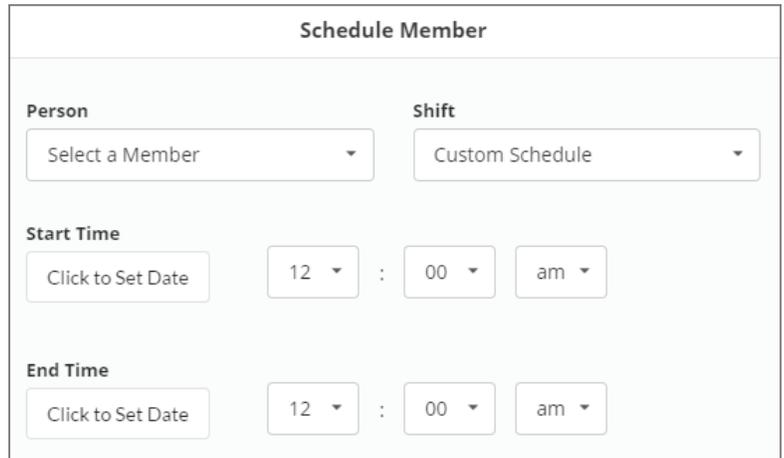


The screenshot shows the same "Schedule Member" sidebar. The "Person" dropdown is closed and shows "Select a Member". The "Shift" dropdown is open, displaying two options: "Custom Schedule" and "Repeating".

1. **Custom Schedule:** This shift option refers to a shift that will only occur once in the calendar, for which you can determine a specific Start and End Time

If you choose this option in the Shift dropdown menu:

- Two sets of fields will appear below in the Schedule Member sidebar to enter the Start and End Times of the shift
- Click the Click to Set Date button on the left side of the Start/End Time field sets, and a calendar will appear where you can type in the date (mm/dd/yyyy) you would like the shift to begin or end, or simply click the desired day block in the calendar to bring up the calendar dropdown
- Click Clear if you do not want to select a date
- Choose your Start/End time selections in the fields to the right of the Click to Set Date fields
- Select your hour, minute, and AM/PM settings via the corresponding dropdown menus
- Click the Create button at the bottom of the sidebar to create the shift and close the sidebar or click Close to close the sidebar without creating the shift

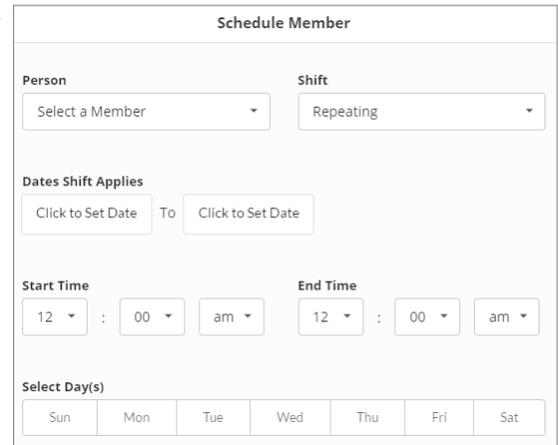


The screenshot shows the 'Schedule Member' sidebar with the 'Shift' dropdown set to 'Custom Schedule'. It features two 'Click to Set Date' buttons, one for 'Start Time' and one for 'End Time'. Each time field has dropdown menus for hour (12), minute (00), and AM/PM (am).

2. **Repeating:** This shift option refers to a shift that will be a regularly recurring shift which will appear on the schedule until the specified End date

If you choose this option in the Shift dropdown menu in the Schedule Member sidebar:

- Determine how long the repeating schedule remains in effect by filling in the Date Shift Applies field that appears below the two dropdown menus
- Select the Click to Set Date fields to bring up a dropdown calendar where you can type in the Start and End dates for the shift. Or, simply choose these dates by clicking the appropriate day blocks in the calendar
- Click Clear to close the calendar dropdown without selecting any dates
- Choose your Start/End time selections in the fields below to the Click to Set Date fields. Select your hour, minute, and AM/PM settings via the corresponding dropdown menus
- Click on the days of the week you would like your shift to apply to in the Select Day(s) field
- Once a day is selected the box will turn a darker gray. To deselect a particular day, click the box again and the color will revert to the original light gray
- Click the blue Create button at the bottom of the sidebar to create the shift and close the sidebar, or click Close to close the sidebar without creating the shift



The screenshot shows the 'Schedule Member' sidebar with the 'Shift' dropdown set to 'Repeating'. It includes a 'Dates Shift Applies' section with two 'Click to Set Date' buttons. Below that are 'Start Time' and 'End Time' fields with dropdown menus for hour (12), minute (00), and AM/PM (am). At the bottom is a 'Select Day(s)' field with buttons for Sun, Mon, Tue, Wed, Thu, Fri, and Sat.

The shift you have created will now appear in the OnCall calendar.

Schedule by Calendar Day

To schedule members for a particular shift, click on any day in the calendar grid, which will bring up the Schedule Members sidebar.

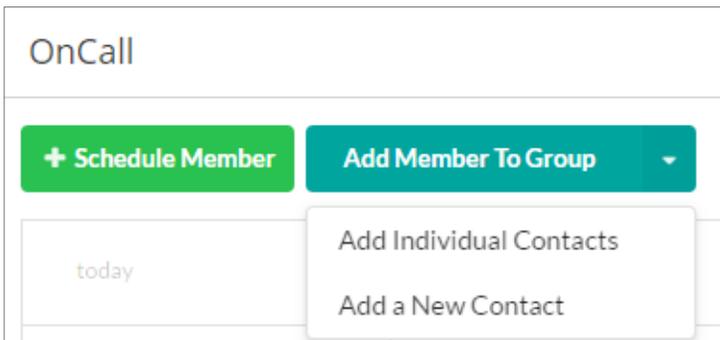
In the sidebar, there are two dropdown fields requiring information to be selected:

- **Person:** By opening this dropdown menu, a list of available group members will appear, allowing you to choose who you would like to assign to the shift
- **Shift:** By opening this dropdown menu, options will appear that allow you to determine what kind of shift you would like to create: Custom Schedule or Repeating

For information on each of these schedule types, please refer to page 4.

6 Add Member to Group

To add a new staff member to a specific OnCall group:

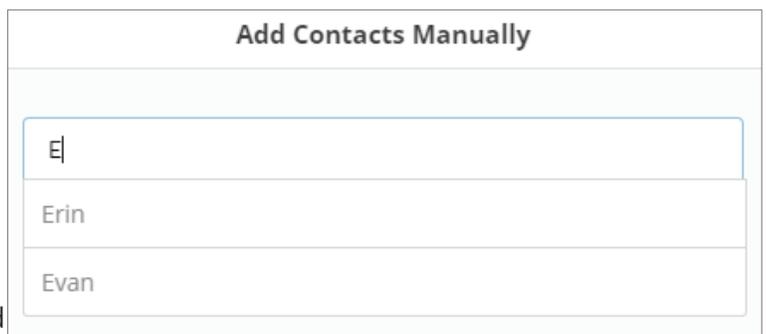


- Navigate to the top left-hand side of your screen where you will see a blue Add Member to Group button located beside the green Schedule Member button
- Click this button and a dropdown menu will appear with two options for how to add members to the group:

1. **Add Individual Contact:** This option allows you to manually choose which contacts in your Contact Manager you wish to add to the group

To do this:

- Clicking this option will cause a sidebar to open from the right side of your screen, where you can type in the name, phone number, or email of the contact you want to add
- As you type in the search bar, results will be filtered
- Click on the name of the contact you wish to add to the group and the contact's name will appear below the search bar
- Continue to add contacts this way without closing the sidebar
- Click the "X" that appears next to the contact's name to remove them from the contact selection
- When finished selecting contacts, navigate to the bottom of the sidebar and click the blue Add Contacts button. Or, click the Cancel button to close the sidebar without adding any contacts to the group





Add New Contact

Name

Email

Phone

Mobile

2. **Add a New Contact:** This option allows you to create a new contact who is not already in your Contact Manager to add to your group

To do this:

- Select this option to open a sidebar to the right of your screen allowing you to enter the name, email, phone number, and/or mobile phone number of the contact in the corresponding fields
- Click the green Create and Add Contact button at the bottom of the sidebar to close the window or click Cancel to return without adding the contact
- As well as being added to the current group, the new contact you added will also be added to your Contact Manager where they will be available to be added to any future group

7 View Event Details

To view the details of each on call shift in any day block in the calendar, click the block on the calendar with the name of the on call member and their scheduled shift time. The Schedule Details sidebar will open to the right of your screen, which will include three items: OnCall group member information, Schedule, and Schedule Override.

- **OnCall Group Member Information:** At the top of the Schedule Details sidebar, you are able to see the information pertaining to the member covering that particular on call shift, **including their:**

1. Name
2. Email
3. Phone number
4. Title

[**Note:** The information will only appear if it is available in the member's personal Contact Manager profile.]

- **Schedule:** Below the Group Member Information, you will be able to view the details of the shift you selected. In this section you will be able to view the Start and End Times of the shift by date and time
- **Schedule Override:** The Schedule Override button allows an administrator to override the selected on call shift either fully or partially by removing the scheduled on call member and replacing them with another, or by removing the member and leaving the shift uncovered
- **Delete Shift:** Below the Schedule Override button, you will see the Delete shift button, which will allow you to remove this particular group member's shift from this day in the OnCall calendar

Event Details

Betty
 betty@example.com
phone
company
title

Schedule

Start: Tuesday, December 13th, 12:00:00 am
End: Tuesday, December 13th, 1:00:00 pm

Schedule Override

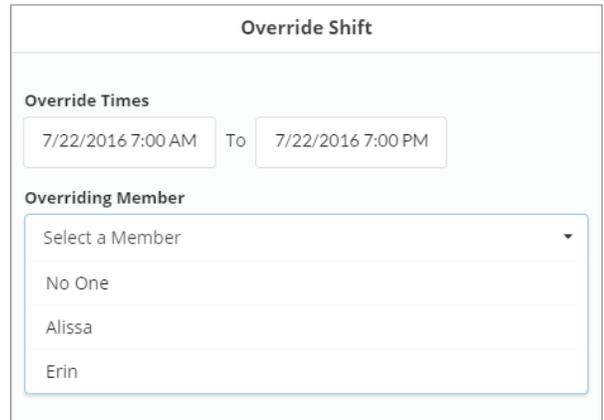
Delete Shift

To override a shift:

1. Click the Schedule Override button and a new sidebar will appear from the right side of the screen
2. Select the time span for which you need a schedule override by clicking on the date fields in the Override Times section and choosing the date and time from the dropdown calendar that appears

[**Note:** By default, the entire length of the shift will be shown in the two Override Times fields, but you can alter the times by clicking on either of the fields and selecting the date and times you need the override to cover using the calendar dropdown.]

3. Choose another member to cover the overridden shift from the Overriding Member dropdown menu that shows the list of available group members
4. There is also the option of selecting “No One” in the dropdown, meaning that if this option is selected, the overridden shift will go uncovered



5. Click the Complete Override button at the bottom of the Override Shift sidebar to implement the override or click Close to close the sidebar, canceling the override

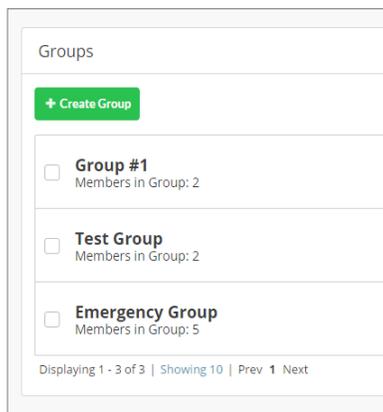
To delete a shift, click on the blue Delete Shift button in the Event Details sidebar.

8 Export the Calendar

To export your OnCall Calendar to an external calendar software:

- Locate the gray Export Calendar button found at the top of your screen to the right of the blue Add Member to Group button
- Clicking this button will bring up a dropdown menu with the names of each group member that has shifts on your calendar. Choose the member that you would like to export the calendar for
- A pop-up will appear that will include a link for the calendar that can be copy and pasted into an external calendar software and will sync the calendar information between the two systems

Groups



In the menu on the far left of your screen in the OnCall module, Groups is the second of three tabs in the list that appears. This tab allows you to create and manage your different OnCall groups.

In the Groups tab, you are able to:

1 View the Lists of Groups

When you enter the Groups tab in the OnCall module, this is where you can view a list of all of your OnCall groups. If there are no groups listed, this means you have not yet created one.

2 Create a New Group

In order to create a new OnCall group, click on the green Create Group button that appears in the top left of the Groups tab in the OnCall module. To learn more about creating a new group, refer to the following section.

3 Navigate Multiple Group Pages

To view a group that does not appear on the first page of the list:

- Navigate down to the bottom of your screen where you will find the page numbers indicating the total number of groups you have created
- Click either the page number you would like to visit, to proceed to the next page of groups or click the Next button which will take you to the next page of groups
- You can also choose how many groups to display at a time by clicking on the “Showing...” link located to the right of the number of displayed groups

4 Edit Existing Groups

Once you have created a group, it will appear in a list below the green Create Group button on the main Groups page.

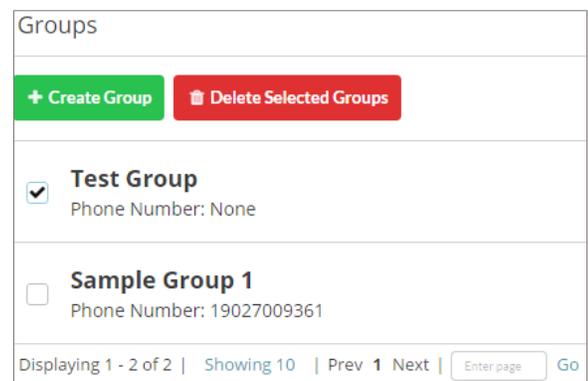
To edit an existing OnCall group:

- Click the blue Edit button located at the far right of the screen across from the corresponding group name
- The Create Group page will open where you are able to modify the group’s settings
- Click Save Group at the bottom of the page to save your edits or click Cancel to return to the main Groups page without making any changes

5 Delete Groups

To delete an existing group:

- Check off the small box that appears to the left of the group name in your list of groups
- A red Delete button will appear next to the green Create Group button, which you can click to delete the group and all its information
- Select multiple groups at once by checking off the boxes of all the groups you wish to delete and click the Delete button



Create a New Group

To create a new OnCall group:

- Click on the green Create Group button that appears at the top left of your screen
- A pop-up window will appear asking you to provide a name for your new group

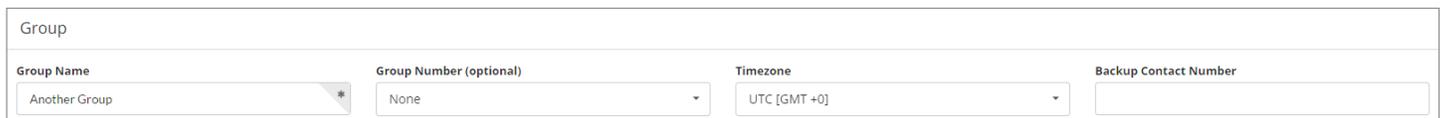
- Click the green Create button to proceed to the group setup page or Cancel to return to the main Groups page without creating a new group.

Group Information

After naming your new group and clicking Create, you will be brought to the group setup page.

The first section at the top of this page asks for four pieces of information:

- **Group Name:** This field is located at the top left of the group setup page and allows you to modify the name you have created for your group. This field must be filled in order to create the new group
- **Group Number (optional):** This field is located next to the Group Name field at the top of the group setup page. This field is where you can choose the phone number via which the scheduled on call member can be reached when they are on duty. Choose the desired phone number from the dropdown menu. This is an optional field
- **Time Zone:** This field is located next to the Group Number field on the top of the group setup page. This is where you can choose which time zone your group will be operating in
- **Backup Contact Number:** This field is located on the top of the group setup page on the far right, next to the Time Zone field. This is where you can enter a backup phone number for the group, which can be used whenever none of the current on call members are able to be contacted via the primary group number. Simply enter the desired backup phone number into the textbox provided. This is an optional field



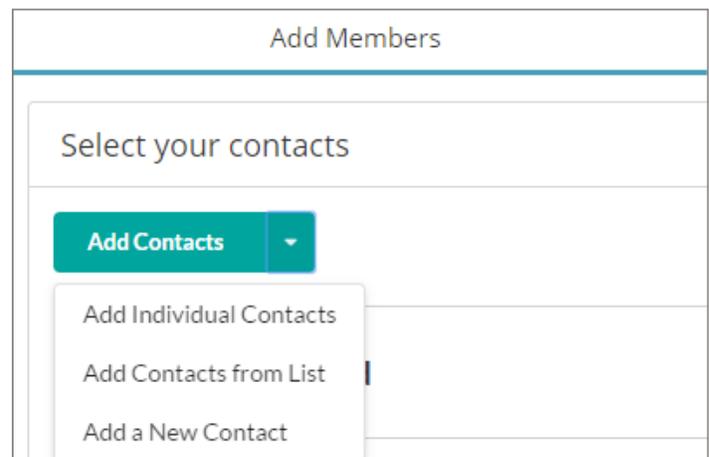
The screenshot shows a form titled "Group" with four input fields: "Group Name" (text input with "Another Group"), "Group Number (optional)" (dropdown menu with "None"), "Timezone" (dropdown menu with "UTC [GMT +0]"), and "Backup Contact Number" (text input).

Add Members Tab

Once you have filled out the Group Information field at the top of the Group Setup page, there are four tabs that are located just below. The first of these tabs on the left side of your screen is the Add Members tab.

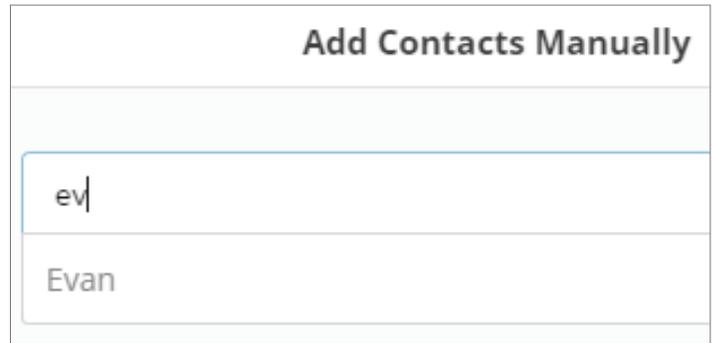
By clicking this tab, a section will appear where you can select the contacts you would like to be a part of your group.

You will see a blue Add Contacts button that, when pressed, will give you three options by which you can select your contacts: Add Individual Contacts, Add Contacts From List, and Add New Contact.



The screenshot shows the "Add Members" tab interface. It features a header "Add Members" and a section titled "Select your contacts". Below this, there is a blue "Add Contacts" button with a dropdown arrow. The dropdown menu is open, showing three options: "Add Individual Contacts", "Add Contacts from List", and "Add a New Contact".

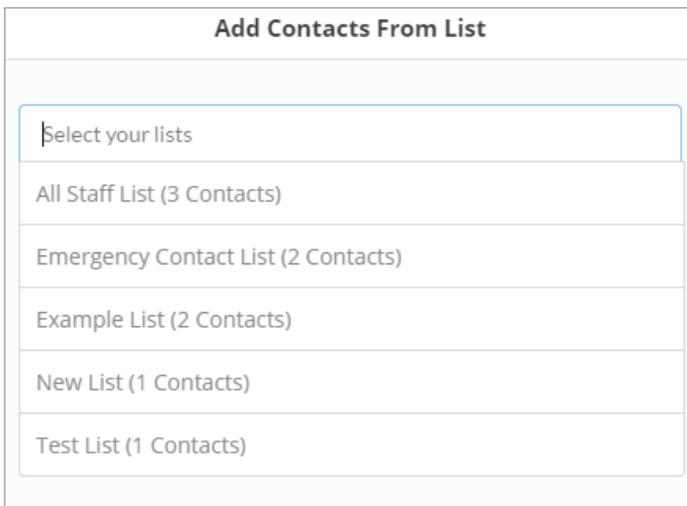
- **Add Individual Contacts:** If you choose Add Individual Contacts, you are able to manually choose which contacts in your Contact Manager you wish to add to the group. Clicking this option in the Add Member to Group dropdown will open a sidebar at the right of your screen where you are able to type in the name, phone number, or email of the Contact Manager contact you would like to add to the group. As you begin typing in the search bar, search results will automatically be filtered, showing matches to the text. Choose the desired contact from the dropdown list of options and their name will appear below the field. Keep adding contacts this way until you have all the contacts you want. Once you have finished, click the blue Add Contacts button at the bottom of the sidebar to add your contacts to the group. Or, click the Cancel button to close the sidebar without adding any contacts.



The screenshot shows a sidebar titled "Add Contacts Manually". At the top is a search input field containing the text "ev". Below the input field is a dropdown list showing a single result: "Evan".

- **Add Contacts From List:** To select your group members based on pre-defined lists found in your Contact Manager, first choose Add Contacts from List from the blue Add Contacts button's dropdown menu which will open a sidebar allowing you to choose a list of contacts from the dropdown field.

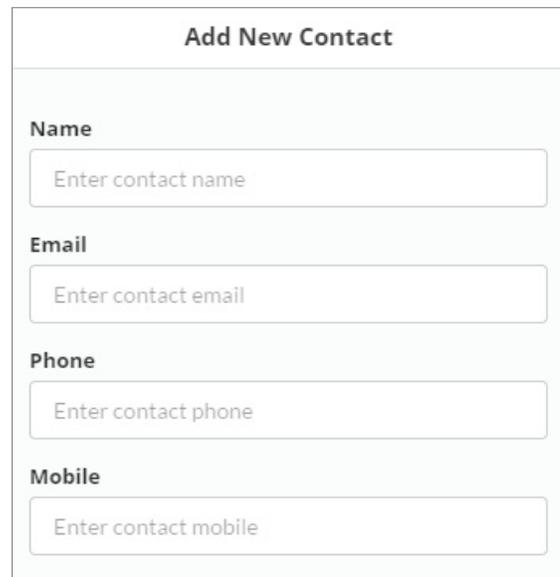
Typing in the name of the list you are searching for will filter the lists automatically. Continue adding lists this way without closing the sidebar and once you have finished, click the blue Add Lists button at the bottom of the sidebar to add the lists. Or click the Cancel button to close the sidebar without adding any lists.



The screenshot shows a sidebar titled "Add Contacts From List". At the top is a search input field containing the text "select your lists". Below the input field is a list of contact lists:

- All Staff List (3 Contacts)
- Emergency Contact List (2 Contacts)
- Example List (2 Contacts)
- New List (1 Contacts)
- Test List (1 Contacts)

- **Add New Contact:** This option allows you to create a new contact who is not already in your Contact Manager to add to your group. Once this option is selected, a sidebar will appear allowing you to enter the name, email, phone number, and/or mobile phone number of the contact in the corresponding fields. Click the green Create and Add Contact button at the bottom of the sidebar to close the window or click Cancel to return without adding the contact. As well as being added to the current group, the new contact you added will also be added to your Contact Manager where they will be available to be added to any future group.



The screenshot shows a sidebar titled "Add New Contact". It contains four input fields with labels:

- Name:** Enter contact name
- Email:** Enter contact email
- Phone:** Enter contact phone
- Mobile:** Enter contact mobile

Add Shifts Tab

Once your contacts have been selected, you must then add shifts to the OnCall calendar for them to be assigned to. To do so, proceed to the Add Shifts tab located the second tab to the left next to the Add Members tab.

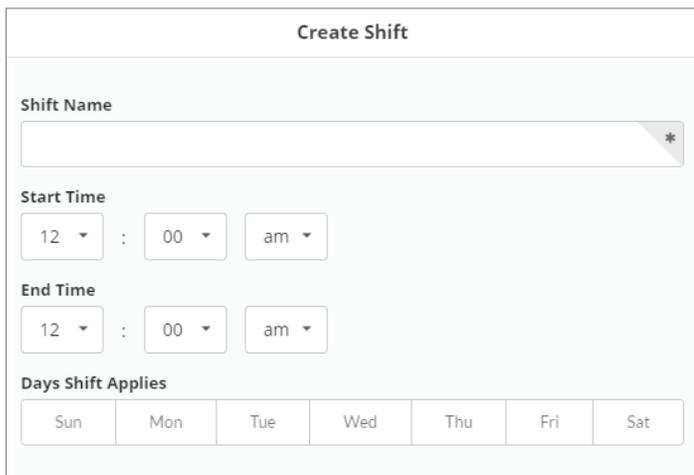
Once you click the tab, a section will appear where you can add and edit your various shifts.

In this tab you can:

1 Add a Shift

To add a new shift to the OnCall schedule:

- Navigate to the green Add Shift button, which is located at the top of the Add Shifts page underneath the Add Members tab on the left side of the page
- Clicking this button will open the Create Shift sidebar on the right-hand side of the page



- Insert a name into the Shift Name field that appears at the top of the sidebar. This is a required action
- Determine your Start and End times for this new shift by using the dropdown menus located below the Name Shift field to choose the hour, minutes, and AM/PM settings for the shift
- Decide which days of the week the shift pertains to in the Days Shift Applies field. Click on the day(s) of the week that you would like to include in the on call shift
- Once a day is selected, the box will turn a darker gray to indicate that the day has been selected. To deselect a particular day, click the box again and the color will revert to the original white color

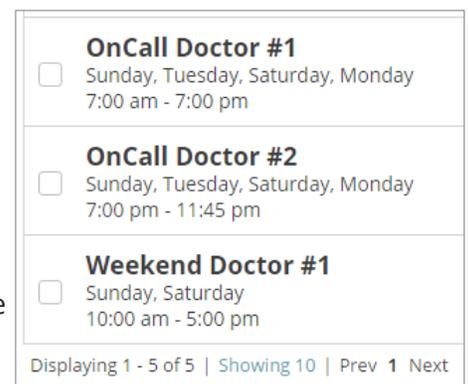
gray to indicate that the day has been selected. To deselect a particular day, click the box again and the color will revert to the original white color

2 Navigate Multiple Shift Pages

Your shifts will appear in a list below the green Add Shift button in the Add Shifts tab.

To navigate through the pages of shifts:

- Look to the bottom of your screen where you will find the page numbers indicating the total number of shifts you have created
- Click either the page number you would like to visit to proceed to another page of shifts or click the Next button, which will take you to the next page of shifts
- You can also choose how many shifts to display at a time by clicking on the "Showing..." link located to the right of the number of displayed shifts



3 Edit Shifts

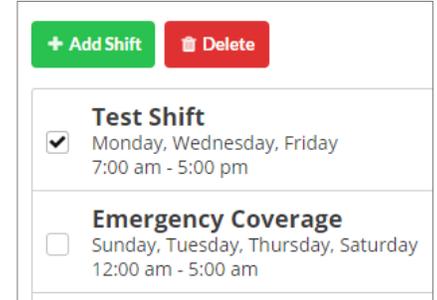
To edit an existing shift:

- Click the blue Edit button located at the far right of the screen across from the corresponding shift name
- The Create Shift sidebar will open where you are able to modify the shift name, the start and end times, and the days of the week to which the shift applies
- Click the Save button to save your changes, or Cancel to close the sidebar

4 Delete a Shift

To delete an existing shift:

- Check off the small box that appears to the left of the shift name in the list
- A red Delete button will appear above the list next to the green Add Shift button that you can click to delete the shift and all its information
- Select multiple shifts at once by checking off the boxes of all the shifts you wish to delete and clicking the Delete button



Thresholds

The third tab in Create Group setup process is the Thresholds tab. This is where you can determine the minimum and ideal staffing levels required for each shift. For example, say you had an on call shift at a hospital where you constantly need certain staffing positions to be available at a moment's notice.

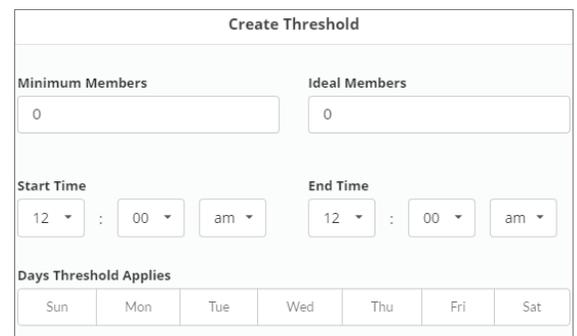
Through the Thresholds tab, for each shift you can assign a specific number of staff members of various specialties to be on call in order to fully cover every situation that may come to pass. You can also edit existing thresholds as needed.

In this tab you can:

1 Add a Threshold

To set the threshold level for a new shift:

- Click the green Add Threshold button that appears on the left side of your screen under the Add Members tab
- A sidebar will show up at the right side of the screen where you can create a new threshold
- At the top of the sidebar there are two fields that ask you for the minimum and ideal number of staff members needed in order to effectively cover the shift
- Use the arrow buttons, which will appear as your mouse hovers over either field, to set your minimum and ideal staffing number
- Determine the Start and End Time of the threshold by selecting the hour, minutes, and AM/PM settings from the corresponding dropdown menus in these fields located below the Minimum and Ideal Member fields



[Note: Start and End times for thresholds may vary from the standard start and end times of the shift depending on the busiest hours of your business or facility. Using a hospital as an example, say the emergency room intake is typically steady during a 5-11:45PM shift except for between the hours of 7 and 9PM where there is a higher intake volume. This is where you can implement a higher on call staffing threshold, and why you can choose a specific Start and End time for this period requiring heavier staffing levels.]

- Once you selected your Start and End times for the shift threshold, you must determine for which days the threshold needs to be applied. Click on the day(s) of the week that you would like to include in the threshold below the Start and End Times fields
- Once you select a day, the box will turn a darker gray to indicate that the day has been selected
- To deselect a particular day, click the box again and the color will revert to the original white color
- Click the Create button at the bottom of the sidebar to activate the threshold for the shift, or, click the Close button to close the sidebar without creating a threshold

[Note: You are also able to create multiple thresholds that overlap with others. However, in doing so, each threshold will stack on top of one another. For example, say you created a threshold for Mondays that required a minimum of two staff members to be on call between the hours of 9AM-5PM, with an ideal of three, and you created another threshold requiring a minimum of one staff member on call Mondays between 2-5PM with an ideal of two. Stacked thresholds means that between the hours of 2-5PM on Mondays, you will now require a minimum of three staff members and the ideal of five.]

2 Edit a Threshold

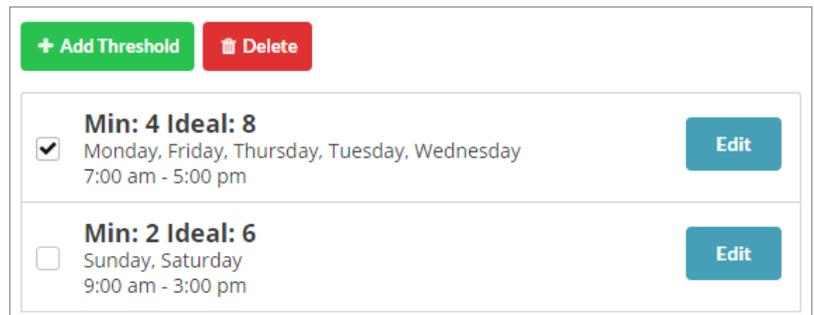
To edit an existing threshold:

- Click the blue Edit button located at the far right of the screen across from the corresponding threshold name
- The Create Threshold sidebar will open where you are able to modify the threshold name, the start and end times, as well as the days of the week to which the threshold applies
- Click the Create button to save your changes or the Close button to close the sidebar without making any changes

3 Delete a Threshold

To delete an existing threshold:

- Check off the small box that appears to the left of the threshold name in the list
- A red Delete button will appear next to the green Add Threshold button which you can click to delete the threshold and all its information
- Select multiple thresholds at once by checking off the boxes of all the thresholds you wish to delete and clicking the Delete button



| | | + Add Threshold | Delete |
|-------------------------------------|---|---------------------------------|------------------------|
| <input checked="" type="checkbox"/> | Min: 4 Ideal: 8 Monday, Friday, Thursday, Tuesday, Wednesday 7:00 am - 5:00 pm | Edit | |
| <input type="checkbox"/> | Min: 2 Ideal: 6 Sunday, Saturday 9:00 am - 3:00 pm | Edit | |

Reminders

The Reminders tab allows you to send a message to your on call staff whenever their shifts are about to begin or about to end. When you click on this tab and enable this function a section will appear where you will be asked how many minutes before the OnCall shift starts/ends that you would like to send the reminder to your contact(s). Simply choose your preferred options from the dropdown menus provided.

[Note: You must select your increment of time in the field provided before another field will appear where you can choose the value. The maximum number of hours you can set a reminder to send before the OnCall shift begins or ends is 24 hours.]

The second section on this page allows you to select the method via which you wish to send the reminder message to your staff. **There are two ways your staff can be contacted:**

Send before OnCall shift starts

Send before OnCall shift ends

- Use Preferred Communication Method
- Choose Communication Method(s)

1 Use Preferred Communication Method

Choosing to send your OnCall reminder via a contact's preferred method of contact means that the reminder will be sent once through the channel that the contact has indicated he or she would like to receive messages from.

Choose Send Preference

How do you want to send to your contacts?

Use Preferred Communication Method (Sends one message type to each contact) Choose Communication Method(s)

[Note: Each contact's preferred method (if known) is noted in their personal Contact Manager profile.]

To choose to send the OnCall reminder to your recipients' preferred communication method:

- Click the radial button found underneath the Choose Send Preference header for Use Preferred Communication Method
- Determine the Fallback Sending Order

Fallback Sending Order

The fallback sending order refers to the order of the channels to which the reminder will be sent to each contact who has NOT indicated a preferred method of contact.

To determine the fallback sending order:

Use Preferred Communication Method

Choose Fallback Sending Order

1

2

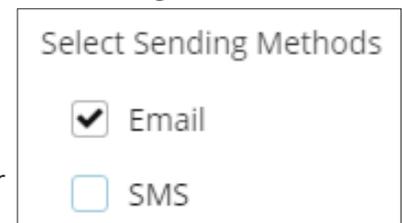
- Click and drag the two options (email and SMS) into the order you would like them to be used. For example, if your fallback sending order is ranked email and SMS, the system will look for an email address in the contact's Contact Manager profile first, and if it finds one, the reminder will be sent via that delivery method. If the system does not see an email address, then it will look for a mobile phone number in the profile to which to send the reminder via SMS
- The system will keep searching in the order of devices you select until it finds a delivery method that it can use to send the reminder to the contact
- Click the blue Save Group button at the bottom right side of your screen to save the group and return to the main Groups page
- Click the Cancel button also located at the bottom right of your screen to return to the main Groups page without saving this current group

2 Choose Communication Method(s)

Choosing to send your OnCall reminder through the Choose Communication Method(s) option means that you are able to manually choose which delivery methods you would like to use to send the reminder to all of your chosen contacts. This option could result in more than one reminder being sent out to a single contact.

To select the Choose Sending Method(s) option:

- Click the radial button that's located underneath the Choose Sending Preference header
- Check off the delivery method(s) you would like to use to send your reminder from the list below
- Depending on how many options you have checked off, each of your contacts will receive the reminder through each of those methods, provided that contact information is available in their Contact Manager profile



Select Sending Methods

- Email
- SMS

[Note: For example, say you checked off both email and SMS as your sending methods of choice. The reminder will then be sent out via email and SMS to every one of your chosen contacts. This means that if a contact has provided an email address and a mobile phone number in their Contact Manager profile, they will then receive the same reminder twice, once via email and again via SMS.]

- Click Save Group at the bottom right side of your screen to save the group and return to the main Groups page
- Click the Cancel button also located at the bottom right of your screen to return to the main Groups page without saving this current group

Once you save your group, you are now able to manage it in the OnCall calendar by selecting it from the Groups dropdown menu.

On Call Now

In the menu on the far left of your screen in the OnCall module, On Call Now is the last of three tabs in the list that appears. This tab provides you with a comprehensive view of each of the members in all of your groups who are currently on call.

The list of current on call personnel is broken down into six columns of information:

- **Name:** The name of the OnCall group member
- **Group:** The OnCall group that the staff member belongs to
- **Start:** The Start Date and Time of the member's on call shift
- **End:** The End Date and Time of the member's on call shift
- **Mobile Number:** The mobile phone number of the on call member (if available)
- **Phone Number:** The phone number (could be the same as the mobile) of the on call member (if available)

| OnCall Now | | | | | |
|------------|----------|-------------------|-------------------|---------------|--------------|
| Name | Group | Start | End | Mobile Number | Phone Number |
| Alissa | Group #1 | Jun 23 2016 10:00 | Jun 23 2016 04:00 | None | None |

Reports (TBA)

Assignments

1. A small hospital requires that there be a doctor and a nurse on call every evening from 5-11:45PM, Monday to Friday. Although if need be, there can be only one person on call per evening.
 - a) Create an OnCall group for this hospital that includes two doctors and two nurses. Also set up the shift, threshold, and reminder for this group.
 - b) In the OnCall Dashboard, schedule a week's worth of OnCall shifts (Monday to Friday) from 5-11:45PM for your new group, with one doctor and one nurse scheduled per day.
2. On Wednesday evening, the scheduled on call doctor has come down with a case of the flu and cannot get out of bed.
 - a) Override this doctor's shift for Wednesday night and replace it with the other doctor in your group.
 - b) What would have happened had there not been another doctor available to cover this shift?
3. A third doctor has come to work at this small hospital and they are able to take on some on call shifts.
 - a) Add a new doctor contact into your OnCall group who exists already in the Contact Manager.
 - b) Schedule this new doctor to a repeating shift schedule for Monday, Wednesday, and Friday from 9AM-5PM for an entire month.
4. What does it mean when a day block in the OnCall calendar has a red-colored background?
 - a) How can you change the background color of the day block back to its normal white?
5. When creating a reminder for an OnCall shift, what does the term "Fallback Sending Order" refer to?