

Call Scheduler™

Version 2.0

Making the Best Use of your Physician's on-call schedule™



Quick Start User Guide

for Providers and other users

On Call scheduling software by Adjuvant Technologies -- www.call-scheduler.com

WELCOME to Call Scheduler®
an on-line scheduling application for on-call scheduling of doctors and other medical practitioners from Adjuvant Technologies. Working with the physician who created this program based on the real-life call scheduling needs of scores of clinics/hospitals throughout the United States, we are taking more than fifteen years of computer-based call scheduling experience to the next level with the powerful graphic and communications capabilities of today's Internet.

Everything you find in this manual is also on our website for your use anytime. This printed manual is for your convenience during training, and for any notes you may need specific to your Group.

The most current manual and updates will always be available on line via the Start Page of the Call Scheduler application so it is easy to find anytime you log in. Also, be sure to check our website for additional news and information:
www.call-scheduler.com.

Thank you for purchasing Call Scheduler!

Sincerely,

The Adjuvant Team
January 07, 2009



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BENEFITS OF USING CALL SCHEDULER™

- Current "real-time" schedule is always available from anywhere with an internet connection, in a central location, in a standard format.
- Telecom centers benefit from immediate access to "live" information. Reduces need for paper faxes. Printing can be done locally.
- Telephone calls and associated interruptions are reduced because data-partners can "help themselves" to relevant information as needed.
- Access is password protected for privacy. Only qualified persons and data-partners can view the calendars.
- No special software needs to be installed or maintained. ASP software means no special system requirements other than an internet connection.
- IT department involvement is minimal since everything is housed on Call Scheduler servers and accessed via the Internet. Upgrades are automatically available to all users.
- Provider Requests can be submitted anytime for Holiday preferences, vacations, swaps and more. Requests are time stamped and archived.
- Email notification of scheduler responses to Provider requests are automatically sent.
- Filter and/or highlight any whiteboard calendar. Filter to view your personal calendar as needed to better visualize your schedule and that of your colleagues.
- All whiteboards can be filtered for better local printing, and faxing needs.
- As a Provider, you can load your personal call schedule into your Palm.
- User Manuals are available on-line for convenient use anytime.

OVERVIEW

You will be using Call Scheduler™ as if it were just another program running on your computer, whatever operating system you are using. However, remember that here you are actually using a computer program remotely over the Internet. The speed and operation of the program depends, therefore, on many factors that may be more related to your Internet connection and browser than to characteristics of the program itself. We suggest you use either Netscape Navigator or Microsoft Explorer for your browser.

You should also be aware of the bottom navigation bar in your browser. If at any time you do not get to see something you expect to see on-screen, check the bottom navigation bar. If the icon for the report or screen is there, just click on it to have it pop up on-screen.

The Call-Scheduler Application uses pop-up windows as part of its basic functionality. To be able to use the program, you will need to disable any anti-popup or ad-blocker software that may be running on your computer. These ad-blockers may have a feature within browsers, toolbars, firewalls, or specific software you have installed on your machine.

The Call Scheduler Website:

(<http://www.call-scheduler.com>)

The Call Scheduler website offers you links to information about Adjuvant, LLC. Feel free to email us using the contact form on-line.

To Log-In Basics:

(<http://login.call-scheduler.com>)

- Your Call-Scheduler Login Username and Password are **case sensitive**. Always type them exactly as specified by your Scheduler.
- Your Scheduler can change your Username and Password for you
- Once a Username has been used, it cannot be used again.
- Your Provider username and password are also needed for the Palm feature.

GETTING STARTED IN CALL SCHEDULER

FAQ Log-in Questions

1. All anti-pop up software MUST be disabled.

- You will not be able to log-on to Call-Scheduler until you do so, or you enable the website call-scheduler.com
- Call-Scheduler uses pop-up windows as part of the program functionality.
- For More anti-pop up information see page xxx

2. AOL users.

- You can use AOL to access the internet as you are usually do. However, after establishing your connection, minimize the AOL window and launch Internet Explorer.
- Call-Scheduler does not support the AOL browser.

3. Your username:password is case sensitive.

- Check to see if your caps are unlocked, and try again.
- Also, most username:passwords do not use any spaces. Please be sure you do not accidentally hit the space bar after entering your username or password.

4. Your information is private.

- No one can access your calendars on line, unless they use a username:password.

5. "Page not found".

- Occasionally, during peak internet usage locally, your login page may seem to be unavailable for a few minutes.
- You should see if you can see other websites. Are they also a problem for you?
- Check to see if you have a live internet connection by going to www.google.com and doing a search.
- If successful, you have a live connection. If not, then you should contact your IT department.
- If the problem continues, please email us contact@call-scheduler.com.

6. Call-Scheduler server reliability.

- If the Call-Scheduler server or connectivity to the internet has a problem at the Call-Scheduler end, alarms go off, and pager-alerts are sent automatically to our support team.
- With this immediate notification system, our team works quickly to restore service to you.
- We have Tier1 Dual Redundant Hi-Speed internet access, RAID systems and daily off-site backup to ensure maximum up-time for Call-Scheduler services.

7. Minimum System Requirements:

- Processor speed: 166Mhz
- RAM Memory: 64 MB
- Monitor: 15" color (at 800x600 or better)
- Modem 28.8KB/sec or faster with phone line connection
- A working Internet connection
- Access to a printer, black and white or color
- Hard drive with at least 10MB free disc space
- Internet browser software such as Netscape Navigator (version 6.0 or newer), or Microsoft Internet Explorer (version 5.0 or newer). Go to www.netscape.com or to www.microsoft.com respectively to download a copy of your choice.
- Adobe Acrobat (version 4.0 or newer). Go to www.adobe.com to download a copy.
- Cookies and Java Script enabled browsers.
- Anti-popup software MUST be disabled or enable it for call-scheduler.com

THE DETAILS

Logging in the First Time:

First, You will need Internet access, and your Username and Password provided to you by your Group Scheduler.

Next, you will need to *disable any anti-popup or ad-blocker software* you may have running, or *enable* your application to allow the website www.call-scheduler.com.

Also, *exit from Outlook* if you have it running, (it interferes with Call-Scheduler). Most users find it easier to work if they have Call-Scheduler running by itself, but it is not necessary.

Then, go to <http://login2.call-scheduler.com> and type in your Username and Password *exactly* as supplied by your Scheduler. It is *case sensitive*, so be careful to enter it properly. Also, do not use any spaces or hit the tab bar.

Click 'Enter', and you should be logged in. You should see the Start Page with Navigation across the top, and a second Red Page (one may be behind the other) ** You should bookmark the Start Page.

If you enter the Username and Password incorrectly, you will see an error message on the Log In page.

If you have anti-popup software still running somewhere, you will only see a Red Screen, and not be able to log in. Click the link 'FAQ for Login' for additional tips and information to help you troubleshoot the issue.

We are not responsible for third-party software you may have installed on your system. You may want to find the user-manuals for your software, or go to the vendor's website for additional help.

We have put together some information that may help you with anti-popups. Please go to: http://www.call-scheduler.com/faq_popup_software.html



THE DETAILS

Call Scheduler Welcome Page:

Welcome Area:

The upper-left section is devoted to **Beta-Testing** information as we develop new features for the Call-Scheduler application. (A)

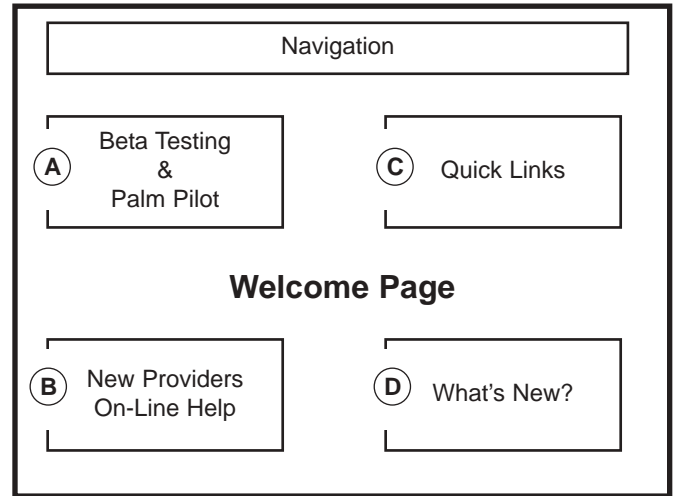
Below that is the link for loading information into your **Palm Pilot!** After an easy sign-up, you have access to instructions and installation of the Palm conduit. Providers using Call-Scheduler can download their personal work and call schedule to their Palms. We support Palm OS version 3.0 or above. The Call-Scheduler Palm application runs on Windows 98, ME, 2000 professional, NT, and Windows XP. (A)

On the lower left is the link for On-Line Help for Schedulers, and the **'New Providers Start Here'** link. This link is the most **current on-line help for users** who are not Schedulers. (B)

Quick Links, (upper right area) takes you directly to the most frequently used area of Call Scheduler. Each link will open a new window directly to the named information. Please **note the 'Requests' Link**. The number behind that link indicates how many Pending Requests are in the Provider Request area. This is one quick way to know if you still have pending requests or not. The other notification method is via email, if your Group Scheduler has the correct email address for your Provider Profile. (C)

The lower-right quadrant is the **What's New** section. This is where we let you know about upgrades made to Call-Scheduler, which are automatically available to all users. Also, when we add new features, we include a link here with detailed "How To" instructions to help you become familiar with how to use the new feature. (D)

If you have questions about how to use Call Scheduler, or experience problems, the Welcome Page also lists our contact information.



THE DETAILS

Call Scheduler Welcome Page

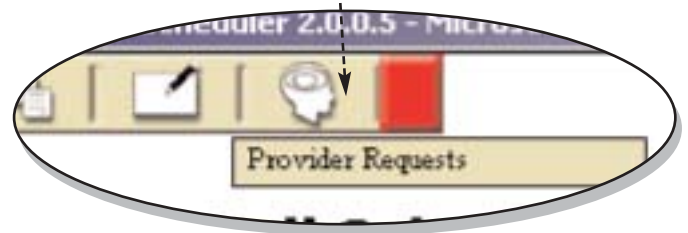
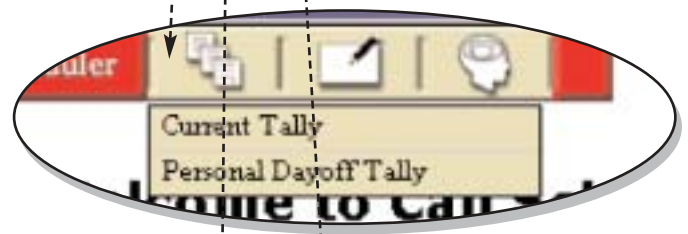
Navigation:

In Call Scheduler, the navigation is across the top and drop-down menus. Run the cursor over any icon at the top to see its submenu options. Select a desired function by clicking on it.

The first icon is used for checking the 'Current Tally' of assignments and your 'Personal Tally'. You can run a tally for any range of time and for any job you wish to check your number of assignments.

The second icon for viewing whiteboards of the schedules. The 'Jobs Only Whiteboard' displays only the jobs/assignments. The 'Complete Whiteboard' has the jobs, vacations and days off for each employee. This is helpful when trying to find someone to take your shift. There are several other views for your to choose from as well.

The last icon is for 'Provider Requests'. You can submit a vacation or day off request for a single day or a range of days. You can request to work a specific shift or request to swap a shift with another Provider. Please consult your manager on the specifics of your scheduling rules.



WHITEBOARDS:

Jobs Only Whiteboard

Shows only the jobs scheduled.

1. Click on the month-link to select a different month or
2. Choose the 'Date' and 'Year' you wish to see and click 'Go'.
3. Click on the Day-View Icon to get the contact and shift information.

Complete Whiteboard

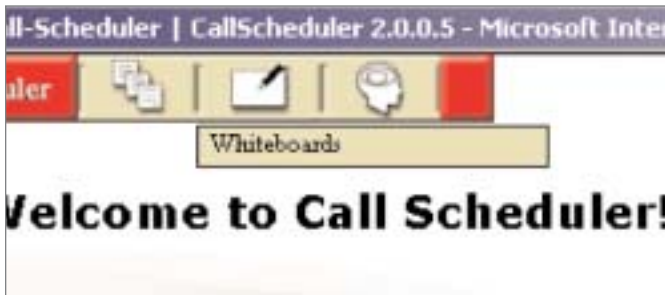
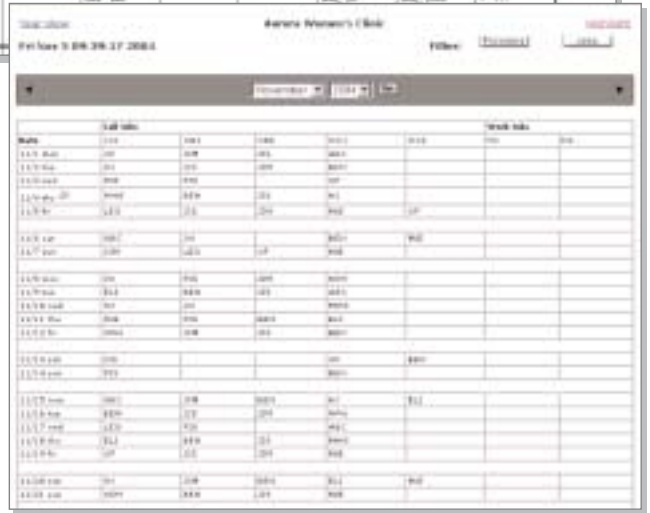
Shows both Days Off and Jobs Scheduled.

1. Click on the month-link to select a different month or
2. Choose the 'Date' and 'Year" you wish to see and click 'Go'.
3. Click on the Day-View Icon to get the contact and shift information.

Other Whiteboards

Your group may be familiar with one of our other views for local printing and faxing.

- Days vs. Jobs
- Provider vs Days
- Jobs vs Days



WHITEBOARDS - FILTERS AND HIGHLIGHTING:

Filters

You have the ability to view and print only the jobs and/or providers you wish to see.

Here's how:

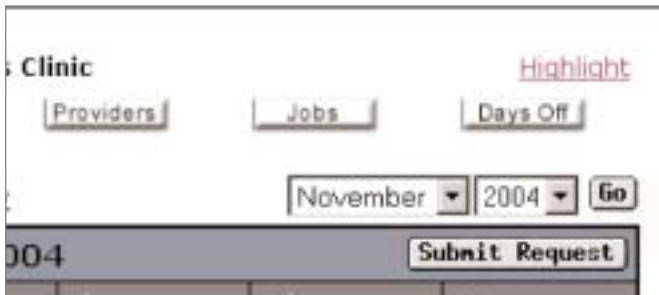
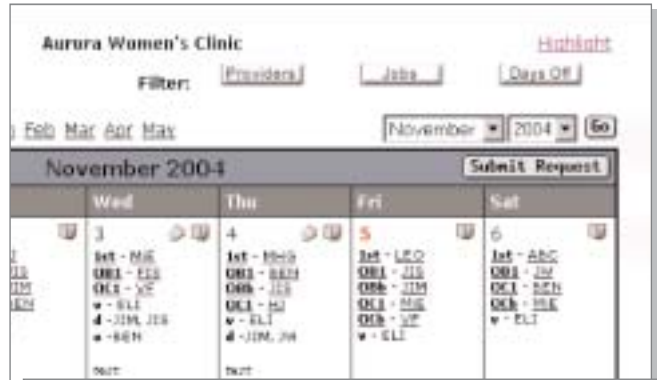
1. Click on the name of the filter you wish to use.
2. Choose which items you wish to view from the pop-up menu and click 'Apply'. (use the select/deselect feature as needed)
3. The "filters on" notation appears under the filter(s) in use, so if you print the calendar, you will know which filter(s) were engaged.
4. To stop filtering, click on the name of the filter again, use select/deselect as needed, and click 'Apply'.

Highlighting

Highlight any two providers on your schedule in the month view! This feature is particularly powerful when used in conjunction with the filters if you have lots of jobs/providers you are sorting through.

Here's How:

1. Click on 'Highlight' (located above the 'Days Off' filter button).
2. Choose providers from the dropdown menus in the pop-up window, and click apply.
3. The calendar will refresh and the providers will be highlighted.
4. To stop highlighting, click on 'Highlight' again, choose 'Reset' and 'Apply'.



PROVIDER COMMUNICATION

Provider Request Area

This section under the last program icon at the top of the screen is dedicated to handling of Provider scheduling requests. Each Provider has a unique username and password to use to create and submit requests for schedule swaps or days off. You can also review all of your Pending, Approved and Declined Requests.

Each request is time-stamped at the time it is submitted to the Scheduler. As soon as the Group Scheduler approves the request, the appropriate changes are made to the schedule and/or Days Off calendars and the Provider initiating the request is notified of the approval or denial. The correct new schedule is immediately available online for all Providers and data-partners. Tallies are also automatically updated.

When a request is processed, email is sent to the requesting Provider if an address is listed in the Provider Profile, along with any comments the Group Scheduler may make. In addition to email notification, Providers can also check the Request Area on-line anytime to see the status of their own requests.

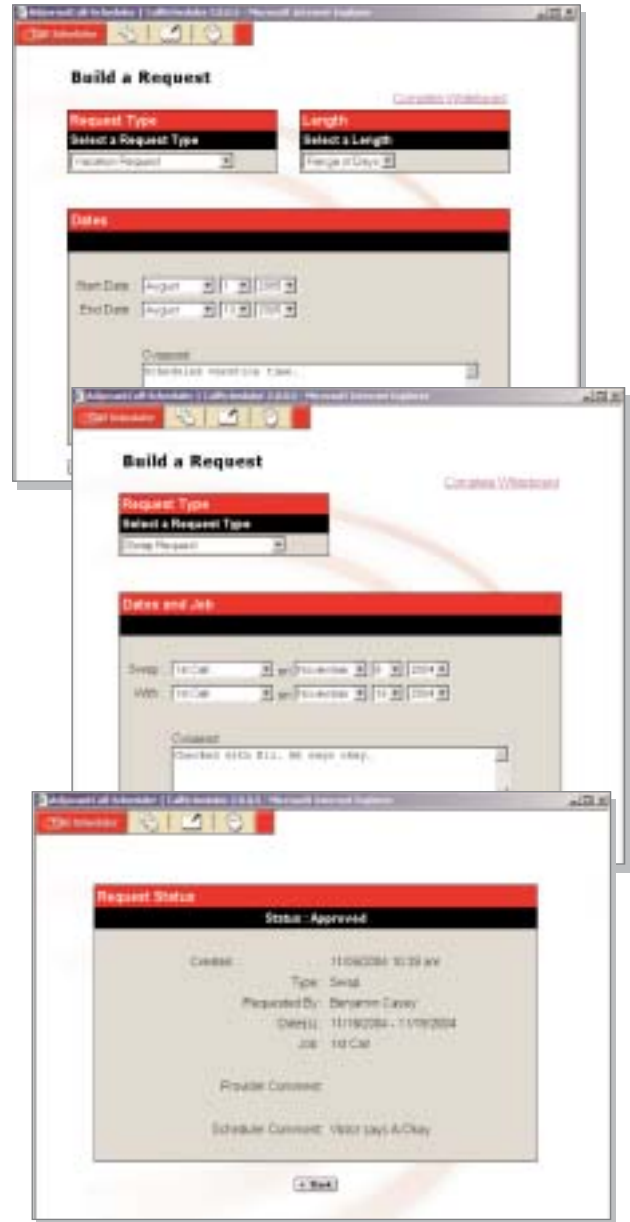
All requests remain in Pending until acted upon. Once processed, they are archived under either the 'Approved' or 'Denied' dropdowns.



BUILD A REQUEST

To create a Request;

1. Click on *Provider Requests*, then on "Submit Request" located on the right side of the red bar labeled "Requests"
2. Click on the "Complete Whiteboard" link to view a calendar to help you make better requests. Review your choices, then minimize the window.
3. In the "Build a Request" window, *Select* the appropriate type of request from the selection box at the upper left. The screen will refresh to ask for additional information depending on the type of request being made.
4. For a "Swap Request", be sure the Provider who is logged in, *making the request, is entered on the top line* called "Swap". The *second line* labeled "With" is for the other half of the request, which may be a different Provider. Enter the second line of information. Both lines must contain information regarding jobs already filled on the current schedule. (Both ends of the see-saw must be filled)
5. *Vacation requests* are easy. Simply select "Vacation" in the "Request Type" dropdown, a "Single Day" or "Range of Days" in the "Select a Length" dropdown.
6. Enter any *comments for the scheduler* as needed. This information will go to the scheduler along with the request.
7. Click "Next" when finished. The request will be submitted to the scheduler. The request will remain in the "Pending" file until the scheduler acts upon it. At that time the request will be automatically updated and filed under "Approved" or "Declined" as appropriate. If the Provider email address is supplied to the system, the Provider will also receive email notification of the scheduler's action.



Notice: All requests are time-stamped and archived for future reference by either the Provider or the Scheduler.

GET YOUR CALL-SCHEDULE ON YOUR PALM PILOT!

Providers using Call-Scheduler can now download their personal work and call schedule to their Palms. Simply dock the Palm to your computer and download your schedule from Call Scheduler on-line.

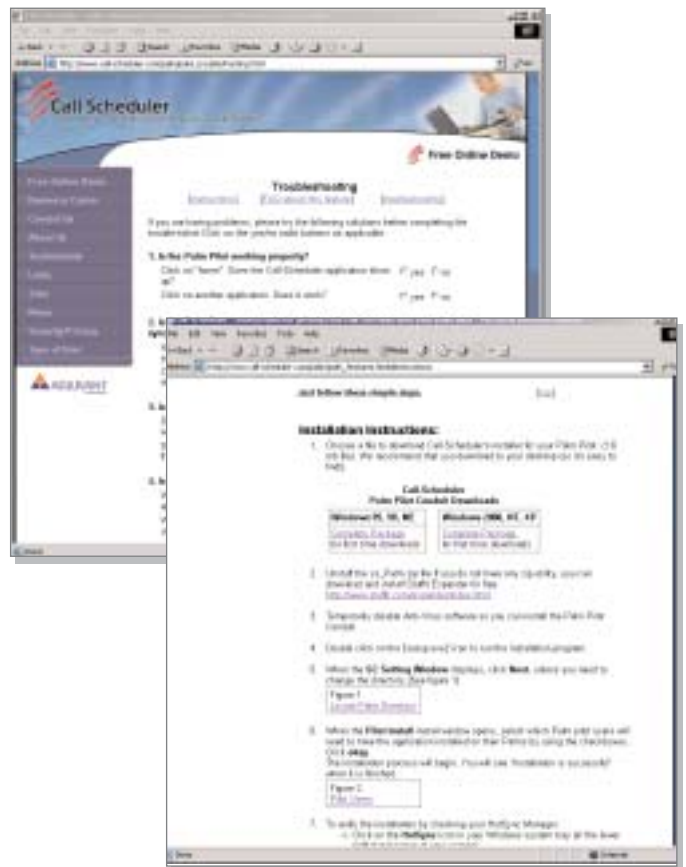
Important!

We support Palm OS version 3.0 or above. The Call-Scheduler Palm application takes 2k of space and runs on Windows 98, ME, 2000 professional, NT, and Windows XP.

We require the Palm Desktop software be installed on your computer before you install the Call-Scheduler software. This is very important because our software will not work properly without the Palm Desktop software's help. If you need assistance with this software's installation, please contact the company from whom you purchased your Palm device.

One Provider's calendar can be sent to a single Palm Pilot.

For more instructions and to Sign-up go to:
http://www.call-scheduler.com/palm/palm_signup.html



FAQ FROM NEW USERS

1. Who can access the system to view?

- Only those persons with a username and password. Schedulers each have their own per Group, and each Provider has his/her own per Group.

2. When viewing, can you see everything, or only who is on call?

- *The Providers:* (when they log-on with their individual username:password) can see both Whiteboards (the job only and the complete whiteboard that contains day-off and vacation info if it is entered). The legend under each calendar shows meaning of the provider's initials, and there is a space for phone/pager info if it is entered. Clicking on the "Day View" for a particular day will bring up a "day-timer" like view of the day with the on-call hours on it. Providers can view this material, but not change anything. They can also see and use their own Provider Request area, and the Current Tally area.
- *The Schedulers:* can see and use everything when they log-on.

3. Who has the ability to edit the schedule?

- *Only the Schedulers* who have username and password access to a particular Group can edit that particular Group schedule. For example, the Schedulers for Hospital A can edit their own schedule, but cannot see or edit the schedule of Hospital B. Hospital B's Schedulers can edit their own schedule, but cannot see or edit Hospital A. Each scheduler has his/her own username and password for each particular Group. Only persons on the Scheduler's List are able to edit the calendars. Adjuvant sets up the initial username and password for the Master Scheduler for each Group. Other Schedulers are set up by the Group's master scheduler.

- *The Provider's username and password does not*

allow them to edit anything. They can view both Whiteboards, use the Current Tally area, and use the Provider Request area to make requests.

4. Can Providers be programmed to view only and not allowed to edit?

- This is the function of Call-Scheduler. Providers can only view their schedules over the internet, and only with their username and password.
- All editing and access control lies with the Schedulers. They are the ones who will issue username and passwords for Providers. The Schedulers are also the ones who will add other Schedulers if needed (for example a backup scheduler).
- Only those on the Scheduler List within the program have editing privileges.

POPUP SOFTWARE: ADDITIONAL TROUBLESHOOTING

The Call-Scheduler Application uses pop-up windows as part of its basic functionality. To be able to use the program, you will need to disable any ad-blockers or anti-pop up software that may be running on your machine. These ad-blockers may be features within toolbars, firewalls, or specific software you have installed on your computer.

Various ad-blocking applications have different ways to enable you to view websites using pop-up windows. In general, the settings are a preference within the specific application that allows you to add domains or urls into a "safe list" of some type. If your application does not have this function, you can still enable pop-up windows by turning off the blocker while you are using Call-Scheduler.

- **Explorer Service pack 2:** After entering login information and clicking "Next" you are looking at a red screen with a Thin Yellow Bar immediately below the address window and above the red coloring. The Yellow Bar notifies the user that a pop-up has been blocked. Click on the Yellow Bar and select "Always allow popups from this site." A window asks you if you wish to re-send login data - click "Retry".

For additional information and instructions try:
http://www.microsoft.com/windowsxp/using/web/sp2_popupblocker.mspx

- **Toolbars:** If you are using toolbars from Yahoo, Google, PopSwatter, MSN etc., you will need to disable the blocker. These links may help you.
 - PopSwatter--
<http://help.popswatter.com/troubleshooting.html>
 - Google Toolbar Options Help--
http://toolbar.google.com/popup_help.html
 - Yahoo Toolbar Companion Help--
<http://help.yahoo.com/help/us/companion/pub/index.html>
 - MSN Toolbar Help--
<http://toolbar.msn.com> and click on "MSN Toolbar Help"
- **Ad-blocking, ActiveX, Java, etc.:** Certain settings in firewall software (such as ZoneAlarm, Norton Personal Firewall, McAfee, etc.) can inhibit the ActiveX control, pop-ups, or other components of Call-Scheduler. Once again, you would have to disable these products in order to use the application.
- **RoadRunner** has partnered with eTrust EZ Armor for Ad-blocking, anti-popup functionality. You will need to disable the blocker from within the eTrust EZ Armor application.
- **Norton SystemWorks:** This is a bundle of software containing a personal firewall (among other features). Again, you will need to unblock Call-Scheduler.com in order to use Call-Scheduler.
- **AOL:** If you are using AOL, minimize AOL and launch Internet Explorer instead.

GLOSSARY

Call Group

--All practitioners who share call scheduling assignments in a single call schedule. A multi-specialty clinic might have several call groups (i.e. one for Pediatrics, one for Family Practice, and one for OB-GYN), with each call group having it's own set of rules particular for that group. Each group produces it's own unique call schedule.

Data Target

--Proces Each place or person you send the Call Schedule to is a Data Target. Your Call Group members will be your main Data Targets, but others on your list will be hospitals, nurses stations, urgent care centers, emergency rooms, and others.

Days Off Call

--Days that the physicians request to not be on call during that time. These may be vacation and other days that a Provider asks to be off for reasons that are not recurrent. Various dayoff types such as "Meeting", "Vacation", "Off Call", "CME", etc. can be specified when submitting a Provider Request.

--"*Off Call*" means that the Provider is working in the office that day, but doesn't want to be on call. "*Day Off*" means the Provider is way from the office, usually personal time.

--In printed or displayed reports, these dayoff type designations will be shown with a descriptive first letter before the physician's initials (i.e. *m-PJZ*). The specific dayoff type chosen should reflect the reason for the Provider being unavailable for call.

Filters

--Filters are available on each Whiteboard. They temporarily "hide" the selected items from view while you look at the whiteboard. This helps isolate information for easier decision making and printing. Any settings selected affects only the viewer, and are reset to default anytime the individual view logs out.

Highlighting

--Highlighting is available on each Whiteboard. It allows you to choose two Providers to color when you view the calendar, but doesn't hide anything. Any settings selected affects only the viewer, and are reset to default anytime the individual view logs out.

Holidays

--Primary Holidays come up every year and shown with the Holiday name in italics.

--Secondary Holidays are different every year depending upon the vagaries of that year's calendar. They appear with the name "Secondary Holiday" in italics.

Icon

--This symbol represents some function or functions that you can perform in the program. Running your cursor over a menu icon yields a pop-up explanation window naming the icon as well as several operational choices to choose from. Clicking on one of these menu choices (opened up by using the icon) initiates the action.

Job

--An assignment that requires scheduling of practitioners who will be responsible for it's duties and performance. Jobs are usually represented by two-letter abbreviations. Jobs can require assignment every day, or just certain days of the week. Assignments can depend upon who is scheduled for some other Job for the same day.

Log Off (Out)

--Clicking this icon on the bottom icon bar signs you out of the program. If you exit by closing the browser window, you will also be out of the program and you will not lose data. Log Off is the preferred method, however.

Month View

--Month View describes a report (or schedule) which shows information for a single calendar month at a time. You can easily switch months (and/or other parameters) to view by clicking on

the appropriate buttons on the report screen. Print any screen by right clicking and choosing print.

Provider

--Any health care provider who takes call assignments for scheduling. Providers are usually represented by a 3-letter abbreviation.

Passwords

--Passwords are set up by the scheduler when to providers or additional schedulers are added to the system for the first time. They are case sensitive and can be changed later by the Group's scheduler.

Printing

--Any screen can be printed. In Explorer: right click and select "print". In Navigator: Right click, select "open frame in new window", then File, Print. If the grid does not print for your calendars, check the "print backgrounds" option in your browser preferences.

Provider

--Any health care provider who takes call assignments for scheduling. Providers are represented by a 3-letter abbreviation by convention. This distinguishes providers from Jobs, which are represented by 2-letter abbreviations. There are multiple Provider Types to choose from as default setting.

Provider Request

--This is an module within Call-Scheduler that enables providers to send requests to the scheduler. After the Provider logs-on, fills out the request on his end and sends it, the request appears in the Provider Requests> Pending Requests area for the scheduler to see and approve or disapprove.

Reports

--Reports available to non-schedulers are: Year Report, Current Tally, Personal Day Off Tally. Any report is printable in Explorer: right click and select "print".

Swaps

--Swaps are trades in call assignments after the original schedule becomes official. The program will show any change in the tallies that may occur as a result of a Swap or any other schedule change.
 --In a Swap, the doctors make an even trade (an eye for an eye) of a Job. The Provider Request area makes Swapping without errors much easier. If a swap request arrives via the "Provider Request" module, and the scheduler approves the swap, the change is posted automatically by Call Scheduler and all calendars and tallies are updated. Only Providers can make requests, only Schedulers can approve/deny requests.

Tallies (Current)

--Call Scheduler™ automatically counts each assignment and displays the running score in a chart called the Tally. This "box score" of counted assignments for each Job, Day Type and provider is displayed in a chart format. It also shows the percent of call for any provider who is supposed to be scheduled at less than 100% (less than equal) of call. Holidays tallies are also listed on the chart.

Tallies (Personal Day Off)

--The Tally contains the most current tally in chart form. The Day Off Types are listed in individual columns, including CME, Sick Day, Meetings, Vacation, etc.

View Only

--Providers have the ability to view the whiteboards, but are not able to change any information. They must log-on with a username and password to view the whiteboards or use the Provider Request area.

Week View

--Week View describes a report (or schedule) which shows information for a single calendar week at a time. The view is available on all Month View Whiteboards. Print any screen by right clicking and choosing print.