New Innovations (RMS) Block Scheduling Training

2024

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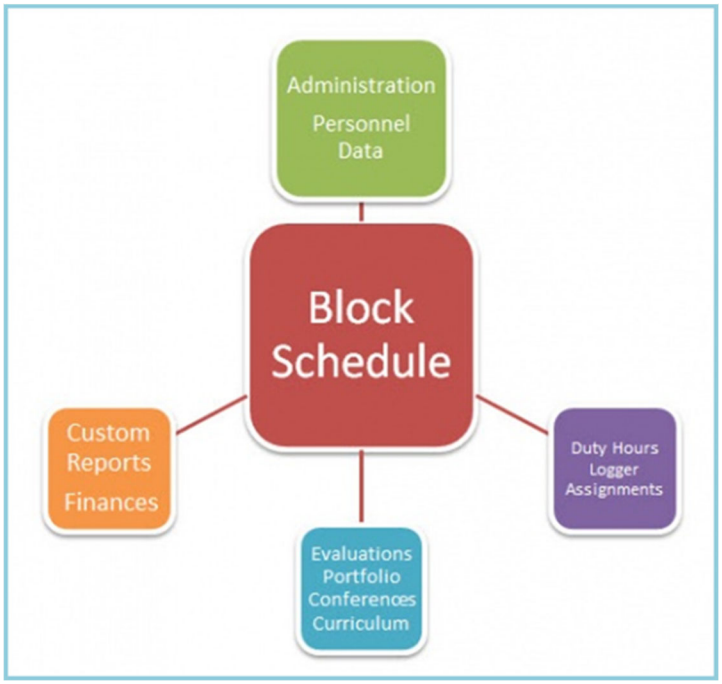
Introduction

For more information about block schedules go to *Help* > *Tutorial Videos* and watch [4.0] Block Schedule-Block Schedule Basics

The Block Schedule displays information about residents rotating to different services throughout the year and who will precept the rotation. Information such as status, post graduate year and program come from the person's demographic record in the Personnel module. Rotation names and academic year intervals used on the schedule come from tables in the Local Setup of Administration.

Other modules in the software that use the block schedule for information are:

- Evaluations - The evaluation module uses the block schedule to create matches between people who are working on the same rotation.
- Conferences - Conference Rosters are created using status and rotation from the block schedule.
- Rotation Requirements - Each program can set up their own rotation requirements to track the number of weeks a resident or fellow spends on rotations that are required for the program.
- Finance/IRIS - Calculations for IRIS reimbursement are based on the block schedule
- Curriculum - Distribute each rotation's Goals and Objectives to residents before they begin their rotation



A new Academic Year should be created each year with correct interval dates before schedules can be built.

Academic Years can be divided into any number of intervals: 4, 12, 13, 26 or 52 or however many you need for your program. The rule of thumb is to create one rotation instance for the longest period of time a person will be on a rotation. In other words, if a resident is assigned a rotation from 7-1 thru 9-30, only create one rotation with a start date of 7-1 and an end date of 9-30 instead of two, one month long rotations.

Example of Department schedule:

Block Scheduling Views

Academic Year: 2016-2017 Schedule View: Department View Edit New

Advanced Interval Selection

Last updated: 7/8/2016 8:25 AM

Person	July	August	September	October	November	December	January	February	March	April	May	June
Faculty (FM-Family Medicine)												
Antonucci, M	FM:FPC2-PCMH FM:Elect	FM:FPC2-PCMH FM:Elect	FM:FPC2-PCMH FM:Elect	FM:FPC2-PCMH FM:Elect	FM:FPC2-PCMH FM:Elect	FM:FPC2-PCMH FM:Elect	FM:FPC2-PCMH FM:Elect	FM:FPC2-PCMH FM:Elect	FM:FPC2-PCMH FM:Elect	FM:FPC2-PCMH FM:Elect	FM:FPC2-PCMH FM:Elect	FM:FPC2-PCMH FM:Elect
Black, J	FM:SportsMed-SC	FM:SportsMed-SC	FM:SportsMed-SC	FM:SportsMed-SC	FM:SportsMed-SC	FM:SportsMed-SC	FM:SportsMed-SC	FM:SportsMed-SC	FM:SportsMed-SC	FM:SportsMed-SC	FM:SportsMed-SC	FM:SportsMed-SC
Jones, R	FM:Card-SC FM:Card-VA	FM:Card-SC FM:Card-VA	FM:Card-SC FM:Card-VA	FM:Card-SC FM:Card-VA	FM:Card-SC FM:Card-VA	FM:Card-SC FM:Card-VA	FM:Card-SC FM:Card-VA	FM:Card-SC FM:Card-VA	FM:Card-SC FM:Card-VA	FM:Card-SC FM:Card-VA	FM:Card-SC FM:Card-VA	FM:Card-SC FM:Card-VA
Matthews, K	FM:MedA-SC	FM:MedA-SC	FM:MedA-SC	FM:MedA-SC	FM:MedA-SC	FM:MedA-SC	FM:MedA-SC	FM:MedA-SC	FM:MedA-SC	FM:MedA-SC	FM:MedA-SC	FM:MedA-SC
Miller, J	FM:MedB-SC FM:MedC-SC	FM:MedB-SC FM:MedC-SC	FM:MedB-SC FM:MedC-SC	FM:MedB-SC FM:MedC-SC	FM:MedB-SC FM:MedC-SC	FM:MedB-SC FM:MedC-SC	FM:MedB-SC FM:MedC-SC	FM:MedB-SC FM:MedC-SC	FM:MedB-SC FM:MedC-SC	FM:MedB-SC FM:MedC-SC	FM:MedB-SC FM:MedC-SC	FM:MedB-SC FM:MedC-SC
Motts, F	FM:Derm-SC	FM:Derm-SC	FM:Derm-SC	FM:Derm-SC	FM:Derm-SC	FM:Derm-SC	FM:Derm-SC	FM:Derm-SC	FM:Derm-SC	FM:Derm-SC	FM:Derm-SC	FM:Derm-SC
Schmidt, D	FM:Geri-PCMH FM:AmbGyn-SC	FM:Geri-PCMH FM:AmbGyn-SC	FM:Geri-PCMH FM:AmbGyn-SC	FM:Geri-PCMH FM:AmbGyn-SC	FM:Geri-PCMH FM:AmbGyn-SC	FM:Geri-PCMH FM:AmbGyn-SC	FM:Geri-PCMH FM:AmbGyn-SC	FM:Geri-PCMH FM:AmbGyn-SC	FM:Geri-PCMH FM:AmbGyn-SC	FM:Geri-PCMH FM:AmbGyn-SC	FM:Geri-PCMH FM:AmbGyn-SC	FM:Geri-PCMH FM:AmbGyn-SC
PRG 1 (FM-Family Medicine)												
Archer, D	FM:SportsMed-SC	FM:MedA-SC	FM:MedB-SC	FM:MedC-SC	FM:Geri-PCMH	FM:FPC2-PCMH	FM:Derm-SC	FM:Card-VA	FM:AmbGyn-SC	EM	FM:Card-SC	PED:COMMUNITY
Wolf, B	FM:Geri-PCMH	FM:AmbGyn-SC	FM:Card-SC	FM:Card-VA	PED:NEO:NWBORN	FM:Derm-SC	FM:FPC2-PCMH	FM:Geri-PCMH	FM:MedA-SC	FM:MedB-SC	FM:MedC-SC	FM:SportsMed-SC
PRG 2 (FM-Family Medicine)												
Aktar, A	FM:Card-SC EM: FM Elective	FM:Card-SC DM:CARD:CCU	FM:Card-VA	FM:ComMed-SC	FM:Derm-SC	FM:FPC2-PCMH	FM:Geri-PCMH	FM:MedA-SC	FM:MedB-SC	FM:MedC-SC	FM:SportsMed-SC	DM:IM:WOMEN'S HEALTH
Julka, V	FM:ComMed-SC	FM:Derm-SC	FM:FPC2-PCMH	FM:Geri-PCMH	FM:MedA-SC	FM:MedB-SC	FM:MedC-SC	FM:SportsMed-SC	FM:AmbGyn-SC	FM:Card-SC	FM:Card-VA	EM
O'Doull, K	FM:MedA-SC	FM:MedB-SC	FM:MedC-SC	FM:AmbGyn-SC	FM:Card-SC	FM:Card-VA	FM:ComMed-SC	FM:Derm-SC	FM:FPC2-PCMH	FM:Geri-PCMH	FM:SportsMed-SC	DM:IM:WOMEN'S HEALTH
Parke, B	FM:MedB-SC	FM:Card-SC	FM:Card-VA	FM:ComMed-SC	FM:Derm-SC	FM:Elect	FM:FPC2-PCMH	FM:Geri-PCMH	FM:MedA-SC	FM:MedB-SC	FM:MedC-SC	FM:SportsMed-SC
PRG 3 (FM-Family Medicine)												
Baker, T	FM:SportsMed-SC	FM:MedA-SC	FM:MedB-SC	FM:MedC-SC	FM:AmbGyn-SC	FM:Card-SC	FM:Card-VA	FM:ComMed-SC	FM:ComMed-SC	FM:ComMed-SC	DM:IM:WOMEN'S HEALTH	FM:ComMed-SC
Gomez, M	EM	FM:AmbGyn-SC	FM:MedA-SC	FM:MedB-SC	FM:MedC-SC	FM:SportsMed-SC	FM:AmbGyn-SC	FM:Card-SC	FM:Card-VA	FM:ComMed-SC	FM:Derm-SC	FM:Geri-PCMH
Wallace, C	FM:AmbGyn-SC	FM:Card-SC	FM:Card-VA	FM:MedA-SC	FM:MedB-SC	FM:MedC-SC	FM:SportsMed-SC	EM	FM:AmbGyn-SC	FM:Geri-PCMH	FM:Derm-SC	FM:Card-VA
Program Director (FM-Family Medicine)												
Beres, A	FM:AmbGyn-SC FM:ComMed-SC	FM:AmbGyn-SC FM:ComMed-SC	FM:AmbGyn-SC FM:ComMed-SC	FM:AmbGyn-SC FM:ComMed-SC	FM:AmbGyn-SC FM:ComMed-SC	FM:AmbGyn-SC FM:ComMed-SC	FM:AmbGyn-SC FM:ComMed-SC	FM:AmbGyn-SC FM:ComMed-SC	FM:AmbGyn-SC FM:ComMed-SC	FM:AmbGyn-SC FM:ComMed-SC	FM:AmbGyn-SC FM:ComMed-SC	FM:AmbGyn-SC FM:ComMed-SC

Example of a resident's My Schedule View:

Block Scheduling Create/Edit

Create/Edit Rotations

Person: Baker, Thomas Eugene Academic Year: 2016-2017

Access All Faculty

☐ Include Archived People ☐ Include Archived Rotations in the List Below

Create rotation intervals using one of these options:

Option One: Add default intervals for the selected academic year.

or

Option Two: Add default intervals for the selected academic year one interval at a time.

or

Option Three: Add a new interval.

Deleted Rotation History | Delete All

New **Rotations**

	Edit	Start Date	End Date	Rotation	Department	Division	Status	PGY	Program	Rotation Pager	Personal Pager	Primary	Compensation Status	Notes	History
Delete	☐	7/1/2016	7/31/2016	FM:SportsMed-SC	Department of Family Medicine	FM-Family Medicine	PRG 3	3	Family Medicine	---	---	✓	C3		History
Delete	☐	8/1/2016	8/31/2016	FM:MedA-SC	Department of Family Medicine	FM-Family Medicine	PRG 3	3	Family Medicine	---	---	✓	C3		History
Delete	☐	9/1/2016	9/30/2016	FM:MedB-SC	Department of Family Medicine	FM-Family Medicine	PRG 3	3	Family Medicine	---	---	✓	C3		History
Delete	☐	10/1/2016	10/31/2016	FM:MedC-SC	Department of Family Medicine	FM-Family Medicine	PRG 3	3	Family Medicine	---	---	✓	C3		History
Delete	☐	11/1/2016	11/30/2016	FM:AmbGyn-SC	Department of Family Medicine	FM-Family Medicine	PRG 3	3	Family Medicine	---	---	✓	C3		History
Delete	☐	12/1/2016	12/31/2016	FM:Card-SC	Department of Family Medicine	FM-Family Medicine	PRG 3	3	Family Medicine	---	---	✓	C3		History
Delete	☐	1/1/2017	1/31/2017	FM:Card-VA	Department of Family Medicine	FM-Family Medicine	PRG 3	3	Family Medicine	---	---	✓	C3		History
Delete	☐	2/1/2017	2/28/2017	FM:ComMed-SC	Department of Family Medicine	FM-Family Medicine	PRG 3	3	Family Medicine	---	---	✓	C3		History
Delete	☐	3/1/2017	3/31/2017	FM:ComMed-SC	Department of Family Medicine	FM-Family Medicine	PRG 3	3	Family Medicine	---	---	✓	C3		History
Delete	☐	4/1/2017	4/30/2017	FM:ComMed-SC	Department of Family Medicine	FM-Family Medicine	PRG 3	3	Family Medicine	---	---	✓	C3		History
Delete	☐	5/1/2017	5/31/2017	DM:IM:WOMEN'S HEALTH	Department of Medicine	DM-Internal Medicine	PRG 3	3	Family Medicine	---	---	✓	C3		History
Delete	☐	6/1/2017	6/30/2017	FM:ComMed-SC	Department of Family Medicine	FM-Family Medicine	PRG 3	3	Family Medicine	---	---	✓	C3		History

Edit

Export to Excel

There are two ways to build a block schedule.

- On the web: Go to *Schedules* > *Block Schedules* > *Schedule Rotations* to build rotations one person at a time.
- MedScheduler: This tool can be downloaded onto a PC. It uses drag and drop technology and resembles a spreadsheet which enables super quick scheduling for many people. Once the schedules are built, the application is synchronized to push all of data into your database.

Glossary

Academic Year - The academic year is used to identify the start date, end date and intervals of a training year. Most data is grouped according to academic year. You can delete an academic year but if you do, the block schedule cannot be viewed for that academic year. The academic year should be set up before building your block schedules.

Intervals - Intervals are blocks of time based on the academic year configuration. Most programs use 12 - 13 blocks per year.

IRIS - Intern and Resident Information System (IRIS) program captures information about interns and residents in approved programs who work at hospitals that participate in the Medicare program.

Rotation Favorites - Rotation Favorites is a tool that permits users to create a custom list of rotations to populate rotation drop-down boxes throughout the suite.

Rotation Requirements - Rotation requirements set the number of weeks that residents are required to be on a specific rotation or set of rotations. Use the Rotation Requirements Report to check residents' progress.

Privileges for access to Block Schedules

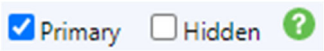
- Level 6 - Create/Edit/View the block schedule in all departments and divisions, create rotation definitions; Use Amion Import Tool
- Level 5 - Create/Edit/View the block schedule in departments and divisions where privileged, create rotation definitions based on Customized Security Settings; Use Amion Import Tool
- Level 4 - Create/Edit/View the block schedule in departments and divisions where privileged; Use Amion Import Tool
- Level 3 - N/A
- Level 2 - View the block schedule; Use iCal (iCalendar) feature
- Level 1 - N/A

Note: A Level 5 or 6 in Administration is needed to configure the iCal (iCalendar) feature.

Create an Academic Year

For more information about block schedules go to *Help* > *Tutorial Videos* and watch [2.07] Admin-Academic Year - Create

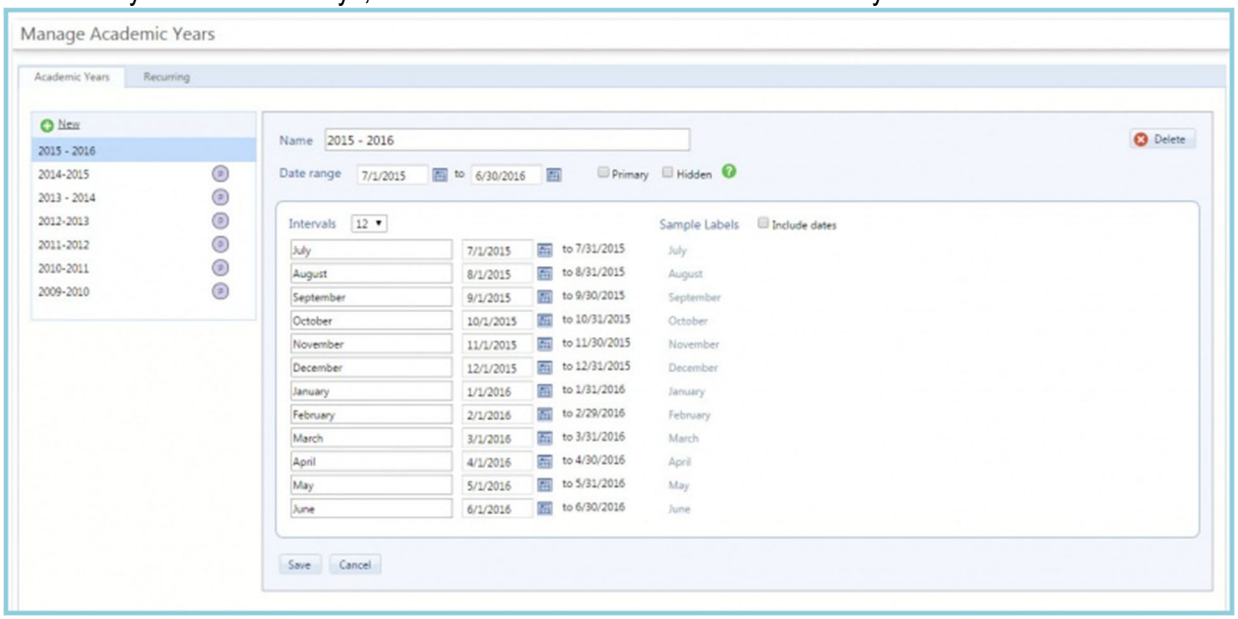
Create a Single Academic Year

1. Go to *Administration* > *Software Setup* > *under Local Setup: Academic Years* > *Academic Years* tab
2. Click **New**
3. Enter new academic year name in the text box, typically this is the current year such as 2024-2025.
4. Enter the start and end dates of the academic year
5. Check or uncheck Primary and Hidden: 

   - Primary years appear first in dropdown lists
   - Hidden years do not appear in lists except in the block schedule for administrators
6. Select the number of intervals for the year. The system divides the year you entered into the number of intervals chosen.
7. Check "Include dates" to make the interval dates appear in the interval label and if you want your custom interval names to appear in MedScheduler.
8. Edit the new interval names and start/end dates as necessary. If you need to update an end date for an interval, update the start date for the next interval and the end date of the previous interval will be automatically updated. Click Save

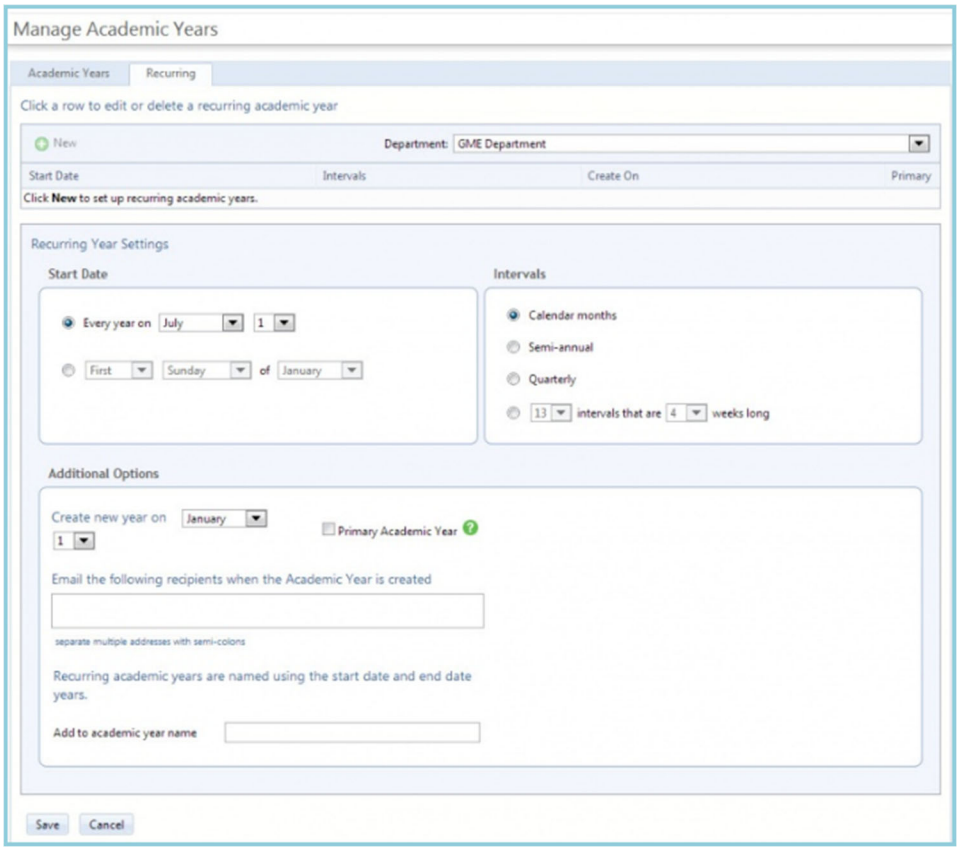
Notes

1. Deleting an academic year does not delete the Block Schedule or Evaluations. You cannot VIEW them but they are still there. Just recreate the academic year.
2. When you create academic year, always make the dates consecutive with no gaps between the last day of the current year and the first day of the next year. Doing so can create problems viewing evaluation results for the correct date range and in the financial applications.
3. Check the dates to make sure they are correct for your program. For example, if your rotations always start on Mondays, check that each interval starts on a Monday.



Create a Recurring Academic Year

1. Go to *Administration* > *Software Setup* > *Local Setup* > *Academic Years* > *Recurring tab*
2. Click **New**
3. Select the start date of the recurring pattern for your academic year
4. Select how many intervals to use
5. Select when the system should create the new year
6. Your email address is entered for you so you can receive an email when the new year is created. Enter other people's addresses if they should be notified too.
7. Each time a new year is created, it is named using the start and end date year. If you want something additional added to the year, enter it in the text box. An example might be creating an academic year for your first RL-1'.
8. Click **Save**



Multiple academic years

- When different training years start on different dates, you can create an Academic Year to accommodate each one. Doing so makes scheduling on the web and in MedScheduler easier because you don't have to adjust dates as you schedule.
- When you schedule the interns, select the intern Academic Year so you're using the correct intervals for scheduling them. Select the PRG year when you schedule the 2nd and 3rd year residents.
- Follow the steps for creating an Academic Year above
- For step 3, name the academic year for the training year it represents. For example, 'Intern 2023 - 2024 for the interns and PRG 2&3 2023-2024 for the second and third years.
- For steps 6 and 7, enter the appropriate number of intervals and edit the dates to reflect the correct interval dates

Notes

1. Once an academic year is created, there is no way to adjust the number of intervals. Just delete the academic year and start over.
2. Editing an academic year does not change any of the data that was entered using that year, such as block schedules. You will need to edit schedules independently.
3. If you include the dates of the intervals in the labels, they will be displayed in the block schedule interval headers. If the dates are wrong, go back to the academic years and change them. They cannot be edited in the schedule.
4. You can only have one primary academic year. Any other additional academic years will be non-primary.

Viewing Rotation Favorites

- From the Main menu, select ***Scheduling* > *Block Scheduling*** > ***Setup*** > ***Rotation Favorites***

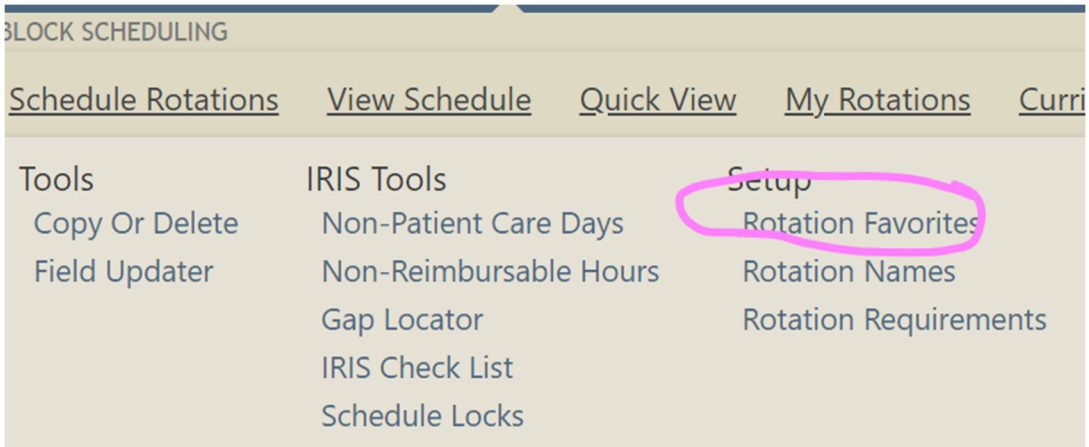
Rotation Favorites are rotations that belong to your department and rotations from other departments that you also use for scheduling and evaluations. This Favorites list enables you to quickly search for and select the most frequently used rotations for your program and saves you from having to search through the entire list of rotations when setting up or editing block schedules.

Compare the list of rotations on the Rotation Schedule to the Rotations Favorites list.
Make a note of any rotations that do not exist that will be required to build the block schedule. If you are missing rotations, work with MMCGME Services to create or update rotations (MMCGMEhelp@umn.edu) or, if a rotation you need to use exists in another department, you can add it to your **Rotation Favorites**.

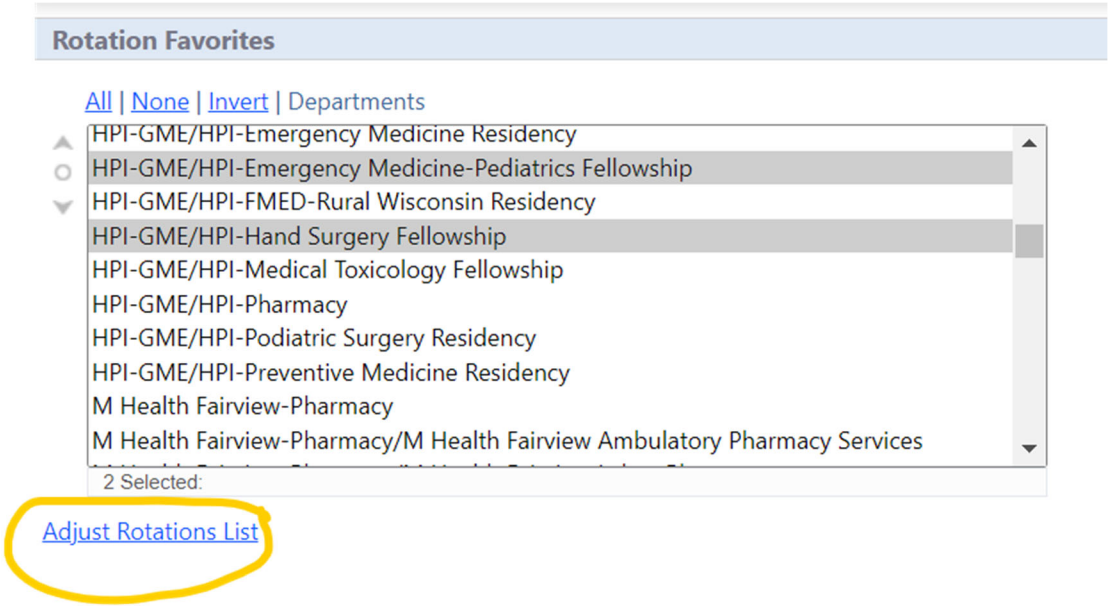
Adding Existing Rotation Favorites

Check other departments' rotation lists to see if the rotation you need already exists. If you find the specific rotation, follow these steps to add it to your **Rotation Favorites**.

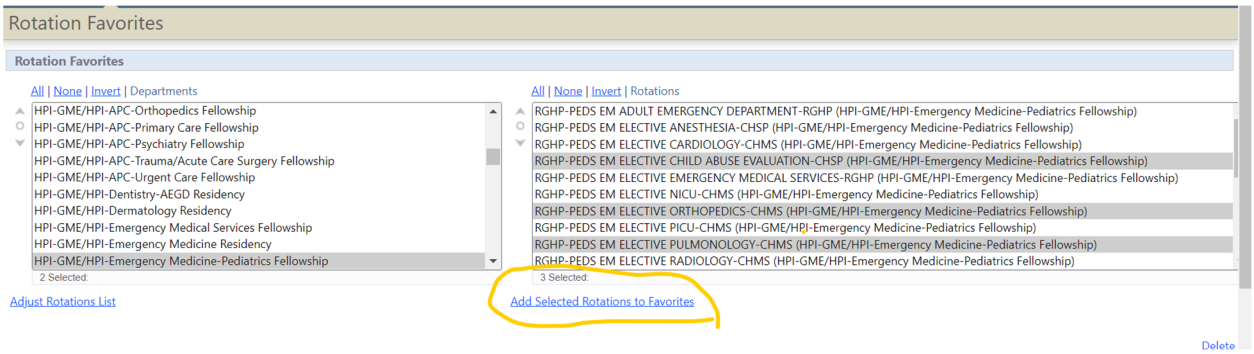
From the Main Menu, select ***Schedules* > *Block Scheduling* > *Setup* > *Rotation Favorites***



Select one or more Departments from the **Departments** multi-select box, and then click the **Adjust Rotations List** link.

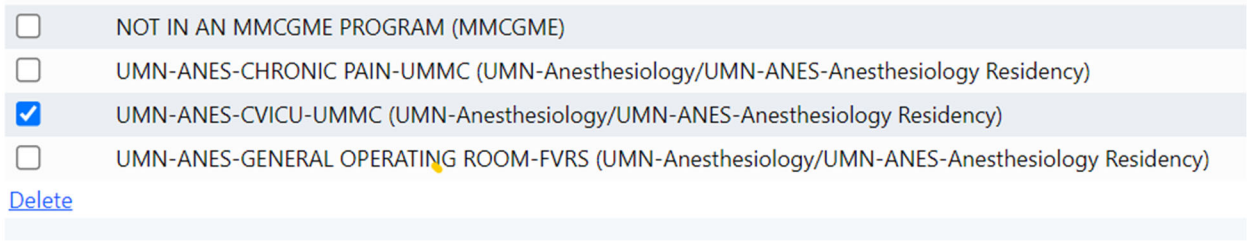


- To select one or more Rotations from the Rotations multi-select box, hold down **Ctrl** to highlight the rotations and then click the **Add Selected Rotations to Favorites** link.



Delete A Rotation Favorite

Note: To delete a Favorite, place checks to the left of the Favorite to mark it for deletion, and then click the **Delete** link. This does not delete a rotation, but rather removes it from the **Rotation Favorites** list.



The Rotation Favorites list appears in these modules as the default rotation list:

- Block Scheduling when building the schedule
- MedScheduler when creating block schedules
- Evaluation Sessions when setting up to make automatic matches
- Duty Hours when editing logs
- Conferences when creating default roster configuration
- Milestones when creating direct milestones by rotation
- Assignment Schedules when applying templates
- Curriculum when linking curriculum documents to rotations

MMCGME Rotation Definitions for Block Schedules

It is important to remember that residents need to have a rotation assigned to them for every week of the academic year. To identify time when a resident is not participating in Medicare reimbursable activities, a generic MMCGME block is inserted in the schedule. No assignments should be assigned to these rotations. They should be used to fill in time in an academic year when a trainee starts late, graduates off-cycle or resigns during the year. The following rotations are to be marked **Primary.**

MMCGME Rotation	Definition
MMCGME-LATE START	• When a resident starts off cycle, this block occupies the time between the start of the academic year and the resident's program start date. Example: If a resident started 8/15/23, there would be a **MMCGME-LATE START** block rotation from 7/1/23-8/14/23.
MMCGME-OFF CYCLE GRAD	• This rotation identifies when a resident graduates from a program mid-cycle. When this happens in the middle of an academic year, this block occupies the time between the program end date and the end of the academic year and prevents them from having gaps in the schedule. • Example: If a resident graduates 9/14/24 • There would be a **MMCGME-OFF CYCLE GRAD** block rotation from 9/15/24-6/30/24
MMCGME-RESIGNED	• This rotation identifies when a resident resigns or leaves the program without completing all requirements. When this happens in the middle of an academic year, this block occupies the time between the termination date and the end of the academic year. This rotation can be used if the trainee resigns or is terminated by the program. • Example: If a resident resigned 1/4/24, there would be a **MMCGME-RESIGNED** block rotation from 1/5/24-2/24/24

<table>
<tr><th>MMCGME Rotation</th><th>Definition</th></tr>
<tr><td>MMCGME-TIME AWAY EXTENDS</td><td>

This identifies dates during which a resident is on a Time Away that EXTENDS her/his time in the program. This rotation should appear in the block schedule without any other rotations appearing in the block schedule for that time period and be marked as primary.
<u>Example</u>: A surgery resident was scheduled to be on a surgery rotation for 8/1/2024-8/31/2024. She will be on Time Away-Extends for 8/15-8/31. The surgery rotation should be deleted from the dates 8/15-8/31, and MMCGME-TIME AWAY EXTENDS should be entered in its place.

<table>
<tr><th>8/1/24-8/14/24</th><th>8/15/24-8/31/24</th></tr>
<tr><td>RGHP-FMED-SURG</td><td>MMCGME-TIME AWAY EXTENDS</td></tr>
</table>
</td></tr>
</table>

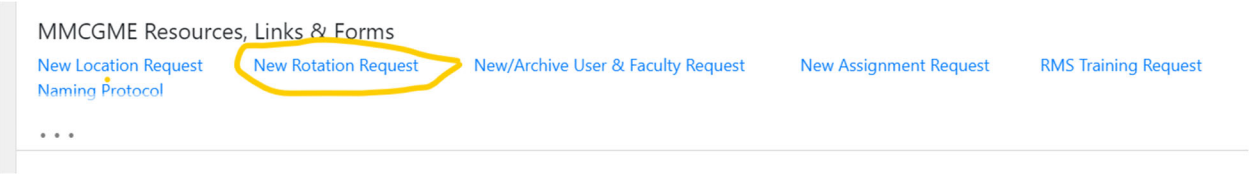
MMCGME Non-Primary Rotations

These rotations must have a primary rotation that covers the time. When using these rotations, the primary checkbox must be unchecked. They can be used for tracking time away for the programs.

Rotation Name
MMCGME-MEDICAL, CAREGIVER OR PARENTAL LEAVE (NON-PRIMARY ROTATION ONLY)
MMCGME-PANDEMIC HALF-DAY TIME AWAY (NON-PRIMARY ROTATION ONLY)
MMCGME-PANDEMIC TIME AWAY (NON-PRIMARY ROTATION ONLY)
MMCGME-PERSONAL LEAVE (NON PRIMARY ONLY)
MMCGME-PROFESSIONAL CONFERENCE (NON-PRIMARY ROTATION ONLY)
MMCGME-SICK (NON-PRIMARY ROTATION ONLY)
MMCGME-SICK HALF DAY (NON-PRIMARY ROTATION ONLY)
MMCGME-VACATION (NON-PRIMARY ROTATION ONLY)
MMCGME-VACATION HALF DAY (NON-PRIMARY ROTATION ONLY)
MMCGME-TIME AWAY-DOES NOT EXTEND (NON-PRIMARY ROTATION ONLY)

Requesting New Rotations or Updating Existing Rotations

If you have determined that the rotation you need does not exist within another department's rotation list, complete the **"New Rotation Request"** to identify the rotations that need to be created, edited, renamed or archived. Your will find this on the New Innovations Welcome Page under MMCGME Resources, Links & Forms



1. Once the form is submitted, it will create a HelpSpot ticket with MMCGME Services.
2. MMCGME will check to make sure there is a PLA and that the requested name meets the naming standards below:

Rotation Naming Standard

Example: UMN-PEDS-CARDIOLOGY-ECHO-UMMC

UMN = institution/site which sponsors the training program

PEDS = abbreviated name of the department (Pediatrics) that "owns" the program (aka 'division' – which is New Innovation's term)

CARDIOLOGY = name of the training program (note: many of the training program names are long, so they may be abbreviated)

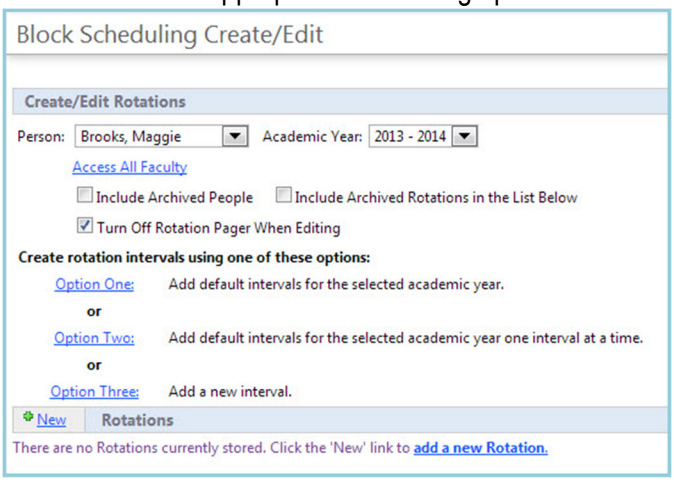
ECHO = rotation name

UMMC = site where rotation occurs (note: a rotation may occur at more than one site, so all sites may be listed or "Multi" may be used to indicate multiple sites – it is important to include the abbreviations of those multiple sites in the rotation names)

Creating a Block Schedule on the Web

For more information about block schedules, go to *Help* > *Tutorial Videos* and watch [4.1] Block Schedule-Creating a Block Schedule on the Web

1. Go to *Schedules* > under Block Scheduling: *Schedule Rotations*
2. Select the person to be scheduled
3. Select the academic year to be used for scheduling
4. Select the appropriate scheduling option described below to add rotations for the selected person



Option 1

Used for adding resident or fellow schedules for all intervals in the year.

1. Click Option One
2. The start and end dates of each interval are populated from the academic year template
3. Resident or fellow personal information is populated from Personnel files
4. Rotation department defaults to Rotation Favorites. If a rotation is not in Rotation Favorites, select the department where the rotation occurs from the Rotation Department dropdown list. When the screen refreshes, the Rotation dropdown list is populated with the rotations from that department.
5. Select the correct rotation from the rotation dropdown list
6. Keep **Primary** checked
7. Continue building the schedule for the rest of the intervals
8. Click **Save**

Block Scheduling Create/Edit

Create Rotation Interval for Baker, Thomas Eugene

Start Date	7/1/2016
End Date	7/31/2016
Person Status	PRG 3
Rotation Department	Rotation Favorites
Rotation	(Unspecified) (Department of Family Medicine/FM-Family Medicine)
Primary	☑
Work Load	100
Compensation Status	C4
Home Department	Department of Family Medicine/FM-Family Medicine
Program	Family Medicine
Post Graduate Year	3
Person Pager	---
Rotation Pager	---
Notes	

Remaining Characters: 500

Notes:

- Rotations marked with an asterisk do not belong to your rotation favorites list.
- To save this interval, click "Save" at the bottom of the screen
- If this is not what you intended to do, please click "Cancel" at the bottom of the screen instead of using the browser's back button

Create Rotation Interval for Baker, Thomas Eugene

Start Date	8/1/2016
End Date	8/31/2016
Person Status	PRG 3
Rotation Department	Rotation Favorites

Option 2

* Recommended Method

Used for adding resident or fellow schedules one interval at a time

1. Click Option Two
2. The start and end dates are populated from the academic year template
3. Resident or fellow personal information is populated from Personnel files
4. Rotation department defaults to Rotation Favorites. If a rotation is not in Rotation Favorites, select the department where the rotation occurs from the Rotation Department dropdown list. When the screen refreshes, the Rotation dropdown list is populated with the rotations from that department.
5. Select the correct rotation from the rotation dropdown list
6. Keep **Primary** checked
7. Click **Save and Continue**
8. Repeat until the block schedule for the academic year is complete

Block Scheduling Create/Edit

Create Rotation Interval for Baker, Thomas Eugene

Start Date	7/1/2016
End Date	7/31/2016
Person Status	PRG 3
Rotation Department	Rotation Favorites
Rotation	(Unspecified) (Department of Family Medicine/FM-Family Medicine)
Primary	☑
Work Load	100
Compensation Status	C4
Home Department	Department of Family Medicine/FM-Family Medicine
Program	Family Medicine
Post Graduate Year	3
Person Pager	---
Rotation Pager	---
Notes	

Remaining Characters: 500

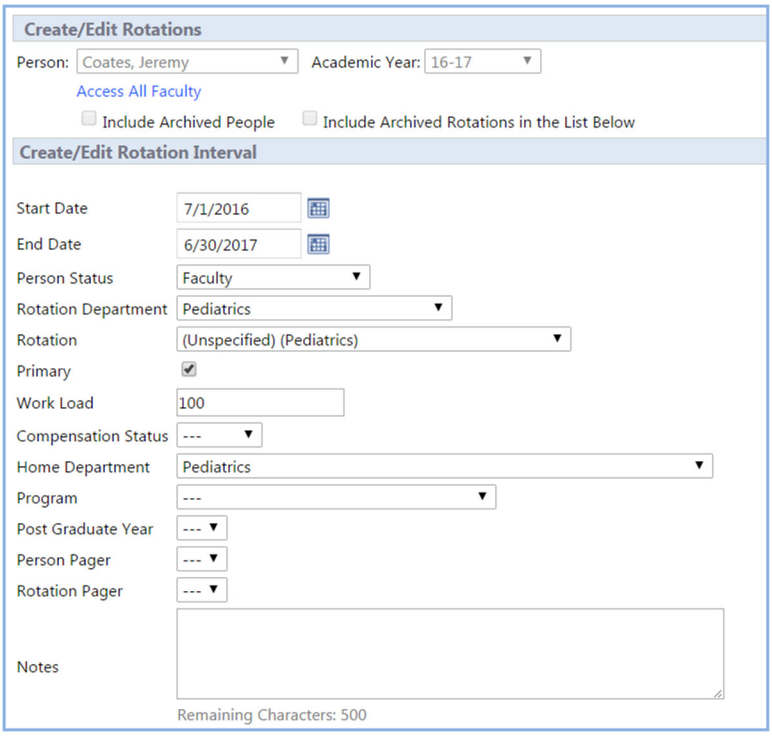
Save and Continue | Save and Return | Cancel and Return

Option 3

* Recommended for building faculty block schedules

Used to build schedules for one rotation for the entire year.

1. Click Option Three
2. Enter the start and end date of the academic year(s). You can add faculty to the block schedule for a rotation they will be evaluating for several years.
3. Select the appropriate rotation
4. Keep **Primary** checked
5. Click **Save**



Rotation Interval Screen

Field	Description
Start and End Dates	These are the default dates of the interval within the selected Academic Year.
Person Status	This is the default status from demographics. (The status in demographics needs to be aligned with the status in the rotation to be properly reimbursed.) • For example: if a person is currently a RL1 and is set to auto advance on 10/1, then it will default to a Status of PGY1 and a Post Graduate Year of 1 for July, August and September. From October on, the values will reflect the planned advancement with a Status Type of RL2 and Post Graduate Year 2. • Note that the advancement process does NOT affect Block Schedules that are already built.
Rotation Department	The list contains all of the Departments/Divisions within the institution. It defaults to "Rotation Favorites" if configured.
Rotation	This list contains the rotations from the selected Rotation Department.
Primary	Checking this box designates this rotation as the one used for IRIS and billing calculations. Multiple rotations can be scheduled for the same interval, but IRIS only allows one rotation to be designated as Primary. Keep the

	PRIMARY box selected (for Primary Rotation) when assigning a rotation to a trainee IMPORTANT: All 365 days in an Academic Year need to be covered by a Primary Rotation. They cannot overlap and there should be no gaps (even on weekends.)
Work Load	This defaults from demographics if populated and will be 100%. Part-time individuals are an exception.
Compensation Status	This defaults from the demographics if populated.
Home Department	This defaults from demographics. It should not be changed unless the resident/fellow is changing programs mid-year.
Program	This defaults from demographics. It should not be changed unless the resident is changing programs mid-year.
Post Graduate Year	This defaults to the post-graduate year currently entered into the demographics record for each resident/fellow. This field is used to calculate for IRIS reimbursement billing and must be the same as the one in demographics.
Person Pager	A resident may be assigned a pager for the entire academic year. This information comes from demographics and can be included on a custom view of the block schedule.
Rotation Pager	A resident may be assigned a pager for a specific rotation. This information can be included on a custom view of the block schedule.

Important Notes About the Rotation Interval Fields

- Much of the Rotation interval will be pre-populated with data copied from the individual's Demographics Record.
- If any fields that contain default information from Demographics contain discrepancies, contact MMCGMEhelp@umn.edu for assistance.
- Whenever a change is made to a default value within a Rotation Interval, only the data in the Rotation Interval is changed; the information in the Demographics Record can only be changed in Personnel Data. The same is true if changes are made in a person's demographics record – the information will not be updated in the rotation, causing an error in the block schedule.

Situations That May Dictate Changes in the Block Schedule

A resident's availability changes (e.g., leave of absence, unplanned vacation)

- Trainees are added or leave mid-year
- The rotation changes
- An elective placeholder is replaced by an actual rotation, if applicable
- New rotations are added to reflect changes in curriculum

Delete a Block Schedules

There are two different methods available to use to delete rotations from the Block Schedule:

Delete One Rotation

- Go to *Schedules* > *Schedule Rotations*
- Select a person
- Click **Delete** in front of the rotation you want to remove

Block Scheduling Create/Edit

Create/Edit Rotations

Person: Gomez, Maria Academic Year: 2016 - 2017

Access All Faculty

☐ Include Archived People ☐ Include Archived Rotations in the List Below

Create rotation intervals using one of these options:

Option One: Add default intervals for the selected academic year.

or

Option Two: Add default intervals for the selected academic year one interval at a time.

or

Option Three: Add a new interval.

New **Rotations**

	Edit	Start Date	End Date	Rotation	Department	Division	Status	PGY	Program	Rotation Pager	Personal Pager
Delete	☐	7/1/2016	7/31/2016	EM:EM:Red	Department of Emergency Medicine	Emergency Medicine	PRG 3	3	Family Medicine	---	---
Delete	☐	8/1/2016	8/31/2016	FM:AmbGyn-SC	Department of Family Medicine	FM-Family Medicine	PRG 3	3	Family Medicine	---	---
Delete	☐	9/1/2016	9/30/2016	FM:MedA-SC	Department of Family Medicine	FM-Family Medicine	PRG 3	3	Family Medicine	---	---
Delete	☐	10/1/2016	10/31/2016	FM:MedB-SC	Department of Family Medicine	FM-Family Medicine	PRG 3	3	Family Medicine	---	---
Delete	☐	11/1/2016	11/30/2016	FM:MedC-SC	Department of Family Medicine	FM-Family Medicine	PRG 3	3	Family Medicine	---	---
Delete	☐	12/1/2016	12/31/2016	FM:SportsMed-SC	Department of Family Medicine	FM-Family Medicine	PRG 3	3	Family Medicine	---	---
Delete	☐	1/1/2017	1/31/2017	FM:AmbGyn-SC	Department of Family Medicine	FM-Family Medicine	PRG 3	3	Family Medicine	---	---
Delete	☐	2/1/2017	2/28/2017	FM:Card-SC	Department of Family Medicine	FM-Family Medicine	PRG 3	3	Family Medicine	---	---
Delete	☐	3/1/2017	3/31/2017	FM:Card-VA	Department of Family Medicine	FM-Family Medicine	PRG 3	3	Family Medicine	---	---
Delete	☐	4/1/2017	4/30/2017	FM:ComMed-SC	Department of Family Medicine	FM-Family Medicine	PRG 3	3	Family Medicine	---	---
Delete	☐	5/1/2017	5/31/2017	FM:Derm-SC	Department of Family Medicine	FM-Family Medicine	PRG 3	3	Family Medicine	---	---
Delete	☐	6/1/2017	6/30/2017	FM:Geri-PCMH	Department of Family Medicine	FM-Family Medicine	PRG 3	3	Family Medicine	---	---

Edit

Delete Multiple Rotations

- Go to *Schedules* > under Block Scheduling: Tools > *Copy Or Delete*
- Click the Delete Rotations tab
- Select a date range. If you change the date, click "Update Personnel List"
- Select the name from the dropdown list
- Click "Display Rotations"
- Put a check mark in the box beside the rotation to be deleted. Multiple rotations can be checked. Use the "All, None and Invert" links.
- Click "Delete Selected Rotations"

Notes:

1. If you delete Rotations attached to curriculum that has been confirmed, those confirmations will no longer be included in the Confirmation Report.
2. Rotations controlled by a Block Schedule Lock will be deleted if you have sufficient privileges to override the Schedule Lock.

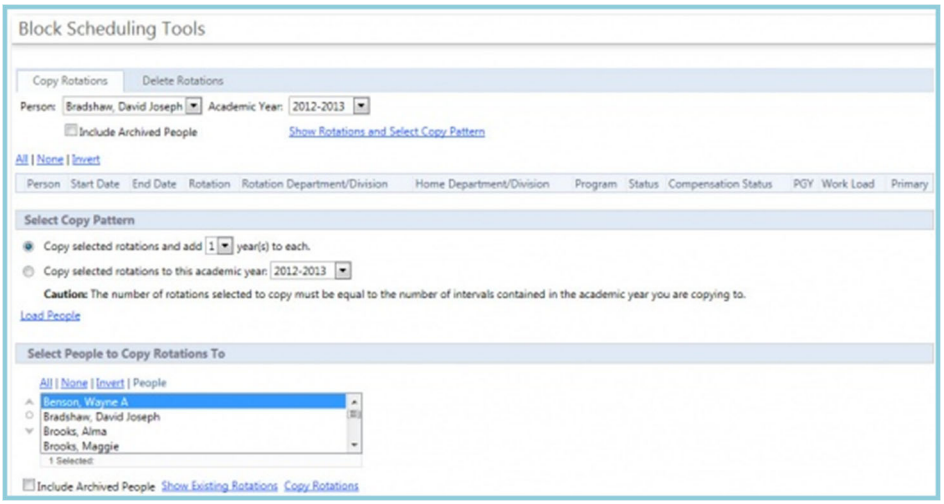
Copying Block Schedules

You can copy block schedules (or specific rotations within those schedules):

- **Only** among individuals in the same Department/Division
- From one individual to another
- From one individual to several others
- From one Academic Year to another

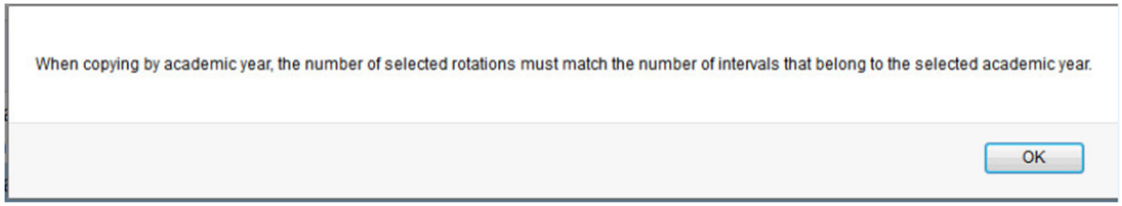
Copy Block Schedule

1. Go to *Schedules* > under Block Scheduling: Tools > *Copy Or Delete*
2. Select the name from the dropdown list
3. Select the Academic Year
4. Click "Show Rotations and Select Copy Pattern"
5. Check the rotation/s you want to copy.
6. Select a Copy Pattern:
    - Copy selected rotations and add __ year to each
    - Copy selected rotation to this academic year - Select an academic year
7. Click "Load People"
8. Select People from the drop-down list to copy rotations to
9. Click "Copy Rotations"



If the block schedule you are copying from has a different number of intervals than the year that you are copying to, an error may occur.

Check the number of intervals in both academic years if you receive this error:



Creating a Block Scheduler from your Desktop

For more information about block schedules, go to *Help* > *Tutorial Videos* and watch [6.1] MedScheduler-Overview & Installation

MedScheduler is a desktop application that allows you to easily create your schedules using drag and drop technology. MedScheduler can be installed directly onto your computer workstation. It communicates securely over the internet directly with your New Innovations online database. MedScheduler retrieves your current scheduling information from the department you're logged into. Once you are done modifying schedules in MedScheduler, you simply synchronize and your online database will be immediately updated to reflect the changes.

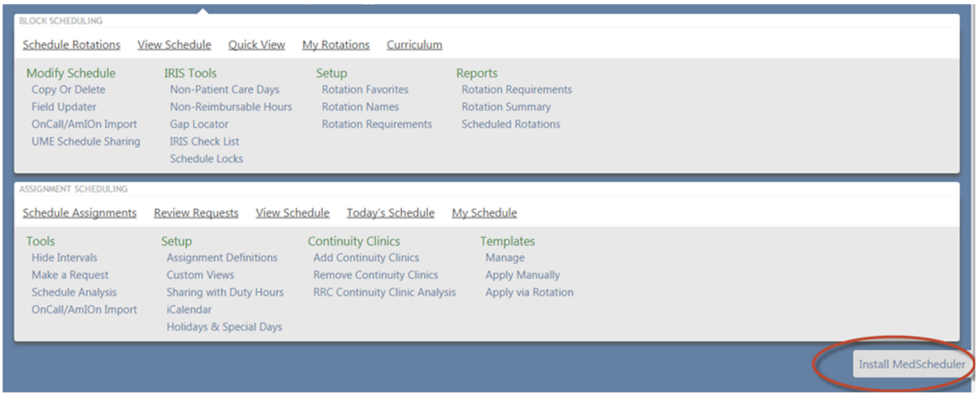
How does it work?

This standalone application works by downloading schedule information from the web database into an interactive spreadsheet application on your computer. Your Block Schedule can be easily created. MedScheduler allows you to see the entire schedule at one time while you're working on it. The schedule can be managed directly on the desktop and, when all editing is complete, the finished schedule is transmitted to the online site updating all online block schedule and assignment schedule information. Anyone in your department can download and use MedScheduler on their desktop. If more than one person is making updates to the schedule at the same time, changes are saved for the last person who synced. Therefore, it is important that everyone using MedScheduler coordinate efforts.

Creating Schedules in MedScheduler

Installing MedScheduler:

1. Install MedScheduler if you haven't already done so, by going to **Schedules** Module and Click the "**Install MedScheduler**" on the bottom right-hand side of the page. You may need Admin rights to install this software.



2. Click the **Download** tab
3. Read the 'End User License Agreement' and click **I Accept**
4. Click **Continue**
5. Click **Download Now**
6. Click **Install**

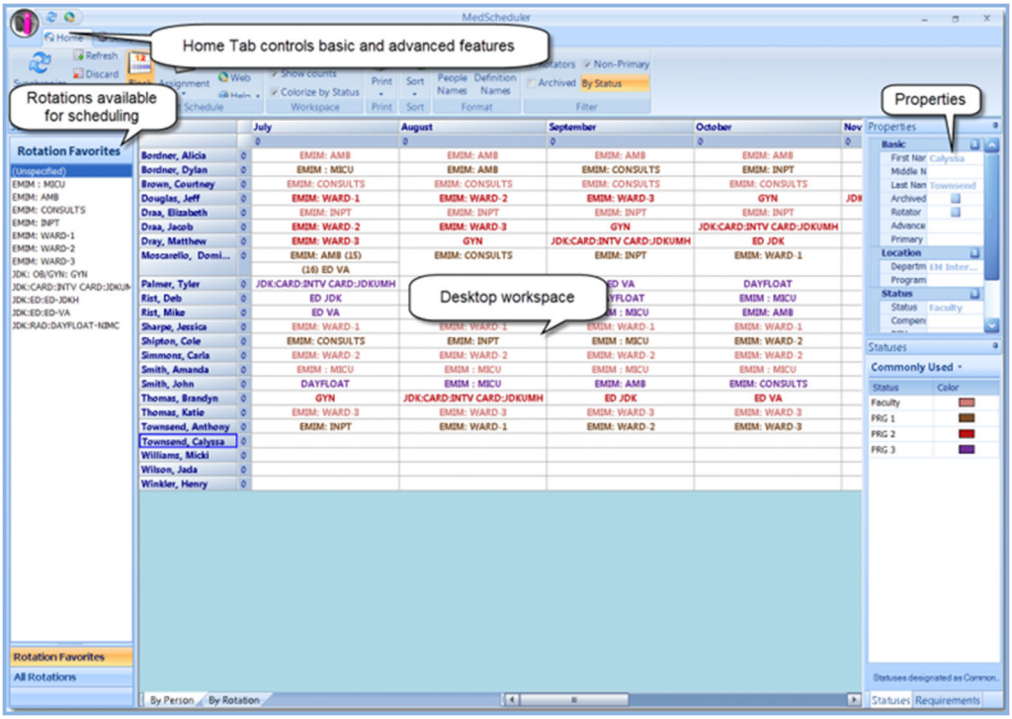
7. Follow the steps in the Synchronization Wizard to finish installing MedScheduler.

Notes:
You can install MedScheduler on more than one computer. Be sure that you discard your data when you open MedScheduler to ensure you have the latest schedules. Make your changes, then Synchronize.

Multiple people can install MedScheduler if they have privileges to create schedules. Care should be taken when multiple people use MedScheduler for the same department. Synchronizing and making any changes can impact the work of others who are also performing tasks in MedScheduler.

Accessing MedScheduler:

1. Go to the Start icon on your PC and select New Innovations, Inc
2. Click **MedScheduler**
3. The Synchronization Wizard opens. Click **Next**.
4. Enter your Institution Login, User Name and Password. Click **Next**.
5. Select your Department/Division and Academic Year. Click **Next**.
6. Using the arrows, select and move the status types of the people you want to import into the box on the right. Click **Next**.
7. Click **Finish**
8. Your data will be downloaded.
9. Choose one of the following in the upper banner:
    - Click **Block** to access your Block Schedule



Creating a Block Schedule:

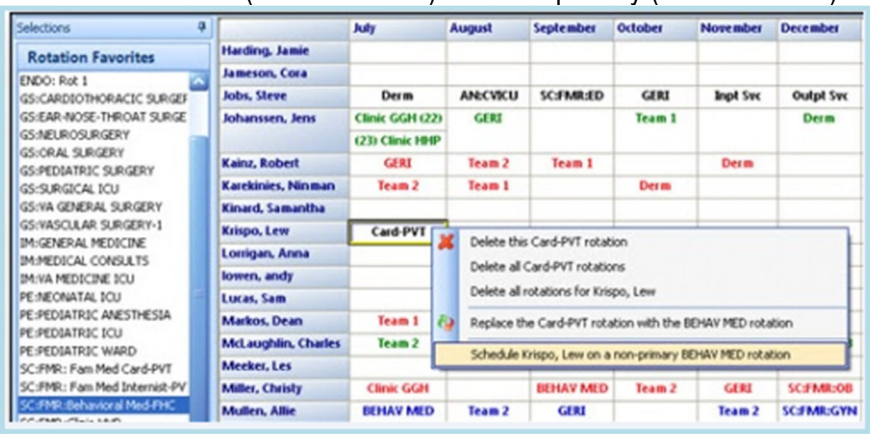
1. To create a block schedule in MedScheduler, drag the rotation from the **Rotation Favorites** list column on the left and drop into the Block Schedule desktop workspace of the desired trainee.
2. If the rotation that you are looking for is not visible in the Rotation Favorites list, click **All Rotations** at the bottom of the list for the comprehensive list of rotations from your program.
3. Continue dragging and dropping rotations into trainee schedule until all intervals in the academic year have a rotation.

Create schedule by person

1. Click the **By Person tab** at the bottom left corner of the page
2. Select a rotation from 'Rotation Favorites' column on the left. If the rotation name is not included in the Rotation Favorites list:
3. click **All Rotations** at the bottom of the list
4. Click the '+ sign' next to a Department/Division to view their rotations
5. Select a rotation in the left panel
6. Find the person to schedule and click in the appropriate cell. The rotation name fills that cell.
7. Optionally, edit start and end dates or create any split schedules:
8. For Split Schedules: click the scheduled rotation in the cell. Rotation information appears in the Properties panel to the right.
9. Change the end date
10. Click back in the cell for that interval. The end date of the rotation appears in parentheses after the rotation name. A new cell appears so that you can schedule the other part of the split.

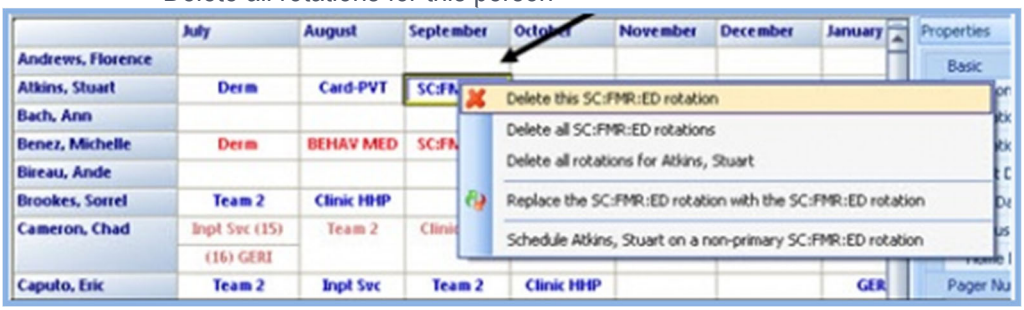
Schedule non-primary rotations

1. Select a rotation in the left column
2. Find the correct person and interval
3. Right-click on the interval
4. Select Schedule (Person's name) on a non-primary (Rotation name) rotation



Delete a scheduled rotation

1. Find the person's name and rotation to delete
2. Right-click on the rotation
3. Choose the correct delete option:
    - Delete this rotation
    - Delete all selected rotations
    - Delete all rotations for this person



Replace rotations

1. Select the replacement rotation
2. Find the person's name
3. Right-click on the current rotation that you want to replace
4. Select **Replace the rotation with [the correct rotation name]**

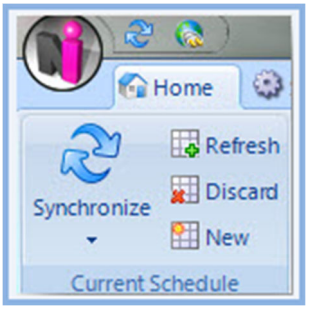
Swap rotations

1. Find the person's name and rotation to swap
2. Click and hover over the edge of the cell and a small gray box appears at the bottom of the arrow
3. Click and drag the cell to the other rotation to swap
4. Release the mouse to swap the rotations

Save schedule

To save the schedule you have made in MedScheduler, you will 'Synchronize' or save your schedule from MedScheduler to your New Innovations online schedule. Synchronize also pulls any updates from the schedule in New Innovations to MedScheduler.

1. In the top left corner of the MedScheduler screen, click **Synchronize**
2. Click **Next**
3. Enter the Institution Login, Username and Password
4. Click **Next**, then **Yes**
5. This screen displays the data transmitted from the desktop to the online website
6. Click **Next**
7. Click **Finish**



Create by rotation

1. At the bottom left of the screen, click the **By Rotation** tab. This changes the placement of the rotation names and people's names.
2. Select someone from the 'People By Name' list
3. Optionally sort the list of available people by status by clicking the **People by Status** option at the bottom of the left panel
4. Click the **+ sign** next to the status type to expand the list
5. Select a Person
6. Find the rotation and block and click the cell to place that person on this rotation
7. When finished building your schedule, save your work. See instructions above for 'Save Schedule.'

NI Logo

- Print: Print your schedule
- Export: Export your schedule to Excel, Text file, PDF or Zip file
- Web RMS: Opens New Innovations

Current Schedule panel

- Refresh: Get new rotations, statuses and people from New Innovations without publishing the schedule
- Discard: Remove the current schedule from MedScheduler and select a new one
- New: Download a schedule for a different department or academic year

Workspace:

- Highlight selection: Highlights the selected cell and all cells that contain the same information in yellow
- Show counts: Displays a count of how many times a person is scheduled on a selected rotation and how many people are on the rotation for each block
- Colorize by Status: The status types can be color-coded by clicking on the down arrow next to the color in the Statuses (In Use) panel on the bottom right. Color coding statuses makes it easy to view them.

Sort: (Not available on the 'By Rotation' tab.) By Name - Sorts the list alphabetically by last name

- By Status - Sorts the list alphabetically by status, then by name

Filters: The Filters section helps you control who you see on your workspace:

- Rotators: Check to display schedules for people from outside departments who are on your rotations
- Archived: Check to display schedules for people who have been archived
- Non-Primary: Check to include non-primary rotations that have been scheduled for the people in your department
- By Status: Click to select the statuses of people you want to see on your schedule

Status Colors:

- The status types can be color-coded for easier viewing. In the Statuses panel to the right, click a color block and select a new color.

Creating Custom Views

Overview

Coordinators can create custom views to show specific types of Block Schedule information. Examples may include just your first year residents or just a single rotation.

Note: The Default Department View cannot be edited or customized.

Person	July	August	September	October	November	December	January	February	March	April	May
Faculty (JGB Med - Internal Medicine)											
Bradshaw, D	EM	EM	EM	EM	EM	EM	EM	EM	EM	EM	EM
	JGB: Geriatrics	JGB: Geriatrics	JGB: Geriatrics	JGB: Geriatrics	JGB: Geriatrics	JGB: Geriatrics	JGB: Geriatrics	JGB: Geriatrics	JGB: Geriatrics	JGB: Geriatrics	JGB: Geriatrics
	JGB: MICU	JGB: MICU	JGB: MICU	JGB: MICU	JGB: MICU	JGB: MICU	JGB: MICU	JGB: MICU	JGB: MICU	JGB: MICU	JGB: MICU
Kollar, D	JGB: Wards B	JGB: Wards B	JGB: Wards B	JGB: Wards B	JGB: Wards B	JGB: Wards B	JGB: Wards B	JGB: Wards B	JGB: Wards B	JGB: Wards B	JGB: Wards B
	JGB:Inpatient	JGB:Inpatient	JGB:Inpatient	JGB:Inpatient	JGB:Inpatient	JGB:Inpatient	JGB:Inpatient	JGB:Inpatient	JGB:Inpatient	JGB:Inpatient	JGB:Inpatient
Spino, T	JGB: Pediatrics	JGB: Pediatrics	JGB: Pediatrics	JGB: Pediatrics	JGB: Pediatrics	JGB: Pediatrics	JGB: Pediatrics	JGB: Pediatrics	JGB: Pediatrics	JGB: Pediatrics	JGB: Pediatrics
	JGB: VA	JGB: VA	JGB: VA	JGB: VA	JGB: VA	JGB: VA	JGB: VA	JGB: VA	JGB: VA	JGB: VA	JGB: VA
	JGB: Wards A	JGB: Wards A	JGB: Wards A	JGB: Wards A	JGB: Wards A	JGB: Wards A	JGB: Wards A	JGB: Wards A	JGB: Wards A	JGB: Wards A	JGB: Wards A
PRG 2 (JGB Med - Internal Medicine)											
Brooks, M	EM	JGB: Ambulatory	JGB: Cardiology	JGB: Consults	JGB: Geriatrics	JGB: MICU	JGB: Pediatrics	JGB: VA	JGB: Wards A	JGB: Wards B	JGB:Inpatient
Lord, N	JGB: Ambulatory	JGB: Cardiology	JGB: Consults	EM	JGB: Geriatrics	JGB: MICU	JGB: Pediatrics	JGB: VA	JGB: Wards A	JGB: Wards B	JGB:Inpatient
Vignos, C	JGB: Geriatrics	JGB: MICU	JGB: Pediatrics	JGB: VA	JGB: Wards A	JGB: Wards B	JGB:Inpatient	JGB: Ambulatory	JGB: Cardiology	JGB: Consults	EM
PRG 3 (JGB Med - Internal Medicine)											
Schell, G	JGB: Consults	EM	JGB: Geriatrics	JGB: MICU	JGB: Pediatrics	JGB: VA	JGB: Wards A	JGB: Wards B	JGB:Inpatient	JGB: Ambulatory	JGB: Cardiology
Program Director (JGB Med - Internal Medicine)											
Benson, W	JGB: Ambulatory	JGB: Ambulatory	JGB: Ambulatory	JGB: Ambulatory	JGB: Ambulatory	JGB: Ambulatory	JGB: Ambulatory	JGB: Ambulatory	JGB: Ambulatory	JGB: Ambulatory	JGB: Ambulatory
	JGB: Cardiology	JGB: Cardiology	JGB: Cardiology	JGB: Cardiology	JGB: Cardiology	JGB: Cardiology	JGB: Cardiology	JGB: Cardiology	JGB: Cardiology	JGB: Cardiology	JGB: Cardiology
	JGB: Consults	JGB: Consults	JGB: Consults	JGB: Consults	JGB: Consults	JGB: Consults	JGB: Consults	JGB: Consults	JGB: Consults	JGB: Consults	JGB: Consults
Rotators											
Rotator (X - Rotators)											
Downton, M	JGB: Geriatrics										

Multiple views of the Block Schedule (compared in Table 1 below) permit you to easily find just the information you need. Anyone with **Privilege Level 1** and above in the Block Schedule module may use existing Schedule Views to view the Block Schedule. However, only people with a **Privilege Level 4** and above in the Block Scheduling module may create, edit, and delete Block Schedule Views.

Table 1: Comparison of Department and Division Block Schedule Views

View Format	Purpose	Features
Quick View	View entire current Academic year with no other filters.	• Scrolling grid option • Does not include Rotators, Rotations Dates • Loads quickly
Temporary View	View Academic year and Intervals selected in **Active Interval Date Range** box	• Grouped by Status Type • Includes Rotators • Loads quickly
Advanced Filtering Options View	Temporary view of specific schedule data. When an Advanced Filtering Option View is saved, it becomes a Custom Block Schedule View.	• Maximum flexibility • May load slowly
Custom Block Schedule View	Saved view of specific schedule data	• Maximum flexibility • May load slowly

Configure the Filters

1. Go to Schedules > View Schedule
2. Click New
3. Which Type of View - Select one:
    1. By Personnel - Schedule will show people along the left side, months (intervals) across the top, with rotations filling the grid
    2. By Rotation - Schedule will show rotations along the left side, months (intervals) across the top, with people filling the grid
    3. By Grid - Select the columns for your schedule view
4. Which Personnel
    1. Select People
    2. Select Status Types
5. Rotators - Select one:
    1. Do Not Show - Rotating residents will not be shown
    2. Together - Rotating residents will be listed with your residents
    3. Last - Rotating residents will be listed at the bottom of the schedule
6. Which Rotations - All rotations are selected by default.
7. Display Options - Select additional display options by checking the boxes, changing the font size, or giving the schedule view a header, sub-header or footer.
8. Click View Block Schedule

Save the Filters

If you like the schedule view you've created, you can save the configuration. At the top of the screen:

- Enter a name
- Optional: Check the box to set this schedule view as the default for all users
- Click Save

Block Scheduling Views

Academic Year: 2015-2016 Schedule View: Temporary View Edit New

Advanced Interval Selection

Save this view? * Residents Only ☐ Set as default Save | Cancel

Department of Family Medicine/FM-Family Medicine

Last updated: 7/21/2015 3:32:44 PM

Person	July	August	September	October	November	December	January	February	March	April
PRG 1 (FM-Family Medicine)										
Archer, D	FM:SportsMed-SC	FM:MedA-SC	FM:MedB-SC	FM:MedC-SC	FM:Geri-PCMH	FM:FPC2-PCMH	FM:Derm-SC	FM:Card-VA (2/1 - 2/28)	FM:AmbGyn-SC	EM
Parke, B	FM:MedB-SC	FM:Card-SC	FM:Card-VA	FM:ComMed-SC	FM:Derm-SC	FM:Elect	FM:FPC2-PCMH	FM:Geri-PCMH (2/1 - 2/28)	FM:MedA-SC	FM:MedB-SC
Wolf, B	FM:Geri-PCMH	FM:AmbGyn-SC	FM:Card-SC	FM:Card-VA	FM:ComMed-SC	FM:Derm-SC	FM:FPC2-PCMH	FM:Geri-PCMH (2/1 - 2/28)	FM:MedA-SC	FM:MedB-SC
PRG 2 (FM-Family Medicine)										
Aktar, A	FM:Card-SC	FM:Card-SC	FM:Card-VA	FM:ComMed-SC	FM:Derm-SC	FM:FPC2-PCMH	FM:Geri-PCMH	FM:MedA-SC (2/1 - 2/28)	FM:MedB-SC	FM:MedC-SC
Julka, V	FM:ComMed-SC	FM:Derm-SC	FM:FPC2-PCMH	FM:Geri-PCMH	FM:MedA-SC	FM:MedB-SC	FM:MedC-SC	FM:SportsMed-SC (2/1 - 2/28)	FM:AmbGyn-SC	FM:Card-SC
O'Doull, K	FM:MedA-SC	FM:MedB-SC	FM:MedC-SC	FM:AmbGyn-SC	FM:Card-SC	FM:Card-VA	FM:ComMed-SC	FM:Derm-SC (2/1 - 2/28)	FM:FPC2-PCMH	FM:Geri-PCMH
PRG 3 (FM-Family Medicine)										
Baker, T	FM:SportsMed-SC	FM:MedA-SC	FM:MedB-SC	FM:MedC-SC	FM:AmbGyn-SC	FM:Card-SC	FM:Card-VA	FM:ComMed-SC (2/1 - 2/28)	FM:Derm-SC	FM:FPC2-PCMH
Gomez, M	EM	FM:AmbGyn-SC	FM:MedA-SC	FM:MedB-SC	FM:MedC-SC	FM:SportsMed-SC	FM:AmbGyn-SC	FM:Card-SC (2/1 - 2/28)	FM:Card-VA	FM:ComMed-SC
Wallace, C	FM:AmbGyn-SC	FM:Card-SC	FM:Card-VA	FM:MedA-SC	FM:MedB-SC	FM:MedC-SC	FM:SportsMed-SC	EM (2/1 - 2/28)	FM:AmbGyn-SC	FM:Geri-PCMH
Rotators										
PRG 1 (Emergency Medicine)										
Benn, J								FM:MedA-SC (2/1 - 2/28)		
PRG 2 (Emergency Medicine)										
Travis, J							FM:Elect			

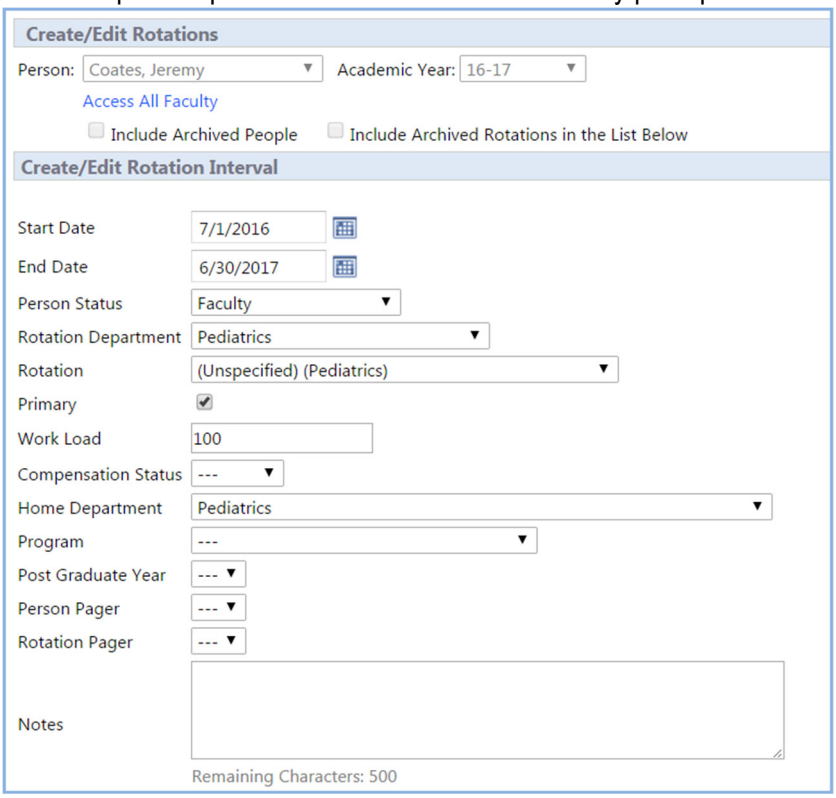
Notes:

1. To add rotations from outside departments: In the 'Which Rotations' section, click “Show Department and Training Location Filters for Rotations Below”. Select the department and/or training locations. Click “Update Rotation List”. The rotations from that department will now appear in the Rotations box.
2. You cannot include outside rotations and outside residents in the same schedule view. If this were allowed, you would get rotating residents appearing on outside rotations on your schedule that have nothing to do with your program.

Creating Faculty Block Schedule

The evaluations module has an automatic matching feature that is dependent upon both the trainees and the faculty members having block schedules in New Innovations. Unlike trainees, faculty typically precept for the same rotation all year long. Also, faculty can be assigned to multiple rotations that they precept because the 'primary' rotation has no relevance for a faculty member.

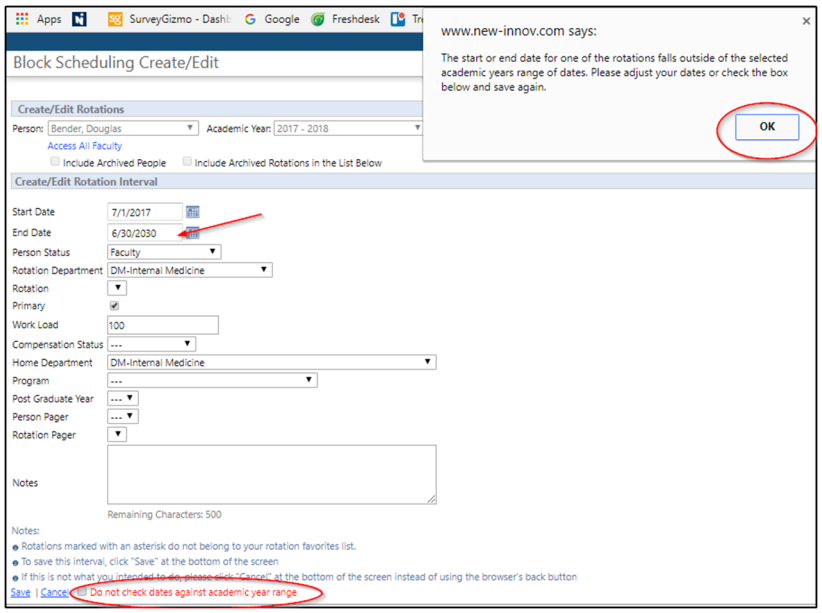
1. Go to Schedules > Schedule Rotations
2. Select the person to be scheduled
3. Select the academic year to be used for scheduling
4. Click Option Three
5. Enter the start and end date of the academic year
6. Select the appropriate rotation
7. Click Save
8. Repeat steps 1 – 4 for each rotation the faculty precepts



<u>Option to Extend the rotation end date beyond the current academic year</u>

If you expect your faculty member to precept the same rotation for years to come, you can create a rotation that spans multiple years. Otherwise, each year you will need to create new faculty schedules.

Use the current academic year and simply change the end date to several years out. The application will recognize that you are trying to end the rotation outside of the chosen academic year. Click OK and then check the box to ask the system not to check the dates against the academic year range. Then click Save.


Apps
SurveyGizmo - Dashb
Google
Freshdesk
Block Scheduling Create/Edit
Create/Edit Rotations
Person: Bender, Douglas
Academic Year: 2017 - 2018
Access All Faculty
Include Archived People
Include Archived Rotations in the List Below
Create/Edit Rotation Interval
Start Date 7/1/2017
End Date 6/30/2030
Person Status Faculty
Rotation Department DM-Internal Medicine
Rotation
Primary
Work Load 100
Compensation Status ---
Home Department DM-Internal Medicine
Program ---
Post Graduate Year ---
Person Pager ---
Rotation Pager
Notes
Remaining Characters: 500
Notes:
Rotations marked with an asterisk do not belong to your rotation favorites list.
To save this interval, click "Save" at the bottom of the screen
If this is not what you intended to do, please click "Cancel" at the bottom of the screen instead of using the browser's back button
Save | Cancel
Do not check dates against academic year range
www.new-innov.com says:
The start or end date for one of the rotations falls outside of the selected academic years range of dates. Please adjust your dates or check the box below and save again.
OK

Set Up Rotation Requirements

Set the number of weeks the residents are required to be on specific rotations according to your Common Program Requirements. This information appears in Portfolio Reviews, on the Program Dashboard in Administration, and in the MedScheduler for the Block Schedule Requirements feature. Specialized features provide for breaking down the number of weeks spent on the rotation by status. For instance, a first year resident may be required to work 4 weeks on a rotation while an upper level trainee must work 6 weeks. If you use this feature, enter the higher number in the total number of weeks spent on the rotation field.

Add Requirements

1. Go to Schedules > Setup > Rotation Requirements
2. Select the program from the dropdown list. If you are privileged in only one department, you won't have a list.
3. Map the statuses by program year that will have rotation requirements. Click Define Statuses per Program Year. Select the statuses you use for each year and click Save
4. Click the Add Rotation Requirement button
5. Enter the name of the requirement such as 'PGY 1 Rotations' or 'SICU'
6. You can add a Short Name that will be displayed in the MedScheduler
7. Enter the total number of weeks that the resident needs to spend on this rotation. This number cannot be larger than the overall total weeks. See step 10.
8. Select the rotation from the Required Rotations list
9. Choose which year the requirement applies to
10. You can further define the number of weeks by year.
11. We have also provided an option to include all rotations in one Requirement. Check the box below the rotation list to 'Include all rotations'.
12. Click Add Rotation Requirement

ICal (iCalendar) - Setup

Overview

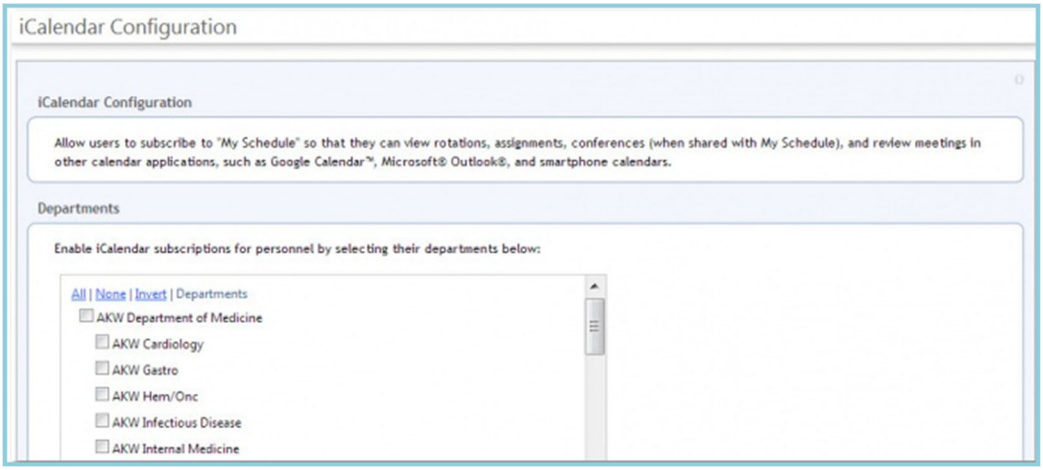
Users can subscribe to 'My Schedule' so that they can view scheduled events in other calendar applications, such as Google Calendar™, Microsoft® Outlook®, and smartphone calendars. Data is refreshed daily and when changes are made to a New Innovations calendar event.

Administrator Setup

Access: Level 5 or Level 6 in Block Schedules

Enable iCal in your department:

- Go to Administration > Software Setup > Local Setup > iCalendar Configuration
- Select your Department(s)
- Click Save

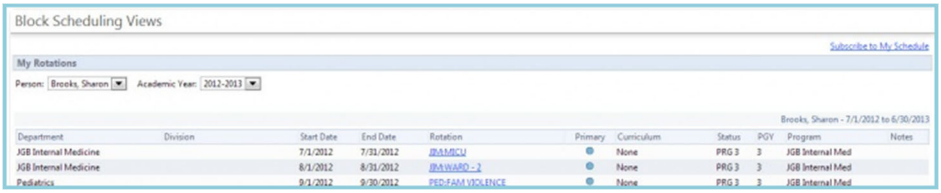


User Setup

Residents, fellows and faculty will need to set up their individual devices to sync the calendars. Both the Block Schedule and Assignment Schedule will appear for the user. There is not a way to turn off one or the other.

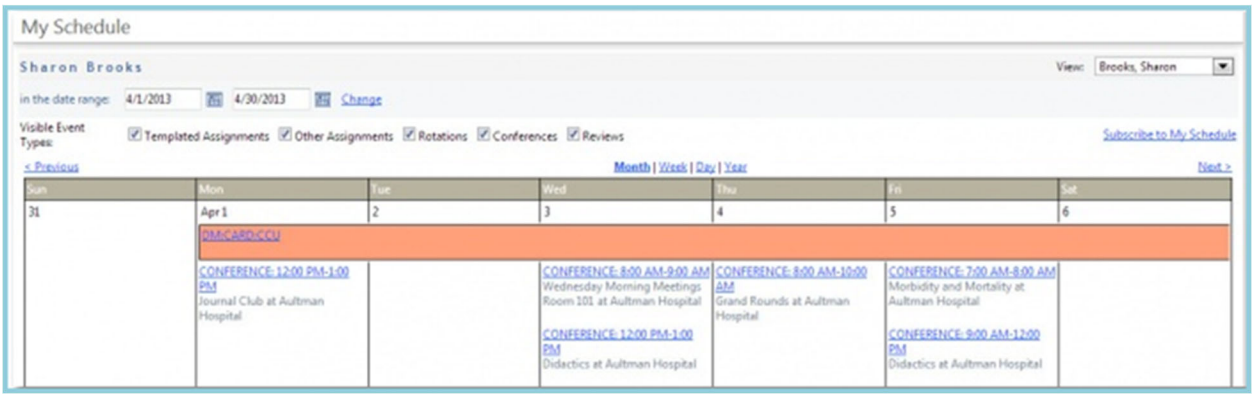
<u>Block Schedules</u>

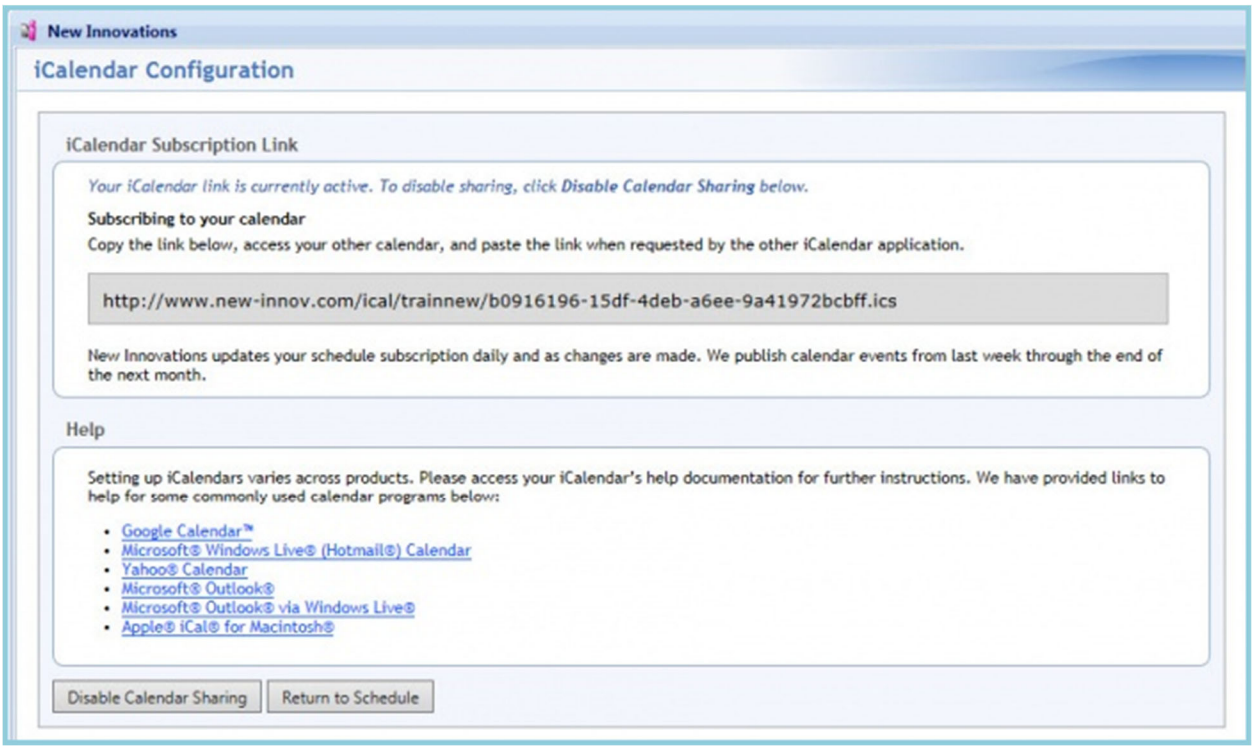
1. Go to Schedules > Block Scheduling > My Rotations
2. Click “Subscribe to My Schedule” on the top right hand side of the screen
3. Read and Agree to the use clause
4. Click "Create iCalendar Link”
5. Right Click and Copy the link in the grey box
6. Follow the steps for your personnel calendar. There are links to help instructions for the most common calendar programs.
7. Click Save



Assignment Schedules:

1. On the pop-up screen, check Enable Calendar Subscription
2. Read and Agree to the use clause
3. Click Create iCalendar Link
4. Copy the link in the grey box
5. Follow the steps for your personnel calendar. We have listed help instructions for the most common calendars on the Configuration page.
6. Click Save



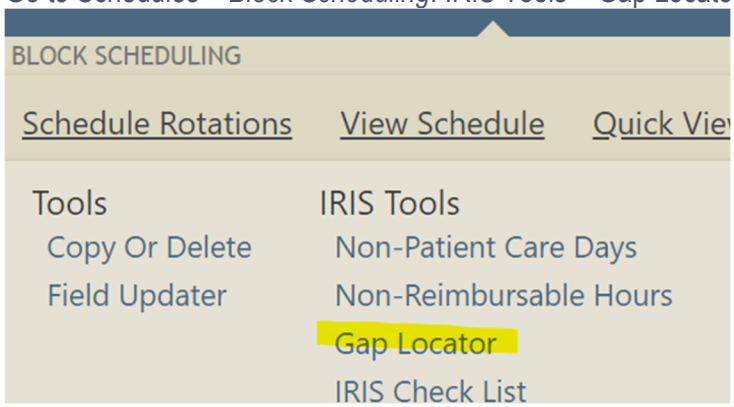
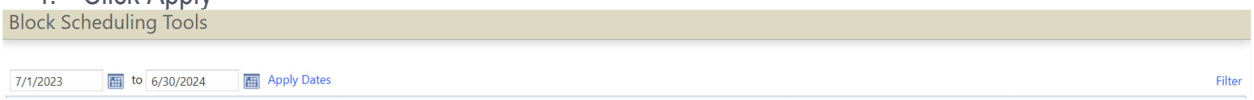


Gap Locator Tool

The Gap Locator Tool helps identify individuals who have not been assigned to a Rotation within a specified date range. The Gap Locator Tool interprets the following rotations as a gap:

- Rotations listed as 'Unspecified'
- Rotations designated as 'Non-Primary'
- Only residents with training records in their Personnel file will be included in this report. Program start and end dates come from the training record as well.

1. Go to Schedules > *Block Scheduling*: IRIS Tools > Gap Locator



2. The current academic year will be displayed. If necessary, change the date range and click Apply Dates.
3. Click Filter to:
   - Select other programs
   - Choose different status types
   - Include rotator programs
   - Include non-primary rotations (Will show the non-primary rotation to indicate that the resident is on a rotation and that a true gap does not exist.)
4. Click Apply