

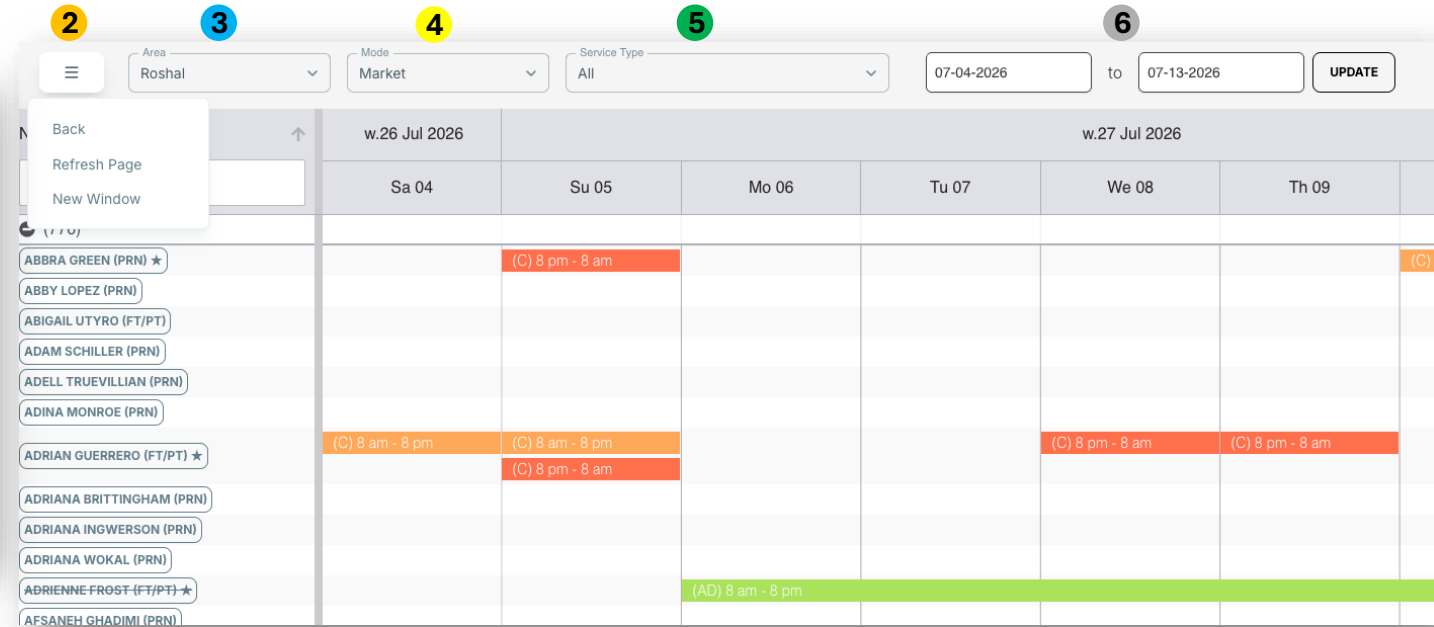
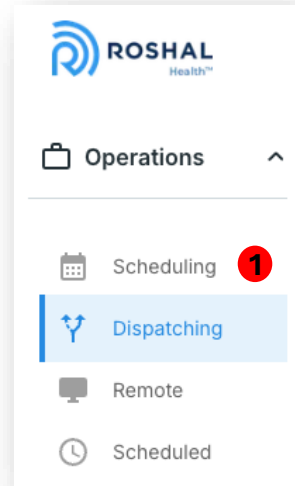
Scheduling Manager Training

Date: 8/6/26

Opening the Scheduling Manager

1. Opening the Scheduling Manager

- 1 • From the admin portal sidebar, click **Scheduling** to open the Scheduling Manager.
- 2 • The **menu button** in the top-left offers **Back**, **Refresh Page**, and **New Window**.
- 3 • Use the **area dropdown** to choose the area you are scheduling.
- 4 • **Set Mode:** Market is the default provider board and is where events are created.
- 5 • **Service Type** filter is used to filter the board by the providers' Service Type.
- 6 • Set the **date range** with the date picker. The board opens on today through one week out.



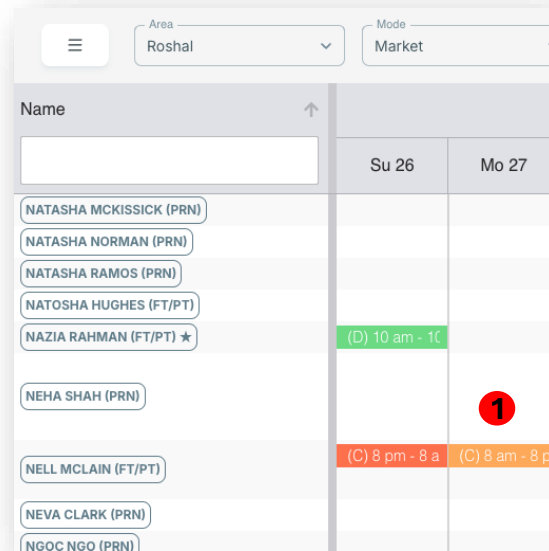
- 1 • Every **row is a provider**, grouped by category, with days across the top.
- 2 • Each scheduled block is a **colored bar** showing a shorthand code plus the hours:
 - **(A)** Available – blue,
 - **(C)** On-Call – orange,
 - **(S)** On-Site – purple
 - **(D)** Dedicated – green,
 - **(AD)** Administrative – lime
 - **(U)** Unavailable – gray,
 - **(T)** Remote – red
- 3 • **Hover** over a colored bar to see a tooltip with the event's full details.
- 4 • A **struck-through** provider name means they are not currently dispatchable.

[illegible]

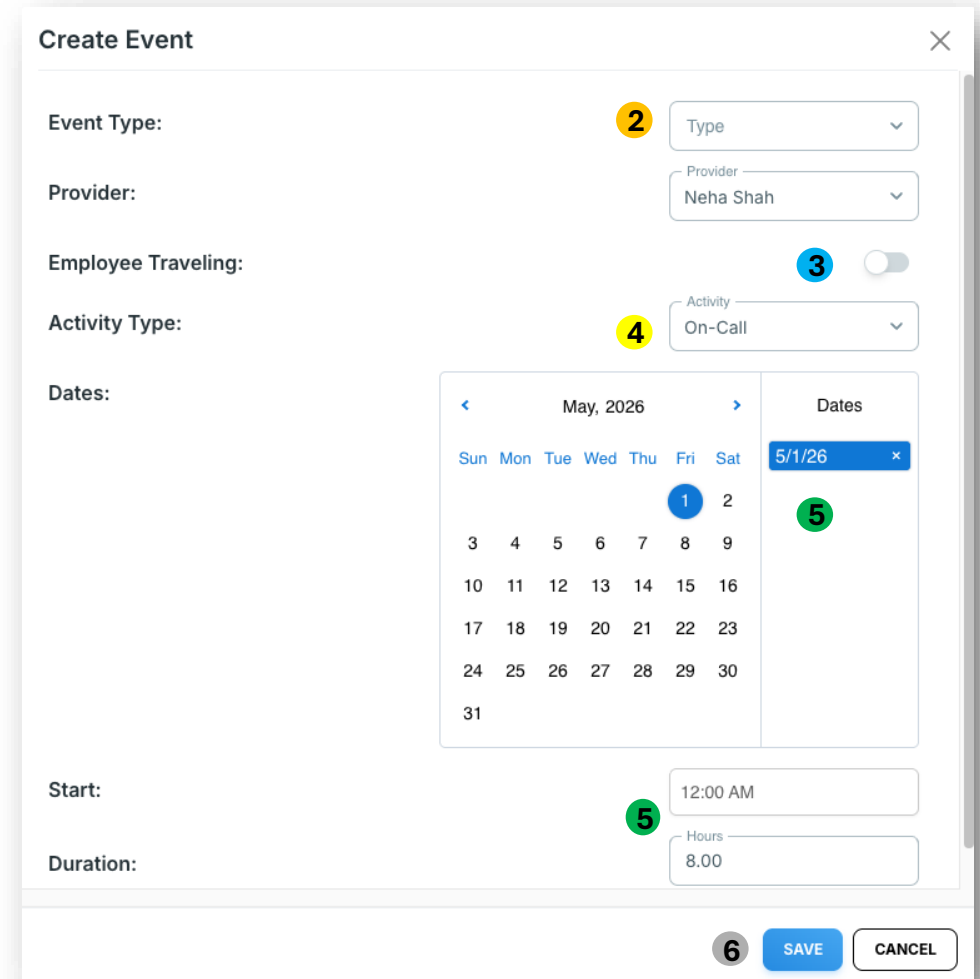
Creating an Event

3. Creating an Event

- 1 • **Double-click** empty space on a provider's row for the day you want.
- 2 • Pick the **Event Type**: Available, Unavailable, Administrative, On-Call, On-Site, Dedicated, or Remote.
 - **Dedicated** needs at least one facility; **On-Call** allows optional stations.
- 3 • Confirm the **Provider**, then set **Employee Traveling** and a **Travel Market** if needed.
- 4 • Choose the **Activity Type** — On-Call, Shifted, Admin, PTO, Training. The list depends on the provider's market.
- 5 • Select the **Dates**, set the **Start time** and **Duration** in hours
- 6 • Click **Save**.



The screenshot shows a provider selection interface. At the top, there are dropdowns for 'Area' (set to 'Roshal') and 'Mode' (set to 'Market'). Below these is a table with columns for 'Name', 'Su 26', and 'Mo 27'. The 'Name' column lists several providers: NATASHA MCKISSICK (PRN), NATASHA NORMAN (PRN), NATASHA RAMOS (PRN), NATASHA HUGHES (FT/PT), NAZIA RAHMAN (FT/PT) ★, NEHA SHAH (PRN), NELL MCLAIN (FT/PT), NEVA CLARK (PRN), and NGOC NGO (PRN). The 'Su 26' column shows a green bar for '(D) 10 am - 10 p' and an orange bar for '(C) 8 pm - 8 a'. The 'Mo 27' column shows an orange bar for '(C) 8 am - 8 p'. A red circle with the number '1' is placed over the empty space in the 'Mo 27' column, indicating where to double-click to create an event.



The screenshot shows the 'Create Event' form. It has a title bar 'Create Event' with a close button. The form contains several fields: 'Event Type' (dropdown menu, labeled with a yellow circle 2), 'Provider' (dropdown menu showing 'Neha Shah', labeled with a yellow circle 3), 'Employee Traveling' (toggle switch, labeled with a blue circle 3), 'Activity Type' (dropdown menu showing 'On-Call', labeled with a yellow circle 4), 'Dates' (calendar view showing May 2026, labeled with a yellow circle 4), 'Start' (time input field showing '12:00 AM', labeled with a green circle 5), and 'Duration' (input field showing '8.00', labeled with a green circle 5). At the bottom right, there are 'SAVE' and 'CANCEL' buttons, with a green circle 6 next to the 'SAVE' button.

Editing Events



4. Editing Event and Handling Requests

- 1 • Click any existing event bar to reopen it in the **Edit Event** window.
- 2 • Adjust the **Event Type**, **Activity Type**, **Start** and **End** times if needed, then click **Save**.
- 3 • Click **Save** to update the event and **Delete** to remove an event

☰

Area
Roshal

Mode
Market

Service Type
All

07-31-2026 to 08-07-2026

UPDATE

Name	w.30 Jul 2026		w.31 Aug 2026		
	Fr 31	Sa 01	Su 02	Mo 03	Tu 04
(803)					
ABBRA GREEN (PRN) ★				(C) 8 am - 8 pm	
ABBY LOPEZ (PRN)				(D) 8 am - 8 am	(D) 8 am - 8 am
ABIGAIL UTYRO (FT/PT)				(D) 10 pm - 5 am	
ABREHAM WOLDE (PRN)	(D) 11 am - 7 pm				
ADALICIA DIAZ (PRN)					
ADAM SCHILLER (PRN)					
ADELL TRUEVILLIAN (PRN)					
ADINA MONROE (PRN)	(C) 1 pm - 8 pm			(C) 1 pm - 8 pm	
ADRIAN GUERRERO (FT/PT) ★		(C) 8 am - 8 pm	(C) 8 am - 8 pm		
			(C) 8 pm - 8 am		
ADRIANA BRITTINGHAM (PRN)		(C) 7 pm - 7 am			

Edit Event

Event Type:

Type
On-Call

Provider:

Provider
Adina Monroe

Stations (Optional):

+

Employee Traveling:

Activity Type:

Activity
On-Call

Start:

08-03-2026 01:00 PM

End:

08-03-2026 08:00 PM

SAVE

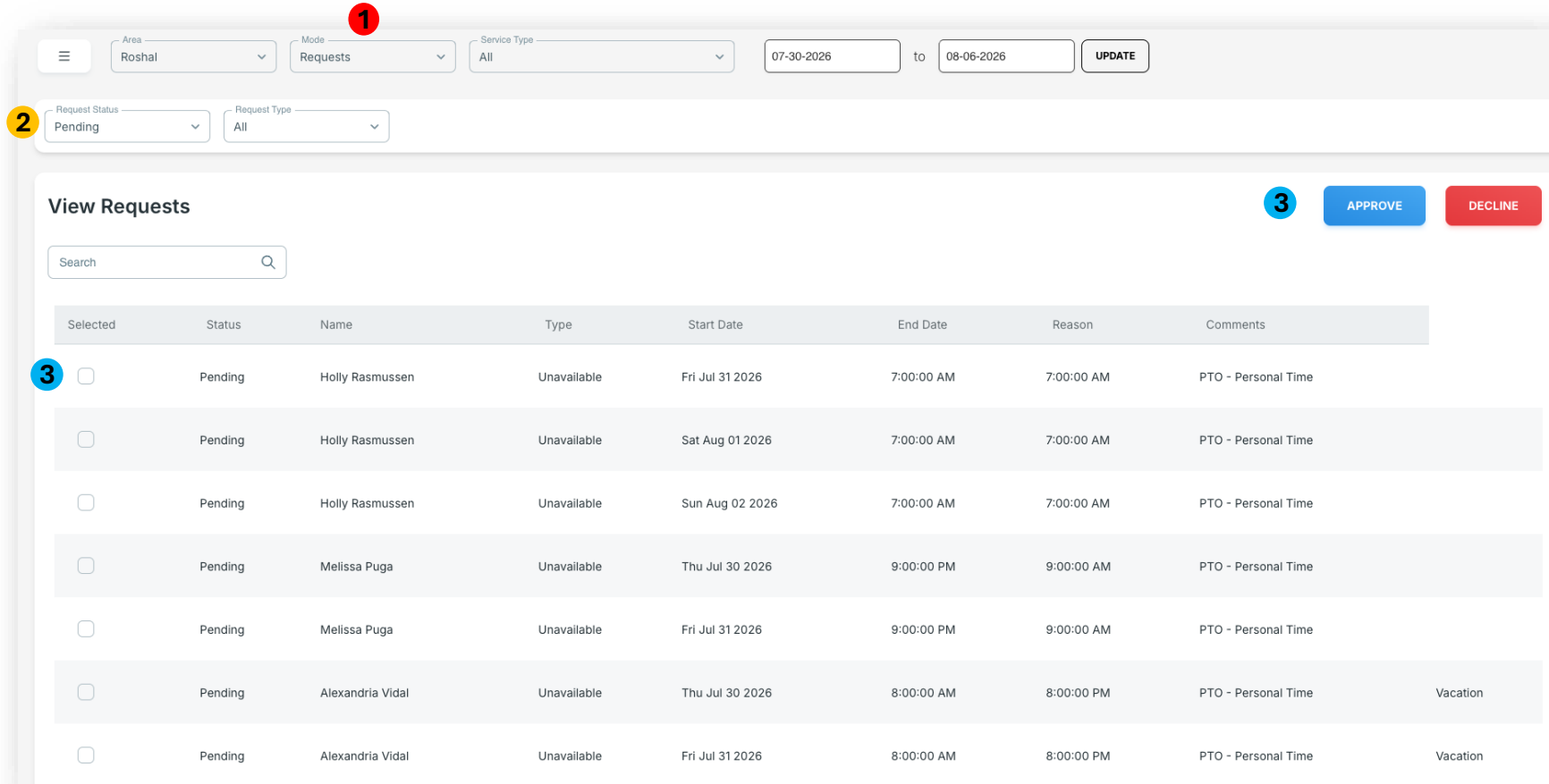
DELETE

CANCEL

Handling Requests

5. Handling Requests

- 1 • Switch **Mode** to **Requests** to work through availability requests submitted by providers.
- 2 • Filter the list by **Request Status** (Pending, Approved, Declined, All) and **Request Type** (Available, Unavailable, All), or search by provider name.
- 3 • Check the rows you want and click **Approve** or **Decline**. Your comments are saved with the decision.



The screenshot shows the 'View Requests' interface. At the top, there are filters for Area (Roshal), Mode (Requests), Service Type (All), and dates (07-30-2026 to 08-06-2026). Below these are filters for Request Status (Pending) and Request Type (All). A search bar is also present. The main table lists requests with columns: Selected, Status, Name, Type, Start Date, End Date, Reason, and Comments. There are two buttons at the top right: APPROVE and DECLINE. The interface is annotated with numbered callouts: 1 points to the Mode filter, 2 points to the Request Status and Request Type filters, and 3 points to the Selected checkbox in the first row of the table.

Selected	Status	Name	Type	Start Date	End Date	Reason	Comments
☐	Pending	Holly Rasmussen	Unavailable	Fri Jul 31 2026	7:00:00 AM	7:00:00 AM	PTO - Personal Time
☐	Pending	Holly Rasmussen	Unavailable	Sat Aug 01 2026	7:00:00 AM	7:00:00 AM	PTO - Personal Time
☐	Pending	Holly Rasmussen	Unavailable	Sun Aug 02 2026	7:00:00 AM	7:00:00 AM	PTO - Personal Time
☐	Pending	Melissa Puga	Unavailable	Thu Jul 30 2026	9:00:00 PM	9:00:00 AM	PTO - Personal Time
☐	Pending	Melissa Puga	Unavailable	Fri Jul 31 2026	9:00:00 PM	9:00:00 AM	PTO - Personal Time
☐	Pending	Alexandria Vidal	Unavailable	Thu Jul 30 2026	8:00:00 AM	8:00:00 PM	PTO - Personal Time Vacation
☐	Pending	Alexandria Vidal	Unavailable	Fri Jul 31 2026	8:00:00 AM	8:00:00 PM	PTO - Personal Time Vacation

EXTRA: What the Remote Event Type Does



6. What the Remote Event Type Does

- 1 • A **Remote** block simply puts the provider **on the schedule** for that window (much like **On-Call**, but for remote work).
- Any order with a delivery type of **Remote** will go to the providers who are on the Remote schedule.
- The provider still has to be **qualified** for the order:
 - **Associated** with the ordering facility.
 - Set up for the order's **service type**, showing they can perform it.
- 2 • From there, dispatching works **exactly the same as on-demand** orders, visible in **Remote Manager**.
- The one difference is that **distance is not taken into account** for remote orders.

The screenshot displays the Roshal Health interface. At the top, there are filters for Area (Roshal), Mode (Market), and Service Type (Wound Care). Below these is a calendar view for July 30, 2026, showing a red block for 'Fr 31' from 8 am to 8 pm, labeled with a red '1'. To the left of the calendar is a list of providers: CHRISTINE PENNINGTON (FT/PT), GRIFFIN PARK, and JENNIFER STEWART (PRN). Below the calendar is a 'Remote Manager' section with a sidebar for Operations (Scheduling, Dispatching, Remote, Scheduled, Shifts, Clinics, Requests, Payroll, Billing, Invoicing) and Reports. The main area shows a summary of orders for the '1 Week' time range: # Orders: 2944, Unassigned: 0, In Process: 39, Completed: 2875, Canceled: 119. Below this is a table of 5 records.

ORDER ID	ORDERED AT	SCHEDULED AT	STATUS	SERVICE TYPE	LOCATION	MRN	PROVIDER	PROVIDER PHONE
ord.390708	2026-08-06 15:41	2026-08-07 09:00	Canceled — Other: test	Ultrasound	Prairie County Hospital District	test6	Emily-Tram Dinh	(972) 992-8176
ord.390574	2026-08-06 09:46	2026-08-07 09:00	Complete	Echocardiogram	Ward Memorial Hospital	430335	Craig Garza	(214) 701-1929
ord.390395	2026-08-05 20:10	2026-08-06 13:00	Complete	Wound Care	Emerus HOP - Horizon City	3180763	Christine Pennington	(703) 851-3725

Overlaid on the right is the 'Create Event' modal, labeled with a red '1'. It contains fields for Event Type (Remote), Provider (Christine Pennington), Employee Traveling (toggle), Activity Type (On-Call), Dates (calendar for July 2026), Start (12:00 AM), and Duration (8.00). At the bottom are 'SAVE' and 'CANCEL' buttons.



ROSHAL

Health™