

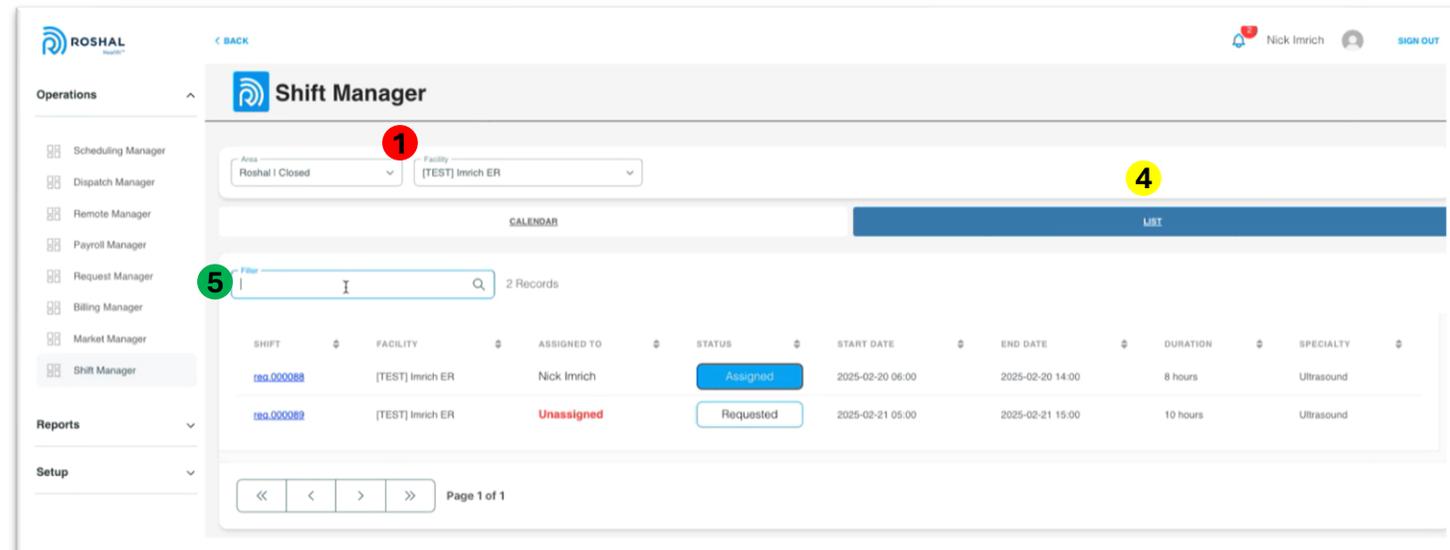
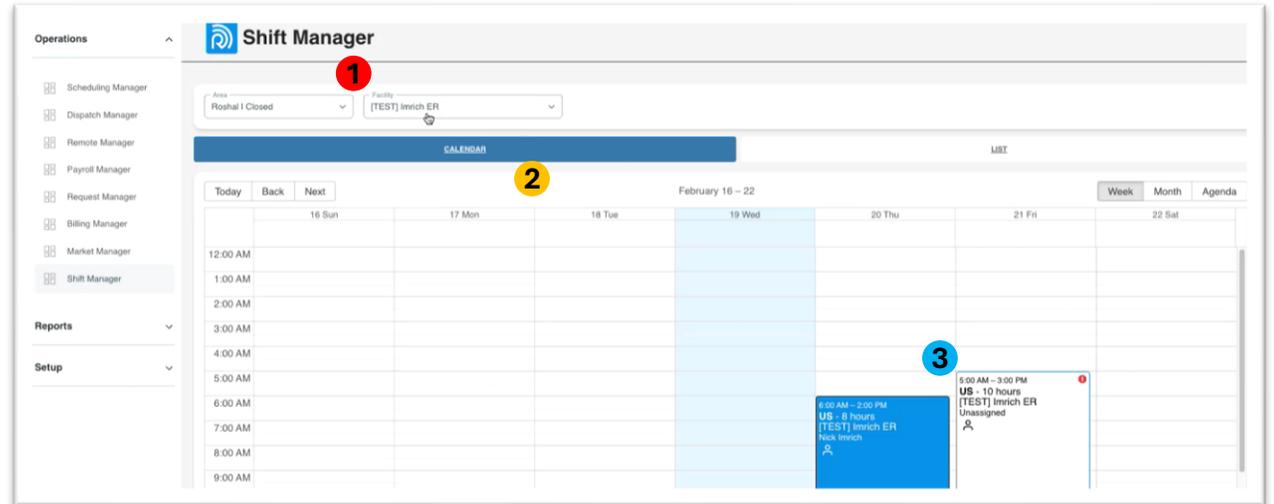
Shifted Schedule Walkthrough

11/13/2025

Shifted Schedule Update

1. Shift Manager Overview

- In phase 1 (current phase) you will be creating the shifted services on behalf of the client.
- 1** • Filter by **Area** or **Facility**.
- 2** • Inside the **Calendar View**, click inside of a specific cell on the schedule to add a shift to that date and time.
- 3** • **Blue** events have been assigned a person while **white** events are unassigned.
 - Click inside the event to assign a person.
- 4** • The **List View** is a condensed version of the Calendar View.
 - Click inside the list item to assign a person.
- 5** • **Filter Search** for specific providers (requested, facility, etc).

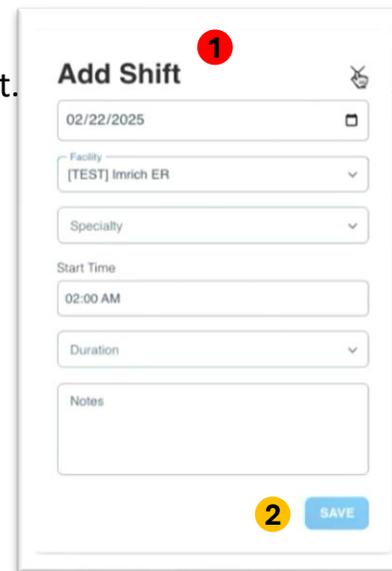


SHIFT	FACILITY	ASSIGNED TO	STATUS	START DATE	END DATE	DURATION	SPECIALTY
req.000088	[TEST] Imrich ER	Nick Imrich	Assigned	2025-02-20 06:00	2025-02-20 14:00	8 hours	Ultrasound
req.000089	[TEST] Imrich ER	Unassigned	Requested	2025-02-21 05:00	2025-02-21 15:00	10 hours	Ultrasound

Shifted Schedule Update

2. Adding and Editing Shifts

- 1 • When **Adding a Shift** fill out the necessary details on behalf of the client.
 - **Facility name.**
 - **Specialty** (Ultrasound, CT, X-ray, etc).
 - **Start Time and Duration.**
 - Any **Notes** if needed.
- 2 • Hit **Save** once completed.
- 3 • When **Editing a Shift** adjust details as needed.
 - 4 • **Assign** the person.
 - Adjust other details if necessary.
 - 5 • **Cancel Shift or Save** (add in a canceled reason when prompted).
- 6 • When **Assigning** a shift this will show all providers assigned to the facility selected.
 - 7 • The **Status** column signifies the persons availability.
 - **On Schedule** – currently has a scheduling conflict (on-call, dedicated, on a shift elsewhere).
 - **Available** – provider specifically marked themselves as available and able to be assigned.
 - **Blank** – no schedule conflict but have not set themselves as available.
 - **NOTE** – system doesn't prevent double booking, pay attention to provider status!
- 8 • Select **Assign** once completed.



Add Shift 1

02/22/2025

Facility [TEST] Imrich ER

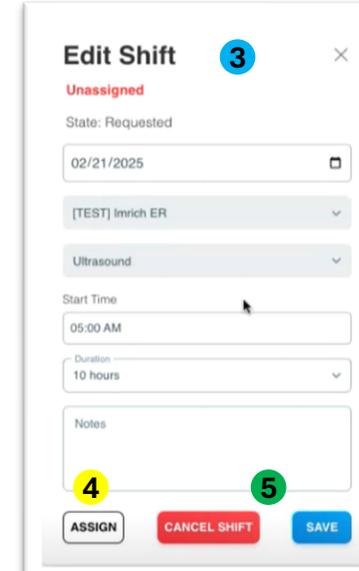
Specialty

Start Time 02:00 AM

Duration

Notes

2 SAVE



Edit Shift 3

Unassigned

State: Requested

02/21/2025

[TEST] Imrich ER

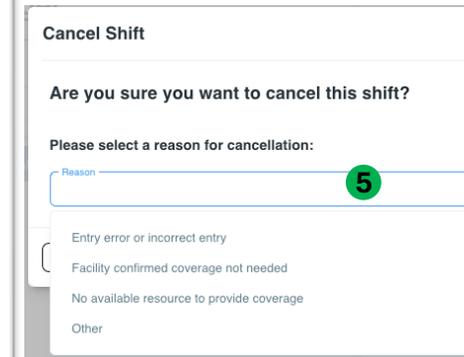
Ultrasound

Start Time 05:00 AM

Duration 10 hours

Notes

4 ASSIGN 5 CANCEL SHIFT SAVE



Cancel Shift

Are you sure you want to cancel this shift?

Please select a reason for cancellation:

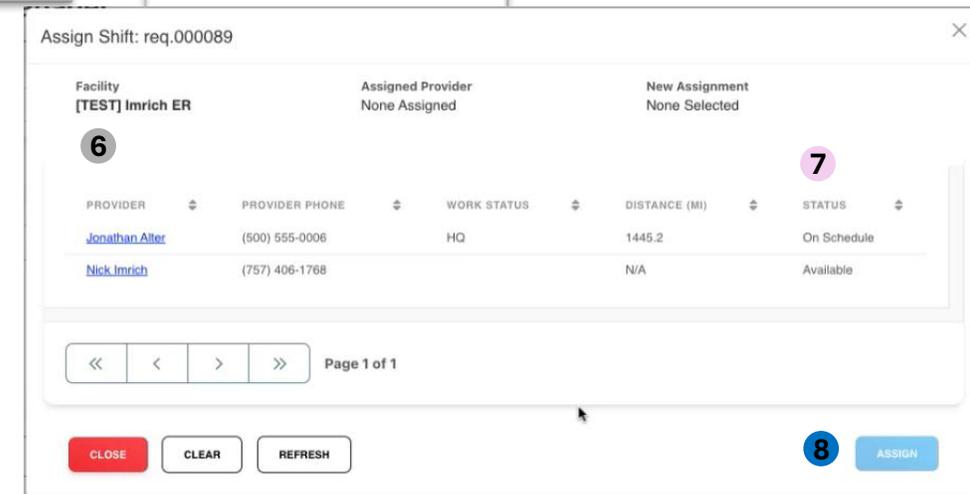
Reason 5

Entry error or incorrect entry

Facility confirmed coverage not needed

No available resource to provide coverage

Other



Assign Shift: req.000089

Facility	Assigned Provider	New Assignment
[TEST] Imrich ER	None Assigned	None Selected

PROVIDER	PROVIDER PHONE	WORK STATUS	DISTANCE (MI)	STATUS
Jonathan Alter	(500) 555-0006	HQ	1445.2	On Schedule
Nick Imrich	(757) 406-1768		N/A	Available

6 7

<< < > >> Page 1 of 1

CLOSE CLEAR REFRESH 8 ASSIGN

Shifted Schedule Update

3. General Comments to Note

- **Phase 1** (current rollout) will only allow admins to create shifted events on behalf of the client and assign them. Clients do not have shifted event creation access yet.
- **Phase 2** will allow clients to create their own events via client portal and the admin will only have to assign the event.
- Once a provider is **Assigned**, that provider will receive a notification, text message and phone call if the event is within 72 hours.
 - They will also be able to see the event on their provider app.
- **Cancelled/Deleted Events in Phase 1**
 - If the client decides they want an event **cancelled** the admin must cancel it for them (client will still see the event but marked as cancelled) .
 - Admins are **not** allowed to **delete** an event on behalf of the client.
- **Cancelled/Deleted Events in Phase 2**
 - The client will have access to **delete** or **cancel** their own events through their own client portal once this phase gets implemented.
 - Clients can **Delete** an event if it has not been assigned yet – deleted events disappear, and no cancellation fee incurred since it has not yet been assigned.
 - Clients must **Cancel** an event if it has already been assigned – this allows us to send cancellation fee to them if necessary.



Shifted Schedule Update

3. General Comments to Note (Continued)

- Q: Once the client has access to Shifted and they place an order for a shifted schedule and the RM does not have a tech available - can they decline the request and if so, is there a message or email that is sent back to the client to let them know?

A: We can't decline a request, right now it would just continue to show as unfulfilled, and you must manually let the client know. We need to develop a solution for a notification to be sent that it will never be fulfilled.





ROSHAL

Health™