PetalMD

User Guide

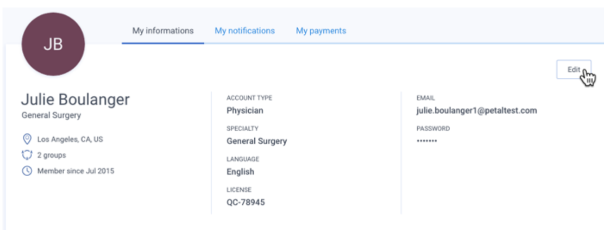
General Navigation

How to change the language

Here is how to change the language in which the platform is displayed:

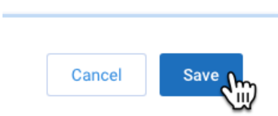
1. Access your profile by clicking on your initials or picture at the bottom left.

2. Click the **Edit** button in the *My information* tab.



3. Click on the Language menu to select the language in which you would like the interface to appear.

4. Click on **Save**

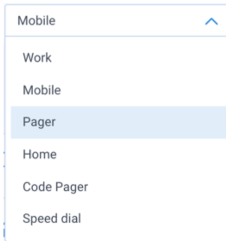


How to maintain your phone

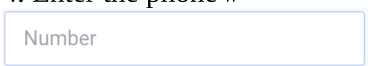
Entering phone #s in PetalMD may have various usage.
1. To enter it, the member must go to his profile

2. He must click on Add a phone #

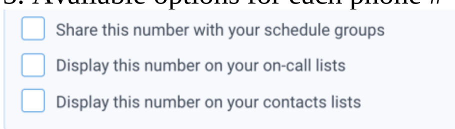
3. Choose the type of # from the proposed list



4. Enter the phone #

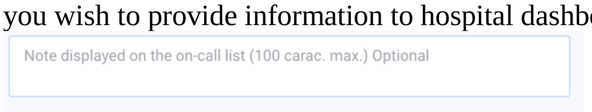


5. Available options for each phone #

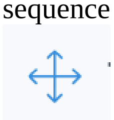


A. Share this number with your schedule groups: this option will make the # available in the schedules of your scheduling group, when you have assignments being identified to display the phone #.
B. Display this number on your on-call lists: this option will make the # available in the hospital dashboard when you have assignment in it.
C. Display this number on your contacts lists: this option will make the # available in the contact menu, for all members of your scheduling groups and for all users of the hospital dashboard, if your scheduling group is part of a dashboard product in your hospital.

The 3 options can be selected for the same phone #, each of them is not exclusive.
6. Note displayed on the on-call list: you have the opportunity to leave a note on each of your phone #s if you wish to provide information to hospital dashboard users who may be trying to reach you.



7. Prioritizing phone #: Click on this symbol to change the display sequence of your numbers. The sequence should be the one followed by users trying to reach you.

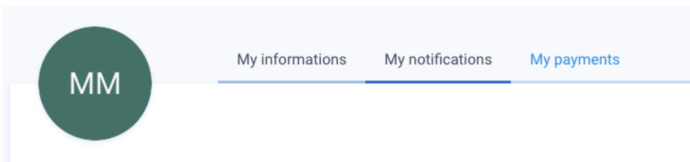


How to change my notification preferences

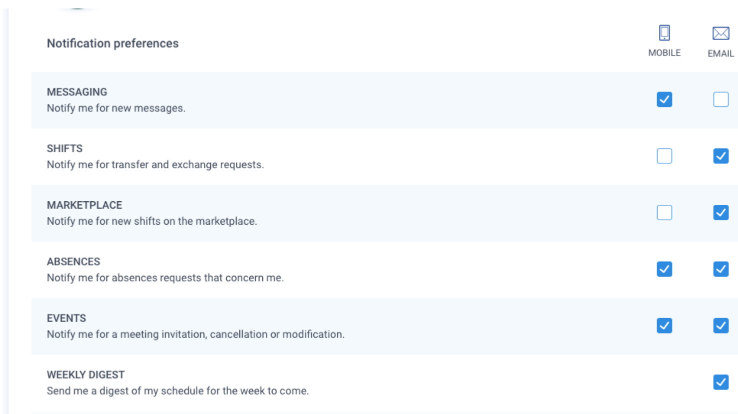
Notifications indicate that there is activity on PetalMD. You can receive a notification by email, an alert through your PetalMD mobile app or you can see them directly in the platform. Every user can configure their personal notification parameters through their profile.

1. Access your profile

2. Access *My notifications*

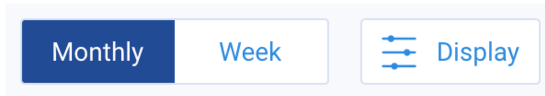


3. Select the notifications that you would like to receive by email or on your mobile



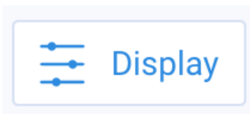
How to change display settings

Personalize your personal calendar display by configuring tabs located at the top right of your screen.

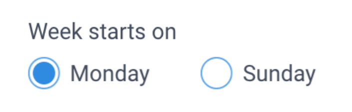


- Click on **Monthly** to display the view for a specific month
- Click on **Week** to display the weekly view

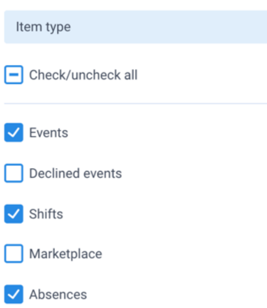
- Click on **Display** to modify your personal calendar display preferences



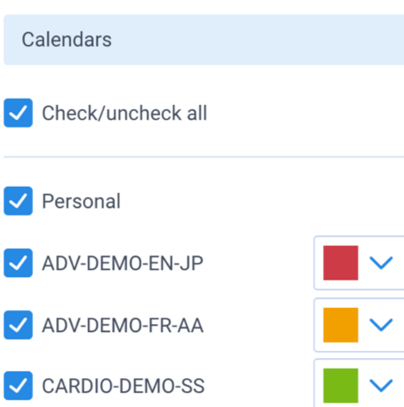
- Choose if you would like your week display to start on Monday or Sunday



- Choose which types of tasks/events you would like to display in your personal calendar



- Choose which groups you would like to display in your calendar and which color should be attributed to each group



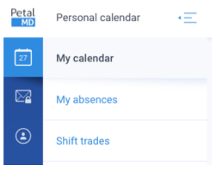
How to transfer a shift

It is possible to transfer a shift to one or many of your colleagues through PetalMD's calendar.

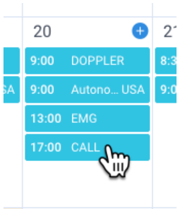
Offer a shift

1. Go to the **Calendar** section.

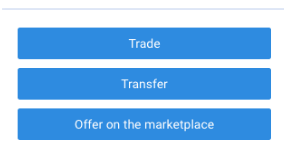
2. Click on **My calendar**.



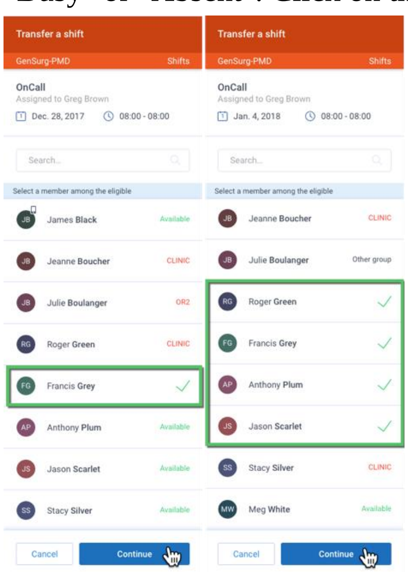
3. Click on the shift you want to transfer.



4. Click on **Transfer**



5. The list of members in your group who have the skills to do the selected task will appear on the screen at this time. It will also be shown to the right of each member if they are "Available", "Busy" or "Absent". Click on the persons to whom you wish to offer your task.



6. Then, click on **Continue**.

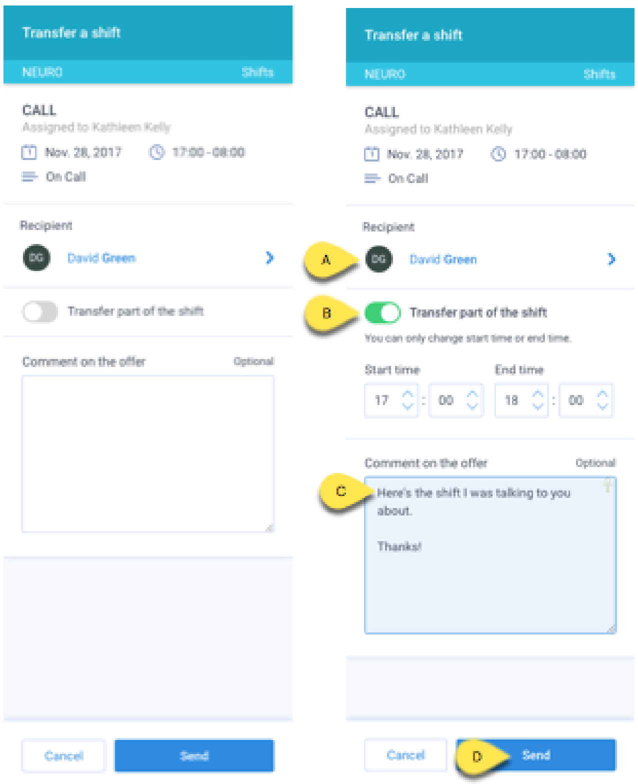
7. This panel allows you to validate the transfer offer you wish to make.

A. Identification of the task that will be transferred.

B. Ability to transfer only part or all of the task. If only part of the task is transferred, this section is activated and the start or end time of the section of the task to be transferred is changed. The task division only allows a division into 2 parts.

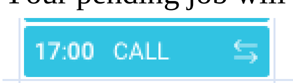
C. Identification of the member to whom the transfer request will be sent with the possibility to modify it by clicking on the arrow opposite the name of the selected member.

D. Possibility to leave a comment on the transfer offer that the receiving member of the request will be able to view.

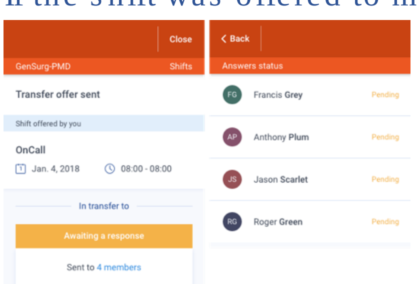


8. Then, click on **Send**

Your pending job will now be identified by the following icon.

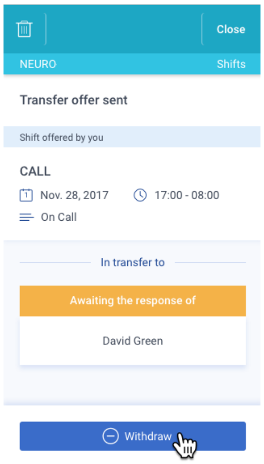


If the shift was offered to many members

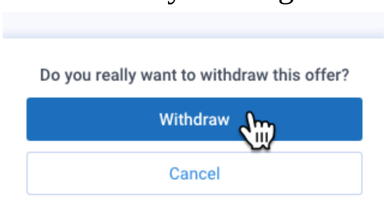


Withdraw my offer

1. Click on the pending proposed task and then on **Withdraw**.

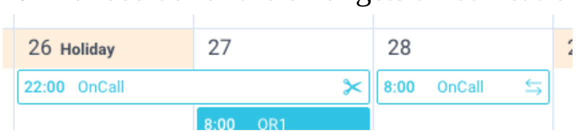


2. Confirm by clicking **Withdraw**

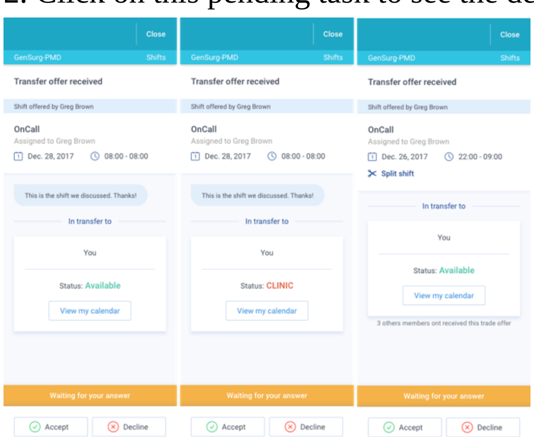


Receiver of the transfer offer

1. The receiver of the offer gets a notification and sees this pending task on their schedule.

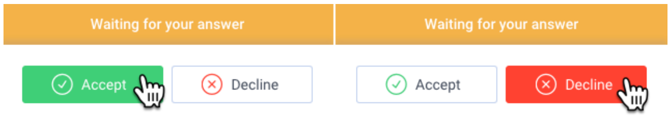


2. Click on this pending task to see the details of the proposed transfer offer.

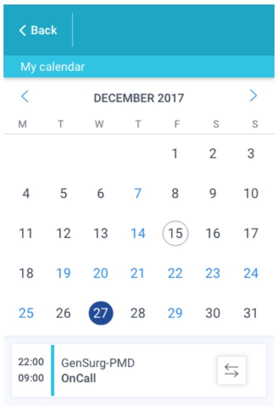


A. You can **Accept** or **Decline** this transfer offer.

If offered to many physicians, the first person to accept a transfer wins the bid.

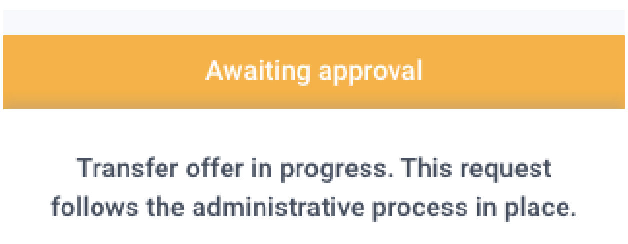


B. You can also click on the **View my calendar** link to see the status of your schedule for this day to help your decision making.



If there's an approval process for the transaction

If you have accepted the transfer offer but a third party has to approve the transfer, you will see this before the transfer is official.



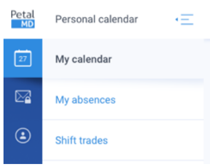
How to trade a shift

It is possible to trade a shift to one of your colleagues through PetalMD's calendar.

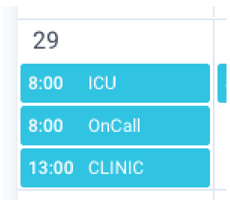
Trade a shift

1. Go to the **Calendar** section.

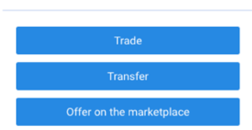
2. Click on **My calendar**.



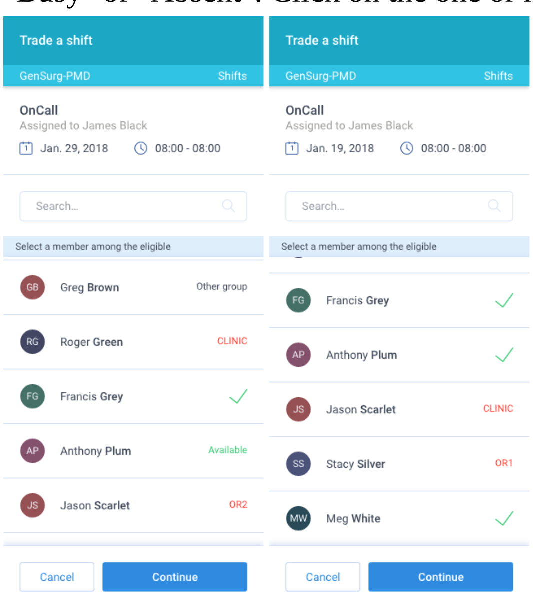
3. Click on the shift you want to trade.



4. Click on **Trade**



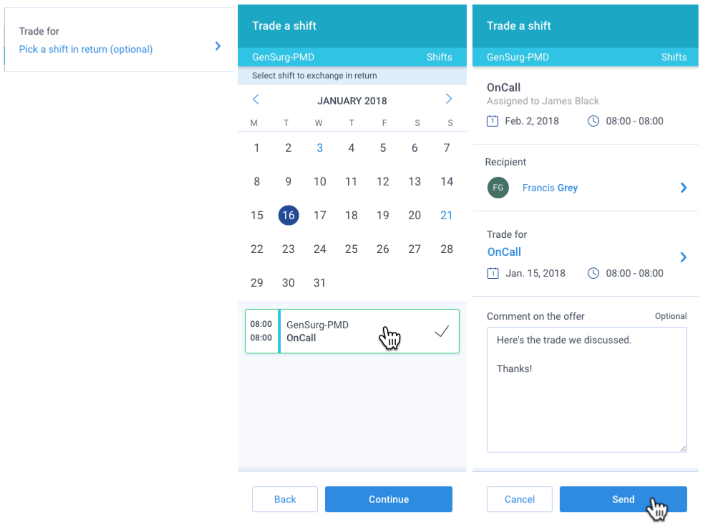
5. The list of members in your group who have the skills to do the selected task will appear on the screen at this time. It will also be shown to the right of each member if they are "Available", "Busy" or "Absent". Click on the one or many members with whom you wish to trade shifts.



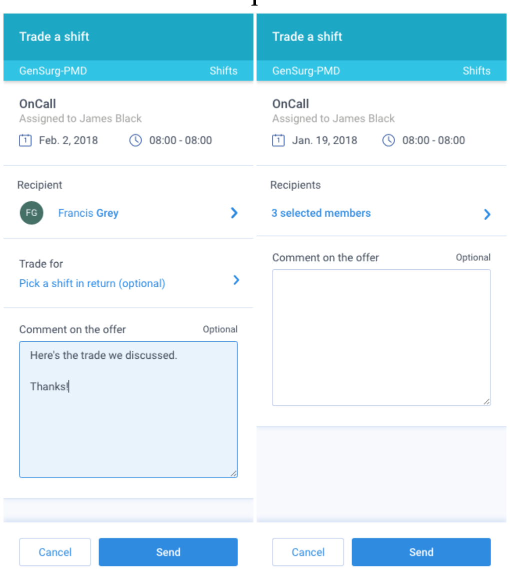
6. Then, click on **Continue**.

7. Two options are available:

A. Send a Trade request by proposing the task to be taken in return. **Only if sent to one member.**

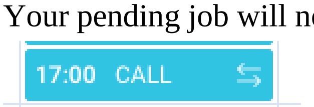


B. Send a Trade request to one or more members letting the receivers offer you a shift in return.

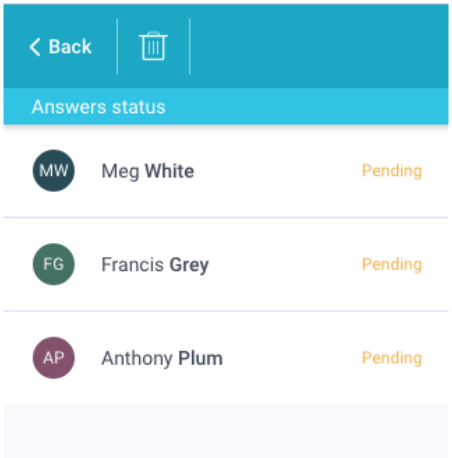


8. Click on **Send.**

Your pending job will now be identified by the following icon.

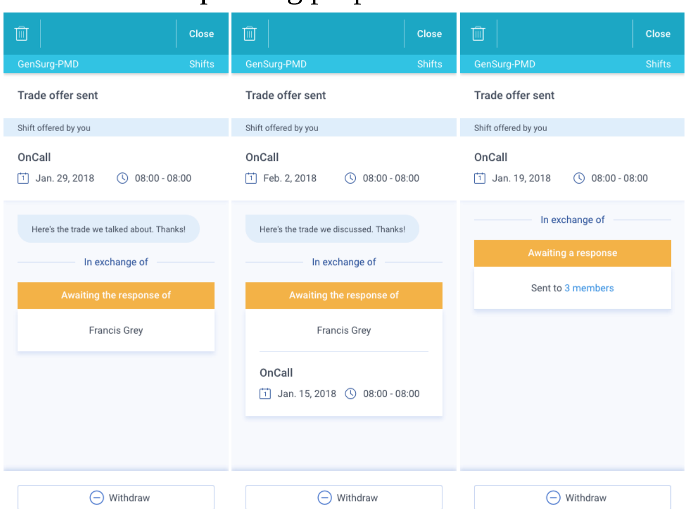


If the shift was offered to many members

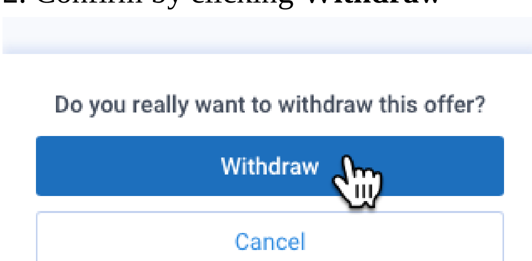


Withdraw my offer

1. Click on the pending proposed task and then on **Withdraw**.



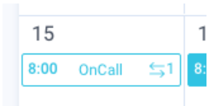
2. Confirm by clicking **Withdraw**



Withdrawal of the offer is possible as long as no proposal has been received.

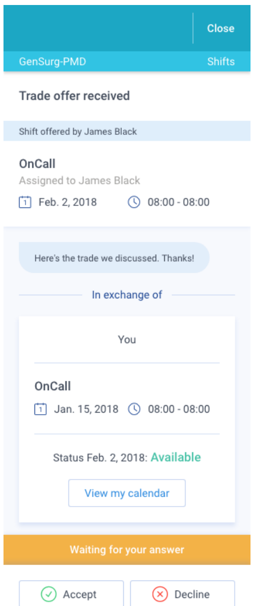
Receiver of the transfer offer

1. The receiver of the offer gets a notification and sees this pending task on their schedule.

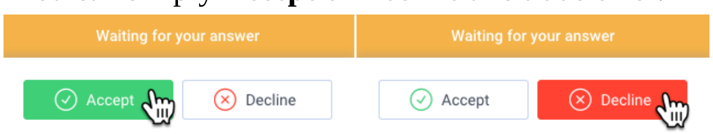


2. Click on this pending task to see the details of the proposed trade offer.

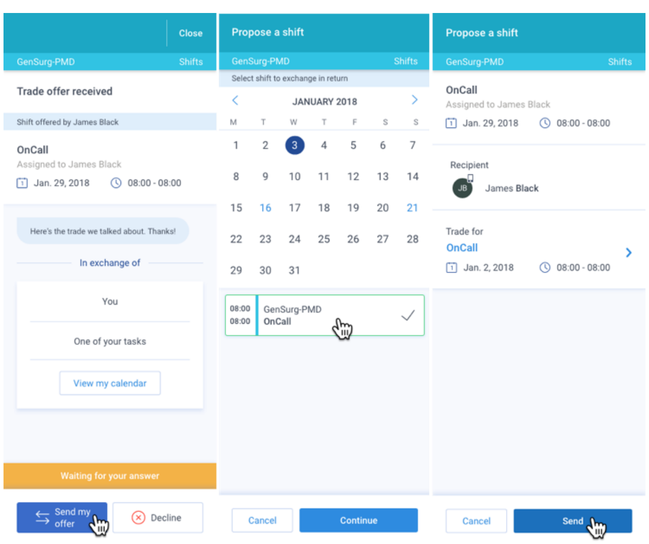
According to Option A of the offer that comes with a traded task selected by the initiator.



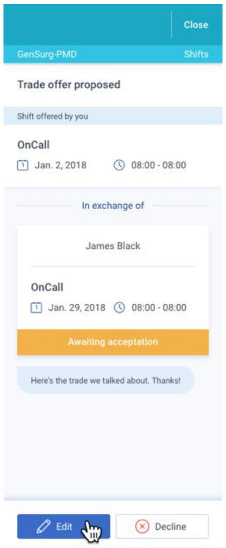
You can simply **Accept** or **Decline** this trade offer.



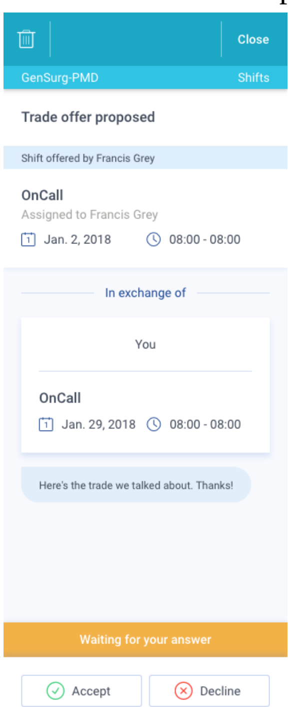
According to Option B of the offer that does not come with a traded task selected by the initiator.

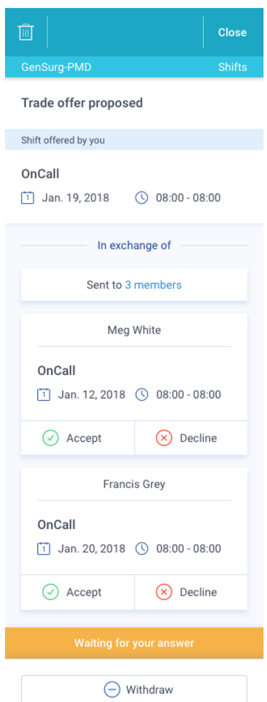


Possibility for the receiver to withdraw their proposal or modify it if the receiver is the one who has proposed the shift as long as it has not been accepted or rejected by the initiator.



The initiator can accept or reject the proposal if it comes from the receiver.





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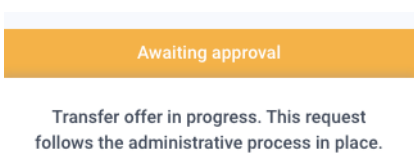
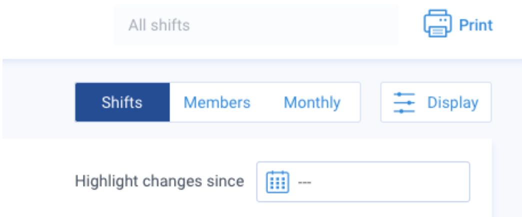
If you have accepted the transfer offer but a third party has to approve the transfer, you will see this before the transfer is official.

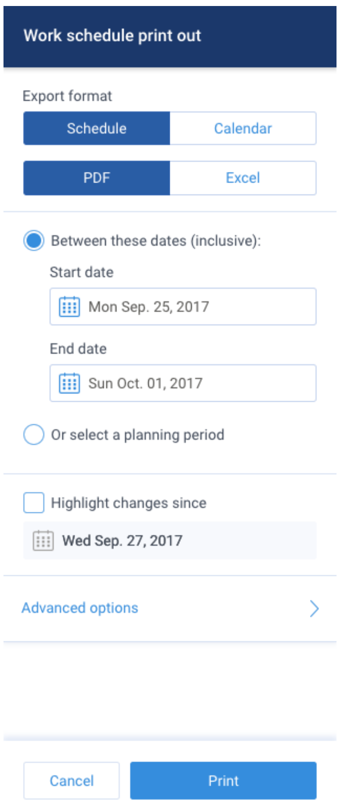


How to print schedule

To print your schedule, access your desired group calendar, and then click on **Print** at the top right of your screen.

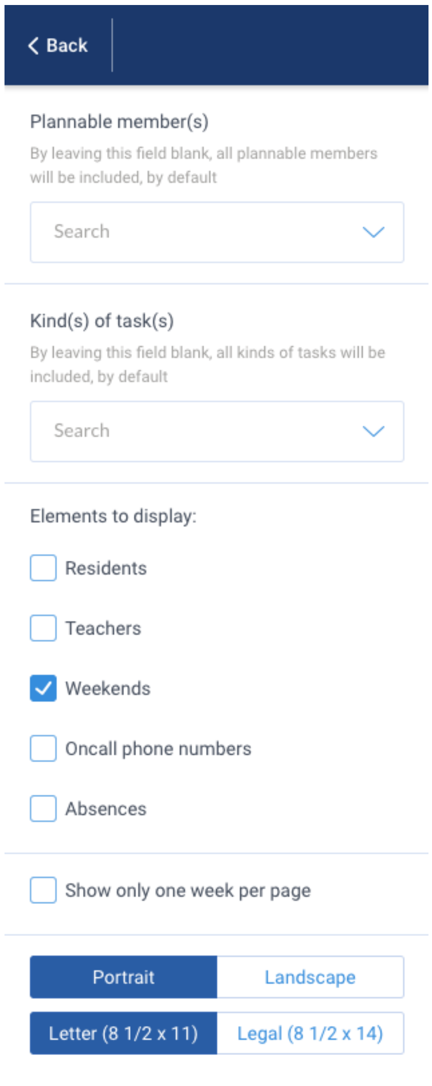


The tab **Work schedule print out** will then appear and allow you to select a specific period for which you would like to print your schedule. You can personalize the calendar to print by clicking on **Advanced options**.

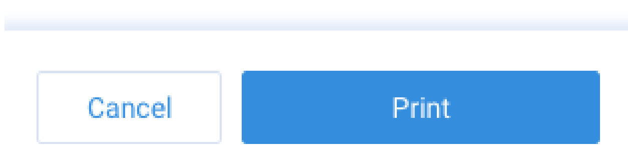


You will then be able to:

- Display certain planned members only
- Display certain types of tasks only
- Display specific information (residents names, physicians names, weekends, on-call phone numbers and absences)
- Display only one week per page
- Choose your print format (Portrait - Landscape, Letter 8 1/2 x 11 - Legal 8 1/2 x 14)



To go back to the main menu and print your calendar, click on back at the top. Then, click on **Print** at the bottom of the screen. This will produce a PDF document, ready to be printed out.



Schedule Planning

Overview

1- Introduction

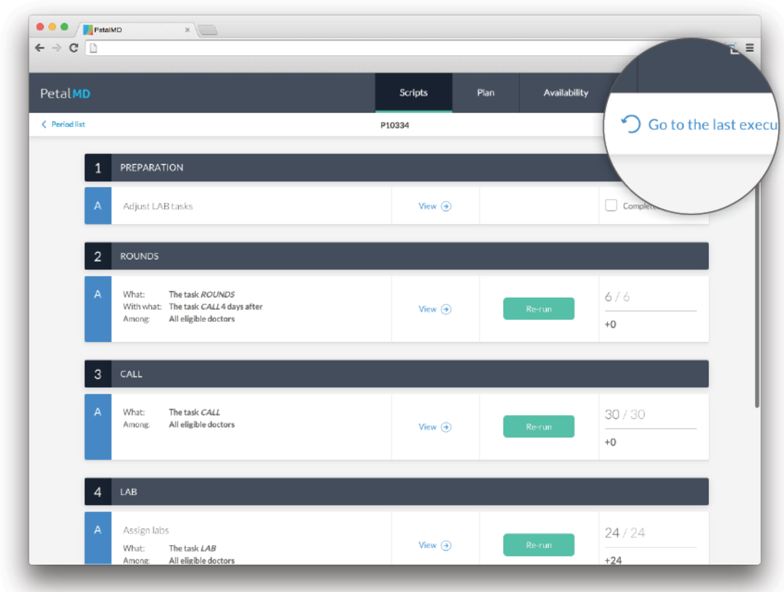
The following pages provide an overview of ergonomic, aesthetic and functional features.

2- Navigation

Navigation is done through tabs; they are located in the dark band, completely at the top of the page.

Advanced

The Script tab is for customer using our advanced option. It is the listing of all steps to execute to build the schedule. It also offers the option of going directly to the last executed step. The scroll is enhanced to keep the header of the script section visible.



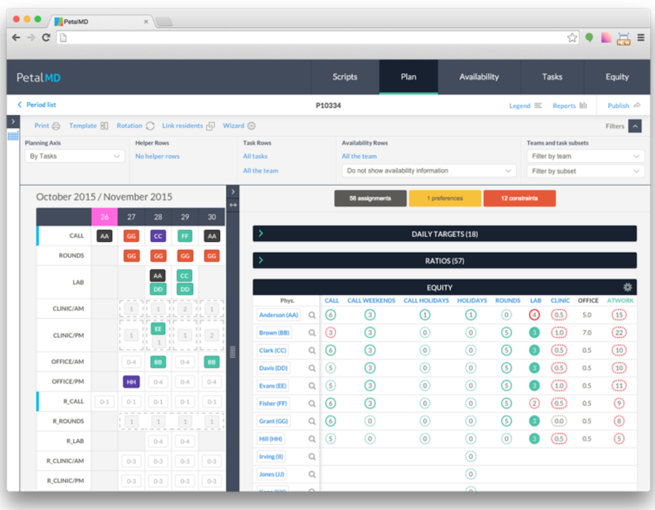
3- Actions and filters

Actions

All the options are found above the filters. Note that Publish feature is at the top right of the screen.

Filters

The filter section is collapsable. When closed, a visual indicator informs you whether the plan view is filtered or not and lets you remove all the applied filters by simply clicking on the red circle with an x.

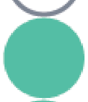


4- Equity

The style of the equity table provides details about the gap between the target and the number of assigned shifts (see legend for details):

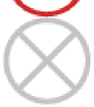

Dotted line
Value below the target


Circle
Value above the target


Filled Circle
Value on target


Green
Exact value or very close to the target


Red
Far from the target value


No circle
No set target, informative counter only

Advanced
Titles indicate the effect of each equity counter on your automated assignment steps:

Black
No impact, informative counter only.

Green
Influent. The equity counter will influence assignments without preventing the automated step from exceeding targets to assign all open shifts.

Blue
Limiting. The equity counter prevents automated steps from exceeding the targets to assign all open shifts.

EQUITY			
Phys.	HOLIDAYS	ROUNDS	ATWORK
Anderson (AA)	1	0	15
Brown (BB)	0	5	22
Clark (CC)	0	5	10
Davis (DD)	0	5	10
Evans (EE)	0	5	11
Fisher (FF)	0	5	9
Grant (GG)	0	5	8
Hill (HH)	0	0	5
Ineligible Physicians (8)			
Total	1	30	90
Target	2	30	201

5- Colours

In the assignment table, each type of non-availability has its own colour:

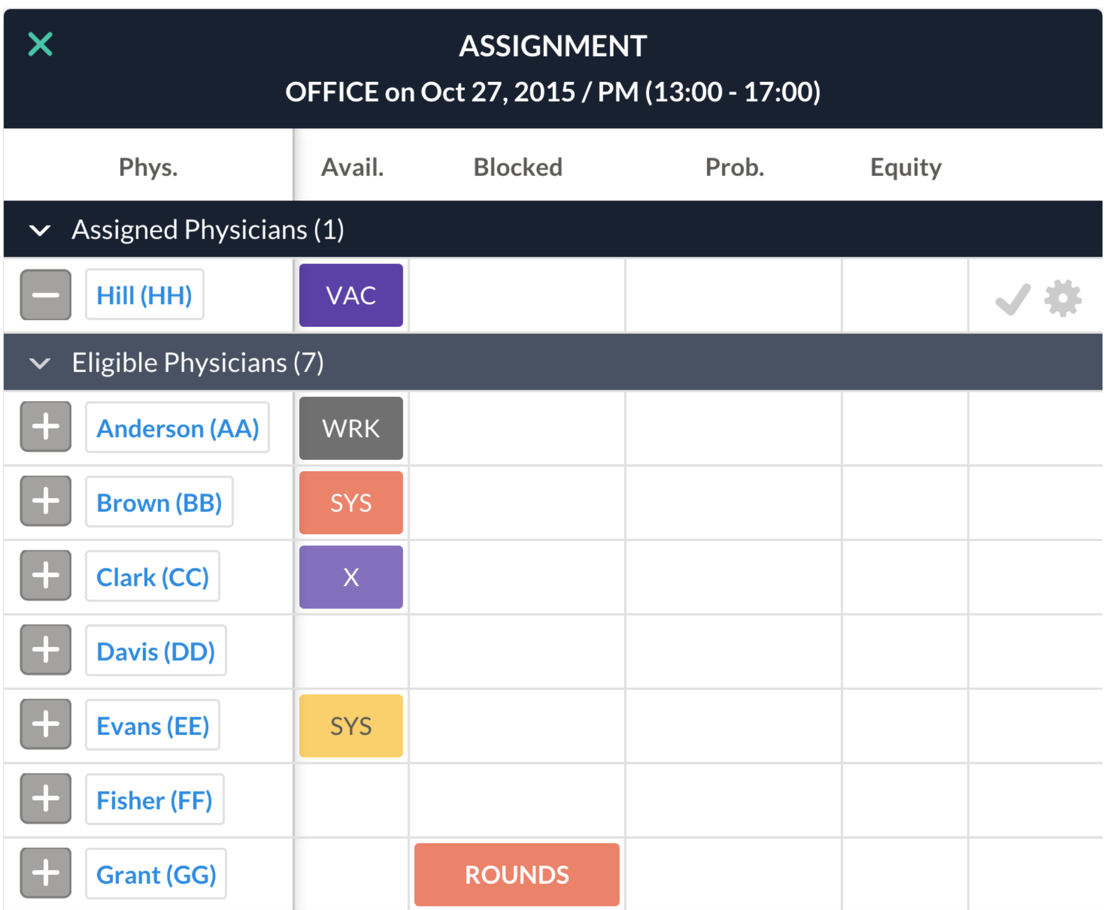
Purple
Absence entered by members or an administrative staff

Black
Shift in another group

Advanced

Red
Strong availability constraint defined in the group configuration

Yellow
Preference availability constraint defined in the group configuration



In the plan, the assigned member colour tiles now give you more accurate information:

Green
Member is assigned without any issues

Purple
Member has an absence in their calendar for this shift or is temporarily unavailable

Black
Member is already assigned to a shift in another group

Red
Member is already assigned to another shift of the group that has been defined as blocking

Advanced

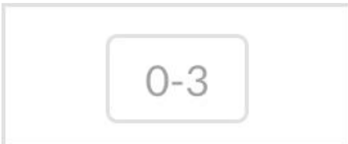
Red
Assignment breaks a strong constraint defined in the group configuration

Yellow
Assignment breaks a preference constraint defined in the group configuration

6- Required members per shift

The plan cells have coloured backgrounds in cases of over-assignment (more members than required):

White background, dashed border
Minimum requirement is not met



White background, no dashes
Minimum requirement is met and the maximum requirement is not exceeded

Red background
The number of members assigned exceeds the maximum requirement

Gray requirement tile, with number
Number of missing member to meet the minimum requirement

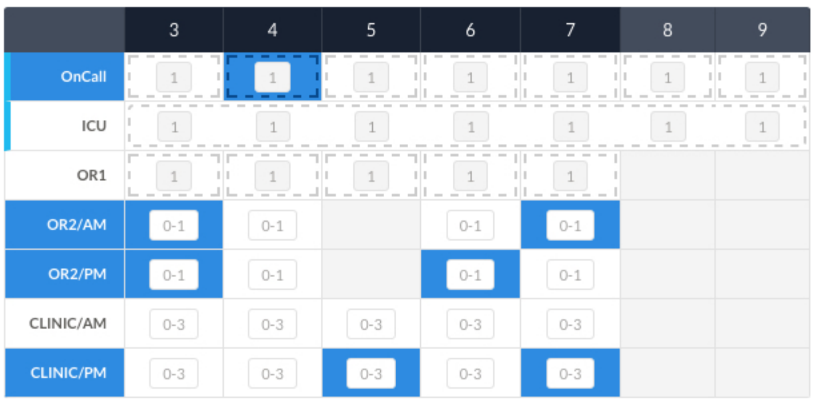
Multiselection

Multiselection saves time and increases your efficiency in using the planning tool whether it is to assign a member to several assignments or to change the parameters of several shifts in a single operation.

To use it, simply hold down the *Shift* key ("⇧") on your keyboard while you select items.

The items you can select are:

- time slot cells for a set of individual ranges
- Shifts labels for complete weeks of a particular shifts



Then make the assignments or changes in the same way as for a single selection. Although, in the Tasks tab, the buttons will be in the right-side column.

How to assign a shift

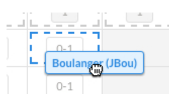
In the *Plan* tab, there are different ways to assign shifts:

- Drag and drop
- Arrows

As a planner, you can ignore planning "problems". Once you have verified and considered any possible availability issues or constraints and taken appropriate action, you have the final word; the application will not block you from making an assignment. Warnings are simply there to assist you in the decision-making process.

Drag and drop

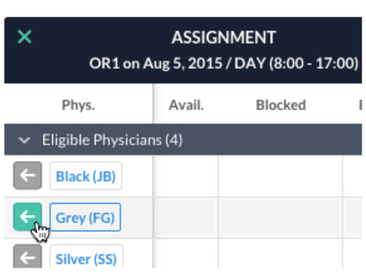
To assign a member to a shift, the member's name can be dragged and dropped onto a cell. To proceed, simply click and hold the member's name from *Equity* table (right column) and move it to the cell where you want to add them and drop. The member's initials will appear in the cell.



Using the arrows

First, you must select a date and a shift by clicking on the corresponding cell. The selected cell, in which the assignment is to be made, will turn blue.

To assign a member, click on the arrow (which will go from gray to green) to the left of the desired member's name in the *Assignment* table found in the right column.



Publication of the schedule

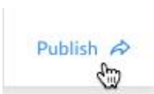
The planning stages are over and the schedule is complete. To share it with the members of your group, you must publish it.

Publishing the schedule

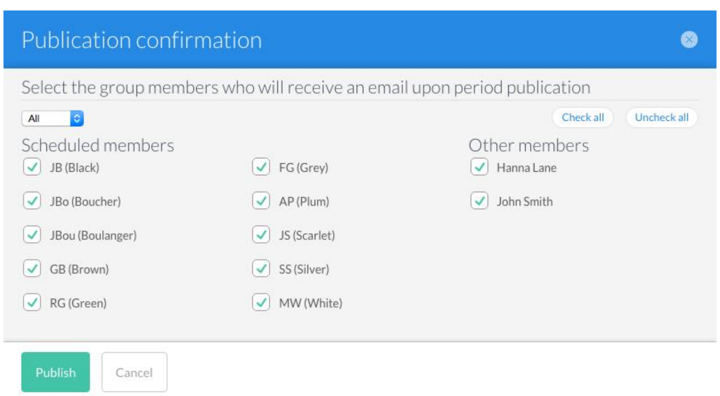
Publishing the schedule is a very important step in the planning process as it sends out the various assignments to the resources' individual calendars. Only at this point can they see the schedule and adjust it to their needs by transferring or exchanging tasks.

Also, publishing the schedule shares with planners of other groups any assignments you may have made to a physician's schedule that is also in that other group.

Publishing a period to the members of your group is as simple as clicking on a button. The *Publish* button is located at the top right of the screen.



A window will open. There you can select the group members to receive an email informing them that the period is now published. Then, to proceed, Click the green *Publish* button. Member's schedules will automatically be updated.



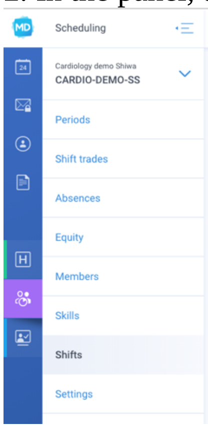
After, the *Publish* button will indicate that the period is published.

Shifts management

SHIFTS MANAGEMENT

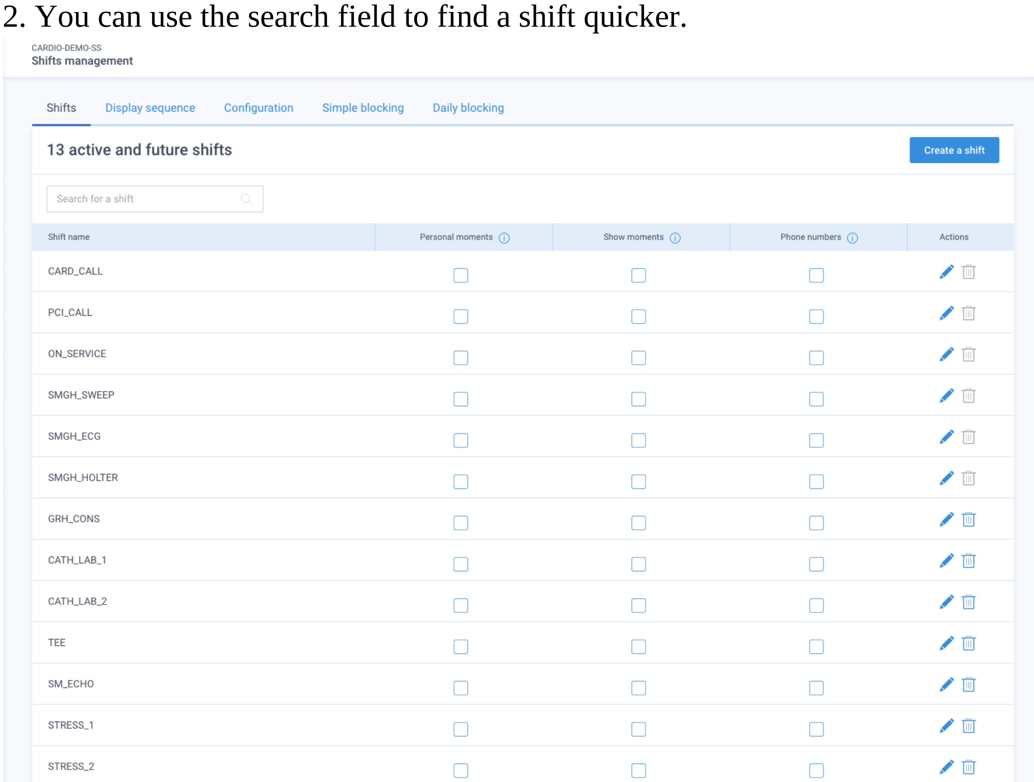
1. Click on **Scheduling** menu

2. In the panel, to the right of the menu, select the **Shifts** section



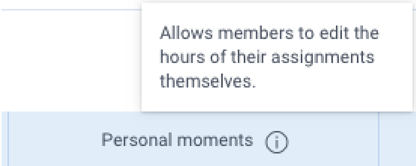
LIST OF SHIFTS

1. The shift list exposes, for a scheduling group, all existing shifts for the current and future periods.
2. You can use the search field to find a shift quicker.

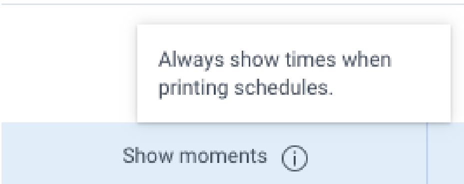


3. **3 options** available directly from the shifts list.

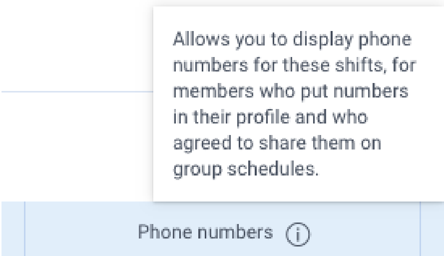
A. **Personal moments:** only available with Standard and Advanced plan.



B. **Show moments**

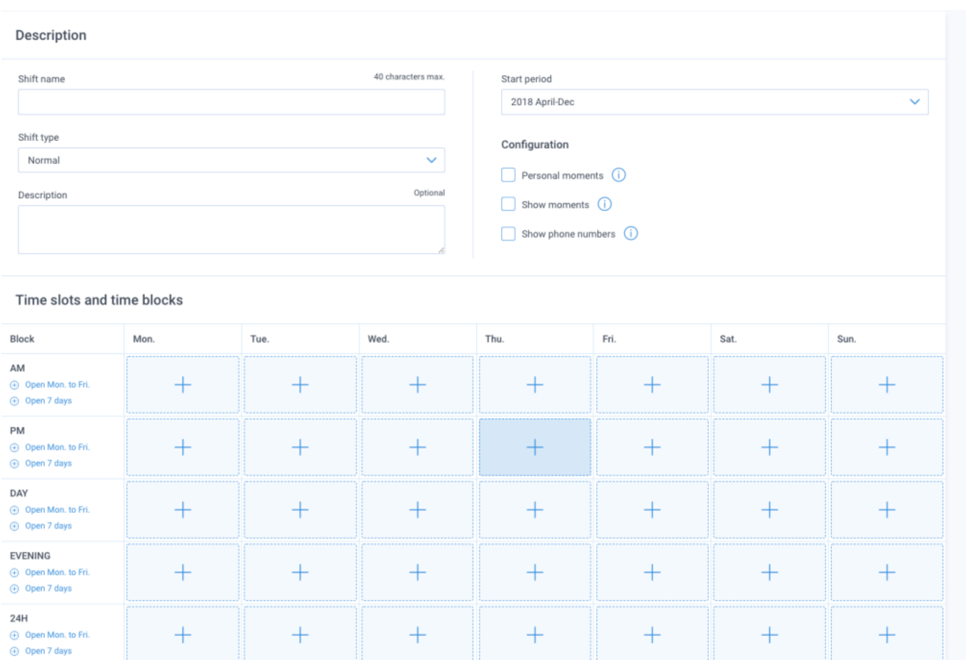


C. **Phone numbers**

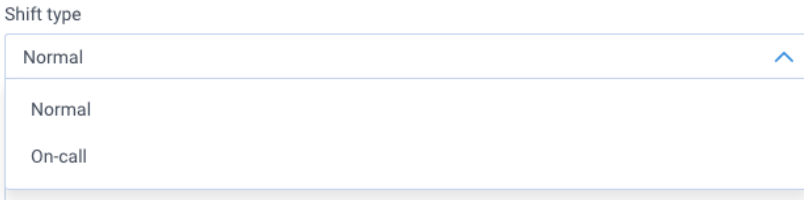


CREATE A SHIFT

1. Click on **Create a shift** button

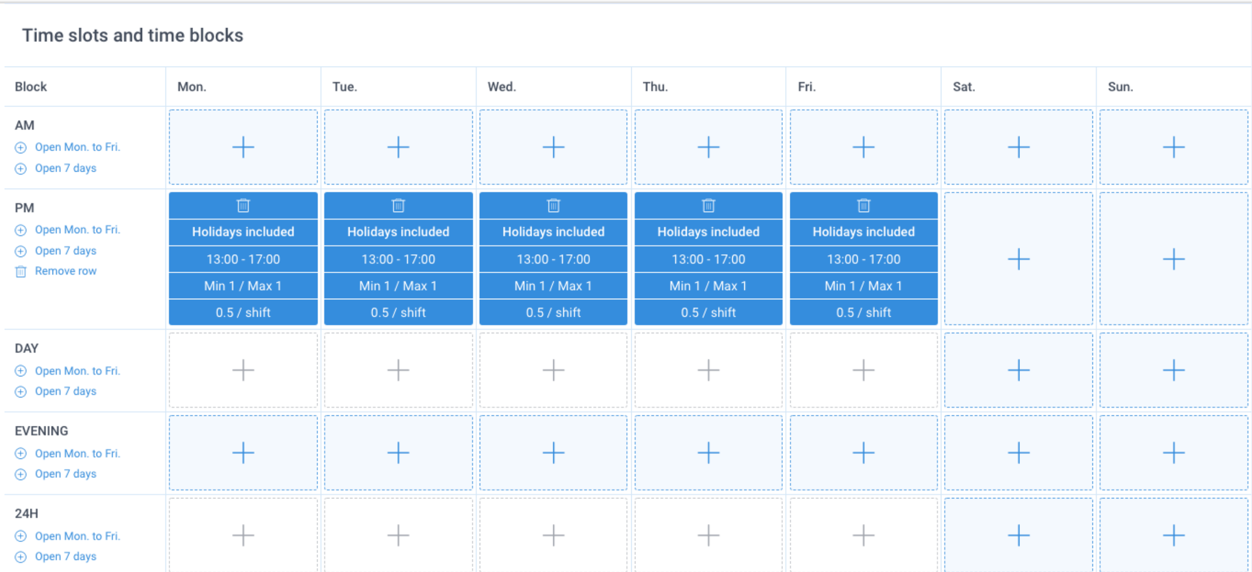


2. Enter the **Shift name**. Maximum 40 characters.
3. Select the **Shift type:**
A. **On-call**: used for shifts that are on call or for responsibilities that need to be joined.
B. **Normal**: used for clinical tasks with physician's attendance.



4. **Description:** optional field. The information in this description will only be displayed when a shift is selected in the personal or group calendar, in the right pane with all the details
5. **Start period**: identify from which period this shift should be added. The available periods are the actual and the one in future. So if for example, the current period is selected, the shift will be added to it and all future existing periods.
6.**Time slots and time blocks selection**:when selecting the time slots, depending on the selection made, the blocking of some other boxes will be done automatically, to avoid configuration errors. The logic that applies is as follows: for a selected time slot, the opening of time slots included in the selected one becomes impossible. For example, when opening the day boxes, the AM and PM boxes become unavailable because they are inclusive of the day.

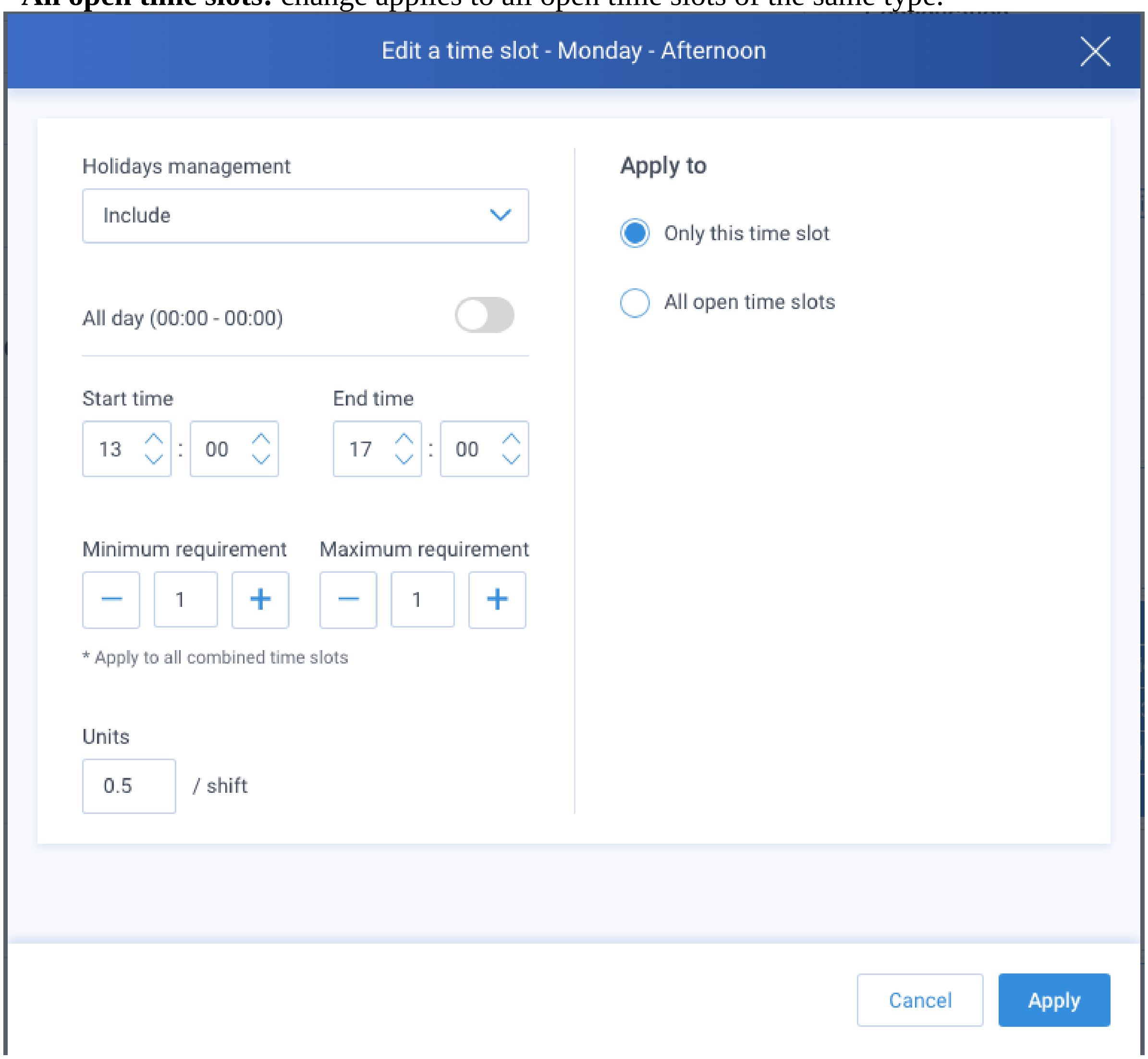
Important: *the hours on a time slot are only indicative. This is the time slot that manages the entire configuration on a shift. So it is important that the hours you select on a time slot make sense with it. Try to avoid: If you select an AM slot and change the hours for 8:00 AM to 5:00 PM, the impact of the shift blocking will only apply to the AM shift and not to the whole day.*



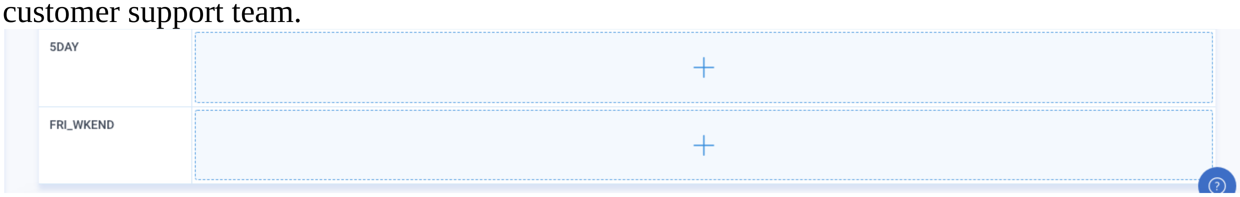
7. By clicking on a time slot open in blue, it is possible to modify the default configurations:

```
A. Holidays management: does this shift need to be open or
closed during holidays
or is it only a time slot for holidays?
```

B. Selecting the **All day** option will default from midnight to midnight, with no possibility to change these times. If you have 24 hour shift and midnight is not the start time, do not use this option.
C. **Start time**: start time of the shift
D. **End time:** end time of the shift
E. **Minimum requirement / Maximum requirement:** are the minimum and maximum number of physicians that can be scheduled for this time slot.
F. **Units:** the unit is the accounting of a shift in the equity counters.
G. **Apply à:**
- Only this time slot: change applies only to this slot for this day
- All open time slots: change applies to all open time slots of the same type.



8. **Multiple blocks:** the multiple blocks simplify the allocation of assignment. A multiple block is composed of various time slots on more than 1 day, which allows to assign the same resource in one click via the planning tool. There are multiple blocks available, but if you cannot find the multiple block configuration that fits your needs, do not hesitate to make a request to our customer support team.

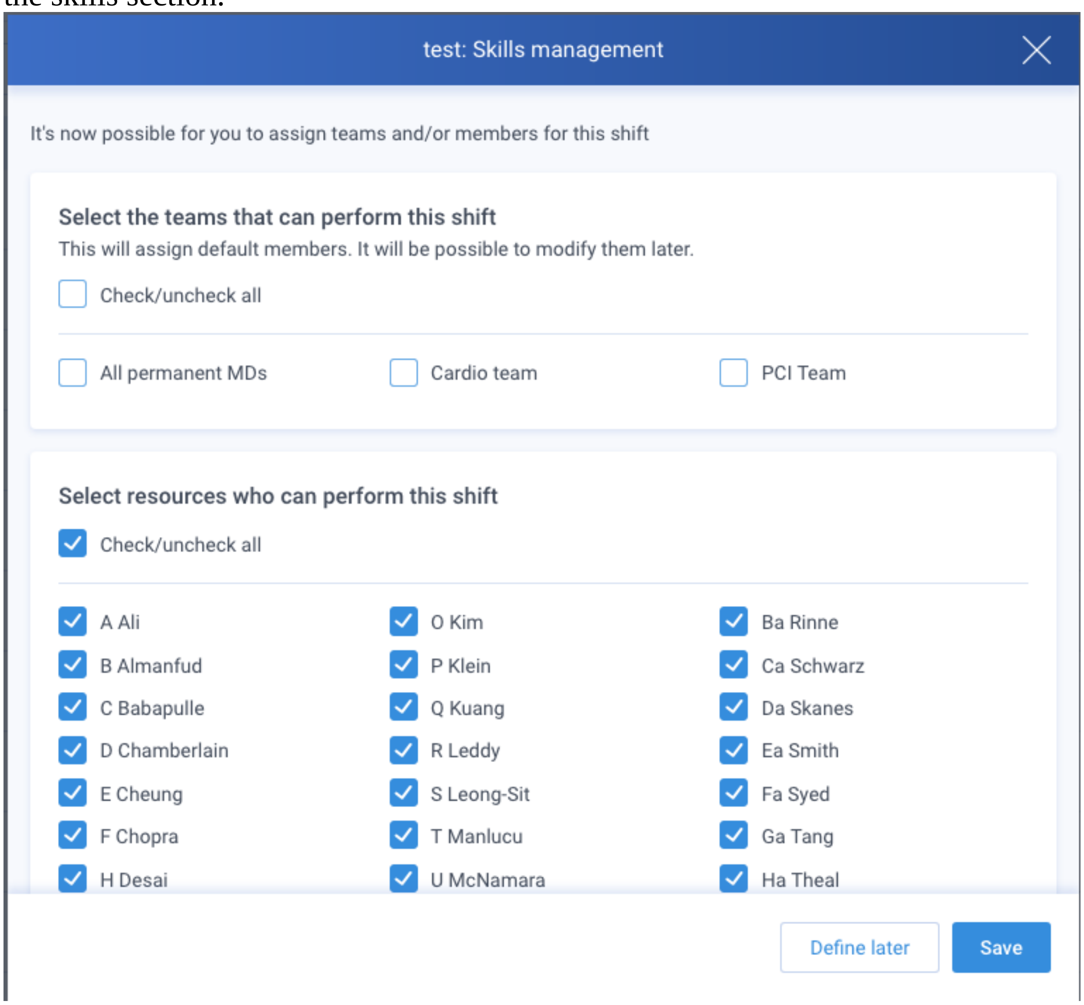


Important: *Multiple blocks are not available with the Basic plan*

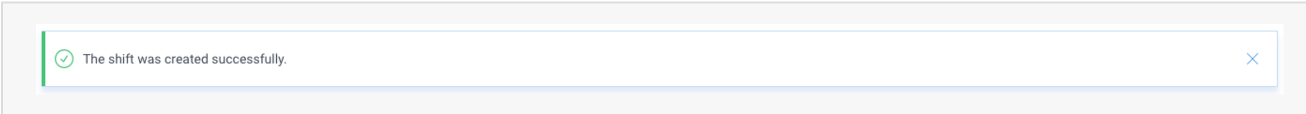
9. Click on **Apply** to save the change in the right time slot. During the application, the modified values should be the ones you just modified.

10.When the configuration is complete, click **Save** to complete the creation of this shift.

11. While saving the new shift, a box opens to allow you to directly manage the skills of members who can to this shift. You can make the changes immediately or make them later via the skills section.



12. Once completed, you will have a diagnosis confirming the creation of the new shift and it will be in the list of shifts.



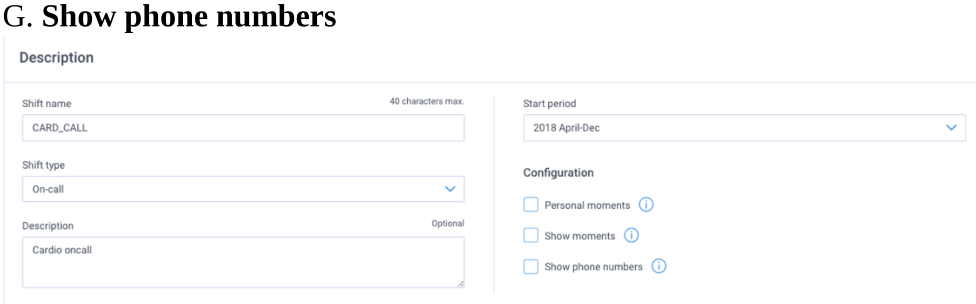
Important: *Don't forget to go in the configuration tab when you add a new shift to configure the rights you will give to your group for this shift.*

EDIT A SHIFT

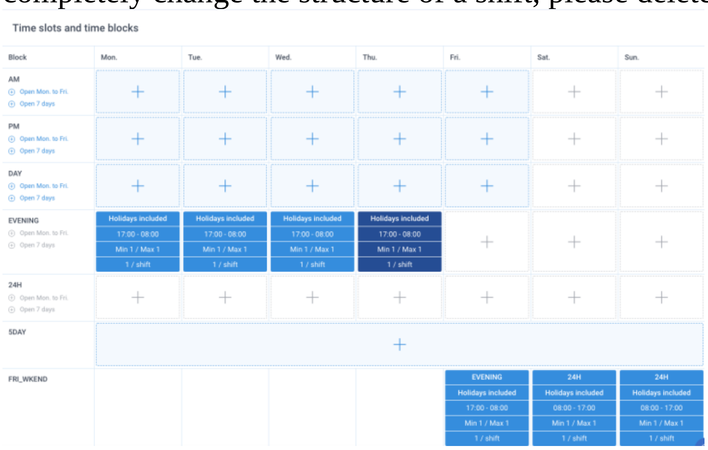
1. Click on **Pencil** corresponding to the shift to modify.

2. The **information** in the Description section can all be changed:

A. **Shift name**
B. **Shift type**
C. **Description**
D. **Start period:** the chosen period will mark the first period from which the change applies
E. **Personal moments:** only available with Standard and Advanced plans
F. **Show moments**
G. **Show phone numbers**

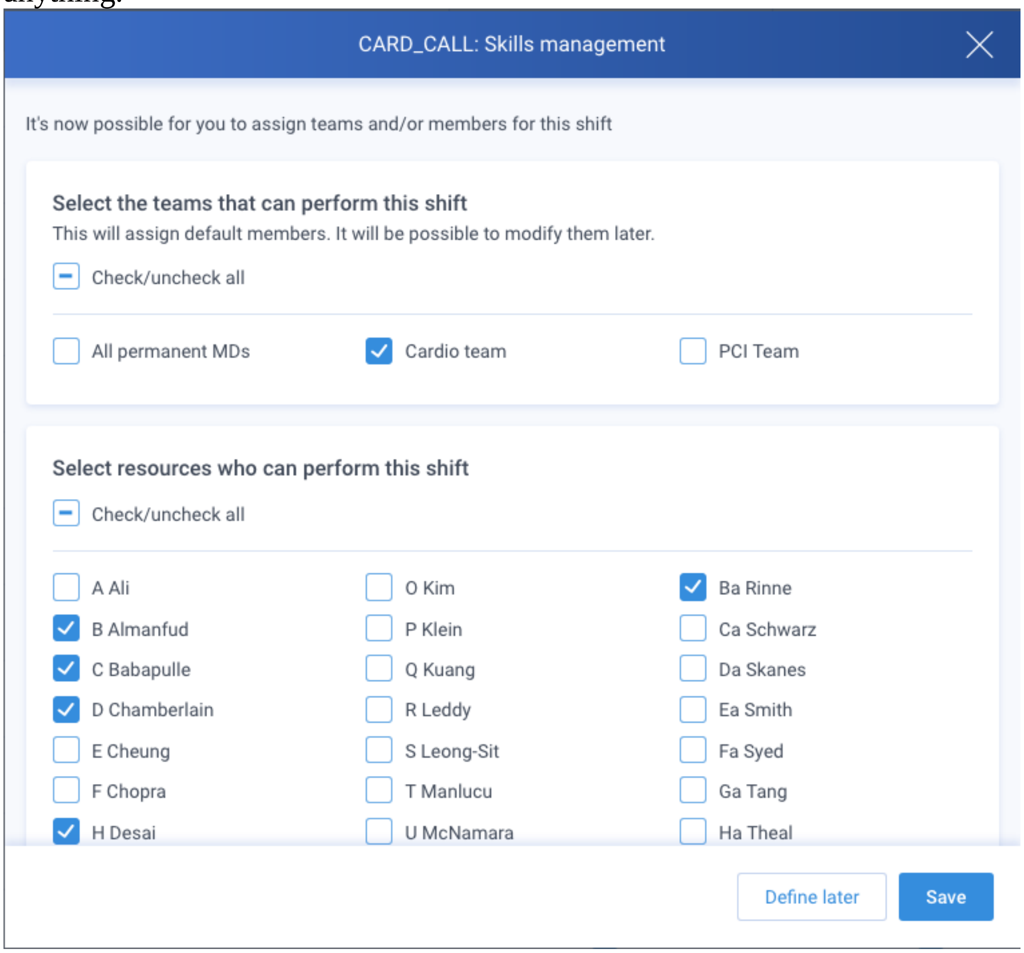


3. The already existing slots cannot be deleted, however, the information of the slots can be modified by clicking on the blue cell. New time slots can also be opened, according to the applicable logic of the time slots which cannot be inclusive one in the other. If you want to completely change the structure of a shift, please delete it and create a new one.



4. When the changes are complete, click **Save** to confirm saving the information.

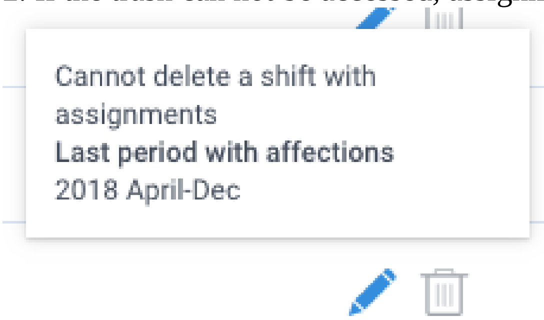
5. While saving, the skills management panel opens to allow you to make adjustments to who can do this shift. If no change is required, click on **Define later** or **Save**, without having change anything.



DELETE A SHIFT

1. Click on the trash of the line corresponding to the shift to delete.

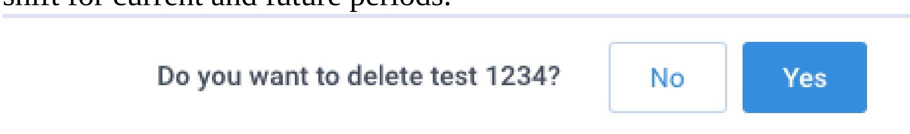
2. If the trash can not be accessed, assignments still exist on this type of shift.



A. By positioning your mouse on the trash, you will get the information of the last period with assignments.

B. If you really want to delete the shift, you will have to remove all the assignments on this one from today's date and for the future. Only after this action will the deletion become available.

3. If the trash is available (blue) and you delete the shift, you will have to confirm the deletion by answering Yes to the confirmation message. The shift will therefore be removed from the list of shift for current and future periods.

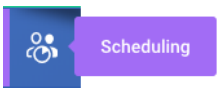


Members and skills

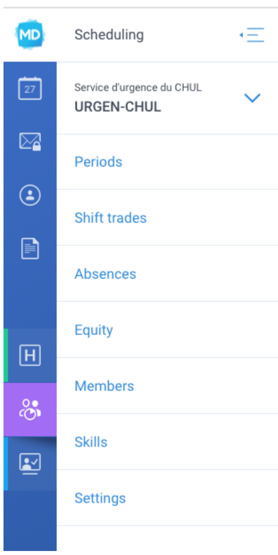
This module lets the scheduler manage the skills of the members, of whom can do what.

ACCESS

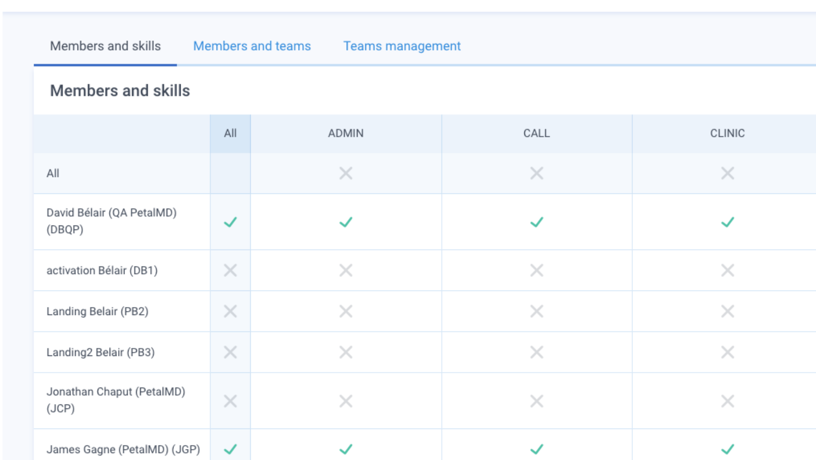
1. Go to the **Schedule Management** menu.



2. Click on the **Skills**.



3. To view or make changes to the skills of members, go to the **Members and skills** tab.



4. Display grid shows member skills with a green checkmark ✓ , while the lack of skills for a member displays a gray X ✗ .

Members and skills

	All	AB_Jour	AB_SOIR	DE_Jour
All		✓	✗	✓
Geneviève Bécotte (GB)	✗	✓	✗	✓
Anne-Catherine Bergeron (ACB)	✗	✓	✗	✓
Daniel Bernier (DB)	✓	✓	✓	✓
Simon Berthelot (SB)	✓	✓	✓	✓
Isabelle Bertrand (IB)	✗	✓	✗	✓
Mathieu Blanchet (MB)	✓	✓	✓	✓

A. The list displays members of the current period and members of future periods.

B. The list displays the shifts of the current period and the shifts of the future periods.

EDIT

1. To make changes to the skill, click the Edit button

2. In edit mode, the table view will be modified to allow you to make changes.

Members and skills

	All	AB_Jour	AB_SOIR	DE_Jour
All		☑	☐	☑
Geneviève Bécotte (GB)	☐	☑	☐	☑
Anne-Catherine Bergeron (ACB)	☐	☑	☐	☑
Daniel Bernier (DB)	☑	☑	☑	☑
Simon Berthelot (SB)	☑	☑	☑	☑
Isabelle Bertrand (IB)	☐	☑	☐	☑
Mathieu Blanchet (MB)	☑	☑	☑	☑
Philippe Boisclair (PB)	☐	☑	☐	☑
Rachel Bruneau (RB)	☑	☑	☑	☑

A. Click on a blue checkmark to remove a skill from a member.

B. Click on a white box to add a skill for a member.

C. Click on a white box ALL, on the first horizontal line under the shifts names, to add a shift as a skill to all members of the group.

D. Click on a white box ALL, on the first vertical column after the name of the members, to add all shifts as skills to a member.

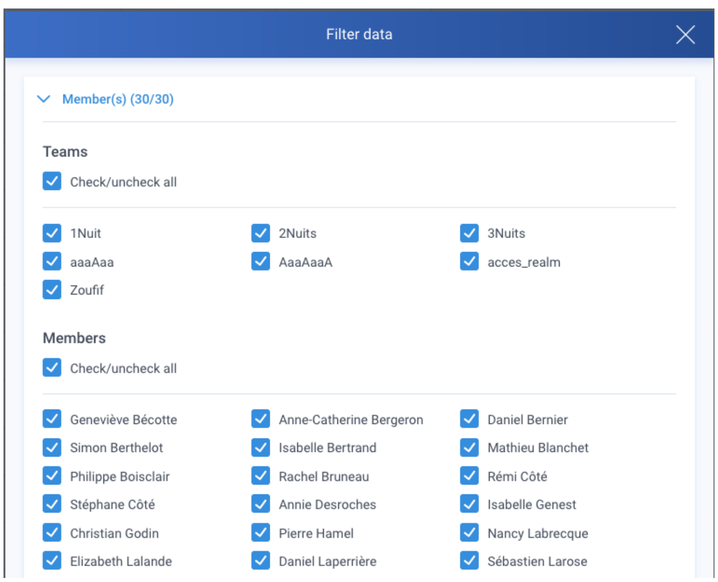
FILTERS

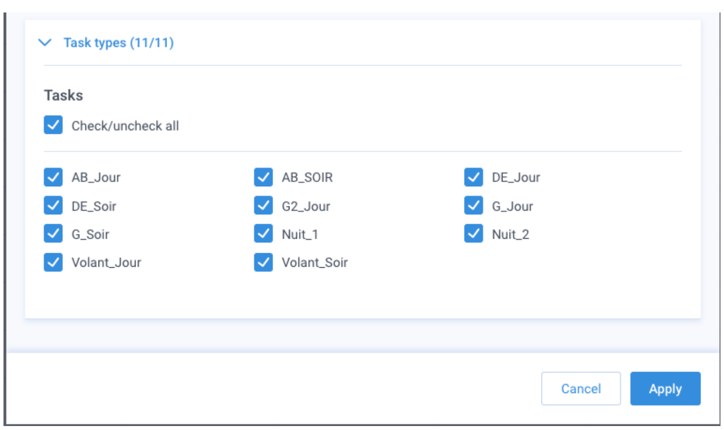
Click the **Filters** button to reduce the information on the page.

IMPORTANT NOTE

By default, if your group has more than 25 shifts, access to this table will be pre-filtered on the first 25 shifts so that the navigation is more efficient and effective. You can then modify the filters to display the information that is relevant to you.

You have the option to apply filters on 2 axes, members and shifts. Once the filters have been selected, click **Apply**.





When filters are applied, the **Filters** button displays a red indicator.

When all the information is visible, the red indicator is not there.

To get only the members of a specific team or a specific subset of shifts, it is important to uncheck the teams and the members and then select one or more teams, or for the subsets and shifts, uncheck subsets and shifts, and then select subsets.

Note

When the data is filtered, the use of the boxes in the ALL row and column will be applied **only to that that can be viewed.**

IMPORTANT NOTES

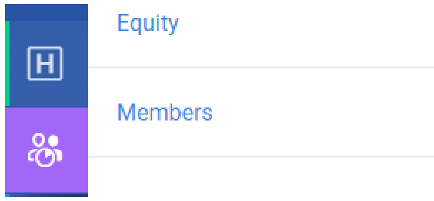
The change in skills has a direct influence on the current period and all future periods.

- Impacts to member eligibility:
  - **Remove a skill:** the member can no longer be considered in exchanges and transfers for this task.
  - **Add a skill:** the member will be an eligible resource in exchanges and transfers.

How to add and remove members

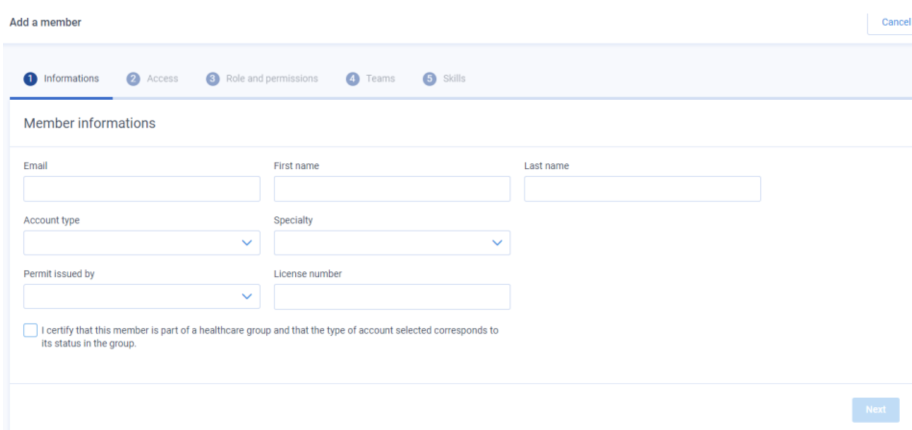
Add a new member to your group

1. From the **Scheduling** section, access the **Members** section



2. Click on **Add a member** at the top right of your screen

3. Enter the member's general information



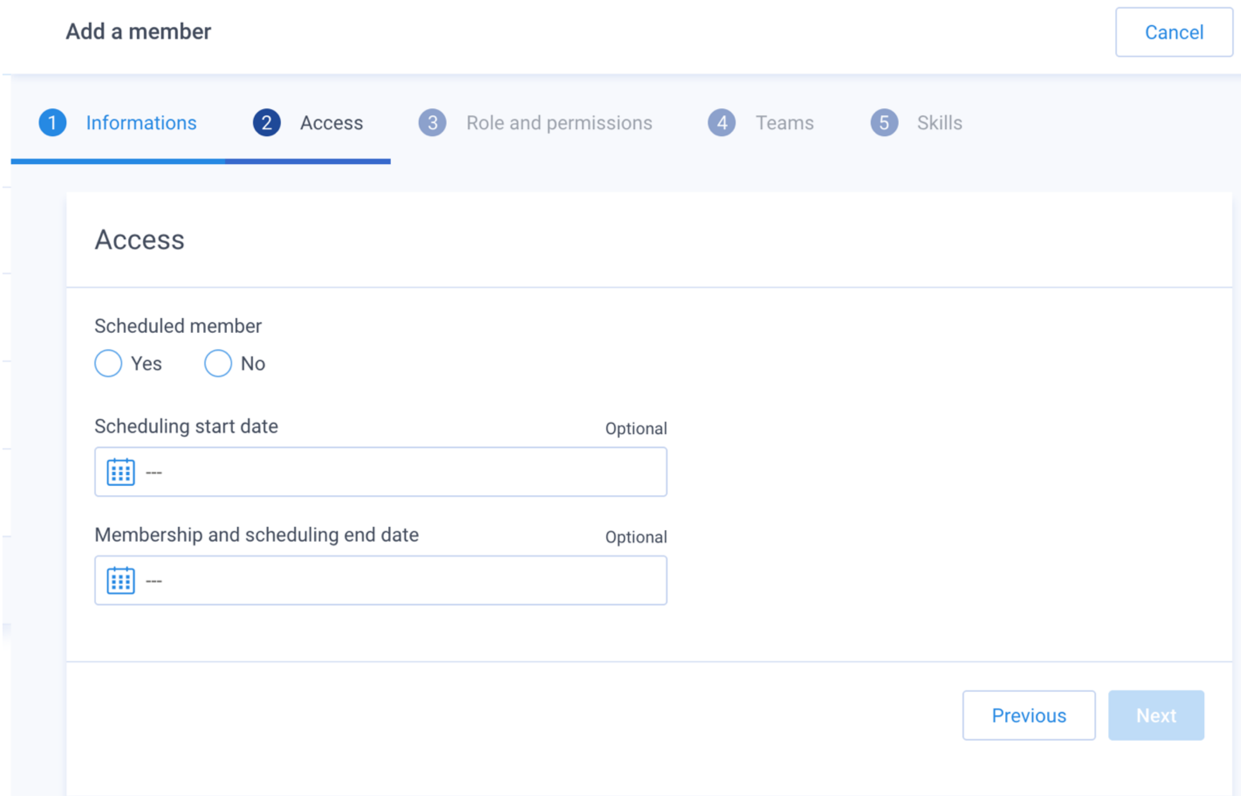
A. If the member already exists on PetalMD, this account will be proposed to you.

B. If you choose the account type Assistant or Administrator, the specialty and license number are not required.

C. You must confirm that the member is added to your group is related to your healthcare practice.

D. Click on **Next** to continue the configuration.

4. **Access**



A. It is important to identify if the member that you are creating will be a planned member.

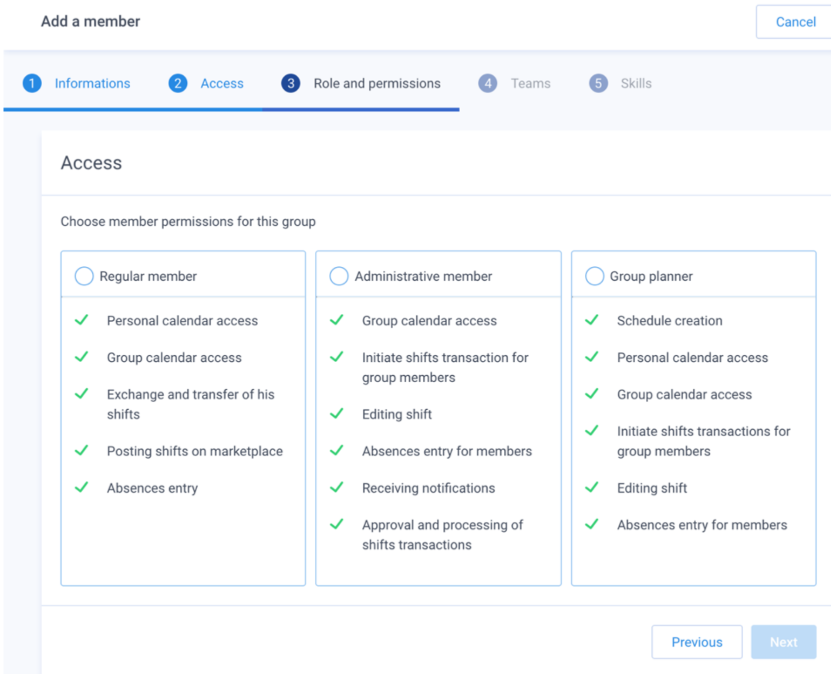
B. The **Start date of planning** identifies from which date onwards the member will be eligible to shift assignment. This tab is optional and if no date is entered, the member will be eligible to shift assignment the moment they are created on PetalMD.

C. The **End date of planning and lost of group access** is an optional tab and will determine which day onwards the member will not be eligible anymore to shift assignment. If no date is entered, the member will receive assignments for all future periods.

D. Initials are required in the case of a planned member. The chosen initials will be displayed in the planning tool. A validation will be made to make sure all members initials are unique in the group.

E. Click on **Next**.

5. **Roles and Permissions**



Three choices are available

A1. **Regular member** for a planned member: will allow access to personal information and the group's scheduling information. The member will be able to perform activities allowed by the group's planner on their own tasks. They will be able to add absences and create personal events.

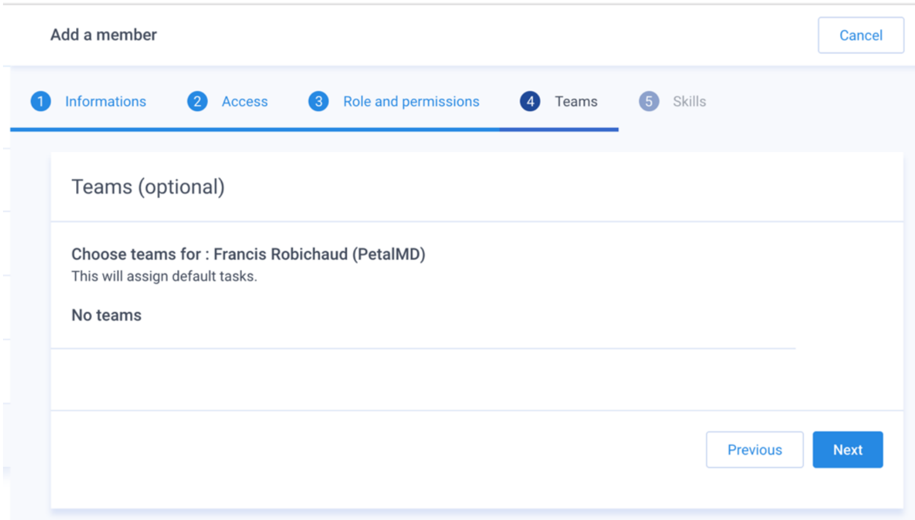
A2. **Regular member** for a non-planned member (equivalent to a read-only member): will only allow access to the group's calendar, without permissions to perform changes, and access to other tools, out of the schedule, such as the messaging, documents and contacts.

B. **Administrative member:** this can be for a planned member or not but, most of the time, this role is attributed to non-planned members for post-publication scheduling management. It allows the member to perform adjustments to the other members' calendars through the group calendar, input absences for others or move shifts with regards to the group's configuration. Members with these permissions will also be notified of all shift trades.

C. **Group planner:** This permission can be given to more than one member, however, it is not suggested to access the planning tool more than one member at a time. Panned or non-planned members can play this role. It allows access to the planning tool and to manage schedules after their publication. Another difference between this role and the administrative member's is that the latest won't be able to approve or process shift changes.

Once the right role is selected, click on **Next**

6. **Teams (optional)**



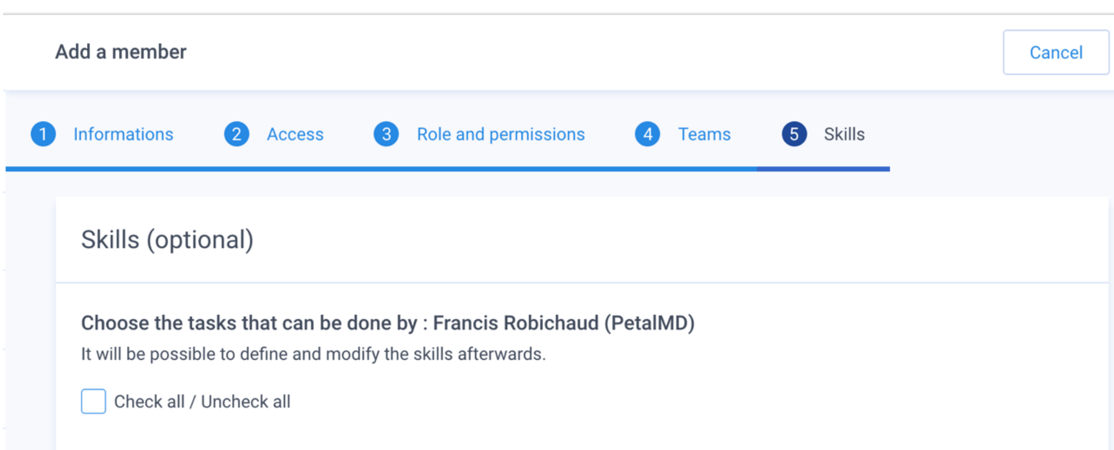
A. The attribution of teams can determine which shifts will be assigned to the member.

B. Beyond that, teams can also be subgroups that can be displayed in the planner tool.

C. If the attribution of one or more teams is associated with competencies for specific tasks, they will be reflected in the next tab, Skills.

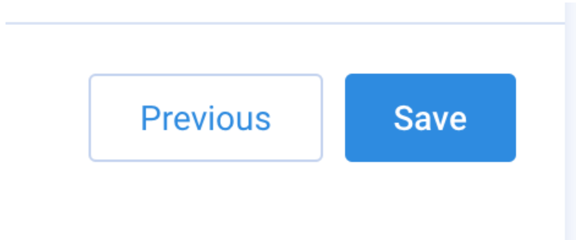
D. If your group doesn't include teams, you can directly go to the next section by clicking on **Next**.

7. **Skills**



A. Choose which shifts can be assigned to this member

8. Click on **Save** to add the member to your group



A. Once the member is saved, it will become part of the group

B. After registration, an activation email will be sent to this new member.

C. If it is a planned member, it will be added to your current and future period, unless their **Start date of planning** is in the future. In that case, the member will be available to shift assignment for periods including that date.

Remove members from your group

You have two options to remove members

1. In the members' list, click on the **Remove** icon

A. If the member is not assigned to a shift on the date of the removal or in the future, they will be removed from the group. If it is a planned member, they will not appear in the future periods as a member available for assignment.

B. If it is a planned member and they are assigned in the future, you will be informed of the number of assignments they have and the date of the last one.

2 choices apply

1. Delete all future assignments and go back to the members' list to remove them.

2. In editing mode, click on the pencil and input an ending date following their last assignment. This will remove the member only at this date and provide you from assigning him to shifts after this date.

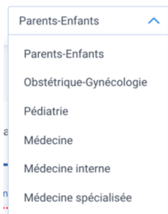
When removing a member, you won't be notified of unpublished assignments, they will automatically be deleted with the member's removal.

Hospital Dashboard

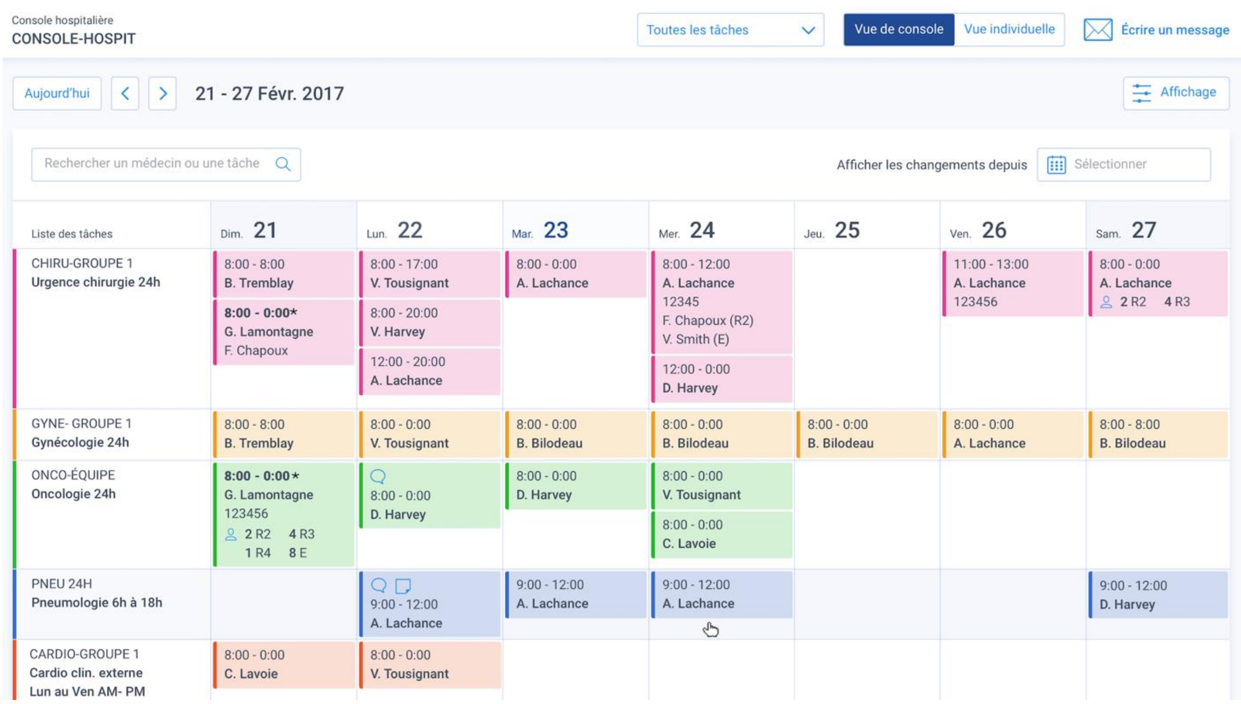
How to select layouts

To optimize the hospital dashboard's usage, it is possible to contact PetalMD to create personalized filters. They allow similar shifts to be grouped together and it accelerates access to the right information for users. Once these filters are created, they are accessible to all members of the hospital dashboard.

To modify display, click on this menu:



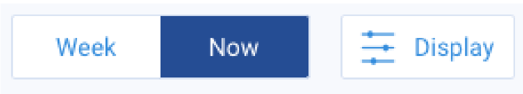
Once your selection is made, the list of shifts is instantaneously updated.



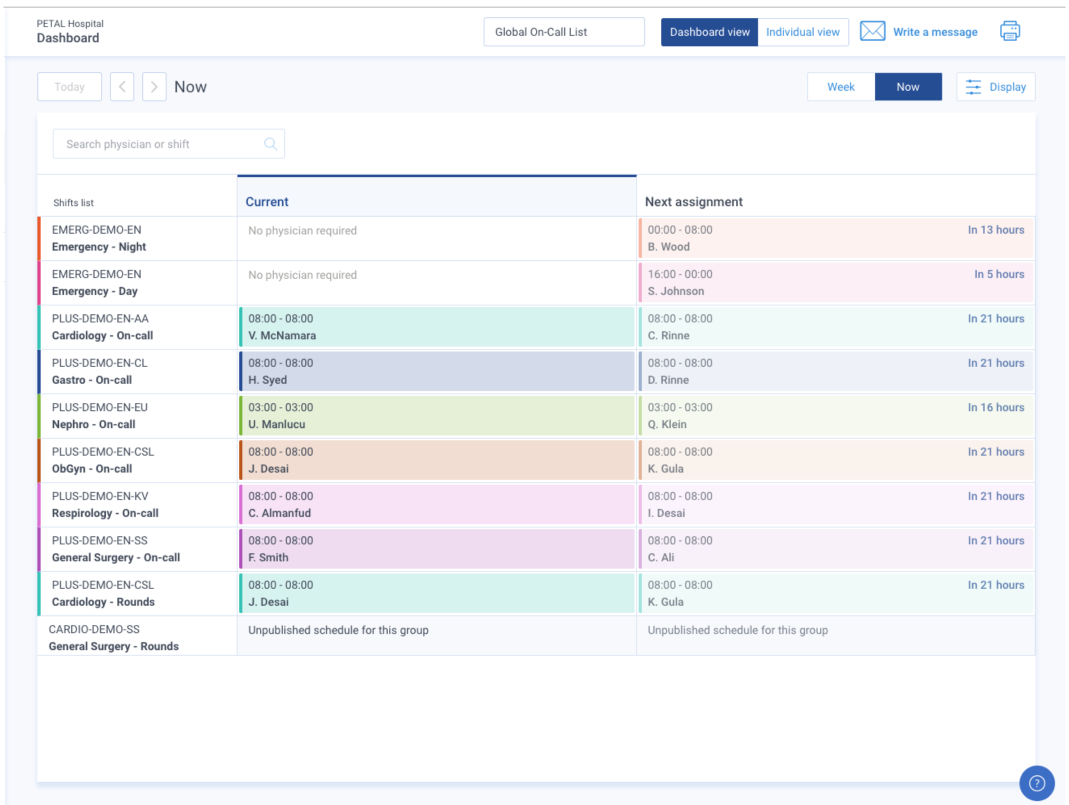
Who's on call now dashboard

A new **Now** toggle allows all dashboard users to see who is currently covering a shift.

1. You can toggle between the Now and Weekly dashboards by using the following button. Your preference will be kept and reused every time you log back into the system:



2. The first column shows who is currently covering a shift. This assignment is based on the **Current** time while the **Next assignment** shows who's the next person that will be affected to a particular shift kind. You can also visualize when the next person's shift will start.



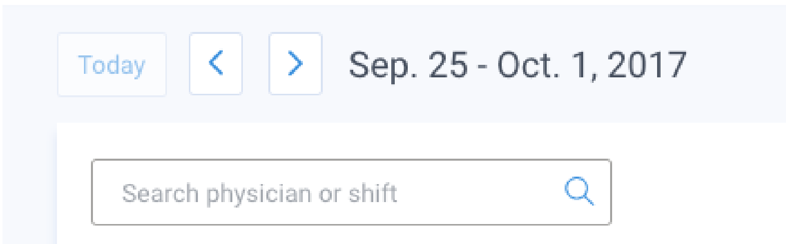
3. Any shift trades that occur among members in a medical service will be updated on the dashboard in real time. If a user remains on the dashboard view and the hour changes, the current and next assignments will automatically be refreshed to show the new assignments.

4. When a user leaves PetalMD, the last toggle selection will be kept for further sessions. For instance, if you sign out while the **Now** dashboard view is selected, it will be the next presented view when you log back in.

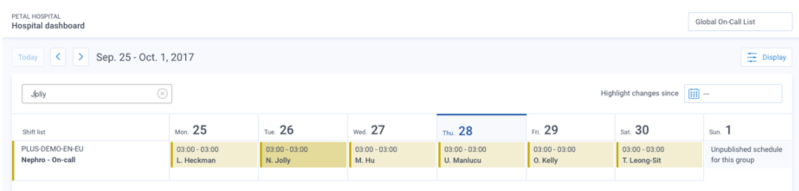
Who's On-Call - How to search

By clicking on the Hospital Dashboard icon, you will access the console schedule.

To search an on-call physician, you only have to type their name in the search bar.



Shifts to which this physician is assigned will then appear on the screen, for the current week.



Afterwards, you can navigate to other weeks by clicking on the arrows at the top of your screen and see their agenda for previous or upcoming weeks.