

# ***Using EPSKED***

The Emergency Physician Scheduling Program

***Version 5***



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The Emergency Physician Scheduling Program  
Version 5

For PC compatible computers using the Windows operating system  
For Macintosh computers used in their PC mode, with Windows installed

Presented by:

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By performing the Program Installation and using the Program, you acknowledge that you have read this EULA, understand it, and agree to be bound by its terms and conditions. You further agree that this is the complete and exclusive statement of the agreement between us, which supersedes any proposal or prior agreement, oral or written, and any other communications between us relating to the subject matter of this agreement.

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## Chapter 1 Getting started with EPSKED

### Introduction to EPSKED

EPSKED is a computer program designed to create work schedules for emergency physicians. EPSKED can adapt to a wide variety of schedules.

Some of EPSKED's features and limitations include:

- Automated scheduling of **up to sixty-four shifts each day** from a maximum of sixty-four different shifts you can define specifically for your schedule. (If you need double/triple coverage for a shift, this counts as two/three shifts of the sixty-four available each day.)
- Scheduling of as many as **255 active providers** at each scheduling location (see below), with each provider having separate requests for total hours, specific numbers of shifts for up to three categories defined for your own schedule, specific days and/or shifts off, shift preferences, number of days in a row worked and optional scheduling cycles. Don't be overwhelmed by the number of options! EPSKED can produce schedules even if all you do is enter your providers' names. The other provider options are either automatically set to standard values, or are available if needed. Templates are used to facilitate data entry.
- Simultaneous, coordinated scheduling of more than one site, even if individual providers work at one or more of the sites. Site schedules can be printed separately, or as part of a global master schedule, showing all shifts at all sites, and spanning several pages if desired.
- Essentially an unlimited number of independent schedule "locations" (such as resident and attending schedules, physician and physician assistant schedules, or separate hospital locations) can be created – with each schedule allowing the full sixty-four daily shifts and 255 active providers. Contact ByteBloc Software for pricing information.
- Automatic generation of summary data for each schedule, utilizing the summary categories you select specifically for your schedule.
- Printing of master schedules in a form ready to copy and distribute. You can also print individual physician schedules, cumulative holiday schedules, extensive summary tables, and a request form that your physicians can use to request days or shifts off.
- Faxing and emailing of schedules and summaries directly from EPSKED.
- Email schedule file options include Adobe Acrobat PDF, HTML, TIFF, Excel, XML and vCalendar.

This chapter on *Getting Started With EPSKED* describes how to install EPSKED on your computer; it then presents an overview of the steps involved in customizing EPSKED to match the needs of your particular schedule. The subsequent chapters on the EPSKED Customizer, starting on page 3, and the EPSKED Scheduler, starting on page 20, present completed sample screens which you should review as you enter information for your own schedule.

**System requirements**

EPSKED 5 is designed for use on computers using the Microsoft Windows operating system, versions XP, Vista, or Windows7 and 8. Use on the Macintosh

requires using a utility such as Boot Camp (built in to Mac OS X and later) and installation of a compatible version of Microsoft Windows.

A monitor with a minimum 1024x768 resolution is required.

Internet access with a supported Outgoing Mail Server are required to send email using EPSKED's Email Manager. A fax modem with telephone line connection is required to send faxes using EPSKED's Fax Manager.

**Installation of EPSKED on your computer**

EPSKED can be installed by you using an installation file available from our Internet website at [www.bytebloc.com/ep5download](http://www.bytebloc.com/ep5download).

Detailed instructions for downloading and

installing EPSKED are available from the web site and are not explained further here.

**Running EPSKED**

The installation program places an *EPSKED 5* icon on your computer desktop. Start EPSKED by double clicking on that icon. (Alternatively, click on the

Windows *Start* button – usually located at the bottom left of your screen – then point the mouse cursor at the *Programs* option to highlight it, highlight the *EPSKED 5* option, then click on the *EPSKED 5* program.) The first time you use EPSKED, it will request that you enter a trial date password. This password determines the dates of a two-month trial period during which your schedules can start while you are trying EPSKED. Please contact ByteBloc Software (see page 6) if you have not received a password.

Before you can begin scheduling, you need to instruct EPSKED about the requirements of your schedule. Important items are the names and lengths of your shifts, and the names and preferences of the medical providers you are scheduling. EPSKED uses a separate *Customizer* program to configure these and other scheduling options specifically for your schedule. The first time you use EPSKED, a message window gives you the option to load the EPSKED Customizer. Click the *Okay* button to load the Customizer program. The initial program display is the Customizer's Main Menu screen.

While using EPSKED, you can follow instructions in this manual as well as those contained in EPSKED's extensive, context sensitive help screens. During your initial customization, the help screens are automatically displayed whenever you begin a new Customizer screen for which you have not previously entered any information. To view the help screens at any time, simply press the <F1> function key on your computer.

The help screens contain multiple examples and are available to assist you from anywhere within EPSKED's Customizer or Scheduler programs. Most help screens are loosely divided into three sections:

1. An overview of the program screen that is currently being described.
2. A description of the program screen display.

3. An explanation of the commands that you can give EPSKED from within the program screen.

Avoid being bogged down trying to understand every detail of the help screen explanations. We strongly suggested that, when you enter an unfamiliar program screen, you first skim the pertinent portion of its associated help screen so that you have an idea of its contents, then return to the program screen and experiment with making entries. All of EPSKED's program screens continuously display abbreviated, context sensitive instructions. Warning and error messages are displayed when needed. You can refer to the more detailed instructions contained in the help screens (press <F1>) when necessary to answer a specific question or review one of the many included examples.

The following two pages contain overviews of the steps involved in working with the EPSKED Customizer and Scheduler. If you ever feel "lost" during customization or scheduling with EPSKED, it may be helpful to reorient yourself by referring to these overviews.

#### Overview of the EPSKED Customizer

EPSKED uses a separate Customizer program that works with the EPSKED Scheduler to create a custom match between EPSKED and the needs of your

schedule. When you customize EPSKED to match your schedule, you enter information in logical steps that answer seven questions:

#### Customize EPSKED in Seven Steps

1. **Who are you?** (See page 9.)
2. **What are your shifts?** (See page 10.)
3. **How do your shifts relate to each other?** (See page 11.)
4. **Which days of the week are your shifts normally scheduled?** (See page 12.)
5. **What appearance do you want for your schedules?** (See pages 13 through 16.)
6. **What summary statistics do you want EPSKED to track?** (See page 17.)
7. **Who are the medical care providers that you need to schedule?** (See pages 18 through 21.)

Each of these options is a selection from the EPSKED Customizer Main Menu screen. Samples of completed screens for each of these steps are contained in the chapter on the EPSKED Customizer, starting on page 7. If you ever feel “lost” while customizing EPSKED, it may be helpful to reorient yourself by referring to the above overview.

Once EPSKED has been customized for your emergency department schedule, only the EPSKED Scheduler needs to be run when you create a new schedule.

**Overview of the EPSKED Scheduler**

EPSKED's Scheduler program uses the information you entered in the EPSKED Customizer program to produce work schedules for your medical providers. To create each schedule, you enter information that answers five questions, then request that EPSKED create a schedule, which you can review, modify and print.

**Creating a New Schedule****Enter information answering these five questions:**

1. **What date do you want this new schedule to start?** (See page 24.)
2. **Are there any changes in normal customization information that you want to make specifically for this schedule?** This step includes altering the shifts used on any day (page 26) and modifying provider requests for the number of shifts and hours that they want to work (page 29).
3. **Are there any holidays in this schedule?** (See page 28.) Automatic addition of preset holidays is also available (page 23).
4. **Are there any shifts your providers are not available to work?** (See page 27.) To assist you in gathering this information, EPSKED can print, fax or email a request form for your providers (page 32). (For WebSked users, the gathering of this information is automatic. See the separate *Using EPSKED with WebSked* manual, available by contacting ByteBloc Software at [support@bytebloc.com](mailto:support@bytebloc.com).)
5. **Are there any shifts specifically requested by your providers that you want to manually preschedule?** (See page 30.)

**Once this information is entered you will:**

- Request that the EPSKED Scheduler automatically generate the schedule.
- Review the computer generated schedule and make any desired modifications. Numerous features are available to assist with this review process, including immediate access to summary and availability information, highlighting of individual provider schedules, and further computerized revision of the schedule. (See page 31.)
- Print, fax or email the schedule for distribution to your providers.

Samples of completed screens for each of these steps are contained in the chapter on the EPSKED Scheduler, starting on page 22. Samples of printed schedules are shown starting on page 33.

**EPSKED registration and activation**

Registration and full activation of EPSKED can be accomplished over the Internet and through email and does not involve reinstallation of EPSKED. From the Scheduler program Main Menu, select the *Register...Order* dropdown menu option available at the top of the screen. Order information is displayed (see page 37) that you can use to convert your copy of EPSKED to a registered version. A credit card can be used for the purchase.

After ByteBloc receives your order, we will email an Activation Code to you. When it is received, select the *Register...Activate* option from the drop down menu at the top of the screen and enter the Activation Code; the trial date restrictions will be removed from your copy of EPSKED.

**A request from us**

EPSKED has already been used to create tens of millions of actually worked hours at many different emergency departments around the world. A majority of the improvements contained in this version of EPSKED were based on suggestions received directly from program users like you. If you identify new or expanded features that could assist with scheduling at your emergency department, please contact us with a description of your needs. Also indicate whether you would be willing to beta test (field test) a trial version containing the suggested features.

We sincerely hope you enjoy working with EPSKED and would appreciate hearing any comments you may have about the program. If your comments relate specifically to your schedule, you can easily send us a copy of your schedule data using the *Help...Email-to-ByteBloc...Schedule Database* dropdown menu option, available at the top of the EPSKED Scheduler Main Menu screen. All information we receive is considered strictly confidential, and will be used only for purposes of program evaluation and development.

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## Chapter 2 – The EPSKED Customizer

This chapter contains EPSKED Customizer sample screens, used to inform EPSKED about a hypothetical schedule that requires simultaneous scheduling of an emergency department and an affiliated urgent care clinic. The schedule is designed to demonstrate many (but not all) of EPSKED's features. The following shifts and scheduled hours are used:

### Sample Emergency Department Schedule

#### *Emergency Department Shifts:*

**Day** 7am - 3pm

**Swing** 3pm - 11pm (1pm - 1am on Sat and Sun)

**Night** 11pm - 7am

#### *Urgent Care Clinic Shifts:*

**Clinic Day** 8am - 4pm

**Clinic Eve** 4pm - 12pm

**Backup shift:** All days except Mondays

**Administrative shift:** Mondays 9am - 5pm

Note that the emergency department requires scheduling of three shifts daily: a Day shift, a Swing shift, and a Night shift. The Swing shift is eight hours long on weekdays, but on weekends is extended to twelve hours to provide additional coverage.

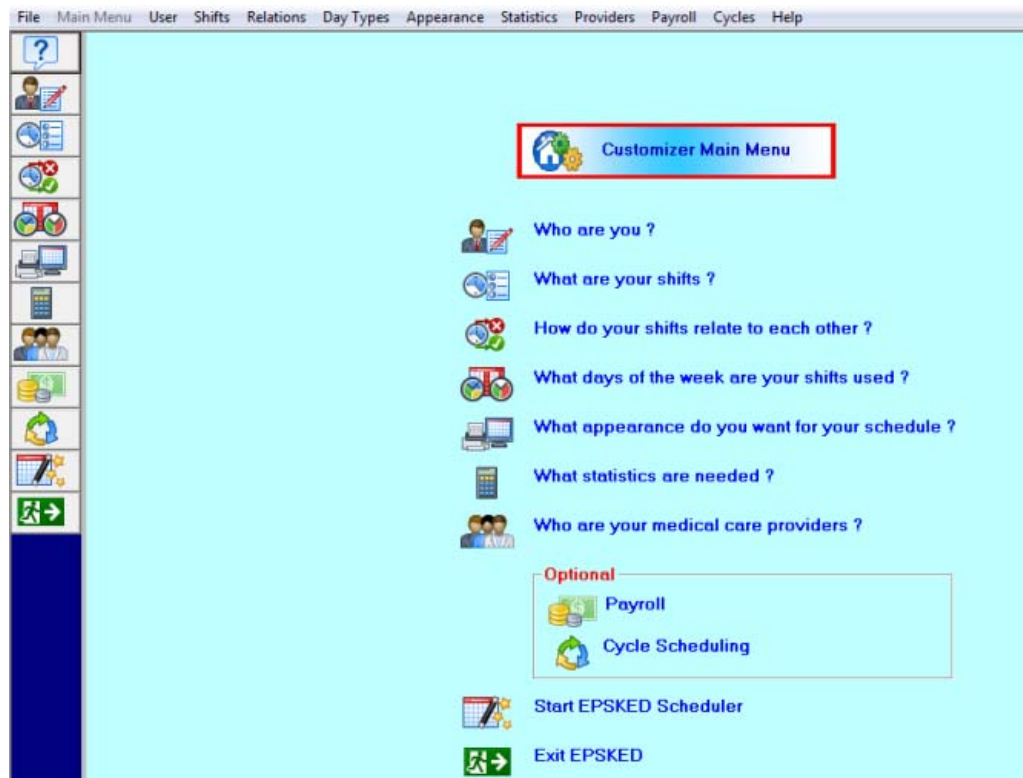
The clinic requires scheduling of two shifts daily: a Clinic Day shift and a Clinic Eve shift.

A Backup shift, scheduled every day except Monday, indicates the person who is expected to cover other shifts should the normally scheduled provider be unable to work due to illness. On Mondays an Administrative shift is scheduled. No Backup shift needs to be scheduled on that day because the physician scheduled for the Administrative shift acts as the backup provider.

The schedule is worked by nine physicians, doctors Bwana, Clark, Cooper, Friedman, Gomez, Jones, McCoy, Samuelson, Smith and Spock. Doctors CClark and CCooper work only in the Clinic. All other physicians can work both in the clinic and in the emergency department. Dr. Bwana is the emergency department director. He will always be scheduled on Mondays for the Administrative shift unless he is on vacation, in which case Dr. Friedman, the deputy director, can fill the shift. Dr. Bwana does not work night or weekend shifts except in emergencies.

Customization examples for other possible schedules are given in examples used in the Help Screens available while running EPSKED.

## *EPSKED Customizer: Main Menu*




The first time you use EPSKED, your initial program display is the EPSKED 5 *Customizer – Main Menu* screen. Press the <F1> function key on your keyboard for more information about this screen. (The <F1> key is labeled F1. It can usually be found on your keyboard as the top left key either in a cluster of keys placed to the left of or in a row above the normal letters and numbers portion of the keyboard.)

### Important notes:

- Begin your initial customization of EPSKED by selecting the *Who are you?* option: click either the command button along the left side of the screen or click the *Who are you?* graphic or text in the center of the screen. On each subsequent screen, click the *Forward* button to progress through all of the needed customization steps in the order shown in this manual. Once your initial customization of a screen is completed you can go back at any time to modify an individual customization item by selecting it from this menu, or selecting the *Create Schedules* option to start the EPSKED Scheduler program.
- The options on this screen correspond to the seven steps shown in Overview of Customization on page 3.
- Do you regularly pre-schedule worked or off shifts on a predictable basis? If so, after finishing the other seven steps, click on the optional *Cycle Creation Menu* and review the information there – it may save you a lot of time!

## Customizer: Who are you?

 **Who are you ?**

**First Name**  **Last Name**

**If you are also a provider, your provider name**

**Job Title**

**Voice #**

**Fax #**

**Dial Prefix**

**Local Area Code**

**Long Distance Prefix**

**Email Address**

**I will be creating more than one site for this location. (See F1 help!)**


	Site Name	Abbreviation
	Main	Main
▶	Auxiliary	Aux
*		

The first step in using the EPSKED Customizer (see the overview on page 3) is informing EPSKED about yourself, the scheduler. Information entered on this screen is the first step in customizing EPSKED for your schedule; it answers the question, *Who are you?*

### Important notes:

- You can create and print schedules without completing any sections of this screen, but some of the information is useful or needed if you want to fax or email your schedules to your providers. EPSKED needs information such as your name, telephone numbers and email address to automatically add to headers and signature lines that are included in faxes or emails that you send to your scheduled providers.
- Telephone formats other than the standard North America 10 digit format can be entered. To change how telephone numbers are printed and displayed in EPSKED, click the Phone Format command button located along the left side of the screen.
- The Site Name entry area beneath the “I will be creating more than one separately printed site...” caption is displayed only when the associated checkbox is selected. When the Site Name entry area is first displayed, EPSKED will automatically show a help screen that explains the purpose of the Site Name entry area. Use that information to decide whether you want to create separate sites for use in your schedules. For our sample schedule described on page 7, sites named ER and Clinic were created.
- When done, click the Forward button to advance to the next Customizer screen.

### Customizer: What are your shifts?


What are your shifts ?

What are the names and hours of your shifts ?												
	Shift Name	Short Name	Site	Start Time	End Time	Length in hours	Weekend shifts if on			Scheduling Priority	Shift off prior to a day off?	Active
							Friday?	Saturday?	Sunday?			
▶	DAY	day	ER	09:00	17:00	8	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	NORMAL	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	SWING - 8	sw-8	ER	15:00	23:00	8	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	NORMAL	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	SWING - 12	sw-12	ER	13:00	01:00	12	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	NORMAL	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	NIGHT	night	ER	23:00	07:00	8	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	HIGH	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	CLINIC DAY	clday	Clin	08:00	16:00	8	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	NORMAL	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	CLINIC EVE	cleve	Clin	16:00	00:00	8	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	NORMAL	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	ADMIN	admin	ER	09:00	17:00	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	NORMAL	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	BACKUP	call	ER	00:00	00:00	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	LOW	<input type="checkbox"/>	<input checked="" type="checkbox"/>
*							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

The second step in using the EPSKED Customizer (see the overview on page 3) is informing EPSKED about the shifts used in your schedule. The entries shown above provide this information to the EPSKED Customizer for the sample schedule described on page 7.

#### Important notes:

- The eight-hour and twelve-hour Swing shifts must be designated as separate shifts (named as SWING - 8 and SWING - 12 in the left column of the sample screen above).
- The NIGHT shift is checked in the *Weekend shifts if on Friday?* column (so that Friday NIGHT shifts are counted as weekend shifts for summary purposes), given a HIGH Scheduling Priority (so that if it is impossible to schedule all shifts in a day, EPSKED tries not to leave the NIGHT shift as the unscheduled shift), and marked as a Shift Off Prior to a Day Off (so that a provider requesting an entire day off is automatically taken off for the previous NIGHT).
- The name of the Administrative shift has been shortened to ADMIN to fit within the maximum thirteen-character name length. It is scheduled for 9am to 5pm, but is counted as zero worked hours in the *Length in hours* column.
- BACKUP is a special shift name that you should use only if you understand its effects. Press <F1> to view the Help Screen for an explanation.
- *Scheduling Priority* (the third to the last column) entries are considered only when it is not possible to fill all of the shifts in a day, such as when there are six shifts to be filled, but only five providers available to work them. Under these circumstances, HIGH priority shifts are preferentially scheduled if possible, leaving a NORMAL or LOW priority shift as the unscheduled shift for the day.
- The last column allows you to inactivate shifts you are no longer using. The inactivated shifts will still appear (with a gray background) at the bottom of the screen. You can also re-order your shifts after you have created them by using the up and down arrow buttons located at the bottom of this screen.

**Customizer: How do your shifts relate to each other?**

How do you feel about working these shifts ?	On the Same Day?	How do you feel about working these shifts ?	One Day Later?	How do you feel about working these shifts ?	Two Days Later ?
DAY	CONFLICT	DAY	CONFLICT	DAY	OKAY
SWING - 8	CONFLICT	SWING - 8	OKAY	SWING - 8	OKAY
SWING - 12	CONFLICT	SWING - 12	OKAY	SWING - 12	OKAY
NIGHT	CONFLICT	NIGHT	PREFER	NIGHT	OKAY
CLINIC DAY	CONFLICT	CLINIC DAY	CONFLICT	CLINIC DAY	OKAY
CLINIC EVE (Scheduled)		CLINIC EVE	OKAY	CLINIC EVE	OKAY
ADMIN	CONFLICT	ADMIN	OKAY	ADMIN	OKAY
BACKUP	CONFLICT	BACKUP	DISLIKE	BACKUP	OKAY


The third step in using the EPSKED Customizer (see the overview on page 3) is describing how your shifts relate to each other. For example, your providers would not want to be scheduled for a morning shift immediately after working the night shift on the previous day. The entries shown above provide shift relationship customization information to EPSKED for the sample schedule described on page 7.

Important notes:

- From this screen, you define relationships between one shift (which is already presumed scheduled and referred to as the *Worked Shift* in the help screens) and all other shifts that could be scheduled on the same day and for the next two days. Relationships are selected from the Prefer, Dislike, Okay, or Conflicts options. Relationships shown above are for the CLINIC EVE shift (selected at the top left of the entry area), with the current highlighting indicating that the DAY and CLINIC DAY shifts are conflicting shifts the day after working the CLINIC EVE shift.
- By default, EPSKED considers any shift starting within 12 hours after the end of another shift as conflicting, but you can override this as needed with your entries on this screen. (See page 10 for the entries that determine shift starting and ending times.)
- You can create multiple shift relationship models (use the *Add a new relation model* command), so that shift relationships can be tailored to allow for the individual preferences of your scheduled providers.
- When entering preference information for the SWING - 12 shift, you can save time by using the *Copy an existing relation model* option to copy the relationships you designated for the SWING - 8 shift. You can use the same command to copy an entire shift relation model to use as a base for creating a new model.

**HINT:** When first entering shift relationships, start with your first defined shift as the Worked Shift, then advance one-by-one through your customized shifts until reaching your last shift. This way you will avoid inadvertently skipping shift relation entries for any of the shifts. Later, if you need to go back and check or change entries, you can select the desired Worked Shift rather than advancing sequentially through all shifts.

***Customizer: What days of the week are your shifts scheduled?***

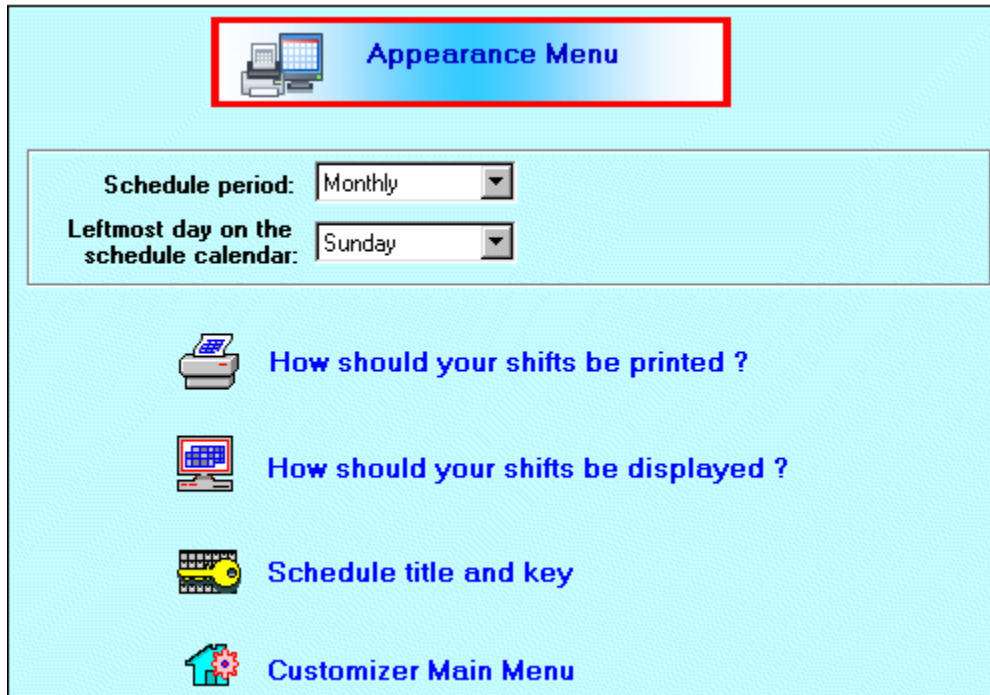
 <b>What days of the week are your shifts used ?</b>		
<p style="text-align: center;"><b>Day Type Name</b></p> <p style="text-align: center;">Mondays</p> <p style="text-align: center;"><b>Days Normally Used</b></p> <p style="text-align: center;"> <input checked="" type="checkbox"/> SU           <input checked="" type="checkbox"/> MO           <input type="checkbox"/> TU           <input type="checkbox"/> WE           <input type="checkbox"/> TH           <input type="checkbox"/> FR           <input type="checkbox"/> SA         </p> <p style="text-align: center;"><b>Shifts Used</b></p> <p>DAY SWING - 8 NIGHT CLINIC DAY CLINIC EVE ADMIN</p>	<p style="text-align: center;"><b>Day Type Name</b></p> <p style="text-align: center;">Tues - Fri</p> <p style="text-align: center;"><b>Days Normally Used</b></p> <p style="text-align: center;"> <input type="checkbox"/> SU           <input type="checkbox"/> MO           <input checked="" type="checkbox"/> TU           <input checked="" type="checkbox"/> WE           <input checked="" type="checkbox"/> TH           <input checked="" type="checkbox"/> FR           <input type="checkbox"/> SA         </p> <p style="text-align: center;"><b>Shifts Used</b></p> <p>DAY SWING - 8 NIGHT CLINIC DAY CLINIC EVE BACKUP</p>	<p style="text-align: center;"><b>Day Type Name</b></p> <p style="text-align: center;">Weekends</p> <p style="text-align: center;"><b>Days Normally Used</b></p> <p style="text-align: center;"> <input checked="" type="checkbox"/> SU           <input type="checkbox"/> MO           <input type="checkbox"/> TU           <input type="checkbox"/> WE           <input type="checkbox"/> TH           <input type="checkbox"/> FR           <input checked="" type="checkbox"/> SA         </p> <p style="text-align: center;"><b>Shifts Used</b></p> <p>DAY SWING - 12 NIGHT CLINIC DAY CLINIC EVE BACKUP</p>

The fourth step in using the EPSKED Customizer (see the overview on page 3) is indicating which shifts are normally scheduled on which days of the week. The entries shown above are for the sample schedule described on page 7. Review the <F1> help screens and understand what a Day Type is before making any entries!

**Important notes:**

- The first time the *Day Types* program screen is entered, EPSKED automatically generates a Day Type named “All Days”, and assigns all of the days of the week to that Day Type. To remove that name, start typing any new name you desire for the first Day Type. In the screen above, “Mondays” was entered. “Mondays” is needed as a separate Day Type because the ADMIN shift is normally scheduled only on Mondays (page 12).
- If you have Day Types that are not normally used except on special days (such as holidays), you can create a Day Type (such as Holiday) that has no days selected from the *Days Normally Used* buttons. From the EPSKED Scheduler, the shifts customized for the Holiday Day Type can be easily assigned to holidays when needed.
- **A common confusion:** The EPSKED program requires that days of the week always be assigned to a Day Type. Until you have designated all of your Day Types, some days of the week may be assigned to a Day Type in which they are not used. This is corrected once all of your Day Types are created and the proper days are assigned.
- **A common confusion:** The names you create for your Day Types are for your convenience only, allowing you to easily select them when needed. The names are *not* used by EPSKED for any other purpose. For example, creating and using a Weekend Day Type does *not* affect which shifts are counted as Weekend shifts when calculating schedule summaries. (Shifts counted as Weekend shifts are determined only by the *Weekend shifts if on Friday?...Saturday?...Sunday?* designations you selected for the *What are your shifts?* screen described on page 10.)


***Customizer: What appearance do you want for your schedule?***





**Appearance Menu**


Schedule period: Monthly

Leftmost day on the schedule calendar: Sunday

 **How should your shifts be printed ?**

 **How should your shifts be displayed ?**

 **Schedule title and key**

 **Customizer Main Menu**


The fifth step in using the EPSKED Customizer (see the overview on page 3) is determining the appearance of your schedule when it is displayed and printed. In addition to the current Appearance Menu screen, three other appearance screens provide EPSKED with this information. (Not to worry – two are nearly identical, the third is usually quick and easy!) The entries shown above are for the sample schedule described on page 7.

On this menu screen you enter two basic pieces of information regarding your schedule:

- What day of the week do you want farthest to the left on the displayed and printed schedules? While Sundays are usually positioned as the first day on the left in a normal calendar, designating Monday as the day farthest to the left places Saturdays and Sundays together at the right hand side of the schedule, facilitating review of weekend scheduling.
- What period of time do you want each schedule to cover? Scheduling lengths from one to thirteen weeks can be selected, in addition to monthly schedules.

If you are performing your initial customization of EPSKED, click the *Forward* button after completing each appearance screen to automatically progress through the remaining appearance screens of the EPSKED Customizer in order – *How should your shifts be printed?*, *How should your shifts be displayed?*, and *Schedule title and key*. These screens are explained on the following three pages.

### Customizer: Printed appearance of shifts

 **How should your shifts be printed ?**

Shift Name	Site	Line#	Letter Case	Leading Dash	Portion of line used
DAY	ER	1	ALL LETTERS UPPERCASE	<input type="checkbox"/>	Whole
SWING - 8	ER	2	ALL LETTERS UPPERCASE	<input type="checkbox"/>	Whole
SWING - 12	ER	2	ALL LETTERS UPPERCASE	<input type="checkbox"/>	Whole
NIGHT	ER	3	ALL LETTERS UPPERCASE	<input type="checkbox"/>	Whole
CLINIC DAY	Clin	1	First Letter Uppercase	<input type="checkbox"/>	Whole
CLINIC EVE	Clin	2	First Letter Uppercase	<input type="checkbox"/>	Whole
ADMIN	ER	5	all letters lowercase	<input checked="" type="checkbox"/>	Whole
BACKUP	ER	5	all letters lowercase	<input checked="" type="checkbox"/>	Whole

Print dotted lines on  
 ER  
 Line 1  
 Line 2  
 Line 3  
 Line 4  
 Line 5

# of blank lines for each day    
 Print time stamp    
 Print shift names to the left of the scheduled provider


Mondays (ER)	Tues - Fri (ER)	Weekends (ER)
1 DAY	1 DAY	1 DAY
2 SWING - 8	2 SWING - 8	2 SWING - 12
3 NIGHT	3 NIGHT	3 NIGHT
4 .....	4 .....	4 .....
5 -admin	5 -backup	5 -backup
Mondays (Clinic)	Tues - Fri (Clinic)	Weekends (Clinic)
1 Clinic Day	1 Clinic Day	1 Clinic Day
2 Clinic Eve	2 Clinic Eve	2 Clinic Eve
3	3	3
4	4	4
5	5	5

The *Printed Appearance* screen allows you to tell EPSKED where to place the names of the providers scheduled for each shift of your printed schedule. The entries shown above provide positioning information for printing shifts in the sample schedule described on page 7. Before entering information for your schedule, you may find it helpful to review the printed schedules starting on page 33. These samples demonstrate how the customization information entered above is used EPSKED when creates a printed schedule.

#### Important notes:

- The preview box in the lower half of the screen illustrates the appearance for the printed schedule for each Day Type (see page 12) in each Site (see page 9). The DAY and CLINIC DAY are both located on Line #1, but are in different sites (ER and Clinic – see page 10), and therefore do not cause a printing conflict. The SWING-8 and SWING-12 shifts are both in the ER site and both printed on Line # 2, but these do not conflict since they are never scheduled on the same day. (A similar situation exists for the BACKUP and ADMIN shifts - see the schedule description on page 7.)
- When the schedule is actually printed, the name of the provider scheduled for each shift replaces the shift name shown here for each day of the schedule. Click the *Print Preview* button for a preview of the printed schedule using fictitious provider names.
- Is your schedule complex? Make use of the additional options such as printing shift names to the left of the scheduled provider, dotted line separators, letter case selection, different line halves, and leading dashed lines that can help distinguish your printed shifts and make your schedule more readable.

**Customizer: Displayed appearance of shifts**

 **How should your shifts be displayed ?**

	Shift Name	Site	Display Line	Portion of line used
▶	DAY	ER	1	Whole
	SWING - 8	ER	2	Whole
	SWING - 12	ER	2	Whole
	NIGHT	ER	3	Whole
	CLINIC DAY	Clin	1	Whole
	CLINIC EVE	Clin	2	Whole
	ADMIN	ER	4	Whole
	BACKUP	ER	4	Whole

Display shift names to the left of the scheduled provider 
Display site name above the shifts


Mondays	Tues - Fri	Weekends
-- ER --	-- ER --	-- ER --
1 DAY 2 SWING - 8 3 NIGHT 4 admin	1 DAY 2 SWING - 8 3 NIGHT 4 backup	1 DAY 2 SWING - 12 3 NIGHT 4 backup
-- Clinic --	-- Clinic --	-- Clinic --
1 Clinic Day 2 Clinic Eve	1 Clinic Day 2 Clinic Eve	1 Clinic Day 2 Clinic Eve

When creating or modifying a schedule you will work with the schedule displayed on your monitor, printing the schedule only when it is ready for distribution to your providers. The schedule display can use the same line assignments as customized for your printed schedule (on page 14). The first time you enter this screen these print line assignments are automatically copied for use in the display of your schedule.

If the automatically entered values are acceptable, you will not need to make any entries on this screen. However, if you have any blank lines in your line assignments, consider moving the shifts displayed below the blank upward to fill in the gap (as was done in the line selections above, below the ER Night shift). With these changes the schedule display will require less vertical height, and may allow a larger character size or obviate the need for scrolling of the display to view the entire schedule.

Reasons that you might want to change the current settings relate to the differences between the monitor size, orientation and available fonts as compared to the paper size and printer fonts available for printing. If you are not sure, click the *View sample display* side button to show a sample of a displayed schedule and make sure that it is easily readable. If it is, simply click the Forward button to continue. If not, consult the <F1> help screen for further recommendations.

### Customizer: Schedule Title and Key

 **Schedule title and key**

**Site Name**

**Schedule title**

**Formatted schedule key**

SHIFT	Start	-	End	Comments
DAY	09:00 AM	-	05:00 PM	
SWING - 8	03:00 PM	-	11:00 PM	
NIGHT	11:00 PM	-	07:00 AM	
ADMIN	09:00 AM	-	05:00 PM	

**Freeform schedule key**

DAY 7am - 3pm  
 SWING 3pm - 11pm (1pm - 1am on Sat & Sun)  
 NIGHT 11pm - 7am  
 Administrative / Backup shift

**Request Schedule key**

Print your name and requested hours at the top of this page.  
 Draw an 'X' through any DAYS you need to be OFF.  
 Draw a LINE through any SHIFTS you need to be OFF.  
 CIRCLE any shifts for which you NEED to be scheduled.  
 Describe any special requests at the bottom of this page.

(Included in this schedule are ##### hours and ##### shifts.)  
 >>>> PLEASE RETURN REQUESTS BY (date)! <<<<

Entries in the *Schedule Title and Key* screen determine the explanatory information printed at the top and bottom of your schedules. It contains five sections:

- **Site Name:** This option is displayed only if you customized more than one site (page 9). The displayed schedule title and schedule key entries apply only to the selected site.
- **Schedule title:** What title do you want printed at the top of each printed schedule? EPSKED provides two title lines; the first is usually used for Emergency Department Schedule and the second for the name of your hospital, clinic, or group.
- **Formatted schedule key:** The information in this area is printed at the bottom of your schedules when the Formatted schedule key checkbox is selected. EPSKED initially fills in information using the shifts in your longest Day Type (page 12). The entries can be edited as needed.
- **Freeform schedule key:** When the Freeform schedule key checkbox is selected, any information entered in this area will be printed at the bottom of your schedules. It can be used alone or to print information in conjunction with the Formatted schedule key.
- **Request Schedule Key:** The EPSKED Scheduler can print a request form that your scheduled providers use to advise you of their availability for a schedule. Instructions are printed at the bottom of the form in place of the normal schedule key. The standard instructions are shown above. You can edit the first five lines of instruction text or add more if desired. The bottom two lines are automatically printed and indicate a due date for the requests, which you select immediately before you print the actual request form.

**Customizer: What statistics are needed?**

<div style="border: 2px solid red; display: inline-block; padding: 2px;"> <b>What statistics are needed ?</b> </div>			
<p style="text-align: center; font-weight: bold;">Category Title</p> <p>TOTAL ▾</p> <p>HOURS ▾</p> <p style="text-align: center; font-weight: bold;">Shifts Used</p> <p>All Shifts</p>	<p style="text-align: center; font-weight: bold;">Category Title</p> <p>EVENING ▾</p> <p>SHIFTS ▾</p> <p style="text-align: center; font-weight: bold;">Shifts Used</p> <p>SWING - 8 SWING - 12 CLINIC EVE</p>	<p style="text-align: center; font-weight: bold;">Category Title</p> <p>NIGHT ▾</p> <p>SHIFTS ▾</p> <p style="text-align: center; font-weight: bold;">Shifts Used</p> <p>NIGHT</p>	<p style="text-align: center; font-weight: bold;">Category Title</p> <p>WEEKEND ▾</p> <p>SHIFTS ▾</p> <p style="text-align: center; font-weight: bold;">Shifts Used</p> <p>All Shifts</p>

The sixth step in using the EPSKED Customizer (see the overview on page 3) is defining the summary statistics – such as the total hours scheduled for each provider – that you want EPSKED to calculate for your schedule. The entries shown here create summary categories for the sample schedule described on page 7.

**Important notes:**

- The EPSKED Customizer automatically creates several summary categories when the *Statistics* screen is first entered. You may accept, modify, delete or add to the suggested categories as desired, up to a maximum of thirty different categories.
- Create a summary category by typing whatever name you desire in the entry area under the Category Title label, or use the dropdown box to select one of the predefined Special categories. Special category names – WEEKEND, WEEKDAY, HOLIDAY, OFF, BACKUP, LOCK SKED, PAYPERIOD and names of days of the week – have a specific, predefined meaning to EPSKED. Summary categories using these special names can be linked to other summary categories, creating new categories. Some examples: WEEKEND CLINIC SHIFTS or HOLIDAY NIGHT HOURS or FRIDAY NIGHT SHIFTS or ... just about any name combination needed to get the summary information you want from your schedule.
- After the title is entered, move to the second line of the summary column. Use the dropdown list box to select one of the available options – you cannot make a typed entry on this line. The options listed depend upon both the first line of the category title and upon the categories you have already customized.
- For normal summary categories you can select either SHIFTS or HOURS from the list. Additional options may be listed in the Summary Option window, allowing you to link one summary category to another. See the <F1> help information for more details.
- Click on the area below the Shifts Used label to show a list of the shifts that you defined for your schedule (page 10). Each shift is displayed with an adjacent checkbox to indicate whether that shift is included in the affected summary category or not.
- Command buttons on the screen allow you to move, insert and delete summary categories as well as decide which categories you want displayed and printed.

**Customizer: Who are your medical care providers?**



The seventh (and final!) step needed to customize EPSKED (see the overview of customization on page 3) is identifying the medical care providers who work the schedule you described in the previous six steps. If you are performing your initial customization of EPSKED, click on the *Individual provider information* option. From that one screen you can make all needed customization entries.

**Important notes:**

- Don't be overwhelmed by the number of options! EPSKED can produce schedules even if all you do is simply enter the names of your providers. The remaining options are either automatically set to standard values or do not need to be used, but are available if required by your schedule. Use the context sensitive <F1> help screens to assist you in deciding which options you need to use.
- The *Individual provider information* option (shown on the next page) allows you to examine and modify all information relating to a single provider. Other options selected from the Provider Menu screen display specific information (such as the number of requested hours and shifts) for all providers.
- From the *Bias for summary categories* option you can assign providers a "bias" for all shifts included in a summary category, increasing or decreasing the likelihood of being scheduled for shifts in that category. A *prohibit bias* prevents EPSKED from scheduling the provider for any shifts contained in that summary category.

## Customizer: Individual Provider Information

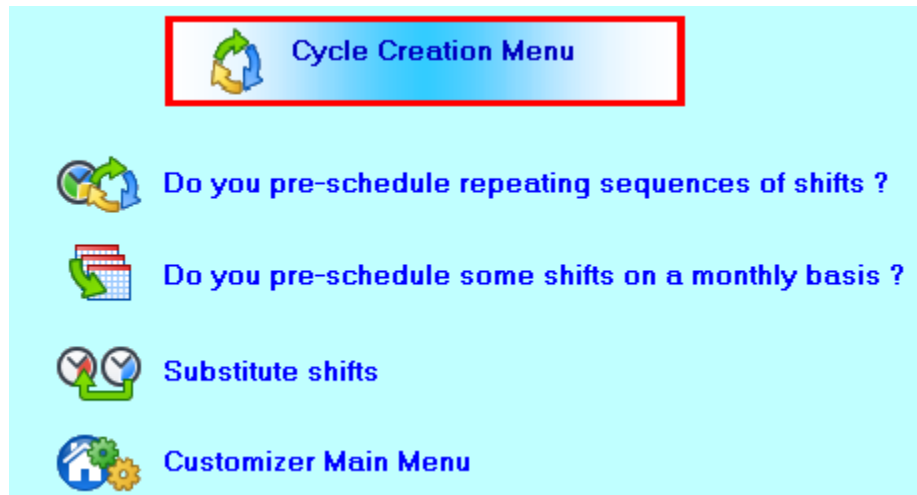
The screenshot displays the 'Individual provider information' screen. The 'Provider' dropdown is set to 'TEMPLATE'. The form includes fields for 'First name' (Temp), 'Last name' (TEMPLATE), 'Title', 'Abbreviation' (TMP), and 'Group ID'. A table for 'Requested' shifts shows columns for 'Hours', 'Shifts II', 'Shifts I', and 'Shifts', with values like '=' and '%'. Another table shows 'Shifts in a row' (4), 'NIGHTS' (selected), 'Relation Model' (STANDARD), and 'Link Sat-Sun?' (checkbox). There are also sections for 'Can't do Shifts', 'Preferred Shifts', 'Hi-Preferred Shifts', 'Disliked Shifts', and 'Hi-Dislike Shifts'. Contact information fields include 'Voice #', 'Cellular #', 'Pager #', 'Fax #', and 'Email'. A 'Repeating Cycle' section shows 'CALL SAME AS MONDAY' and '2/18/2013'. At the bottom, a 'BASE PAY' table shows '100' and a 'WEEKEND' column.

The Individual Provider Information screen displays all EPSKED Customizer requests specific to an individual provider. (Click the graphic image to the left of each row to see all provider requests specific to the Customizer option in that row.) In addition to the provider name, the most important to you are probably the usual number of hours and shifts requested by the provider for each schedule, the number of days in a row the provider prefers to work (referred to as Shifts In A Row in the program screen), and types of shifts for which the provider has special preferences.

When you first display this screen, the name TEMPLATE is automatically shown in place of the provider name. In the remaining entry sites in the TEMPLATE form, select or enter the most common value used by your providers for that request area. The template feature will save you time when adding a new provider: click the *Add a new provider* button, then enter the new provider's name and abbreviation. The template values are automatically copied to the newly added provider, ready to be modified if needed. Several default values are initially assigned to TEMPLATE, any of which you can change.

After you have entered your providers, you are ready to create schedules. Click the Main Menu dropdown menu at the top of the screen to show the EPSKED Customizer Main Menu, then click the bottom Start Scheduler option to begin actual scheduling. Congratulations!!

***Customizer: Cycle scheduling (optional)***



The Cycle Menu is reached by clicking the *Cycle* dropdown menu at the top of any the EPSKED Customizer screens, or by clicking the *Cycle Creation Menu* option from the Main Menu screen. EPSKED's cycles are used to automatically schedule shifts or off requests that you always preschedule on a predictable basis. This saves you from having to manually enter these shifts for each new schedule. Cycle scheduling is optional. **If your schedule does not require this feature you do not need to make any entries on the cycle scheduling screens.**

The cycle menu selections are:

- **Repeating sequences of shifts** - Repetitive sequence cycles are used for prescheduling of shifts such as *Scheduled for the Admin shift every Monday*, or *Off every other weekend*, or for fully scheduled cycles sequences such as *Day-Day-Swing-Swing-Night-Night-Off-Off-Off*. Cycles can be up to thirty weeks (210 days) in length. Note that the first day of the entered cycle repeats as the next day following the last day of the cycle. See the help screens for details.
- **Month based cycles:** The *Repeating sequences of shifts* cycles described above cannot be used for predictable month-based scheduling such as *Off every second Thursday* of every month or *Scheduled for the Day shift the last Monday* of every month. This type of cycle scheduling requires use of month-based cycles.
- **Substitute shifts:** When a shift is already filled or not used on a day that EPSKED expects the shift to be cycle scheduled, a substitute shift can instead be scheduled.
- Click the *Customizer Main Menu* option to return to that screen. From there, you can
- select the *Start EPSKED Scheduler* option (see page 8) to begin actual scheduling.

***Customizer: Payroll (optional)***



The Payroll Menu is reached by clicking the *Payroll* dropdown menu at the top of any the EPSKED Customizer screens, or by clicking the *Payroll* option from the Main Menu screen.

After a schedule is worked, you will likely need to do payroll calculations to determine how much providers will be paid for their efforts. EPSKED can calculate your payroll taking into account such factors as the total number of hours worked, the number of hours worked for specific shifts or sites, the time of day a shift is worked, and whether the hours worked required staying after the normal hours of the shift. Different hourly pay rates can be set for each provider in each of these different factors. **Entry of payroll information is optional. If your schedule does not require these features - for example, if you are an academic institution and your providers are salaried staff or residents - you do not need to make entries on any of the payroll screens.**

The payroll menu selections are:

- **Payroll setup** - you can define payroll related items as the payroll period (do you create payroll ever month, every week, every two weeks, or every four weeks?), the symbol for the currency you use (by default set to \$), how the hours in shifts that straddle the end and beginning of two payroll periods should be counted (all in one payroll period or split between two), whether you pay extra for overtime hours (hours worked beyond the normal scheduled hours of a shift), and how the hours of shifts that straddle two payroll categories should be handled (needed only if you pay different rates depending upon the time of day). See the help screens for details.
- **Payroll Categories:** A Base Pay category is automatically created, allowing you to enter a basic hourly pay rate for each provider. If you pay different hourly rates for different shifts (night shifts, for example), overtime (hours worked beyond the normal scheduled hours of a shift), and holidays, and for specific times of day, you can track these by creating additional payroll categories.

### ***Chapter 3 – The EPSKED Scheduler***

This chapter contains sample EPSKED Scheduler screens for a schedule involving simultaneous scheduling of an emergency department and an affiliated urgent care clinic. It is designed to demonstrate many (but not all) of EPSKED's features. Sample screens for the customization of this schedule were shown in the chapter on the EPSKED Customizer starting on page 7. The sample screens on the following pages display entries used by the EPSKED Scheduler to schedule for these shifts:

#### **Sample Emergency Department Schedule**

*Emergency Department Shifts:*

**Day** 7am - 3pm

**Swing** 3pm - 11pm (1pm - 1am on Sat and Sun)

**Night** 11pm - 7am

*Urgent Care Clinic Shifts:*

**Clinic Day** 8am - 4pm

**Clinic Eve** 4pm - 12pm

**Backup shift:** All days except Mondays

**Administrative shift:** Mondays 9am - 5pm

As was explained in the last chapter on the EPSKED Customizer, the emergency department requires scheduling of three shifts daily: a Day shift, a Swing shift, and a Night shift. The Swing shift is eight hours long on weekdays but is extended to twelve hours on weekends to provide additional coverage.

The clinic requires scheduling of two shifts daily: a Clinic Day shift and a Clinic Eve shift.

A Backup shift, scheduled every day except Monday, indicates the person who is expected to cover other shifts should the scheduled physician be unable to work. On Mondays an Administrative shift is scheduled. No Backup shift needs to be scheduled on that day because the physician scheduled for the Administrative shift acts as the backup physician.

The schedule is worked by nine physicians, doctors Bwana, Clark, Cooper, Friedman, Gomez, Jones, McCoy, Samuelson, Smith and Spock. Doctors Clark and Cooper work only in the Clinic. All other physicians can work both in the clinic and in the emergency department. Dr. Bwana is the emergency department director. He will always be scheduled on Mondays for the Administrative shift unless he is on vacation, in which case the deputy director, Dr. Friedman, can fill the shift.

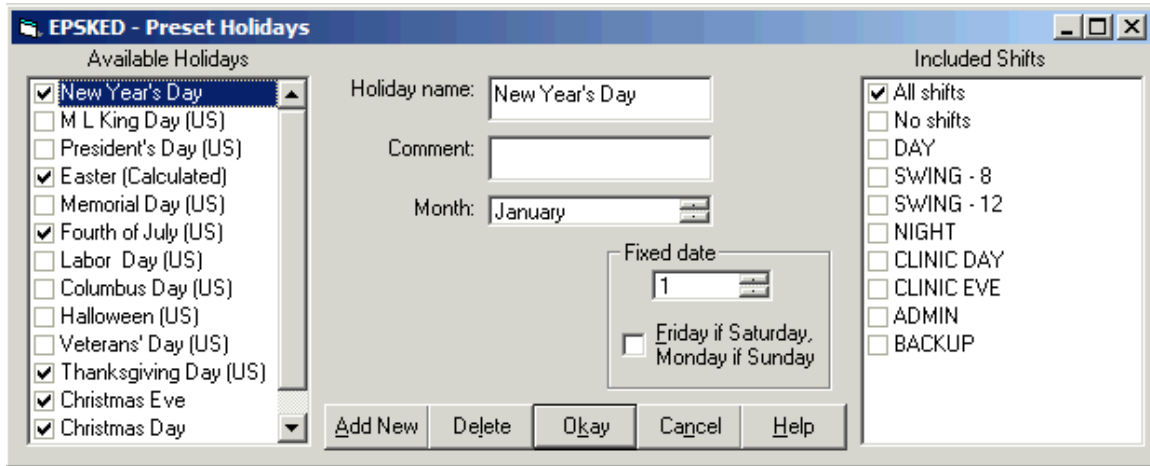
**Scheduler: Main Menu**

The EPSKED Scheduler Main Menu is the initial program screen displayed when you start EPSKED and have entered enough customizing information to allow EPSKED to create a schedule. The Main Menu screen allows you to select from among several scheduling options. Most commonly you will elect to create a new schedule, retrieve a previously created schedule, send email messages to your scheduled providers, create a cumulative summary of multiple schedules, or return to the EPSKED Customizer to make changes. Please also take a moment to review the other options so that you are aware that they are available. Brief descriptions of each of the scheduling options available from this menu can be viewed by pressing the <F1> help key.

**Important note:**

- Before scheduling, you can decide on the standard holidays that EPSKED should automatically add to your schedules. (See the next page of this manual for instructions.)
- To create your first schedule, click the *Create a new schedule* option. The remainder of this chapter describes the screens you will encounter after making that selection. If you need to leave EPSKED before you have completed all of the scheduling screens, simply click the *Home* button (the bottom side button on all of the EPSKED Scheduler screens) to return to this Main Menu screen, then click the *Exit EPSKED* button. All entries you have made will be saved, ready for use the next time you start EPSKED.

### Scheduler: Preset Holidays



Display of the Preset Holidays screen is available as an option only from the EPSKED Scheduler Main Menu. Click the *Options* dropdown menu at the top of the Main Menu screen, then click on the *Holiday* option to display the Preset Holidays window. This entry area allows you to select or define standard holidays that can be automatically added to your schedules. EPSKED comes with several predefined holidays, both for international users and for the United States (the location of the largest number of EPSKED users). These holidays can be selected, erased or modified, and new holidays can be added as desired.

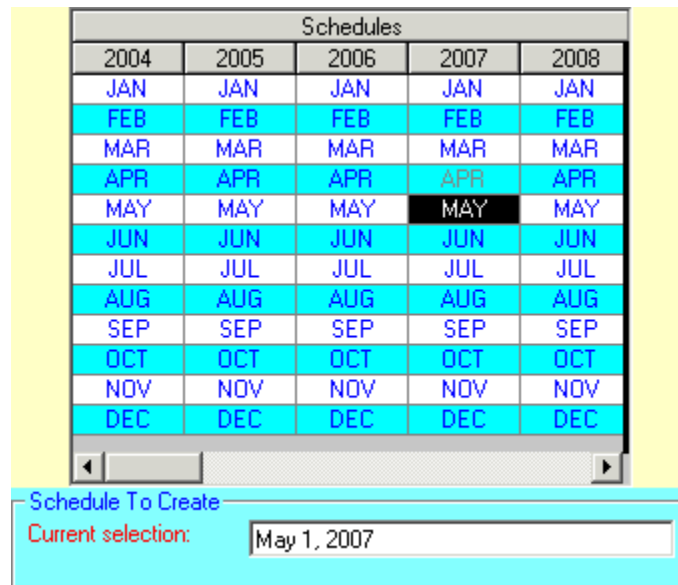
Additional holidays can also be entered for each schedule at the time of scheduling using the *Designate Holiday* screen shown on page 29.

Holidays are defined by first identifying a name (such as New Year's Day, as shown in the sample screen above) and a month (January) in which the holiday occurs. Within the month, the holiday being defined can occur either on fixed date (e.g., January 1), or a fixed week and weekday in the month (e.g., 3rd Monday in January.)

By default, all shifts on the defined holiday are counted as holiday shifts, but this can be changed. (For example, you might not want to count your night shift on New Year's Day as being a holiday shift.) Shifts that should be counted as holiday shifts on the holiday can be added or removed from the list displayed along the right side of the Preset Holidays window. You can also click the "No shifts" option in that list if you want a holiday labeled on the schedule, but without any shifts worked on that day counted as holiday shifts. (For example, you might want to list a provider's birthday on the schedule, though this information might be better added to the schedule as a comment for the day.) Comments can be added from the Prescheduling Screen (page 26). The comments feature is not described in this manual. See the <F1> help from that screen for more information.

Click the [Okay] button when you have completed holiday entries, and you will be returned to the EPSKED Scheduler Main Menu screen (page 23).

***Scheduler: Create a new schedule – date selection***



The first step in using the EPSKED Scheduler to create a new schedule (see the overview of creating a schedule on page 5) is identifying the starting date of the schedule you want to create.

Important notes:

- If the partial screen shown above is viewed in color, the starting dates of completed schedules (for example, the April 2007 schedule) are displayed in gray characters. If no schedule has been created for a starting date, the date is displayed in blue characters. Immediately below the displayed grid is a window that displays the full month name, day and year of the starting date of the currently selected schedule.
- Double click on a date to accept it as the starting date of the schedule you want to create; the EPSKED Scheduler will proceed automatically to the next screen.

**Note for first time EPSKED users:** Since this is your first EPSKED schedule, no completed schedule exists for the period immediately prior to the initial schedule that you want to create. To include a schedule produced before your use of EPSKED, you can use the *Manually enter a preexisting schedule* selection from the EPSKED Scheduler Main Menu (page 23) to enter that schedule into the EPSKED database. Once entered and saved, that schedule is available to ensure that no scheduling conflicts exist between the end of the last schedule that you manually created and the beginning of the first computerized schedule that you will create. If you are manually entering a schedule only so that it is taken into account while creating the current schedule, you do not have to enter the entire schedule unless you are also interested in seeing its complete summary data. For scheduling purposes, only the scheduling information for the final days of the schedule is required.

### Scheduler: Prescheduling Calendar

May 2007							(Highlight)
SUN	MON	TUE	WED	THU	FRI	SAT	
		-- ER -- 1	-- ER -- 2	-- ER -- 3	-- ER -- 4	-- ER -- 5	
		day *----- sw-8 *----- night *----- call *----- Clinic -- clday *----- cleve *-----	day *----- sw-8 *----- night *----- call *----- Clinic -- clday *----- cleve *-----	day *----- sw-8 *----- night *----- call *----- Clinic -- clday *----- cleve *-----	day *----- sw-8 *----- night *----- call *----- Clinic -- clday *----- cleve *-----	day *----- sw-12 *----- night *----- call *----- Clinic -- clday *----- cleve *-----	
-- ER -- 6	-- ER -- 7	-- ER -- 8	-- ER -- 9	-- ER -- 10	-- ER -- 11	-- ER -- 12	
day *----- sw-12 *----- night *----- call *----- Clinic -- clday *----- cleve *-----	day *----- su-8 *----- night *----- call *----- admin bwana Clinic -- clday *----- cleve *-----	day *----- sw-8 *----- night *----- call *----- Clinic -- clday *----- cleve *-----	day *----- sw-8 *----- night *----- call *----- Clinic -- clday *----- cleve *-----	day *----- sw-8 *----- night *----- call *----- Clinic -- clday *----- cleve *-----	day *----- sw-8 *----- night *----- call *----- Clinic -- clday *----- cleve *-----	day *----- sw-12 *----- night *----- call *----- Clinic -- clday *----- cleve *-----	
-- ER -- 13	-- ER -- 14	-- ER -- 15	-- ER -- 16	-- ER -- 17	-- ER -- 18	-- ER -- 19	
day *----- sw-12 *----- night *----- call *----- Clinic -- clday *----- cleve *-----	day *----- su-8 *----- night *----- call *----- admin bwana Clinic -- clday *----- cleve *-----	day *----- sw-8 *----- night *----- call *----- Clinic -- clday *----- cleve *-----	day *----- sw-8 *----- night *----- call *----- Clinic -- clday *----- cleve *-----	day *----- sw-8 *----- night *----- call *----- Clinic -- clday *----- cleve *-----	day *----- sw-8 *----- night *----- call *----- Clinic -- clday *----- cleve *-----	day *----- sw-12 *----- night *----- call *----- Clinic -- clday *----- cleve *-----	
-- ER -- 20	-- ER -- 21	-- ER -- 22	-- ER -- 23	-- ER -- 24	-- ER -- 25	-- ER -- 26	
day *----- sw-12 *----- night *----- call *----- Clinic -- clday *----- cleve *-----	day *----- su-8 *----- night *----- call *----- admin bwana Clinic -- clday *----- cleve *-----	day *----- sw-8 *----- night *----- call *----- Clinic -- clday *----- cleve *-----	day *----- sw-8 *----- night *----- call *----- Clinic -- clday *----- cleve *-----	day *----- sw-8 *----- night *----- call *----- Clinic -- clday *----- cleve *-----	day *----- sw-8 *----- night *----- call *----- Clinic -- clday *----- cleve *-----	day *----- sw-12 *----- night *----- call *----- Clinic -- clday *----- cleve *-----	
-- ER -- 27	-- ER -- 28	-- ER -- 29	-- ER -- 30	-- ER -- 31			
day *----- sw-12 *----- night *----- call *----- Clinic -- clday *----- cleve *-----	day *----- su-8 *----- night *----- call *----- admin bwana Clinic -- clday *----- cleve *-----	day *----- sw-8 *----- night *----- call *----- Clinic -- clday *----- cleve *-----	day *----- sw-8 *----- night *----- call *----- Clinic -- clday *----- cleve *-----	day *----- sw-8 *----- night *----- call *----- Clinic -- clday *----- cleve *-----			

The *Prescheduling Calendar* is the first screen displayed after you select the schedule that you want to create. The schedule display shown above is for the sample schedule described on page 22.

#### Important notes:

- The *Swing-12* shift is scheduled on Saturday and Sunday, the *Swing-8* shift on Monday through Friday. The Admin shift is scheduled on Monday, the Backup shift on the other days of the week. These match what was requested in the *What day of the week are your shifts used?* screen described on page 12.
- Dr. Bwana is already cycle scheduled for all of the Monday Admin shifts. This results from a *Repetitive sequence cycle* (see page 20) that started on a Monday and contained entries of *Admin-available-available-available-Off-Off*. These entries also result in Dr. Bwana also automatically being off for all weekend shifts. Dr. Clark is cycle scheduled on May 8th as the result of a *Month-based cycle* (see page 20) scheduling him for the *Clinic Day shift every second Thursday* of the month.
- Click the printer button to print, fax, or email a request form that your scheduled providers will use to specify the shifts they need off for vacation or other obligations, as well as requesting any shifts they want to be scheduled. Instructions printed at the bottom of the form are determined by the *Request schedule key* entry on page 16. (For WebSked users, the gathering of this information is automatic.)
- If your schedule does not display the shift names, you can elect to do this using the Options...Display dropdown menu at the top of the screen, then select the *Display abbreviated shift name...* option.

**Scheduler: Change shifts used in the schedule**

MON	TUE	WED	THU
	-- ER -- 1 day DAY sw-8 SWING - 8 night NIGHT call backup -- Clinic -- olday Clinic day cleve Clinic eve	Mondays Tues - Fri Weekends Okay Cancel	-- ER -- 3 day DAY sw-8 SWING - 8 night NIGHT call backup -- Clinic -- day Clinic day eve Clinic eve
-- ER -- 7 day DAY sw-8 SWING - 8 night NIGHT admin admin -- Clinic -- olday Clinic day cleve Clinic eve	-- ER -- 8 day DAY sw-8 SWING - 8 night NIGHT call backup -- Clinic -- olday Clinic day cleve Clinic eve	-- ER -- 9 day DAY sw-8 SWING - 8 night NIGHT call backup -- Clinic -- olday Clinic day cleve Clinic eve	-- ER -- 10 day DAY sw-8 SWING - 8 night NIGHT call backup -- Clinic -- olday Clinic day cleve Clinic eve
14	15	16	17

The *Change Day Types* screen is shown prior to computerized scheduling when requested from the *Prescheduling Calendar* screen (page 26) by clicking the *Do you need to change the shifts used on any day?* button. The graphic of this button is shown to the left of this paragraph. The *Change Day Types* screen permits you to alter the shifts used on individual days of the schedule from the normal shifts used in the Day Types assigned by the entries on page 12.



Why change the shifts used on a day in the schedule? Suppose that May 1 (May Day) is traditionally a busy day in your emergency department. May 1 falls on a Thursday in the current schedule and normally uses the Swing-8 shift. To obtain additional coverage, change the May 1 shifts to those of the *Weekend Day Type* (which uses the Swing-12 shift; see page 12) by left clicking anywhere on May 1 to open the selection window shown above, then left clicking on the *Weekend* option to select Day Type. The shifts on May 1 would then change from those shown above to:

TUE
-- ER -- 1 day DAY sw-12 SWING - 12 night NIGHT call backup -- Clinic -- olday Clinic day cleve Clinic eve

**A common confusion:** It is important to understand that the names you assign to Day Types are for your convenience only. The fact that the shifts in the *Weekend Day Type* were used on a Thursday does ***not*** mean that these shifts will be counted as weekend shifts in your schedule summaries! Weekend summary categories only count shifts defined as weekend shifts by the *Weekend shift if on Friday...Saturday...Sunday* selections shown on page 10.

Important note:

- You can create combinations of shifts not included in your standard Day Types; right mouse click on a day to display a window allowing you to add or remove individual shifts.

## Scheduler: Provider Availability

[All sites]				April 2007			
SUN	MON	TUE	WED	SUN	MON	TUE	WED
1	2	3	4	11	9	10	11
-- ER --	-- ER --	-- ER --	-- ER --	-- ER --	-- ER --	-- ER --	-- ER --
DAY SWING - 12 NIGHT backup	DAY SWING - 8 NIGHT admin	DAY SWING - 8 NIGHT backup	DAY SWING - 8 NIGHT backup	DAY SWING - 8 NIGHT backup	DAY SWING - 8 NIGHT admin	DAY SWING - 8 NIGHT backup	DAY SWING - 8 NIGHT backup
-- Clinic --	-- Clinic --	-- Clinic --	-- Clinic --	-- Clinic --	-- Clinic --	-- Clinic --	-- Clinic --
Clinic day Clinic eve	Clinic day Clinic eve	Clinic day Clinic eve	Clinic day Clinic eve	Clinic day Clinic eve	Clinic day Clinic eve	Clinic day Clinic eve	Clinic day Clinic eve
Start Daylight Saving							
Easter							

The *Provider Availability* screen is shown when requested from the *Prescheduling Calendar* (page 26) by clicking the *What shifts do your providers need off?* button. The graphic for this button is shown to the left. Before EPSKED performs automated scheduling, you will usually want EPSKED to know which shifts in the schedule each provider has requested not to work. This information is entered using the *Provider Availability* screen.



The shifts that a provider is prescheduled to work and the shifts a provider is unable to work are marked on this screen using the symbols shown in the symbol key to the left. A provider is prescheduled to work a shift if the shift is lock scheduled (see page 31) or cycle scheduled (page 20). The provider is unable to work a shift if the shift is requested Off on this screen, if the provider is cycle scheduled off for a shift (see page 20), or if the provider Can't Do the shift (see page 19).

Important notes:

- On entry to the partial screen above, the provider shown is already marked *Can't Do* for the NIGHT shifts (see page 19) and for all Sunday shifts (using Prohibit Bias on a SUNDAY SHIFTS summary category as referred to on page 18).
- The entry taking off all remaining shifts on Tuesday the 3rd was made by simply clicking on the date. The Night shift on the day before would have been automatically marked as off had it not been a Can't Do. (Night shifts were designated as *Off Prior To A Day Off* - see page 10.)
- The entries taking off the Day and Swing - shifts on Wednesday the 11th were made by clicking on each of the shifts.
- The Clinic Day and Clinic Eve shifts on Wednesday the 4<sup>th</sup> are marked as *Wish off* by Ctrl+LeftClick on the shift. A *Wish off* shift indicates a shift that a provider can work if needed to fill the shift, but only if necessary.
- Shifts that are cycled scheduled (admin shifts on Mondays) or lock scheduled (the Clinic Day shift on Tuesday the 3<sup>rd</sup>) for a provider are displayed with a black background.
- Organize your entry of Off shifts by first arranging your individual Provider Request Forms alphabetically by provider. Click the *Next Provider* button after each form entry is complete to advance to the Provider Availability screen for the next provider in the same order as your forms. (For WebSked users, the gathering of this information is automatic – it does not need to be manually entered.)

COLOR KEY
Lock/Cycle Scheduled
-Need Off
Wish Off
Can't Do
^ Cycle Off

## Scheduler: Designate Holidays

MON	TUE	WED	THU
	<p style="color: blue; margin: 0;">May Day</p> <p style="margin: 0;">-- ER --</p> <p style="margin: 0;">day DAY</p> <p style="margin: 0;">sw-12 SWING - 12</p> <p style="margin: 0;">night NIGHT</p> <p style="margin: 0;">call backup</p> <p style="margin: 0;">-- Clinic --</p> <p style="margin: 0;">olday Clinic day</p> <p style="margin: 0;">cleve Clinic eve</p>	<div style="border: 1px solid gray; padding: 10px; width: fit-content; margin: auto;"> <div style="background-color: #000080; color: white; padding: 2px; border: 1px solid gray; display: inline-block;">Holiday Name</div> <div style="border: 1px solid gray; padding: 5px; margin: 10px 0; width: 150px;">May Day</div> <div style="display: flex; justify-content: space-around; margin-top: 10px;"> <div style="border: 1px solid gray; padding: 5px 15px;">Okay</div> <div style="border: 1px solid gray; padding: 5px 15px;">Cancel</div> </div> </div>	
<p style="color: blue; margin: 0;">MD Meeting</p> <p style="margin: 0;">-- ER --</p> <p style="margin: 0;">day DAY</p> <p style="margin: 0;">sw-8 SWING - 8</p> <p style="margin: 0;">night NIGHT</p> <p style="margin: 0;">admin admin</p> <p style="margin: 0;">-- Clinic --</p> <p style="margin: 0;">olday Clinic day</p> <p style="margin: 0;">cleve Clinic eve</p>	<p style="margin: 0;">-- ER --</p> <p style="margin: 0;">day DAY</p> <p style="margin: 0;">sw-8 SWING - 8</p> <p style="margin: 0;">night NIGHT</p> <p style="margin: 0;">call backup</p> <p style="margin: 0;">-- Clinic --</p> <p style="margin: 0;">olday Clinic day</p> <p style="margin: 0;">cleve Clinic eve</p>	<p style="margin: 0;">-- ER --</p> <p style="margin: 0;">day DAY</p> <p style="margin: 0;">sw-8 SWING - 8</p> <p style="margin: 0;">night NIGHT</p> <p style="margin: 0;">call backup</p> <p style="margin: 0;">-- Clinic --</p> <p style="margin: 0;">olday Clinic day</p> <p style="margin: 0;">cleve Clinic eve</p>	<p style="margin: 0;">-- ER --</p> <p style="margin: 0;">day DAY</p> <p style="margin: 0;">sw-8 SWING - 8</p> <p style="margin: 0;">night NIGHT</p> <p style="margin: 0;">call backup</p> <p style="margin: 0;">-- Clinic --</p> <p style="margin: 0;">olday Clinic day</p> <p style="margin: 0;">cleve Clinic eve</p>

The *Designate Holidays* screen is displayed prior to computerized scheduling when requested from the *Prescheduling Calendar* (page 26) by clicking the *Are there any holidays...?* button. The graphic associated with that button is shown to the left of this paragraph. The *Designate Holidays* screen allows you to enter holiday information for the current schedule, the third step in creating a schedule (page 5). Holidays are added by clicking on the day that you wish to identify as a holiday, entering a holiday name up to sixteen characters in length, then marking the shifts in that day that are holiday shifts. EPSKED can summarize holidays both as HOLIDAY SHIFTS and as HOLIDAY HOURS summary categories (see page 17).



### Important notes:

- The partial screen view above shows entries for a May Day holiday on May 1st, and for a physician meeting day on May 7th (see explanation below).
- The May Day holiday entry was made by clicking on May 1 on the calendar, typing *May Day* in the text entry box shown here, then clicking the Okay button. All shifts in the day are initially marked as holiday shifts by a purple highlighting. If you want only some of the shifts counted as holiday shifts, you may toggle the holiday status for any of the individual shifts by simply clicking on the shift.
- Standard holidays can be automatically added to your schedule using the *Preset Holidays* window described on page 24.

The *Designate Holiday* function can also be used to label a day (such as the physician meeting day shown on Monday, May 7th) by typing the desired name (here, *MD Meeting* was used), then removing the holiday status from all shifts by clicking each one. Using the *Designate Holidays* screen in this fashion creates a label at the top of the day in place of the date. If you prefer, you can instead label a meeting at the bottom of the day using the *Add a scheduler comment* to a day feature: from the *Prescheduling Calendar* (page 26), simply right click on the date; a *Scheduler Comment for Day* window will appear containing a text entry area. Type the comment that you want added to the day.

***Scheduler: Change provider requests for the current schedule***

Provider Information - May 2007						
PROVIDER NAME	REQUESTED HOURS	NIGHT SHIFTS!!	WEEKEND SHIFTS!	EVENING SHIFTS~	SHIFTS IN A ROW	NIGHT IN A ROW
Bwana	100	0	0	%5	5	1
Clark	=127	0	5	%6	5	3
Cooper	=127	0	5	%6	5	3
Friedman	160	4	4	%8	5	3
Gomez	=127	=4	5	%6	5	3
Jones	=127	=4	5	%6	5	3
McCoy	=127	=4	5	%6	5	3
Samuelson	=127	=4	5	%6	5	3
Smith	=127	=4	5	%6	5	3
Spock	=127	=4	5	%6	5	3
Requested ->	1276	28	44	61		
To schedule ->	1276	31	44	62		

The EPSKED Scheduler *Provider Information* screen is displayed prior to computerized scheduling when requested from the *Prescheduling Calendar* screen (page 26) by clicking the *Do you need to change any provider requests?* button.



The graphic associated with this button is shown to the left of this paragraph.

Making needed changes to the normal scheduling requests of your scheduled providers is part of preparing EPSKED to create a new schedule (see page 5). Information here is similar to the matching EPSKED Customizer screen (see page 19) except that all <=> and <%> entries have been supplemented with calculated numerical request values. Separate help screens are available for each column of the *Provider Information* screen.

Below the summary are shown the schedule totals for the *Requested* and the available *To schedule* statistics. These values are specific to the current schedule and show summary values for total hours, and for the total number of shifts in the schedule for any maximum (!), high (!) and medium (~) priority shift request categories that you have customized.

**Important notes:**

- Changes made to provider requests in the Provider Information screen affect only the current schedule variant. Permanent changes to provider requests (which affect all future schedules) need to be made from the corresponding area of the EPSKED Customizer (page 19).
- The more closely you adjust provider requests so that the *Requested* values match the *To schedule* values, the better the schedule that EPSKED can help you create.

### Scheduler: Prescheduling Locked Shifts

-- ER -- 6	-- ER -- 7	-- ER -- 8	-- ER -- 9
day *----- sw-12 *----- night *----- call *----- Clinic -- clday *----- cleve *-----	day * <b>GOMEZ</b> ----- sw-8 *----- night *----- admin * bwana ----- Clinic -- clday *----- cleve *-----	day *----- sw-8 *----- night *----- call *----- Clinic -- clday *----- cleve *-----	day *----- sw-8 *----- night *----- call *----- Clinic -- clday *----- cleve *-----
Provider availability for the SWING - 8 shift on May 7, 2007 (> =			
*Bwana (BW) = conflict		Cooper (CO) = can't do	
Clark (CL) = can't do		Friedman (FR) = okay	
		*Gomez (GO) = conflict	
		Jones (JO) = okay	
clday *----- cleve *-----	clday *----- cleve *-----	clday *----- cleve *-----	clday *----- cleve *-----

The *Preschedule Shifts* screen allows you to manually preschedule (referred to as “lock schedule” in the remainder of this manual) your providers for shifts that they have specifically requested. These requests are included in the Provider Request Forms which can be printed by clicking on the print button from the *Prescheduling Calendar* screen shown on page 26. When EPSKED performs computerized scheduling it will automatically schedule around these locked shifts without changing them – they are “locked” in place.

#### Important notes:

- Starting with the *Prescheduling Calendar* (page 26), the partial calendar above shows the appearance of the schedule after the scheduler clicked on the Day shift on the 7th, then typed *GO* to schedule Doctor Gomez for that shift. (The *GO* abbreviation is shown next to Dr. Gomez’s name in the “Availability Window”, the provider listing that is displayed overlying an adjacent area of the schedule.) Locked shifts can be entered either by typing the two or three letter abbreviation shown next to a provider’s name in the Availability Window, or by double clicking the provider name itself. The small lock icon adjacent to Dr. Gomez’s lock scheduled shift reminds you of its special status.
- After the Day shift was scheduled, the data entry area automatically advanced to highlight the Swing-8 shift on the 7th. The Availability Window displayed below the date indicates the status of each provider for the highlighted Swing-8 shift. Note that Drs. Clark and Cooper can't do the Swing shift (and would have the Swing shift entered as a *Can't Do* shift on page 19). Drs. Bwana (cycle scheduled for all Admin shifts) and Gomez (just lock scheduled) have conflicting shifts (page 11) scheduled on the same day. All other providers are Okay to do the highlighted Swing-8 shift.
- After you have made any needed alterations to the shifts used on individual days (page 27), entered provider off requests (page 28), updated holidays (page 29), made changes to *Provider Information* (page 30) and prescheduled any locked shifts (this page), you are ready to schedule. Press the <Esc> key to clear the Availability Window, and display the *Prescheduling Calendar*, click the *Do the automated schedule creation* button shown to the left of this paragraph, then watch the EPSKED Scheduler create your schedule!



## Scheduler: Schedule revision

	VED	THU	FRI	SAT	SUN	MON	TUE
			an MARK   on CLINTON ba JARNET day NELSON	an MARK   on EULA ba JARNET day URSEK	an CLINTON   on CLINTON ba JARNET day URSEK	an STONE   on MARK ba JARNET day EULA	an CLINTON   on URSEK ba JARNET day URSEK
	an XXXX   on ED ba JARNET day HIGGINS	an EULA   on HIGGINS ba JARNET day HIGGINS	an NELSON   on XXXX ba JARNET day HARSIGLI	an URSEK   on HARSIGLI ba JARNET day HARSIGLI	an CLINTON   on CLINTON ba JARNET day NELSON	an MARK   on URSEK ba JARNET day NELSON	an HIGGINS   on ED ba JARNET day HIGGINS
	an XXXX   on HARSIGLI ba JARNET day HARSIGLI	an CLINTON   on XXXX ba JARNET day SMITH	an NELSON   on XXXX ba JARNET day SMITH	an LENNY   on CLINTON ba JARNET day SMITH	an NELSON   on SMITH ba JARNET day XXXX	President's Day	
	an SMITH   on XXXX ba JARNET day HARSIGLI	an NELSON   on CLINTON ba JARNET day HARSIGLI	an EULA   on HARSIGLI ba JARNET day SMITH	an URSEK   on CLINTON ba JARNET day URSEK	an HIGGINS   on HIGGINS ba JARNET day EULA	an XXXX   on CLINTON ba JARNET day EULA	an NELSON   on XXXX ba JARNET day EULA
	an URSEK   on EULA ba JARNET day EULA	an SMITH   on JARNET ba JARNET day SMITH					

SYMBOL KEY  
 =Locked  
 =Tacked  
 =Cycle  
 =scheduled  
 =Split

The Schedule Revision screen is displayed only after you have completed computerized scheduling. You may now review, modify, or print the schedule as desired. The schedule shown above was created by EPSKED using the entries shown in the previous sample EPSKED Customizer and Scheduler screens for the sample schedule described on page 22.

### Important notes:

- To highlight an individual provider schedule, click the *Highlight one provider* button.
- To view summary information for the schedule, click the *Show schedule summary* button. From the Summary screen you can create Bias entries, which can help you equalize provider scheduling in summary categories other than the normal request categories. Also available from the Summary screen is a separate Overtime entry screen, used for entering changes to the scheduled hours that result when providers stay late, leave early, or split shifts. The resulting summary of worked hours can be directly exported as an Excel spreadsheet for use in payroll calculations.
- To save a schedule for later retrieval, click the *Save this schedule variant* button. You can save and retrieve an unlimited number of schedule variants for each schedule.
- To print a schedule, click the *Print/fax/email a schedule* button and follow the displayed instructions. The next three pages show samples of printed schedules, demonstrating some of the print options.
- If you have more than one site, you can opt to display or print one or more of those sites.
- Click the *Home to Main Menu* button when you finish working on your schedule. If you have made changes to the current schedule but have not yet saved them, you are given the opportunity to do so before being returned to the EPSKED Scheduler Main Menu Screen.

**Sample Schedule Printouts**

**The personalized Request Form can be used by your providers to indicate to you the shifts they need off for vacation or other obligations.**

Emergency Department Schedule  
For: ER, Clinic

Requested # of hours: 100 Bwana

May 2007  
\* SCHEDULING REQUESTS \*

SUN	MON	TUE	WED	THU	FRI	SAT
		May Day .. ER .. DAY SWING - 12 NIGHT backup .. Clinic .. Clinic day Clinic eve	2 .. ER .. DAY SWING - 8 NIGHT backup .. Clinic .. Clinic day Clinic eve	3 .. ER .. DAY SWING - 8 NIGHT backup .. Clinic .. Clinic day Clinic eve	4 .. ER .. DAY SWING - 8 NIGHT backup .. Clinic .. Clinic day Clinic eve	5 .. ER .. DAY SWING - 12 NIGHT backup .. Clinic .. Clinic day Clinic eve
6 .. ER .. DAY SWING - 12 NIGHT backup .. Clinic .. Clinic day Clinic eve	MD Meeting .. ER .. DAY SWING - 8 NIGHT <span style="border: 1px solid blue; padding: 2px;">admin</span> .. Clinic .. Clinic day Clinic eve	8 .. ER .. DAY SWING - 8 NIGHT backup .. Clinic .. Clinic day Clinic eve	9 .. ER .. DAY SWING - 8 NIGHT backup .. Clinic .. Clinic day Clinic eve	10 .. ER .. DAY SWING - 8 NIGHT backup .. Clinic .. Clinic day Clinic eve	11 .. ER .. DAY SWING - 8 NIGHT backup .. Clinic .. Clinic day Clinic eve	12 .. ER .. DAY SWING - 12 NIGHT backup .. Clinic .. Clinic day Clinic eve
13 .. ER .. DAY SWING - 12 NIGHT backup .. Clinic .. Clinic day Clinic eve	14 .. ER .. DAY SWING - 8 NIGHT <span style="border: 1px solid blue; padding: 2px;">admin</span> .. Clinic .. Clinic day Clinic eve	15 .. ER .. DAY SWING - 8 NIGHT backup .. Clinic .. Clinic day Clinic eve	16 .. ER .. DAY SWING - 8 NIGHT backup .. Clinic .. Clinic day Clinic eve	17 .. ER .. DAY SWING - 8 NIGHT backup .. Clinic .. Clinic day Clinic eve	18 .. ER .. DAY SWING - 8 NIGHT backup .. Clinic .. Clinic day Clinic eve	19 .. ER .. DAY SWING - 12 NIGHT backup .. Clinic .. Clinic day Clinic eve
20 .. ER .. DAY SWING - 12 NIGHT backup .. Clinic .. Clinic day Clinic eve	21 .. ER .. DAY SWING - 8 NIGHT <span style="border: 1px solid blue; padding: 2px;">admin</span> .. Clinic .. Clinic day Clinic eve	22 .. ER .. DAY SWING - 8 NIGHT backup .. Clinic .. Clinic day Clinic eve	23 .. ER .. DAY SWING - 8 NIGHT backup .. Clinic .. Clinic day Clinic eve	24 .. ER .. DAY SWING - 8 NIGHT backup .. Clinic .. Clinic day Clinic eve	25 .. ER .. DAY SWING - 8 NIGHT backup .. Clinic .. Clinic day Clinic eve	26 .. ER .. DAY SWING - 12 NIGHT backup .. Clinic .. Clinic day Clinic eve
27 .. ER .. DAY SWING - 12 NIGHT backup .. Clinic .. Clinic day Clinic eve	28 .. ER .. DAY SWING - 8 NIGHT <span style="border: 1px solid blue; padding: 2px;">admin</span> .. Clinic .. Clinic day Clinic eve	29 .. ER .. DAY SWING - 8 NIGHT backup .. Clinic .. Clinic day Clinic eve	30 .. ER .. DAY SWING - 8 NIGHT backup .. Clinic .. Clinic day Clinic eve	31 .. ER .. DAY SWING - 8 NIGHT backup .. Clinic .. Clinic day Clinic eve		
<p>***[ SCHEDULE KEY ]*****</p> <p>* Print your name and requested hours at the top of this page. *</p> <p>* Draw an 'X' through any DAYS you need to be OFF. *</p> <p>* Draw a LINE through any SHIFTS you need to be OFF. *</p> <p>* CIRCLE any shifts for which you NEED to be scheduled. *</p> <p>* Describe any special requests at the bottom of this page. *</p> <p>* (All sites in this schedule include 1276 hours and 186 shifts.) *</p> <p style="text-align: center;">&gt;&gt;&gt;&gt; PLEASE RETURN REQUESTS BY April 5, 2007! &lt;&lt;&lt;&lt;</p> <p>* * * * *</p>						

The request form shows shift names printed on the days that they need to be scheduled. Included on the form are the name of the provider, the provider's requested number of hours for the schedule, and printed instructions for completing the form. This form was automatically personalized for Dr. Bwana; he is already marked off (in red, with a line crossing out the shift name) for night and weekend shifts, and already cycle scheduled for the Admin shift on all Mondays (shown in blue with a surrounding box).

## Using EPSKED 5

*Personalized Master* schedules show all scheduled shifts, highlighting those scheduled for a single provider.

Emergency Department Schedule For ER, Clinic		Sample personalized master schedule				
		Bwana 96 hours, 16 shifts				
May 2007						
SUN	MON	TUE	WED	THU	FRI	SAT
		May Day -- ER -- day FRIEDMAN n=12 JONES night SAMUELSON  off cooper -- Clinic -- day Clark dent McCoy	2 -- ER -- day <b>BWAN</b> n=12 JONES night MCCOY  off cooper -- Clinic -- day Clark dent Friedman	3 -- ER -- day GOMEZ n=12 FRIEDMAN night JONES  off <b>Bwana</b> -- Clinic -- day Spock dent Clark	4 -- ER -- day <b>BWAN</b> n=12 SPOCK night FRIEDMAN  off gomez -- Clinic -- day Samuelson dent Cooper	5 -- ER -- day SAMUELSON n=12 SPOCK night SMITH  off cooper -- Clinic -- day Gomez dent McCoy
6 -- ER -- day GOMEZ n=12 JONES night MCCOY  off spock -- Clinic -- day Cooper dent Samuelson	MD Meeting -- ER -- day GOMEZ n=12 FRIEDMAN night SMITH  off <b>Bwana</b> -- Clinic -- day Cooper dent Jones	8 -- ER -- day <b>BWAN</b> n=12 MCCOY night GOMEZ  off samuelson -- Clinic -- day Smith dent Cooper	9 -- ER -- day <b>BWAN</b> n=12 SPOCK night MCCOY  off cooper -- Clinic -- day Clark dent Smith	10 -- ER -- day FRIEDMAN n=12 GOMEZ night SMITH  off <b>Bwana</b> -- Clinic -- day Clark dent Spock	11 -- ER -- day <b>BWAN</b> n=12 GOMEZ night SPOCK  off cooper -- Clinic -- day Friedman dent Samuelson	12 -- ER -- day FRIEDMAN n=12 SAMUELSON night GOMEZ  off cooper -- Clinic -- day Smith dent Clark
13 -- ER -- day FRIEDMAN n=12 SMITH night JONES  off spock -- Clinic -- day Cooper dent Clark	14 -- ER -- day SPOCK n=12 MCCOY night SAMUELSON  off <b>Bwana</b> -- Clinic -- day Cooper dent Clark	15 -- ER -- day <b>BWAN</b> n=12 SPOCK night MCCOY  off cooper -- Clinic -- day Smith dent Friedman	16 -- ER -- day GOMEZ n=12 FRIEDMAN night SMITH  off spock -- Clinic -- day Jones dent <b>Bwana</b>	17 -- ER -- day JONES n=12 MCCOY night FRIEDMAN  off gomez -- Clinic -- day Cooper dent <b>Bwana</b>	18 -- ER -- day SMITH n=12 <b>BWAN</b> night SPOCK  off mccoey -- Clinic -- day Samuelson dent Jones	19 -- ER -- day SAMUELSON n=12 GOMEZ night JONES  off smith -- Clinic -- day McCoy dent Cooper
20 -- ER -- day MCCOY n=12 SPOCK night GOMEZ  off smith -- Clinic -- day Samuelson dent Cooper	21 -- ER -- day FRIEDMAN n=12 SMITH night JONES  off <b>Bwana</b> -- Clinic -- day Clark dent Cooper	22 -- ER -- day FRIEDMAN n=12 SAMUELSON night SPOCK  off cooper -- Clinic -- day Jones dent Clark	23 -- ER -- day FRIEDMAN n=12 JONES night SAMUELSON  off smith -- Clinic -- day Cooper dent <b>Bwana</b>	24 -- ER -- day SPOCK n=12 SMITH night JONES  off <b>Bwana</b> -- Clinic -- day Clark dent Cooper	25 -- ER -- day MCCOY n=12 FRIEDMAN night GOMEZ  off spock -- Clinic -- day Clark dent Smith	26 -- ER -- day JONES n=12 FRIEDMAN night SPOCK  off mccoey -- Clinic -- day Clark dent Smith
27 -- ER -- day MCCOY n=12 SMITH night JONES  off Friedman -- Clinic -- day Cooper dent Clark	28 -- ER -- day MCCOY n=12 SAMUELSON night SMITH  off <b>Bwana</b> -- Clinic -- day Cooper dent Gomez	29 -- ER -- day <b>BWAN</b> n=12 FRIEDMAN night SAMUELSON  off gomez -- Clinic -- day Cooper dent Spock	30 -- ER -- day GOMEZ n=12 <b>BWAN</b> night SPOCK  off cooper -- Clinic -- day Clark dent Friedman	31 -- ER -- day MCCOY n=12 GOMEZ night FRIEDMAN  off <b>Bwana</b> -- Clinic -- day Clark dent Cooper		

[ SCHEDULE KEY ]

--- ER ---

DAY 7am - 3pm

SWING 3pm - 11pm (1pm - 1am on Sat & Sun)

NIGHT 11pm - 7am

Administrative / Backup shift

--- Clinic ---

Clinic Day 8am - 4pm

Clinic Eve 4pm - midnight

Select the *Options...Printer* dropdown menu available at the top of most EPSKED Scheduler screens to display the EPSKED Print Option window. Options are available to print the shift name to the left of the scheduled provider as well as to adjust the highlighting, paper margins, paper size and orientation, font selection, and other print properties.

If you look closely, you'll notice that there are 20 shifts highlighted but that the summary under Dr. Bwana's name at the top indicates he is scheduled for only 16 shifts. The reason? Four shifts are *Backup* shifts, which do not count toward the worked shift totals (see page 10).

The *Individual Schedule* prints only the shifts that are scheduled for one provider.

Emergency Department Schedule For ER, Clinic      Sample individual schedule      **Bwana**

May 2007

SUN	MON	TUE	WED	THU	FRI	SAT
		May Day	2 or DAY (9a-5p)	3 or BACKUP (12a-12:00a)	4 or DAY (9a-5p)	5
6	MD Meeting or ADMIN (9a-5p)	8 or DAY (9a-5p)	9 or DAY (9a-5p)	10 or BACKUP (12a-12:00a)	11 or DAY (9a-5p)	12
13	14 or ADMIN (9a-5p)	15 or DAY (9a-5p)	16 clin CLINIC EVE (4p-12a)	17 clin CLINIC EVE (4p-12a)	18 or SWING - 8 (3p-11p)	19
20	21 or ADMIN (9a-5p)	22	23 clin CLINIC EVE (4p-12a)	24 or BACKUP (12a-12:00a)	25	26
27	28 or ADMIN (9a-5p)	29 or DAY (9a-5p)	30 or SWING - 8 (3p-11p)	31 or BACKUP (12a-12:00a)		

```

***** [ Schedule summary for Bwana ]*****
TOTAL      EVENING    NIGHT      WEEKEND    HOLIDAY    BACKUP
HOURS      SHIFTS      SHIFTS     SHIFTS     SHIFTS     SHIFTS
96         5           0          0          0          4
*****
*****
*****
* Please turn in you schedule request forms by the preceding month!!!
* Every month at least one is late and I cannot schedule until all requests are received.
* NEXT TIME I SEND GUIDO AND THE BOYS!!!
*
* Bwana.....(900)555-1234 Gomez.....(900)555-7654 Smith.....(900)555-9876
* Clark.....(888)555-4567 Jones.....(900)555-4567 Spock.....(900)555-5678
* Cooper.....(900)555-3456 McCoy.....(900)555-8765
* Friedman.....(900)555-4321 Samuelson.....(900)555-6543
*****

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At the bottom of the printed *Individual Provider* schedule is a large provider information area. This area can be used for printing memos intended only for your providers, as well as automatically printing all providers' voice telephone numbers. Modifications specific to the current schedule can be made before printing.

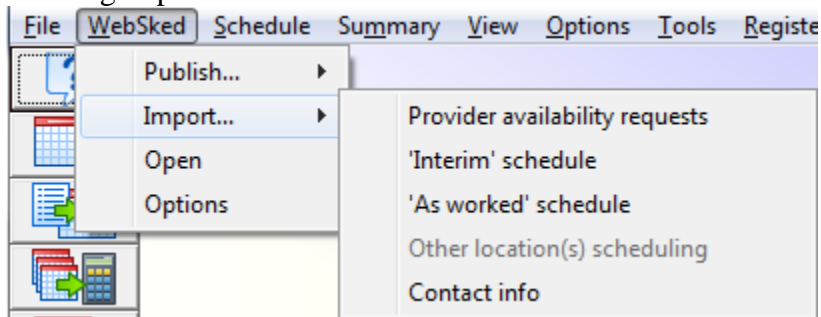
Master schedules, backup schedules, blank schedules and cumulative holiday schedules as well as schedule summaries, cumulative schedule summaries and overtime summaries can also be printed or emailed as Adobe Acrobat, HTML, TIFF, and vCalendar files. Schedules and summaries can be exported to Excel, or as Ascii delimited or XML files.

### *Scheduler: Working with WebSked*

If the activation code (page 37) you receive from ByteBloc Software includes WebSked access, EPSKED will display a new WebSked dropdown menu option at the top of Scheduler program screens.

WebSked is an Internet based scheduling solution that integrates with EPSKED. WebSked requires use of EPSKED for schedule creation. The advantages of adding WebSked are that it handles all of the provider interactions that normally require time consuming "hands on" work by the schedule administrator. WebSked simplifies the gathering of provider requests for shifts on or off (imported directly from WebSked without having to be manually entered by the scheduler), keeps available a continually updated "live" schedule, facilitates rescheduling by allowing providers to see who is available for shifts, and provides an easy mechanism for proposing and accepting schedule changes. WebSked also sends reminders of scheduled shifts, hopefully eliminating the "forgotten" shift.

From the Scheduler Main Menu (page 23) the options shown here are made available, allowing import of information from WebSked:



Using the WebSked...Publish option, from the *Prescheduling calendar* screen (page 26) you can also publish Request schedules to WebSked (to gather your providers' schedule requests) and from the *Schedule Revision* screen (page 32) you can publish a Draft or As Scheduled schedule. Using EPSKED with the WebSked website requires these basic steps:

1. Publish a provider Request schedule from EPSKED to WebSked.
2. Import the completed provider requests from WebSked back to EPSKED.
3. Publish schedules (either Draft or "As scheduled") created using EPSKED to the WebSked website.
4. Optionally import Interim schedules (if needed for payroll or other purposes).
5. Import the final "As Worked" schedule from WebSked to EPSKED, including all changes that providers have made to the schedule while it was being worked

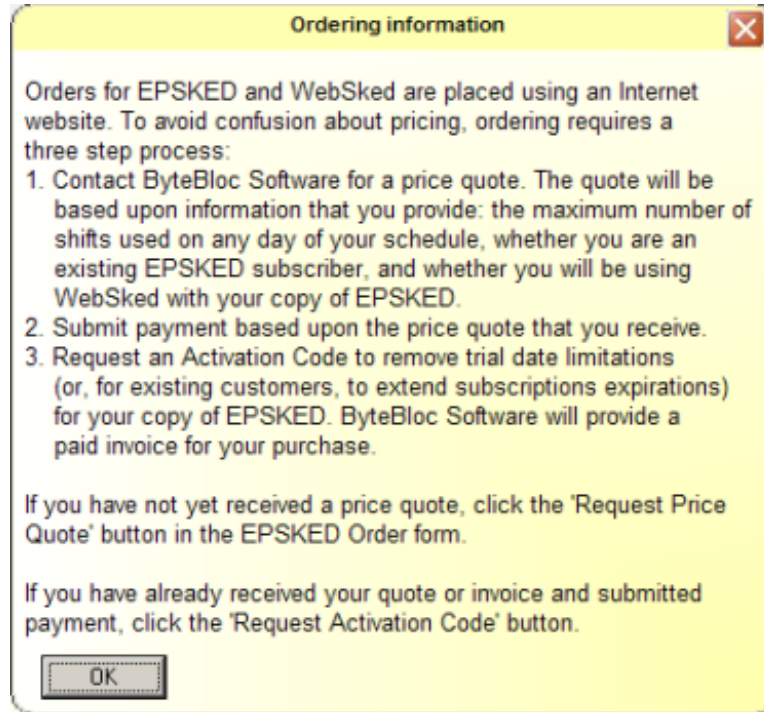
Full details are available in the *Using EPSKED with WebSked* manual available as a PDF document from ByteBloc Software by contacting us at [service@bytebloc.com](mailto:service@bytebloc.com). To see WebSked in action, interactive audiovisual WebSked tutorials are available on the Internet at:

[www.bytebloc.com/WebSkedFlash/tutorials.html](http://www.bytebloc.com/WebSkedFlash/tutorials.html)

where you can view detailed information about how WebSked is used by your providers.

## EPSKED Ordering and Registration

EPSKED orders are placed using the *Register...Order* dropdown menu option. This option is enabled at the top of the *Scheduler Main Menu* (page 23) when that screen is displayed. When the *Register...Order* option is selected, EPSKED displays this overview of the ordering process:



followed by this Ordering Information form, which provides links to web pages for requesting both a [Price Quote](#) and an Activation Code:

If you have not yet received a price quote:  
click the 'Request Price Quote' button.

If you have already received a quote and submitted payment:  
click the 'Request Activation Code' button.

System ID:  Shifts/day:  Location ID information and Comments:

Privacy and security statement    Request Price Quote    Request Activation Code    Help    Cancel

After ByteBloc receives your order, we will email an Activation Code to you. When it is received, select the *Register...Activate* option from the drop down menu at the top of the screen and enter the Activation Code. The trial date restrictions will be removed from your copy of EPSKED. You will not need to reinstall EPSKED.

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We hope you found this manual instructive, that it provided you a good introduction to using EPSKED, and that you enjoy working with EPSKED. If you have any comments or concerns that you would like to communicate to ByteBloc Software, please email us at [service@bytebloc.com](mailto:service@bytebloc.com).