Quick Start Guide

1. Install the Amion desktop scheduler

Build and maintain Amion schedules in our desktop scheduler, OnCall. Only the scheduler needs access to OnCall. Your providers and other staff view schedules at Amion.com or via the Amion mobile app.

- [Install OnCall](#), the Amion desktop scheduler
- Instructions to [run OnCall on a Mac](#)

*Schedules are built in "On-Call" which needs to be downloaded onto the computer (similar to excel or word) and you can also download it from amion.com. Please note that on-call and amion.com are **2 different things**. "On-Call" is for the schedulers to build their actual schedules and amion.com is for the staff who need to view the schedule. Once a scheduler is done building the schedule, they will need to click to publish the schedule and that is how it shows up to amion.com.*

2. Create a schedule

2a. Choose type of schedule:

File-New

Amion offers two types of scheduling platforms (it is important to make the right decision here because if you don't, then you will have to start over):

- Provider/Health professional scheduling (often referred to as Attending or basic scheduling). The Attending platform provides a multi-year schedule.
- Resident/Fellow scheduling. The Resident platform is per academic year.

UNLESS YOU HAVE A RESIDENT BLOCK (ROTATION) SCHEDULE, DO NOT USE THE RESIDENT SCHEDULE TEMPLATE

2b. To create a brand new schedule, you will need to customize your template first:

After you selected the correct type of platform, the first thing you will see is a pop-up box called **"general set-up"** with the following tabs:

- *Services*: things people do, ex: AM Clinic, SICU,etc
- *Staff Types*: attending, fellow, residents, etc
- *Staff*: actual names go here- you will need to select the drop down menu next to the names to select their staff type, which will be color coded for your convenience

→ Once you are done, click the finish tab and then click display my schedule and it will display a grid that you can now work with to build the schedule itself.

*To make schedule easier to look at, click and drag the brown border cells (upper left) underneath the days and you can stretch out the calendar. You can also click Window-Font to adjust the size and font type of the text in the schedule. *

2c. Now, you are ready to input the data into your template

1. Click names in each row to assign people to a particular type of service – services are displayed to the left on the outside of the calendar day and the corresponding person will appear in that row.

Info Box: This will pop up for you on the side of your schedule and is a useful tool for making and creating rules for each service (ex: only MD's for night call, in which only MD's will appear as options when you set up that part of the schedule) or creating the time frame for your schedule (ex: weekend schedule click boxes to un-check M-F), etc.

3. Use the icons to enhance your schedule/view schedule in different ways.

The icons are located at the top of the screen. You can mouse over each icon and it will tell you what each icon is.

3a. The icons are listed in the order they appear on the screen.

: The question mark takes you to website's help index.

: Blue arrows in the top left corner can take you back to the previous month or forward to the next month. The middle button is the bull's eye which will take you to the current month.

: This table (1st icon in the upper left hand of the screen) displays your schedule in table format. You can lay out your schedule like a grid, which is good and helpful for people that have lots and lots of rows and want to include rows of names with abbreviations, and you can also choose to make assignments in this view.

: This is the 2nd icon, which represents the calendar format. This allows you to view the calendar as if it is in paper format.

: The face icon (3rd icon) displays work preferences- where anything specific to a person happens. This info box allows you to choose what person you want to work with in this screen, you can enter the pager/contact info/email address in the slots provided. You can also customize the availability of that person using the boxes right

below that person's name by ex-ing out boxes that represent the days that staff cannot work and it will populate that particular staff as unavailable during those specific days. Additionally, you can select the drop down menu- 2 icons to the right of the "?" mark in which you can put the requested sick/vacation days (off-schedule services) and you can add those off-schedule services by double-clicking on the days requested for those off-schedule services.

Once you go back to the calendar format, you can see that the calendar memorizes these rules and if you schedule that person for days when they have off schedule services, it will pop up with a flag that they cannot work those days.

** There is a feature where staff can submit their requests online- if staff goes to amion.com, they can submit their requests by clicking on icon that looks like sun with glasses on it and they can select shift or days that they cannot work and they can add corresponding notes to those days requested. Once they submit their preferences, the requests go automatically to the scheduler. Please note that this feature is optional- you don't have to allow staff to have that feature but it makes it easier to keep up with requests.

: The sigma is a statistics and tallies page. You can tally hours/shifts by day/service and over schedule/full year/specific time frame and it will tally for each staff and give individual numbers and totals for each staff member.

: The schedule content window icon will help you display the schedule in different ways. For example, let's say out of the 4 services, you only want to display 2, or you want to display sub-services, this icon will help you display different versions of your calendar. You can also re-name the schedule according to the different displays. ** This icon is especially helpful when you have a large amount of rows and you only want to display a certain amount of rows. You can also view the schedule in subsets in amion.com by clicking the "all rows" drop down menu, in which you can choose what subset to view.

: The blue bolded letter "i" brings back your info box in case you ever lose it (the one that has all the staff listed).

: The icon with the sigma with the line through it is used to change your date range in shorter or longer increments of time.

⊙ : The icon that looks like a clock is used to customize shift times. For example, let's say you have one service (AM clinic) and it runs from 8am-12pm, but on Mondays it is different, you will be able to adjust the times for the service with this icon.

◪ : The icon right next to the clock is for split shift, in which you can split shifts between 2 people on any shift. You can also right click the specific person's name on the calendar and select split shift.

▮ : Yellow post it note allows you to add post-it notes to any assignment. You can make the notes public or private (If the notes are made private, only the scheduler(s) in the schedule builder will be able to view; no one from amion.com will be able to see the notes). If you select public view, the notes will appear at the bottom of the calendar when you print a copy.

▣ : Highlighter tool: when you click on someone's name, all of their assignments are highlighted in both calendar and table views. You can see holes in schedule, by clicking highlighter and it will fill up all the parts of the calendar that has no one scheduled.

- Window- Autoscheduler- A window will appear (similar to how the info box looks like) and you can fill in the holes in the schedule, one row at a time, for whatever specific time you select by clicking apply.

3b. Now, make all necessary changes and publish to AMiON.com.

* If at any point in time, you realize that you forgot/want to add more staff or more services, simply click on **"File-General Setup"** and you will be brought back to the pop up info box and you can make any necessary changes.

DON'T FORGET! Once the schedule is complete and all changes have been made, click File-Publish to AMiON.
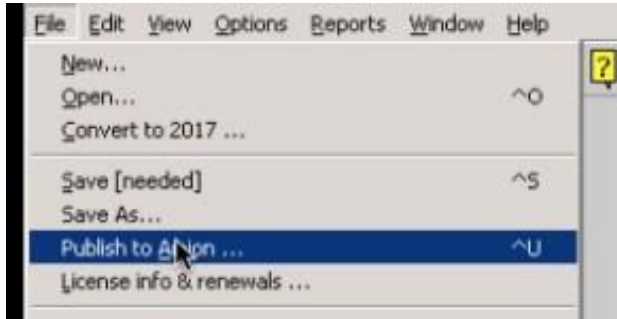
A pop-up box will appear and you will have to enter your admin password and your email address. Finally, click the "save to AMiON" button and you will receive a confirmation message that says "your file is updated".
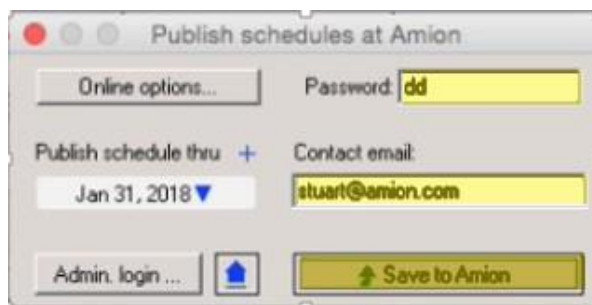
4. Create Pager Directory in AMiON.com.

Go to AMiON.com and set up display preferences for your schedule.

1. Click File/Preferences/AMiON Display
2. On the far right of the box, there are several check box options. Click the 4th box, "Include tel # in pager directory"