Clinician Scheduler Documentation

Release 2.0

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CHAPTER

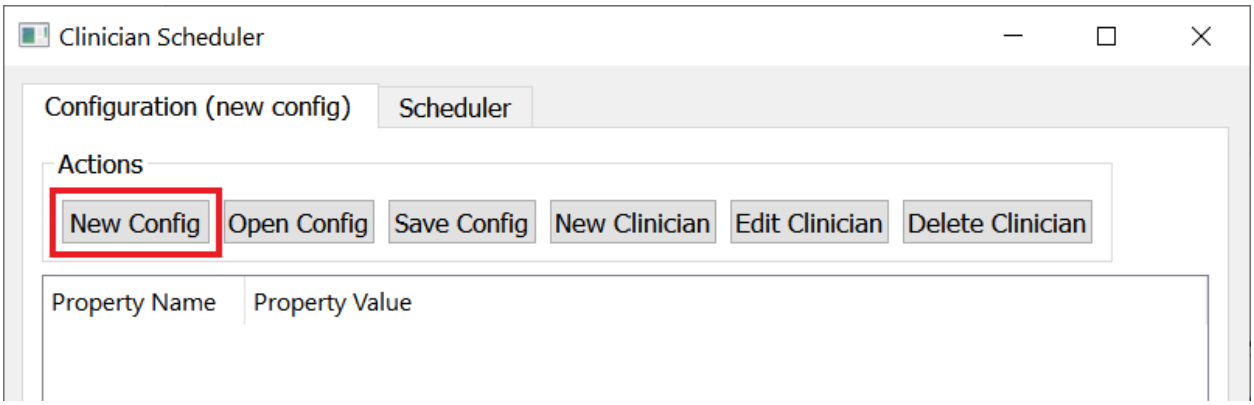
ONE

CLINICIAN CONFIGURATION

The clinician configuration specifies which clinicians are available, which divisions they are covering, and how many weeks they should cover in each of their divisions.

1.1 Creating a new configuration file

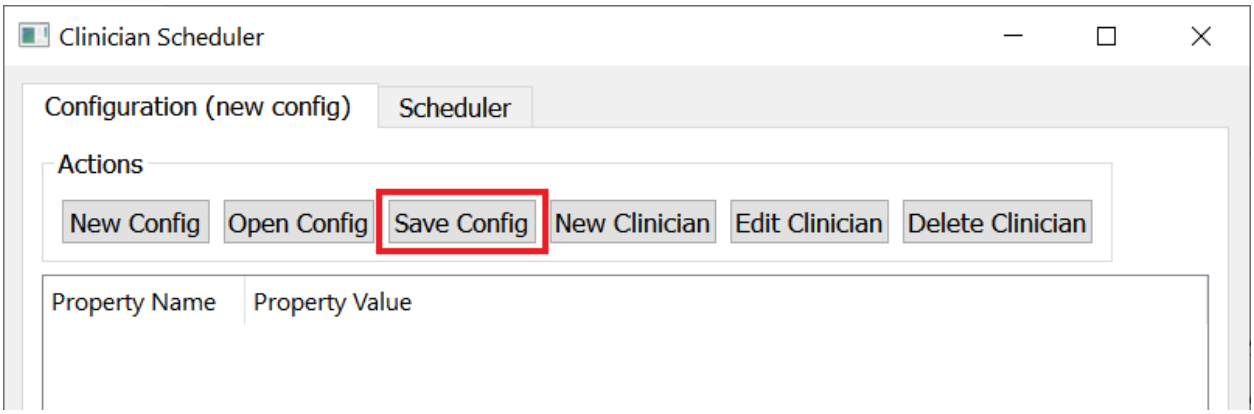
By default, you will get a blank configuration file when you launch the program. If you would like to discard the changes you have made and start a configuration file from scratch, simply click on *New Config*.



Warning: Unsaved changes to a configuration file will be discarded upon clicking on *New Config*.

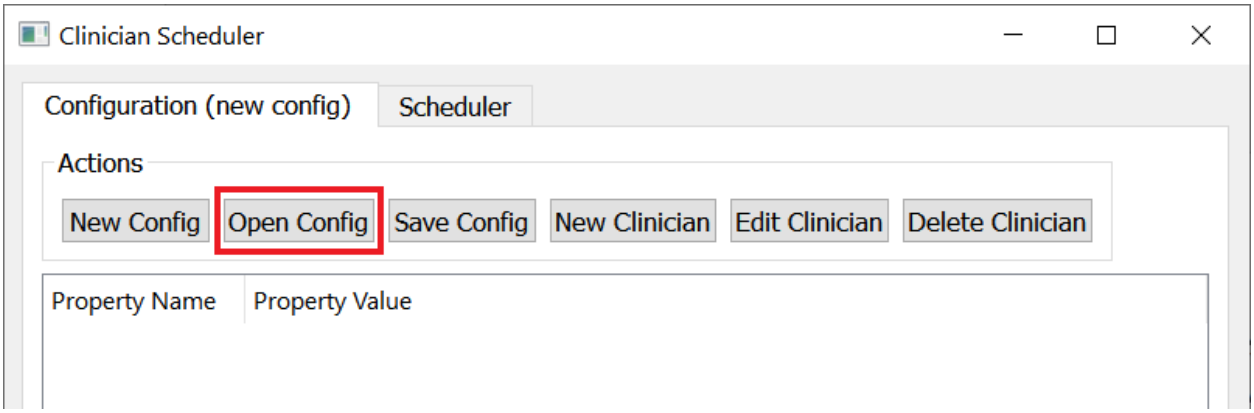
1.2 Saving the configuration file

When you are ready to save the configuration you created, click on *Save Config* and choose a place to save your file. Make note of the name and directory of the file so you could load it in future runs.



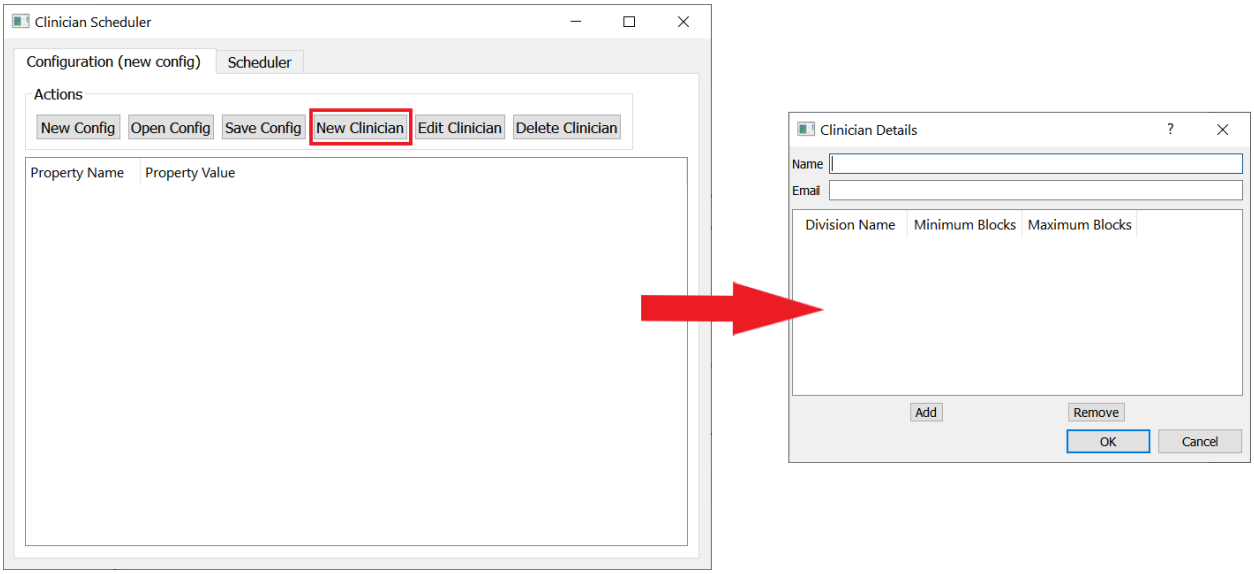
1.3 Loading a configuration file

If you would like to open a previously created configuration file, simply click on *Open Config*, navigate to the location of the file, and select it.



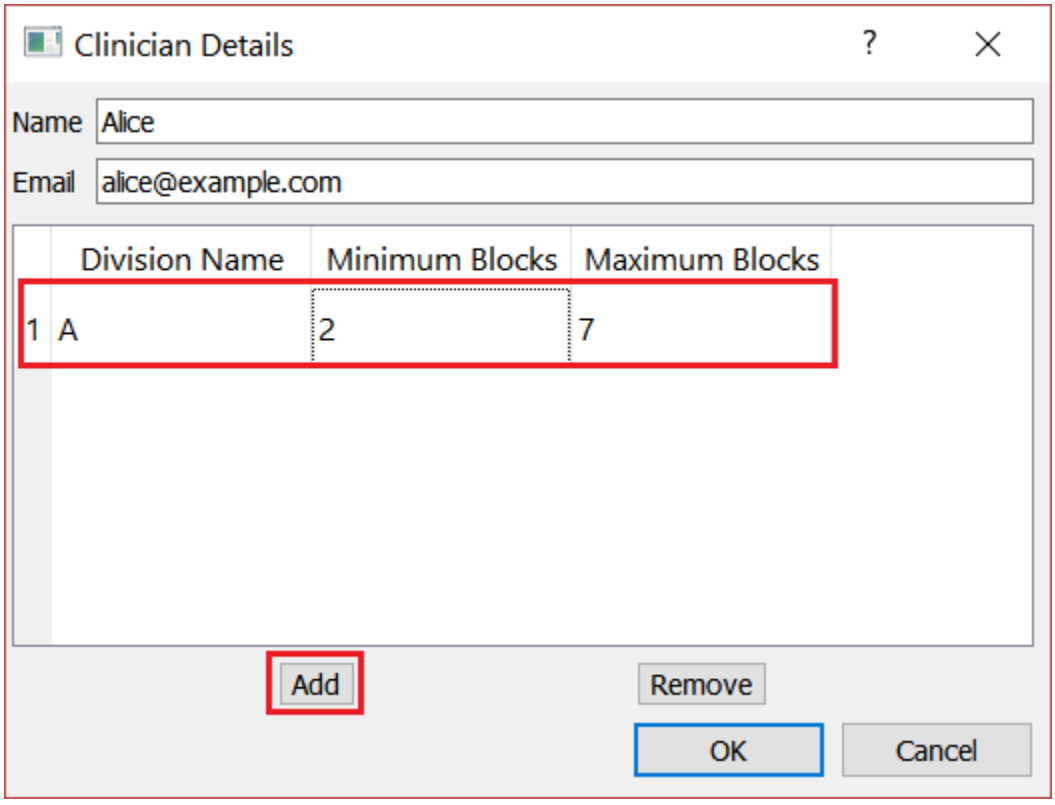
1.4 Adding a new clinician

1. From the configuration tab, click *New Clinician*. You should see a form for supplying clinician details.

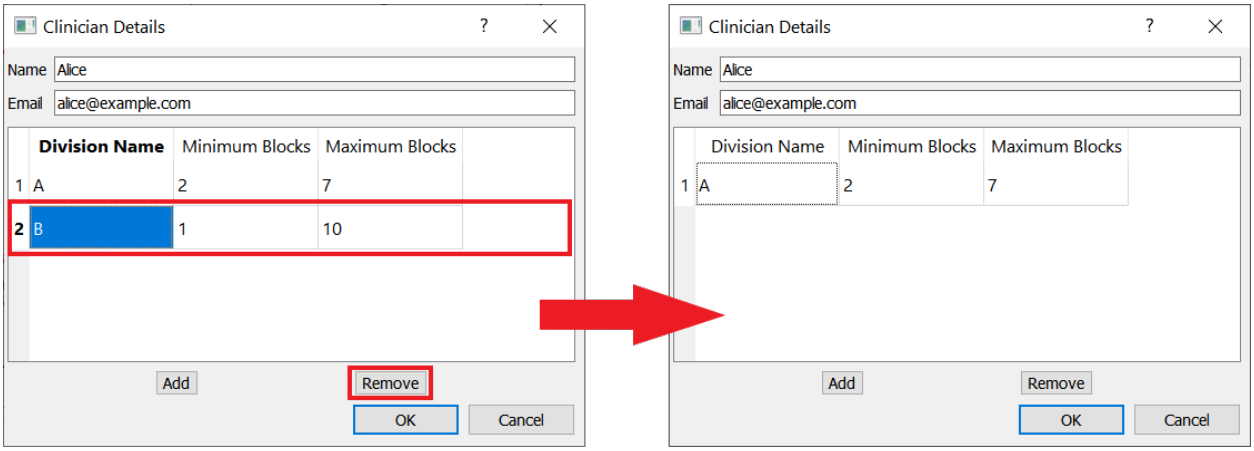


2. Fill out the name, email (optional), and divisions that the clinician will be covering. To add a division you can click on *Add* and a new row will be added to the table which you can fill out. You can set the minimum and maximum number of blocks that a clinician can work in a given division.

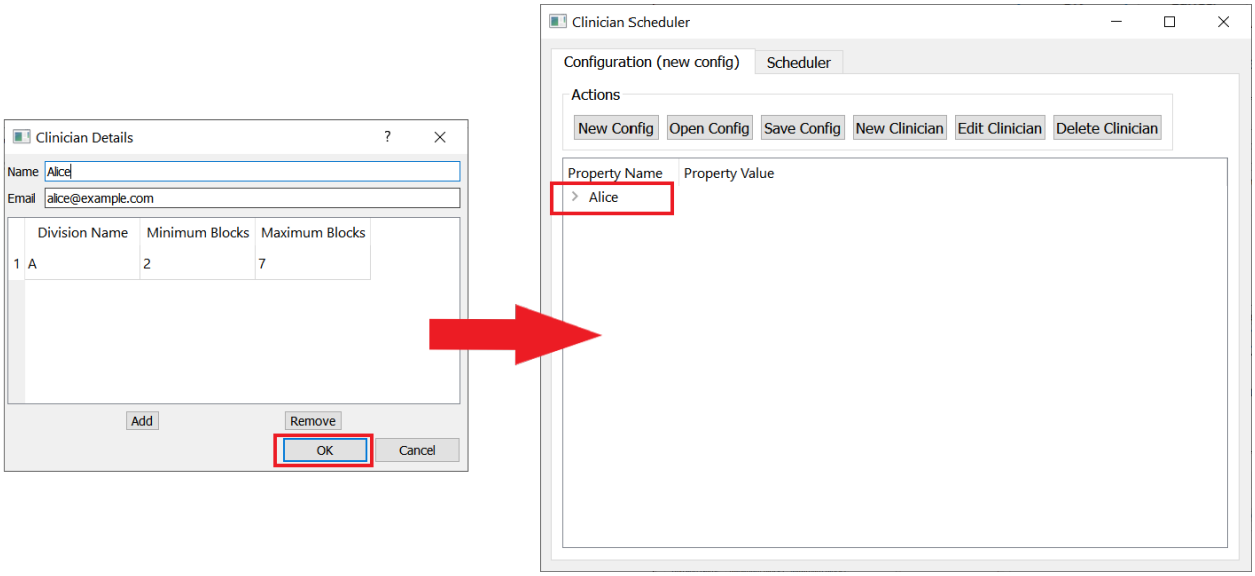
Note: A single block corresponds to two weeks.



3. To delete a row from the table, select the row and then click *Remove*.

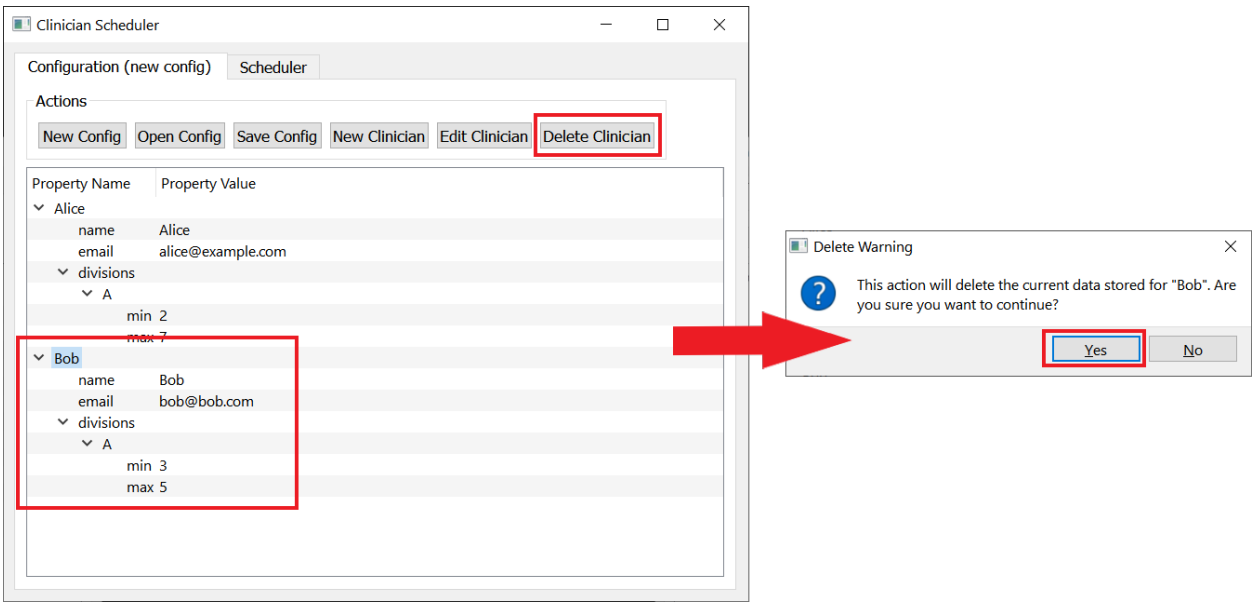


4. When you are finished entering the data for the clinician, click *Ok*. You should now see a new entry in the main table for that clinician.



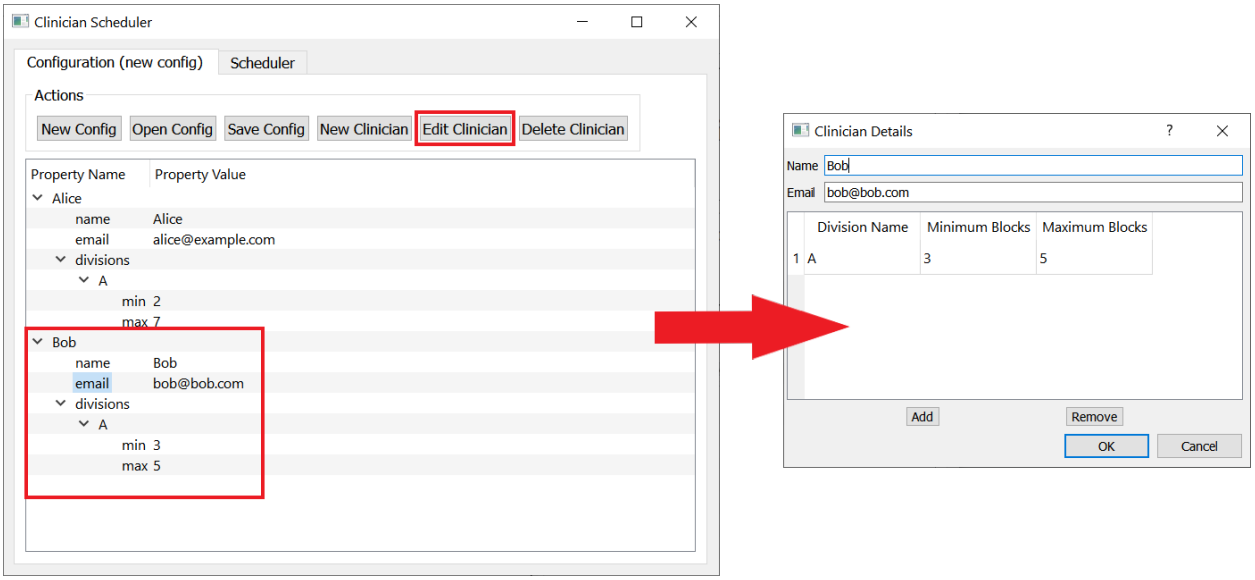
1.5 Deleting an existing clinician

To delete an existing clinician, simply select a row corresponding to the clinician in the table and click on *Delete Clinician*.



1.6 Editing an existing clinician

To edit the information of a clinician, select a row corresponding to the clinician in the table and click on *Edit Clinician*. You should see a dialog window where you can change the information. For more details on how to enter data in the edit dialog, see *Adding a new clinician*.



CHAPTER

TWO

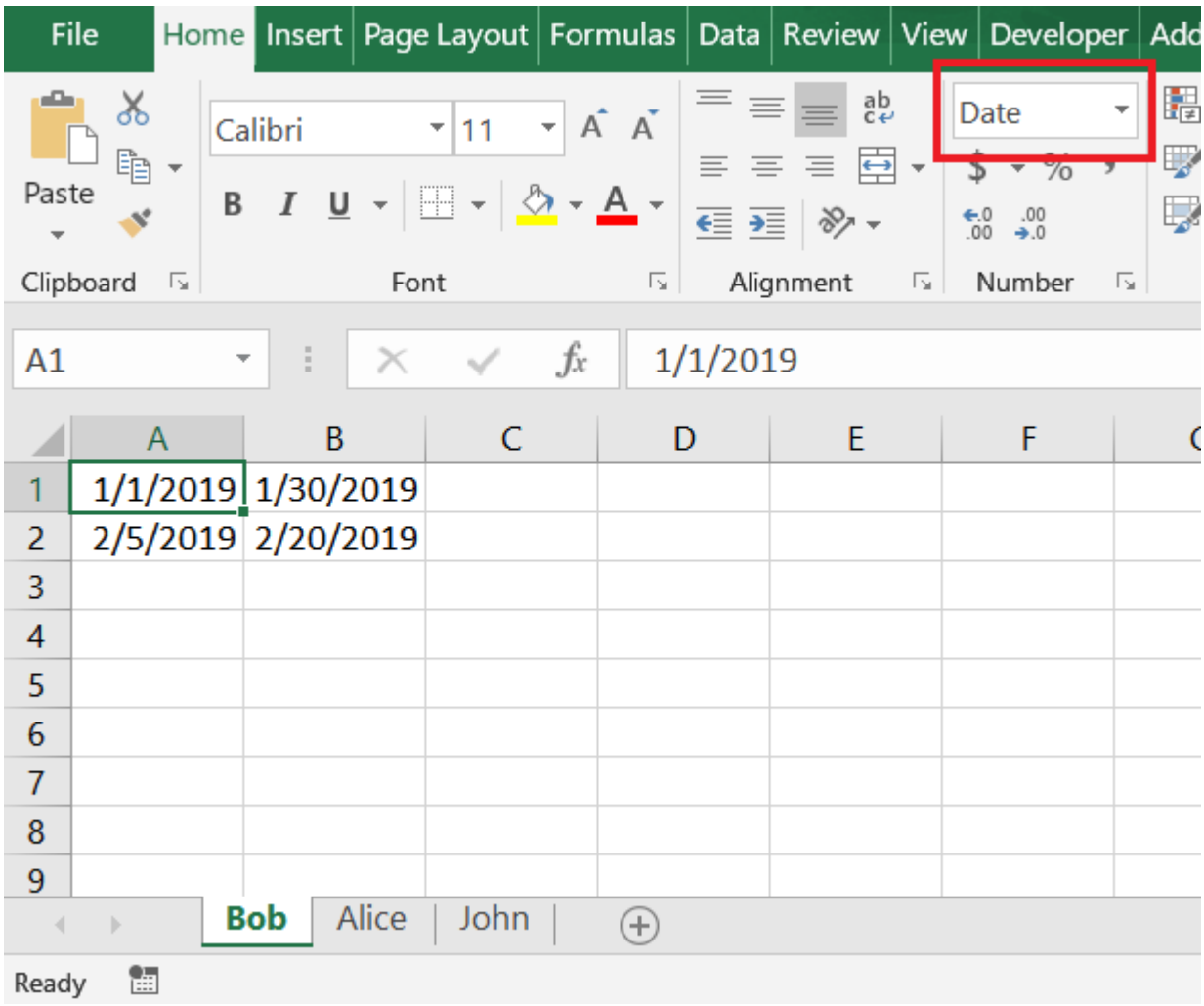
REQUESTS & HOLIDAY WEEKENDS

Clinician requests for time-off and the dates of holiday weekends are supplied using a pair of excel files.

2.1 Clinician Requests Excel File

The requests file should have a single sheet per clinician that is in the configuration file you created in *Clinician Configuration*. Inside each sheet, each request is entered on a separate row, containing the start and end date (inclusive) of the request.

Warning: Make sure each value in the Excel file is formatted as a date!

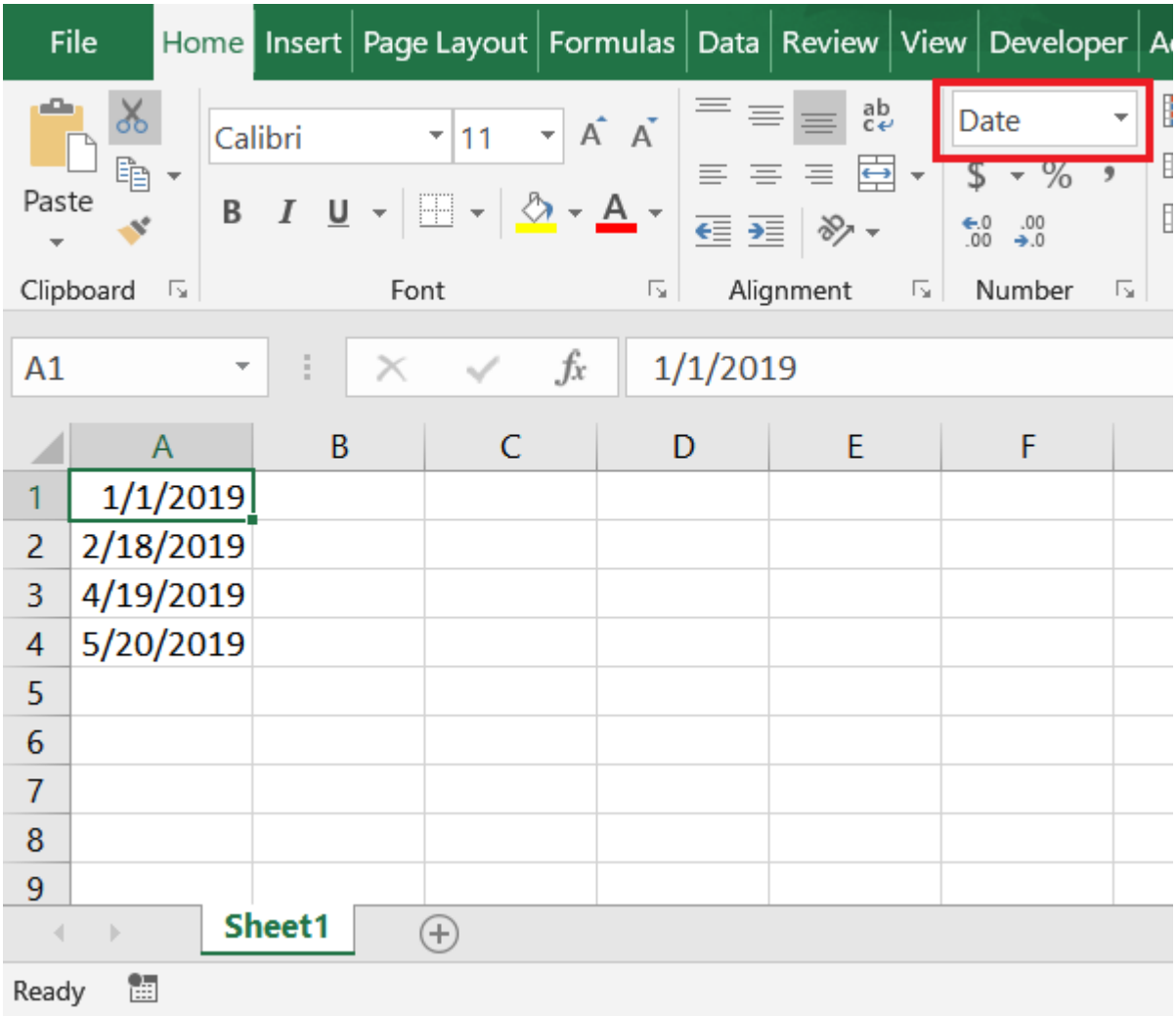


Note: To enter a request for a single day, use the same value for both start and end date.

2.2 Holiday Weekends Excel File

The holiday weekends file should have a single sheet with the dates of the holiday weekends, one in each row.

Warning: Make sure each value in the Excel file is formatted as a date!


File
Home
Insert
Page Layout
Formulas
Data
Review
View
Developer
Paste
Calibri
11
Date
Clipboard
Font
Alignment
Number
A1
1/1/2019
A
B
C
D
E
F
1 1/1/2019
2 2/18/2019
3 4/19/2019
4 5/20/2019
5
6
7
8
9
Sheet1
Ready

CHAPTER

THREE

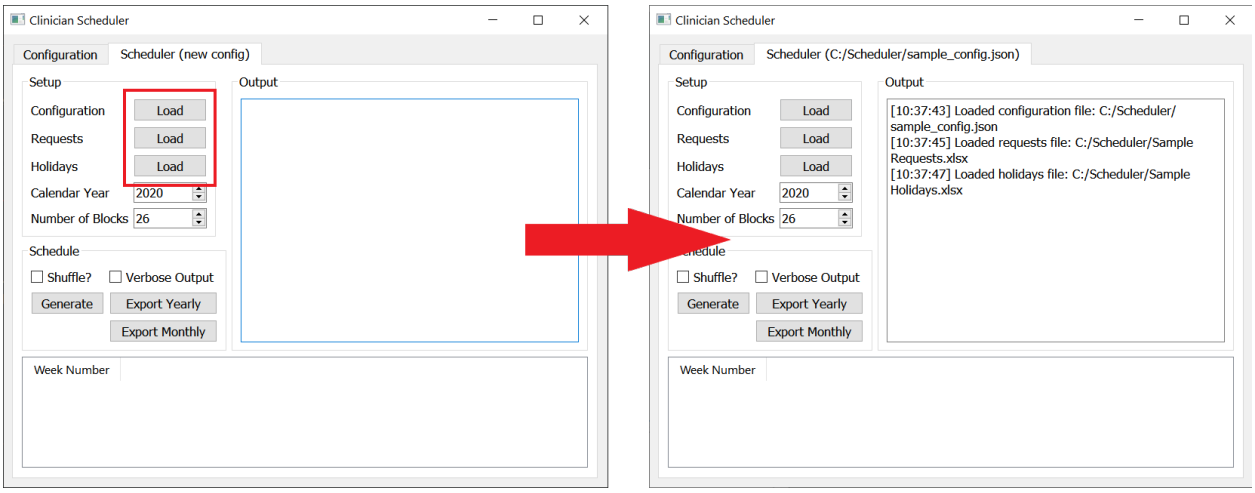
SCHEDULING

3.1 Generating a schedule

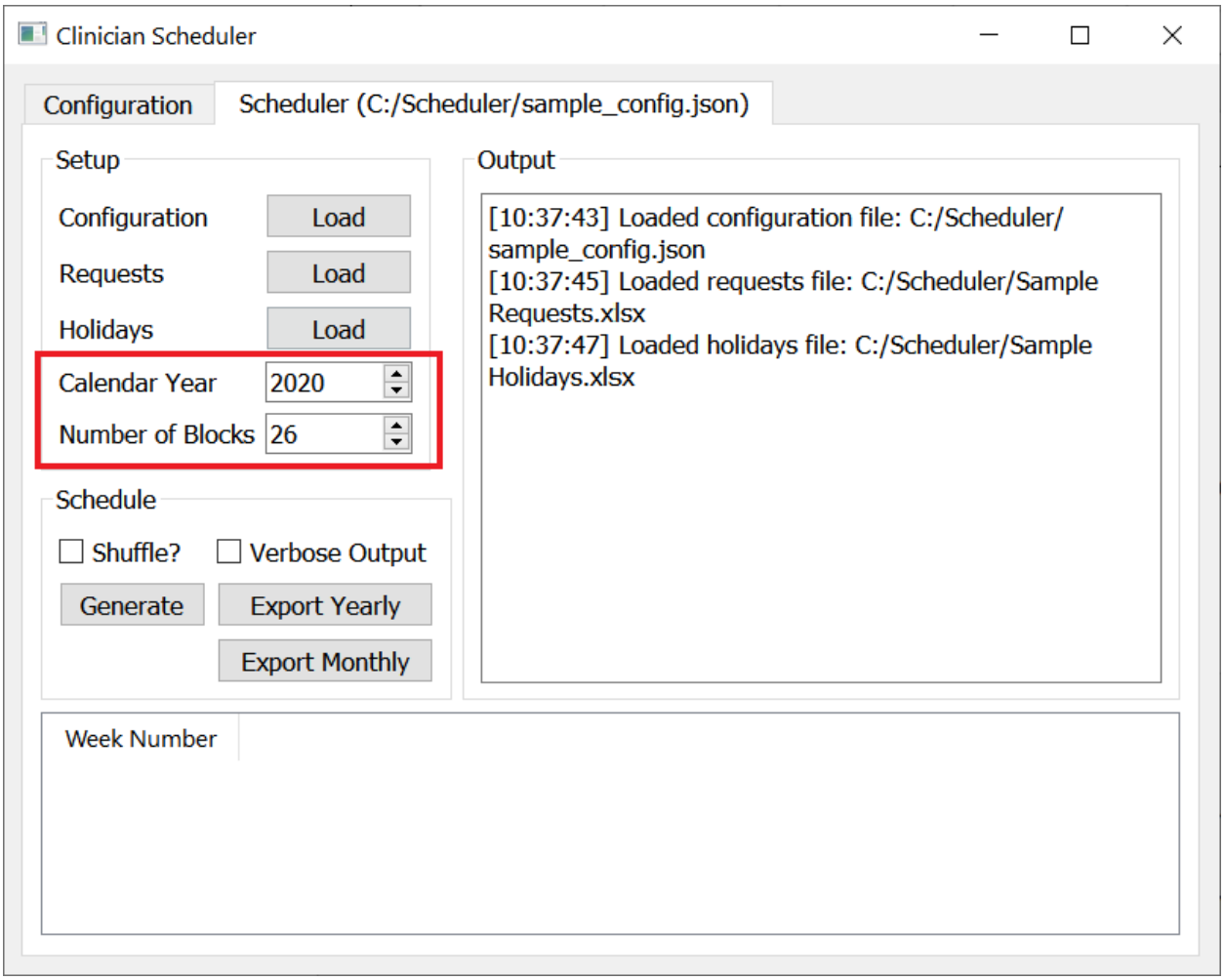
Once you have created a configuration file, you can switch over to the *Scheduler* tab of the application in order to generate a schedule.

1. Load the configuration, requests, and holidays files that you created earlier in *Clinician Configuration* and *Requests & Holiday Weekends*.

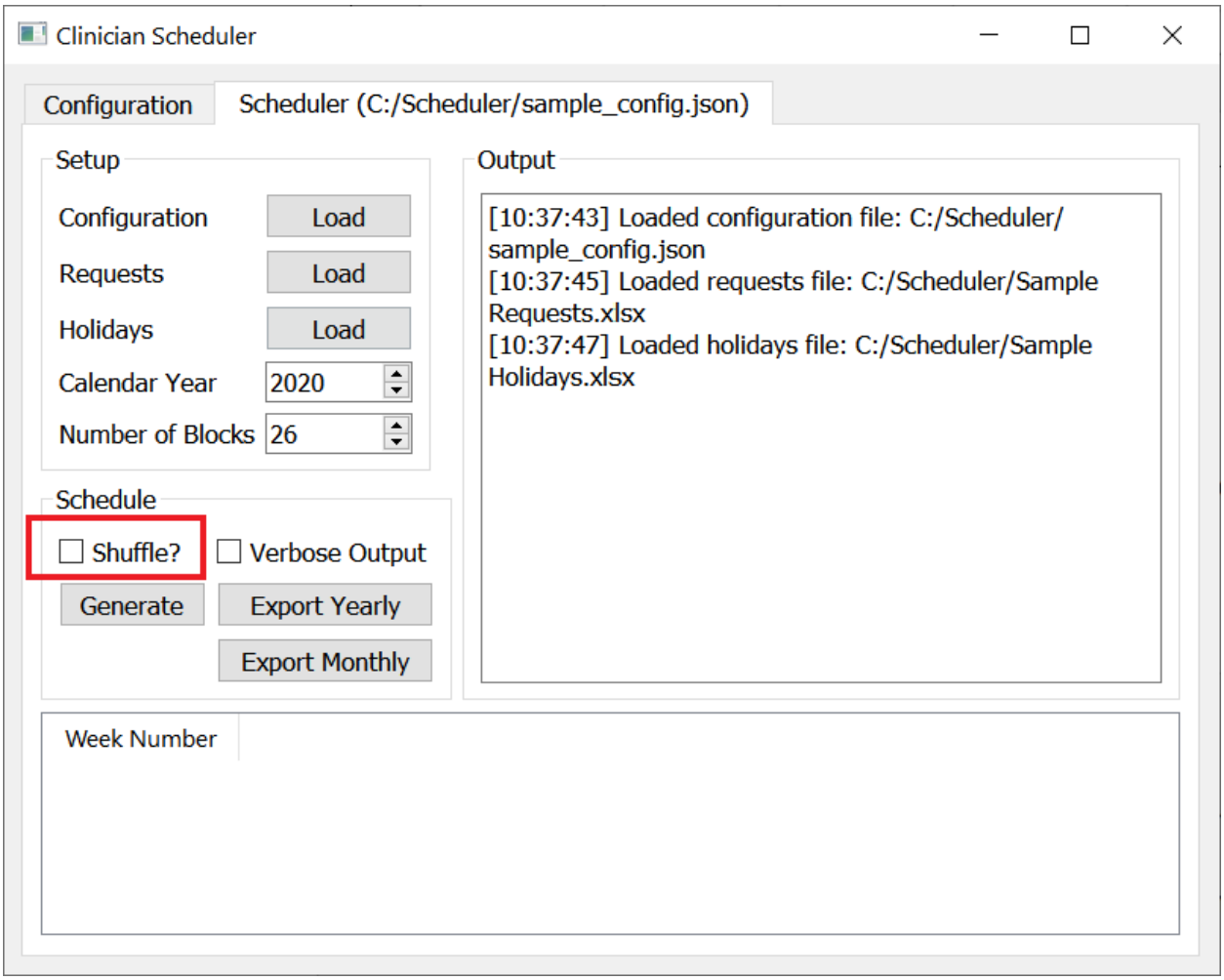
Note: You can be sure that everything loaded correctly by checking the output on the right.



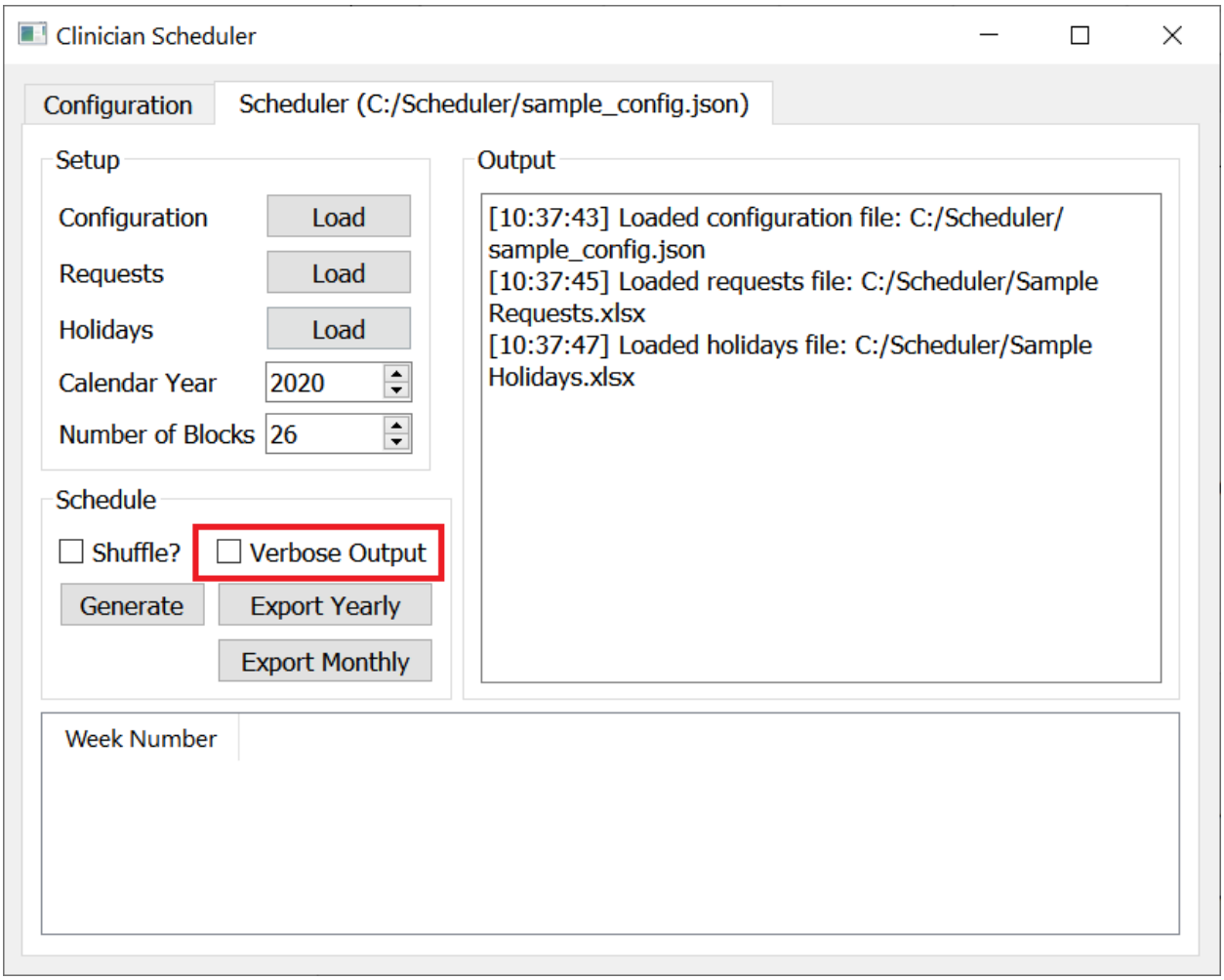
2. Set the starting calendar year for the schedule, as well as the number of 2-week blocks that you want the schedule to cover. By default, the calendar year is the upcoming year, and the number of blocks is 26, to cover a full year.



3. **(Optional)** Check the *Shuffle?* checkbox if you would like the scheduler to generate a slightly different schedule each time you click on *Generate*.

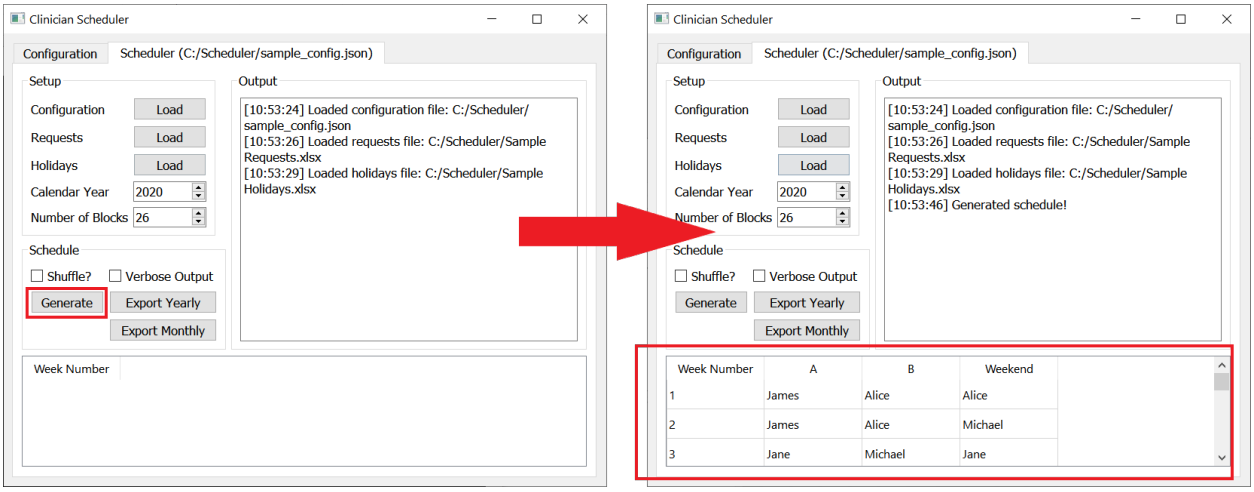


4. **(Optional)** Check the *Verbose Output* checkbox if you would like to see detailed output on the right after the scheduler finishes generating the schedule.



5. Click on *Generate* to generate a schedule.

Warning: Depending on the amount of clinicians and requests provided, it may take some time to find an optimal schedule.



Warning: It is possible that the scheduler will not be able to come up with a schedule that satisfies your constraints. This can be a result of either of the following reasons:

- There are not enough clinicians to distribute evenly throughout the year
- The minimum and maximum number of blocks of clinicians are too restrictive

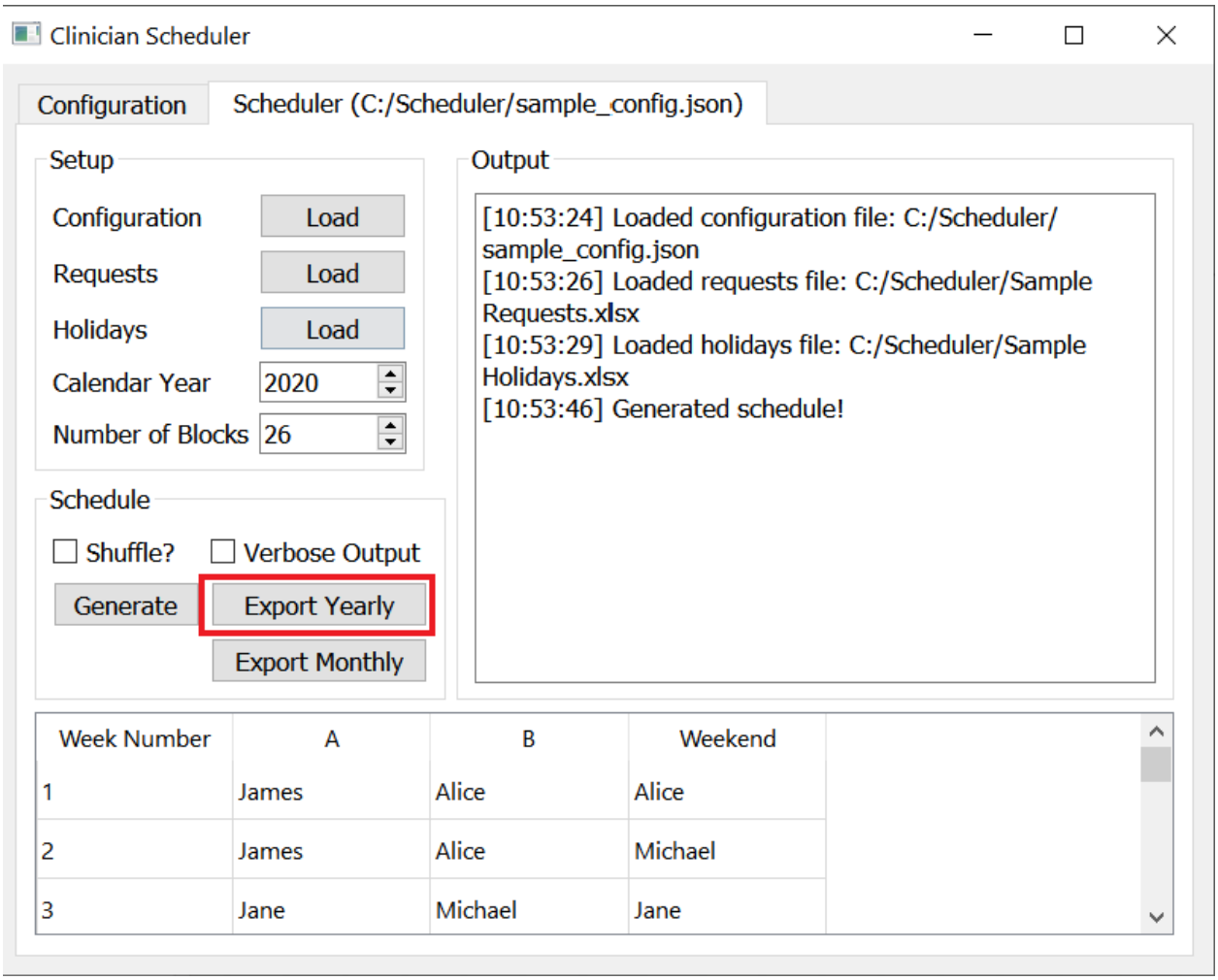
Try changing the configuration file by adding new clinicians, or changing the min/max blocks of different clinicians to allow for more flexibility.

See *Clinician Configuration* for more information on modifying the configuration file.

3.2 Exporting a schedule

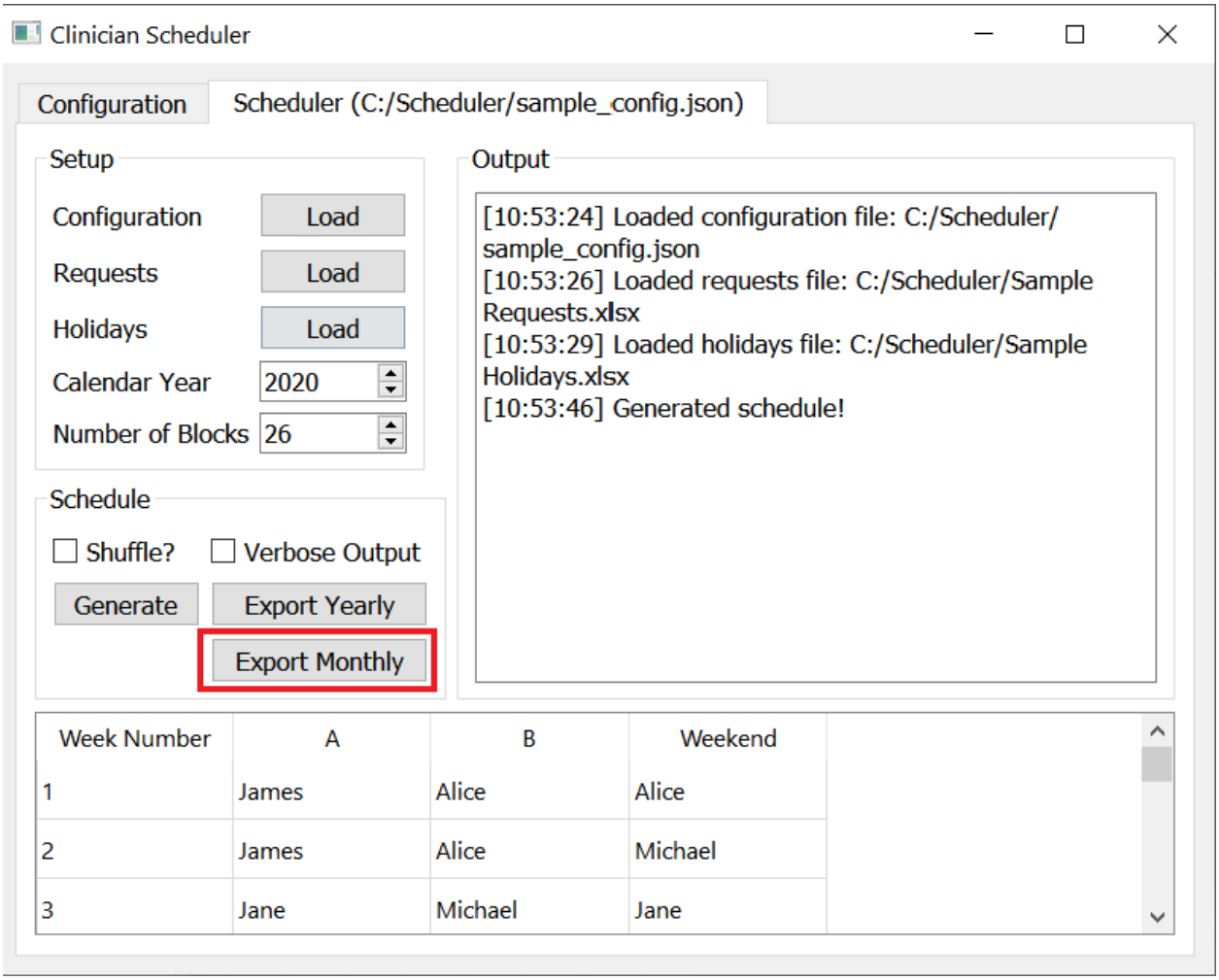
If you are satisfied with the generated schedule, you can choose to export it as an Excel file. There are two Excel format options: *Yearly Export* and *Monthly Export*.

Selecting the *Yearly Export* option will generate an excel file with a single sheet, displaying the clinicians that are covering a particular division for a given week or weekend. It is very similar to the table output in the application itself.



Selecting the *Monthly Export* option will generate a more detailed breakdown of the schedule, with a separate sheet

for every month, detailing which clinician covers which division on which day.

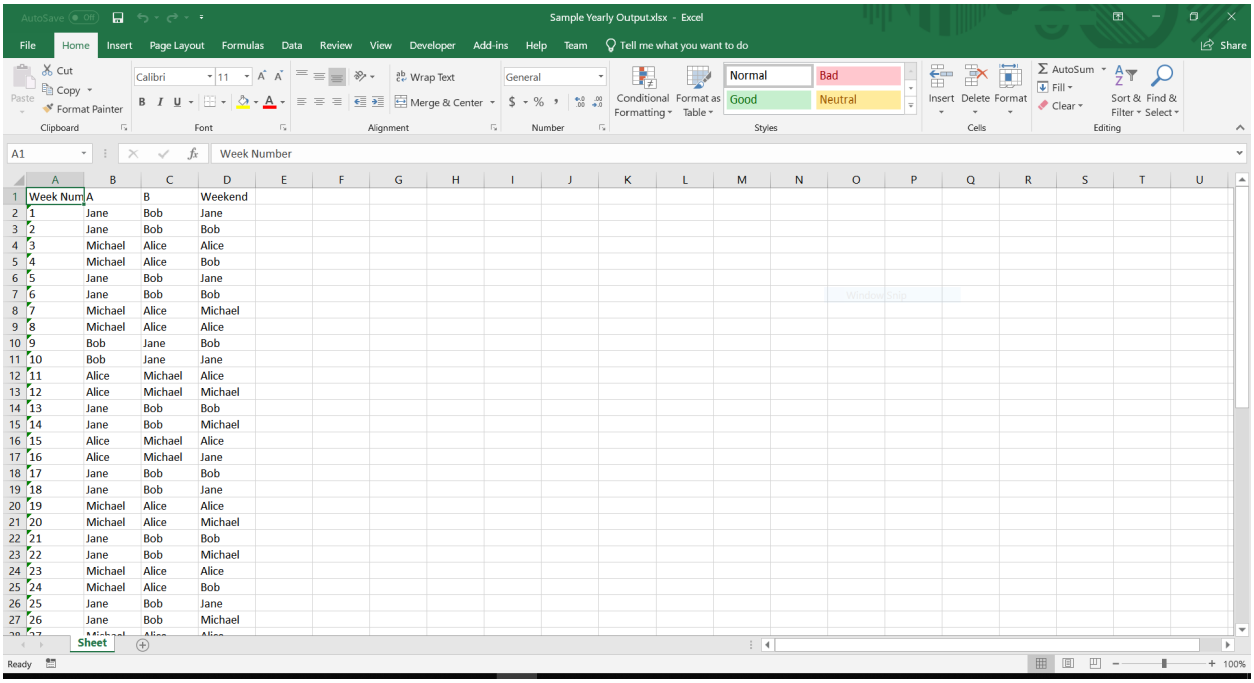


CHAPTER

FOUR

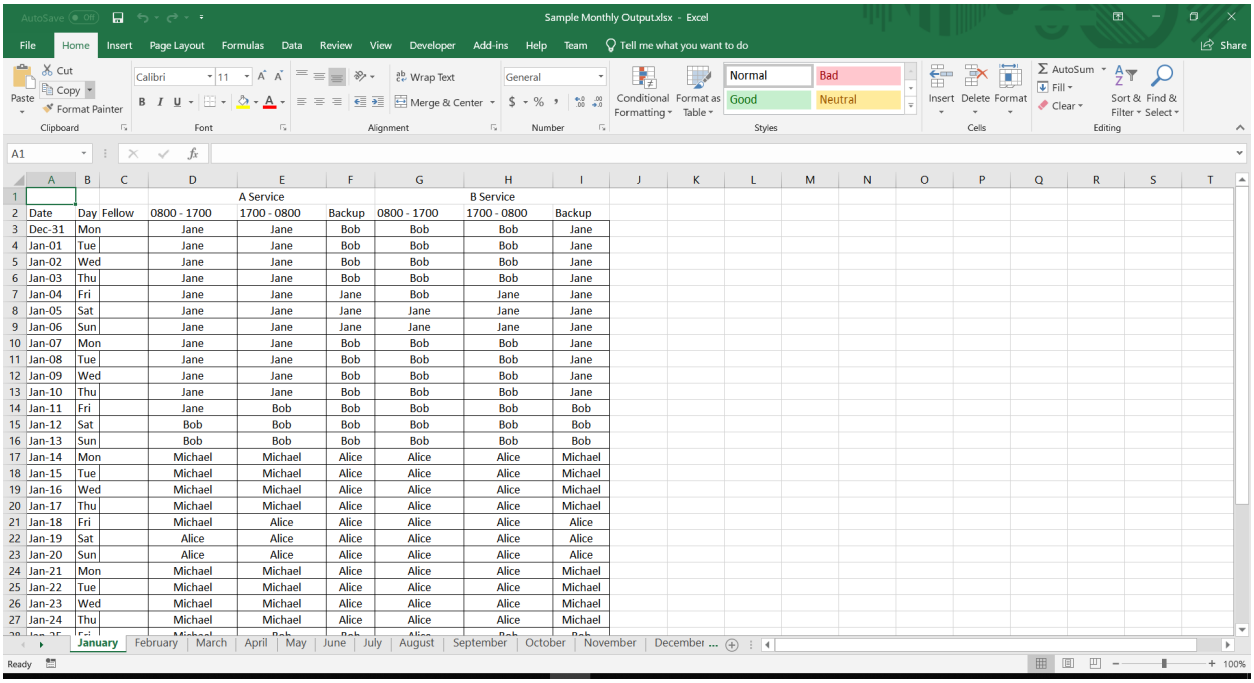
SAMPLE OUTPUT

4.1 Yearly Excel Format



Week Num	A	B	Weekend
1	Jane	Bob	Jane
2	Jane	Bob	Bob
3	Michael	Alice	Alice
4	Michael	Alice	Bob
5	Jane	Bob	Jane
6	Jane	Bob	Bob
7	Michael	Alice	Michael
8	Michael	Alice	Alice
9	Bob	Jane	Bob
10	Bob	Jane	Jane
11	Alice	Michael	Alice
12	Alice	Michael	Michael
13	Jane	Bob	Bob
14	Jane	Bob	Michael
15	Alice	Michael	Alice
16	Alice	Michael	Jane
17	Jane	Bob	Bob
18	Jane	Bob	Jane
19	Michael	Alice	Alice
20	Michael	Alice	Michael
21	Jane	Bob	Bob
22	Jane	Bob	Michael
23	Michael	Alice	Alice
24	Michael	Alice	Bob
25	Jane	Bob	Jane
26	Jane	Bob	Michael

4.2 Monthly Excel Format



			A Service			B Service		
Date	Day	Fellow	0800 - 1700	1700 - 0800	Backup	0800 - 1700	1700 - 0800	Backup
Dec-31	Mon		Jane	Jane	Bob	Bob	Bob	Jane
Jan-01	Tue		Jane	Jane	Bob	Bob	Bob	Jane
Jan-02	Wed		Jane	Jane	Bob	Bob	Bob	Jane
Jan-03	Thu		Jane	Jane	Bob	Bob	Bob	Jane
Jan-04	Fri		Jane	Jane	Jane	Bob	Jane	Jane
Jan-05	Sat		Jane	Jane	Jane	Jane	Jane	Jane
Jan-06	Sun		Jane	Jane	Jane	Jane	Jane	Jane
Jan-07	Mon		Jane	Jane	Bob	Bob	Bob	Jane
Jan-08	Tue		Jane	Jane	Bob	Bob	Bob	Jane
Jan-09	Wed		Jane	Jane	Bob	Bob	Bob	Jane
Jan-10	Thu		Jane	Jane	Bob	Bob	Bob	Jane
Jan-11	Fri		Jane	Bob	Bob	Bob	Bob	Bob
Jan-12	Sat		Bob	Bob	Bob	Bob	Bob	Bob
Jan-13	Sun		Bob	Bob	Bob	Bob	Bob	Bob
Jan-14	Mon		Michael	Michael	Alice	Alice	Alice	Michael
Jan-15	Tue		Michael	Michael	Alice	Alice	Alice	Michael
Jan-16	Wed		Michael	Michael	Alice	Alice	Alice	Michael
Jan-17	Thu		Michael	Michael	Alice	Alice	Alice	Michael
Jan-18	Fri		Michael	Alice	Alice	Alice	Alice	Alice
Jan-19	Sat		Alice	Alice	Alice	Alice	Alice	Alice
Jan-20	Sun		Alice	Alice	Alice	Alice	Alice	Alice
Jan-21	Mon		Michael	Michael	Alice	Alice	Alice	Michael
Jan-22	Tue		Michael	Michael	Alice	Alice	Alice	Michael
Jan-23	Wed		Michael	Michael	Alice	Alice	Alice	Michael
Jan-24	Thu		Michael	Michael	Alice	Alice	Alice	Michael