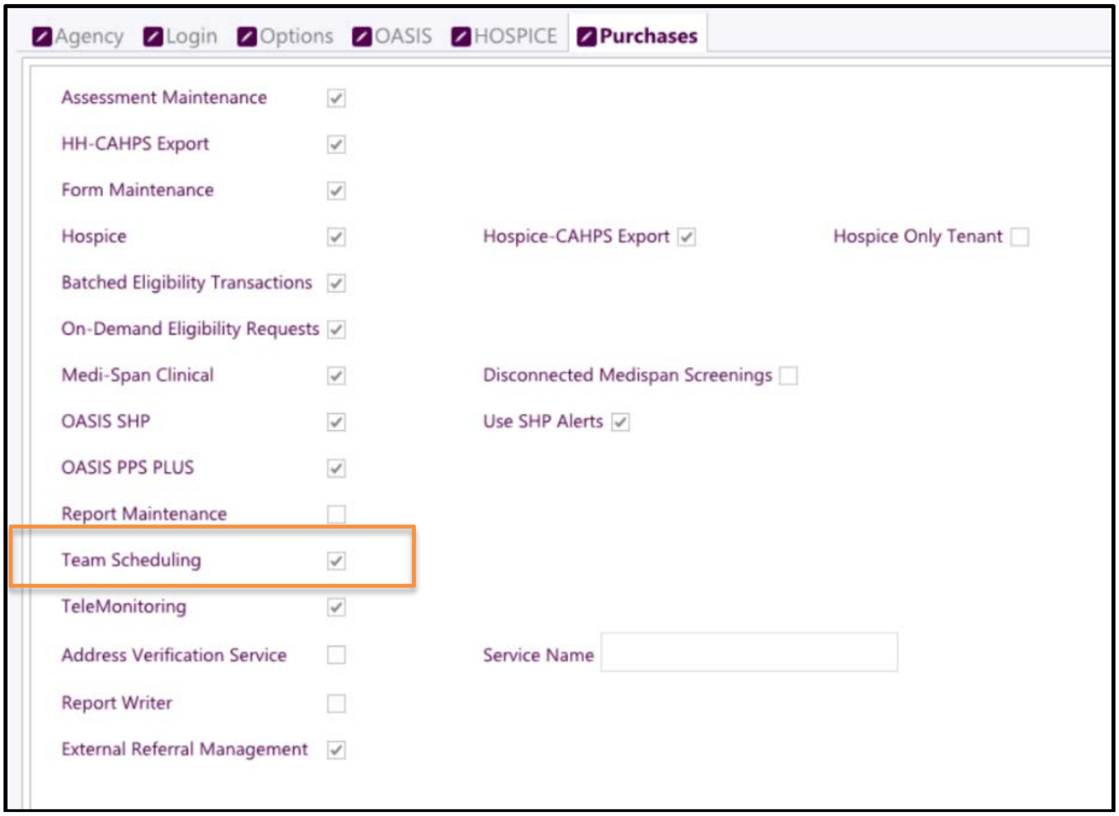
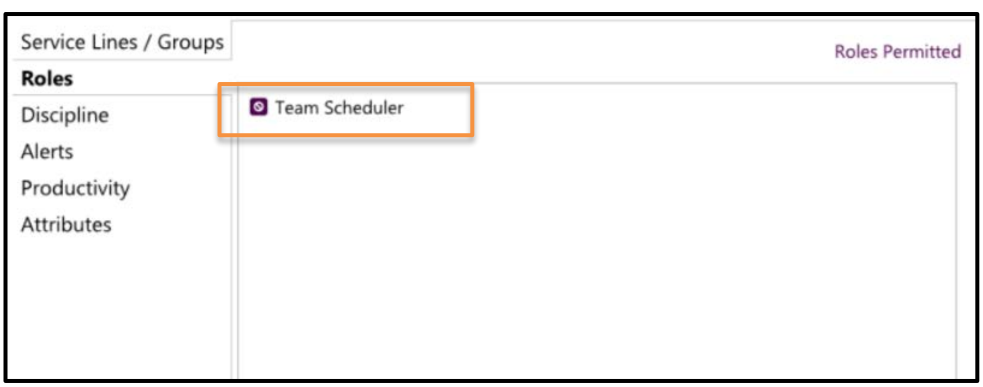
Getting Started

Permissions

Agencies wishing to utilize Team Scheduling should contact the Delta Health Technologies Customer Support Team. When enabled, Team Scheduling will be listed with a checkmark under **Agency Setup | Purchases.**

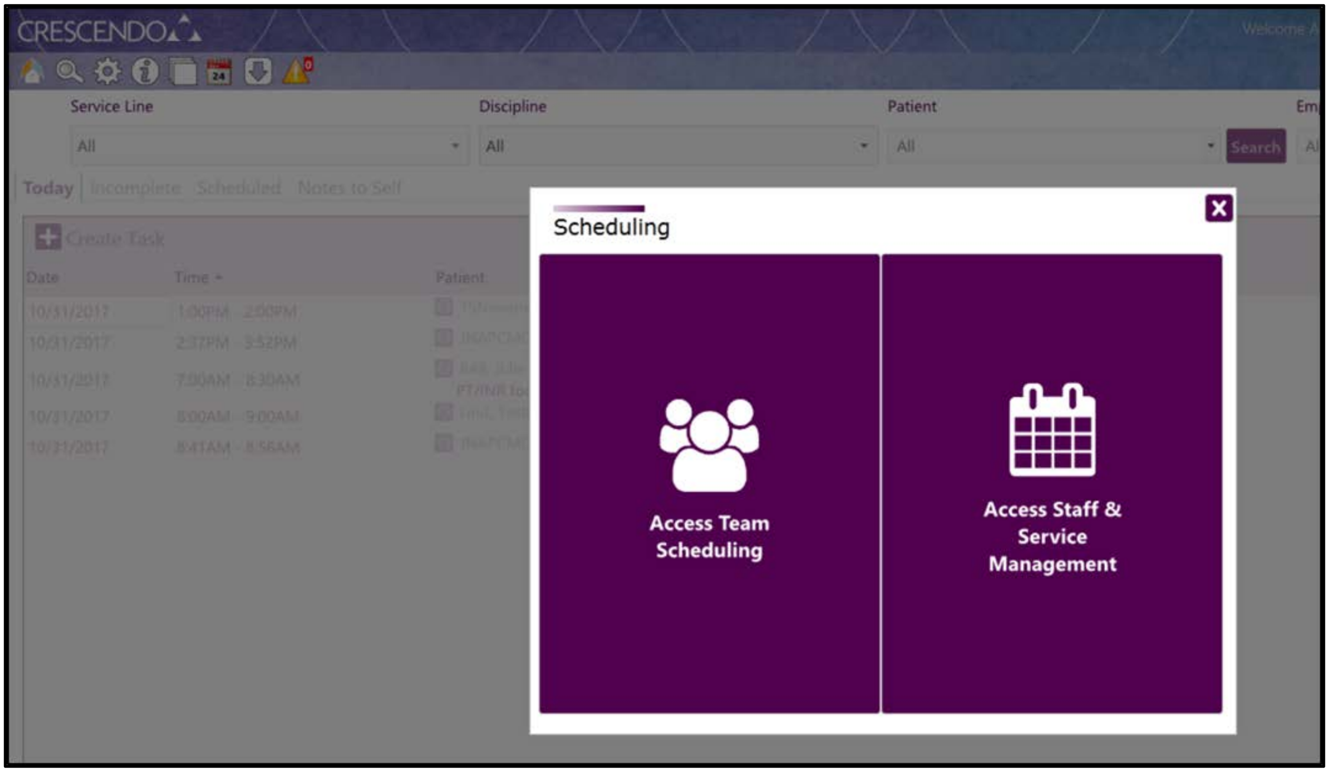


Access to Team Scheduling is configured per user by assigning the **Team Scheduler** role to that user's profile.



Users with the Team Scheduler role defined on their user profiles will be given the option to access Team Scheduling or access Staff & Service Management (SSM) when clicking the calendar icon in Crescendo Clinical.

Please note that Team Scheduling is not available for users marked as “is employee.” Those employees will continue to utilize SSM’s Clinician Portal



When launching Team Scheduling for the first time, the user will encounter music notes while the application installs. If the user encounters an error stating that Microsoft .NET Framework 4.5.2 is necessary, the user will need to install Microsoft .NET Framework 4.5.2 at the following link: https://www.microsoft.com/en-us/download/confirmation.aspx?id=42643.

When installed, the Team Scheduling application will launch. The application icon appears like the one below in the user’s system tray.

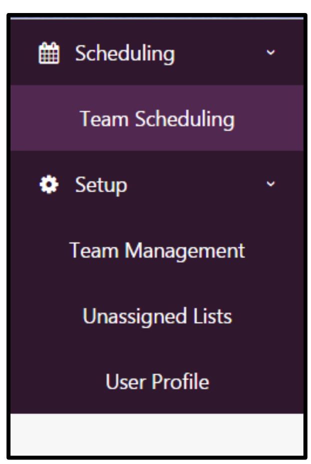
If the application launches with a gray screen and does not load during its initial launch, exit the application and relaunch from Crescendo Clinical.

Application Basics

A) Expands and collapses side navigation menu
B) User options including Logout
C) Link to Delta Health Technologies website
D) Link to About Crescendo page

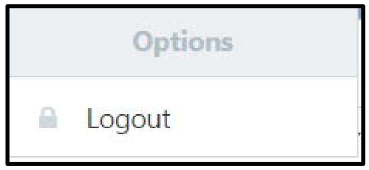
Navigation

The left navigation menu lists a Scheduling menu and a Setup menu. The Scheduling menu has a sub option for Team Scheduling and the Setup menu has the following sub options: Team Management, Unassigned Lists, User Profile.



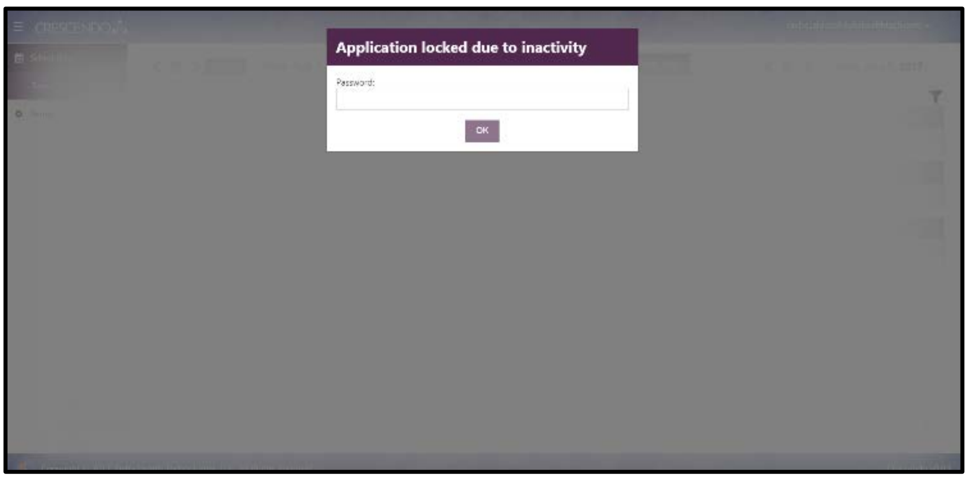
Logging Out

When finished utilizing the Team Scheduling application, select the arrow next to the username in the upper right corner of the screen. Click Logout.



Inactivity

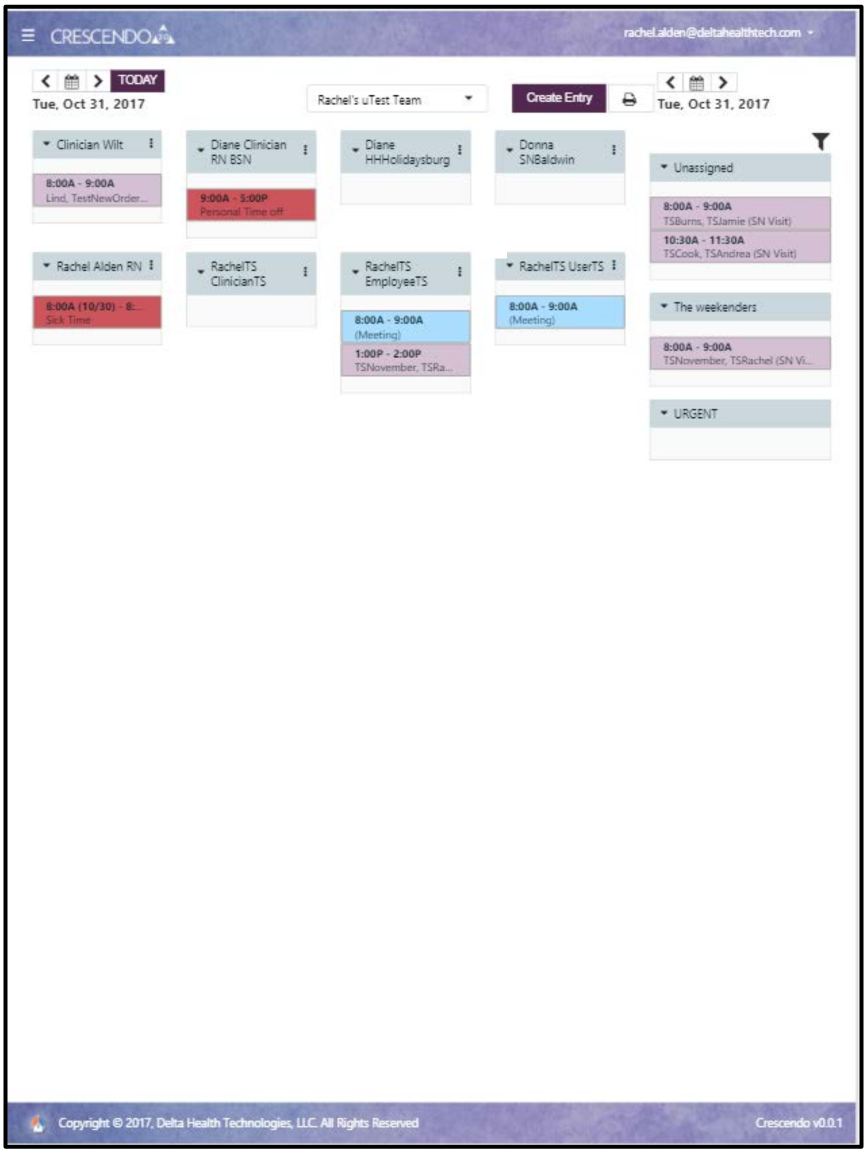
If a user is inactive for the period of time defined in Crescendo Clinical under **Agency Setup | Options | Inactivity Timeout**, the user will be required to re-enter his or her password to reauthenticate. After entering the password, the user should click OK. If the password was entered incorrectly, please try again.



Mobile Access

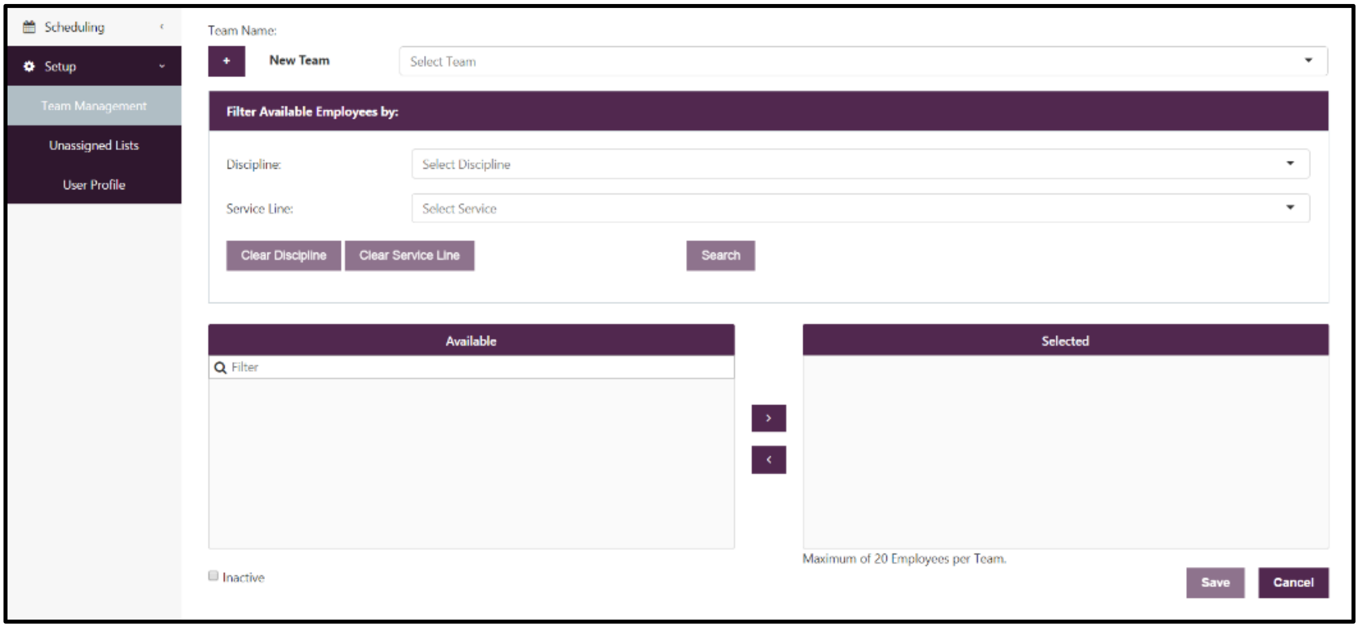
The Team Scheduling application can be accessed, if needed, on a tablet device connected to the internet through a Google Chrome browser. Navigate to your agency's URL for Crescendo (i.e., xxxx.crescendoit.com) and add /teamscheduling to the end. For example, https://xxxx.crescendoit.com/teamscheduling. Authenticate using your regular Crescendo credentials.

The Team Scheduling application will continue to be refined for tablet optimization in coming releases.

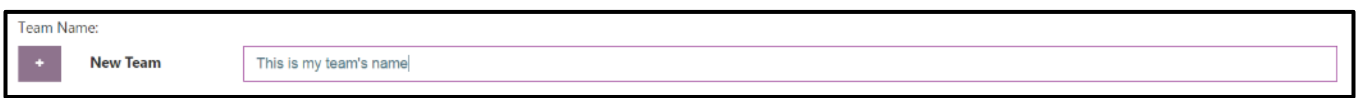


Creating & Managing Teams

In order to create or manage teams, access the Team Management section of the application. The following window will display:

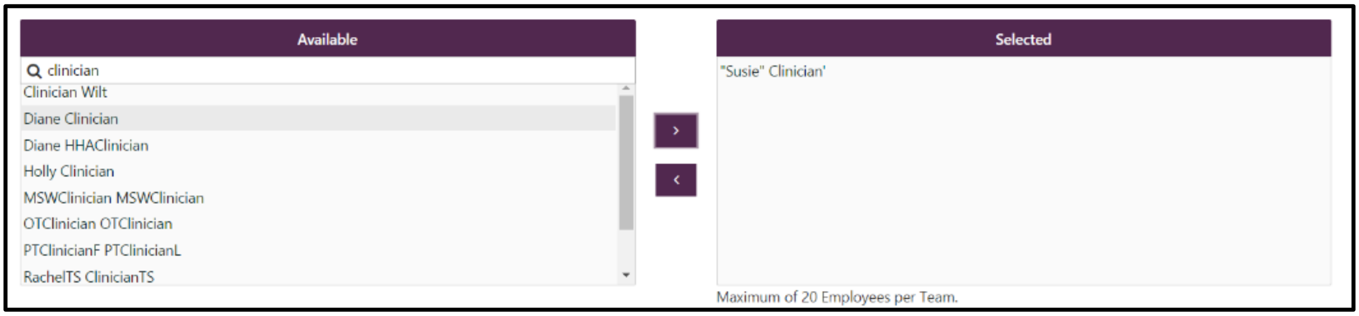


To add a new team, click the  icon next to the words "New Team." After clicking the plus icon, the Select Team box changes to say "Enter Team." Enter the team name.



To search for employees to add to the team, use the option to Filter Available Employees by Discipline and/or Service Line. Employees returned in the Available results will either have the discipline assigned in the employee's profile or have permissions within the service line group chosen.

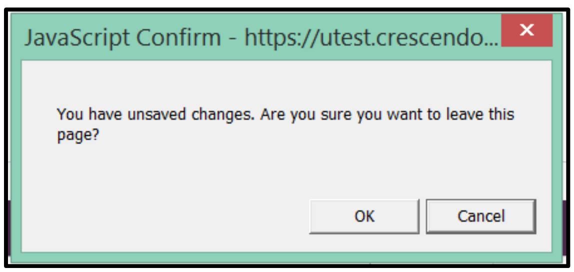
Type in the search or filter box to filter the Available results by name. Select the name of the employee to add to the Selected box and use the arrows to add the employee to the Selected box or drag and drop the employee to the Selected box.



Multiple searches may be used. Simply select to Clear Discipline and/or Clear Service Line to clear the search criteria and begin a new search.

Please note that a maximum of 20 employees may be assigned to one scheduling team. If the number in the selected box exceeds 20, the save button will be disabled.

If the user navigates away from the page without saving, an error message will appear. Clicking OK will discard changes and continue the navigation.



Editing an Existing Team

To view or edit an existing team, click in the team drop-down at the top of the page. A drop-down list of existing names will appear. The user may also type in the box to search by name. Click on a team to select it.

When selected, the team details will display. Employees on the team will be listed in the Selected box. A new option will appear under the team name to allow edits of the team name.

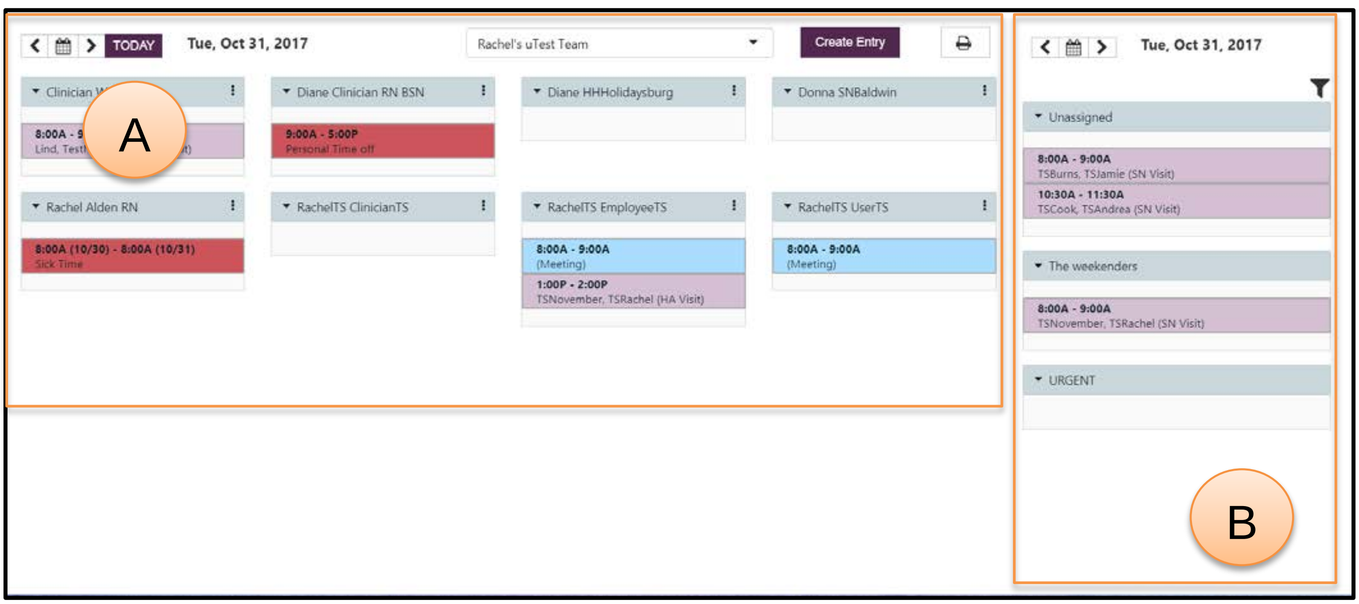
The save button will be disabled until changes have been made to the team. Changes will be discarded by clicking Cancel.

A team may be inactivated by selecting the Inactive checkbox at the bottom of the screen and saving the change. Inactive teams will display in the Team Management team drop-down list with a red asterisk indicating that the team is inactive.

Scheduling by Teams

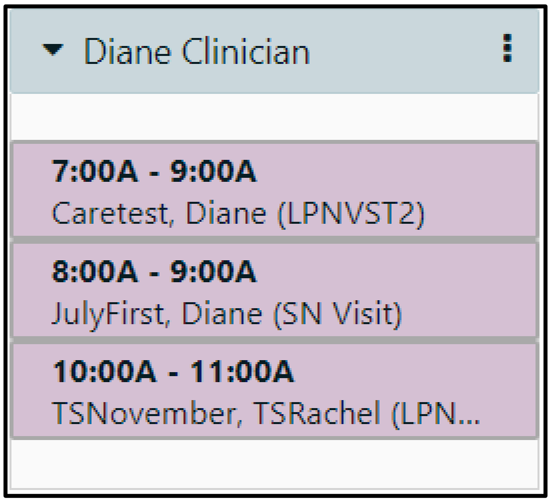
Once a team is configured, select **Scheduling | Team Scheduling**. The following screen displays.

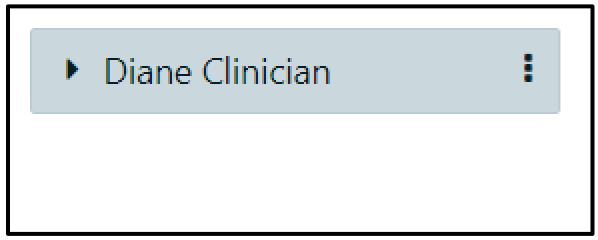
Select a team from the drop-down. The employees associated with the team, their entries, and unassigned lists associated with the team will display.



The right side of the screen **(B)** lists unassigned visits for the date listed on the right side. The remainder of the screen **(A)** shows the employees assigned to the team and their entries for the date chosen on the left side of the screen.

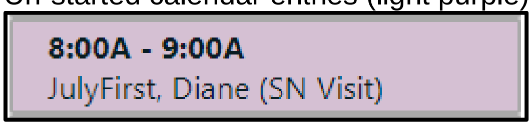
Each employee's entry list and the unassigned entry lists can be collapsed and expanded by clicking the icon on the left.



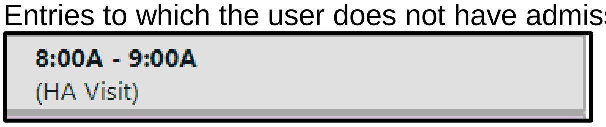


Calendar entries are color coded:

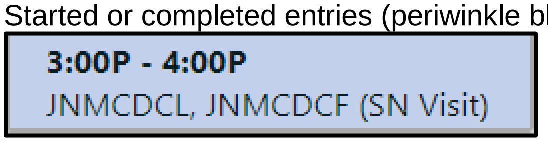
1. Un-started calendar entries (light purple)



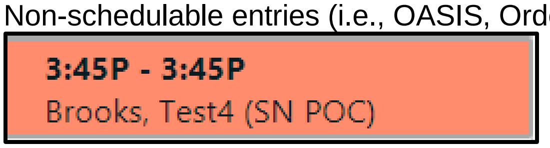
2. Entries to which the user does not have admission-level access (gray)



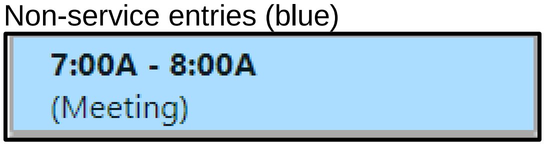
3. Started or completed entries (periwinkle blue)



4. Non-schedulable entries (i.e., OASIS, Order Entry, HIS, etc.) (orange)



5. Non-service entries (blue)



6. Calendar block entries (red)

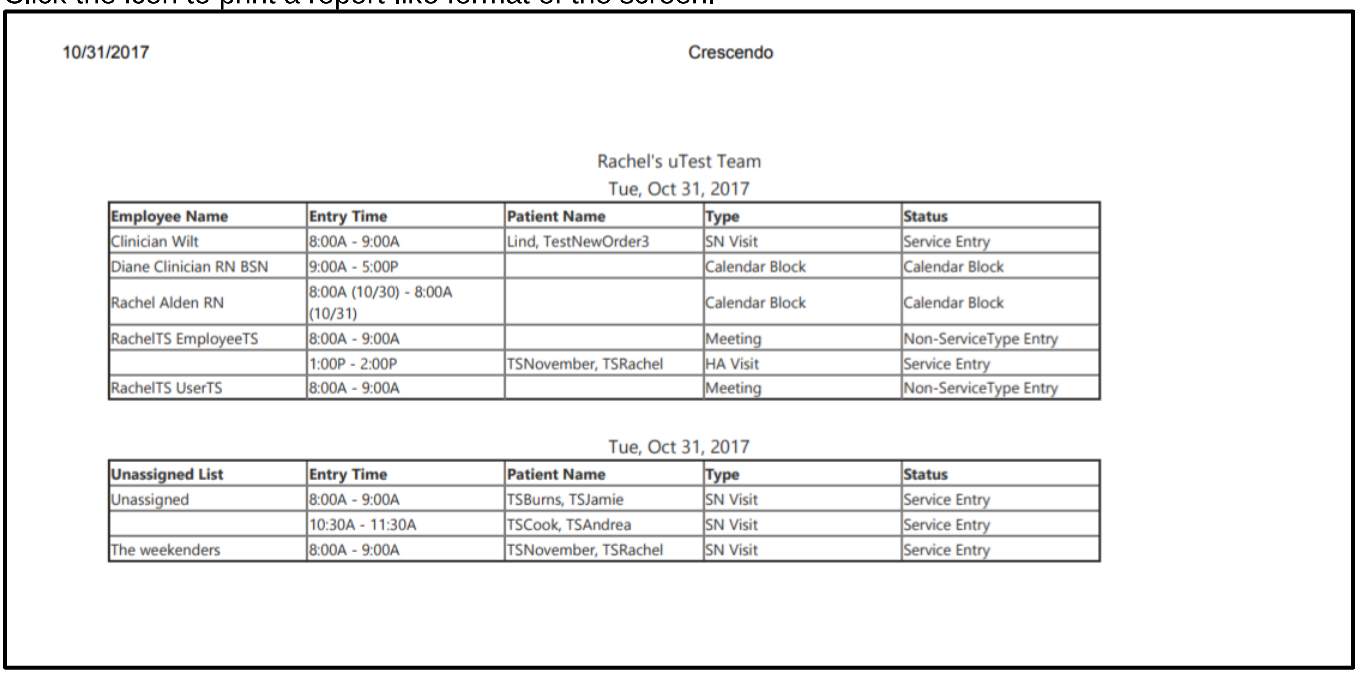
Dates for the unassigned lists and the Team view can be modified utilizing the calendar icons or arrows next to the date. If the unassigned list date differs from the team date, the unassigned list date will be shown in red.

Fri, Aug 4, 2017

Printing the Screen

At the top of the Team Scheduling view, a printer icon displays:

Click the icon to print a report-like format of the screen.



10/31/2017 Crescendo

Rachel's uTest Team

Tue, Oct 31, 2017

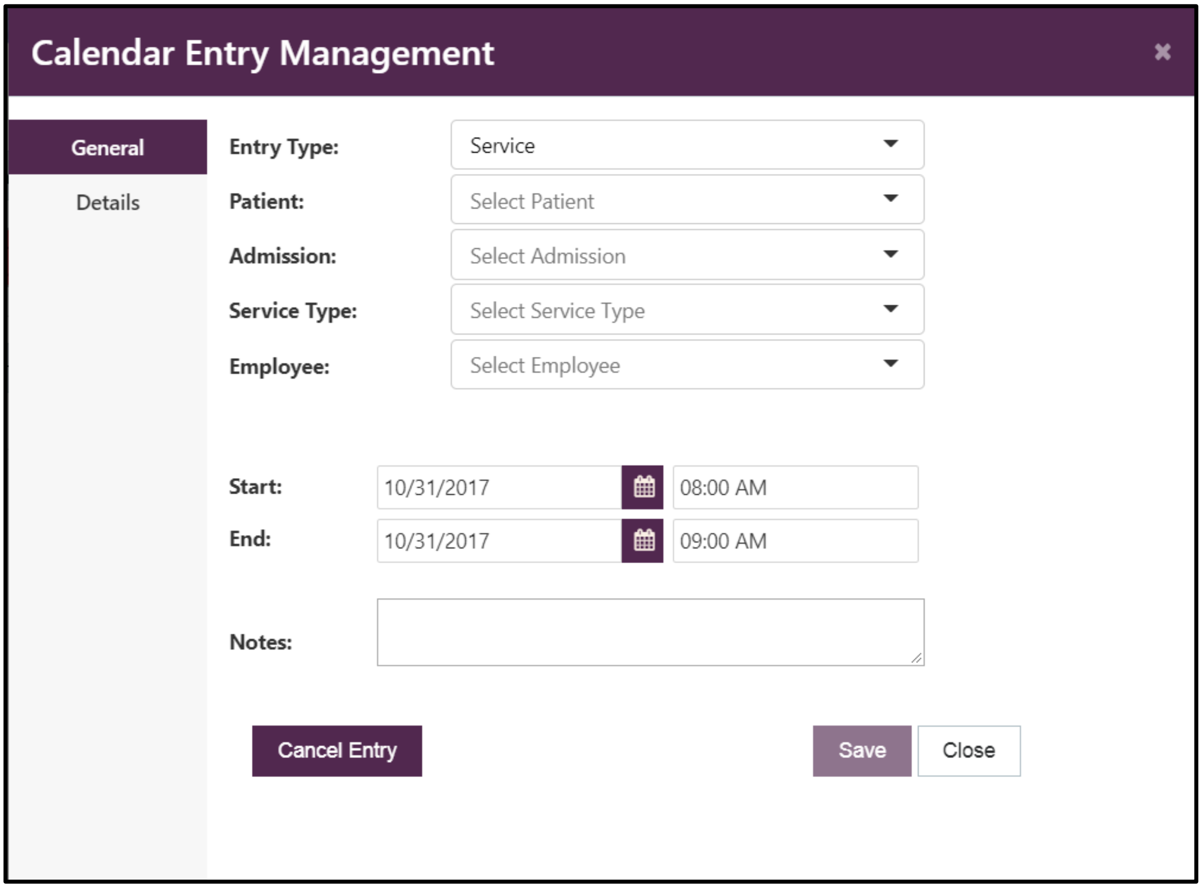
Employee Name	Entry Time	Patient Name	Type	Status
Clinician Wilt	8:00A - 9:00A	Lind, TestNewOrder3	SN Visit	Service Entry
Diane Clinician RN BSN	9:00A - 5:00P		Calendar Block	Calendar Block
Rachel Alden RN	8:00A (10/30) - 8:00A (10/31)		Calendar Block	Calendar Block
RachelTS EmployeeTS	8:00A - 9:00A		Meeting	Non-ServiceType Entry
	1:00P - 2:00P	TSNovember, TSRachel	HA Visit	Service Entry
RachelTS UserTS	8:00A - 9:00A		Meeting	Non-ServiceType Entry

Tue, Oct 31, 2017

Unassigned List	Entry Time	Patient Name	Type	Status
Unassigned	8:00A - 9:00A	TSBurns, TSJamie	SN Visit	Service Entry
	10:30A - 11:30A	TSCook, TSAndrea	SN Visit	Service Entry
The weekenders	8:00A - 9:00A	TSNovember, TSRachel	SN Visit	Service Entry

Creating Entries

To create a new entry in the Team Scheduling application, select the Create Entry button at the top of the screen to the right of the team selection drop-down. The Entry Management window displays.

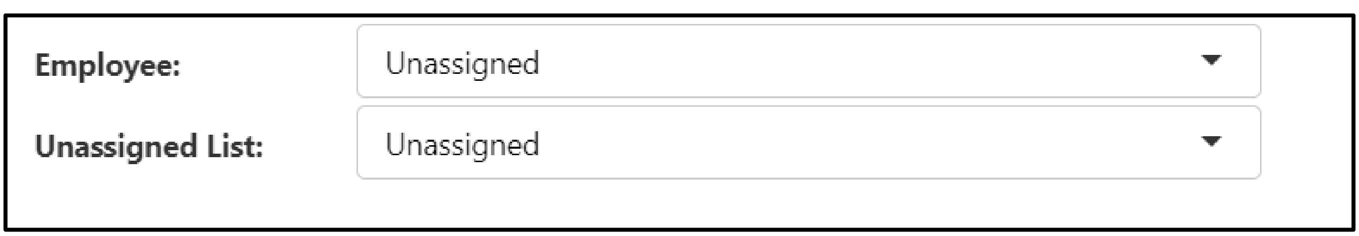


The entry type defaults to Service. To create a service entry, select a patient. Then, select an admission. Then, select a service type.

Service types listed will be limited to the service types allowed for the admission chosen including limitations by admission status (only items allowed before admit will show before the patient is admitted, etc.).

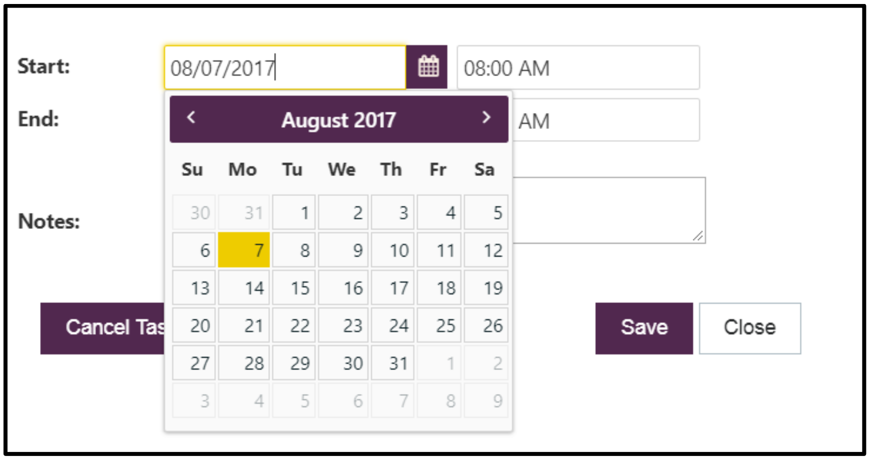
Next, select an employee. If no employee can be assigned, select Unassigned. Employees listed will be employees who can perform the service type chosen.

If choosing an unassigned employee, an additional field will display to allow assignment to a specific unassigned list. If no particular list required, select unassigned.

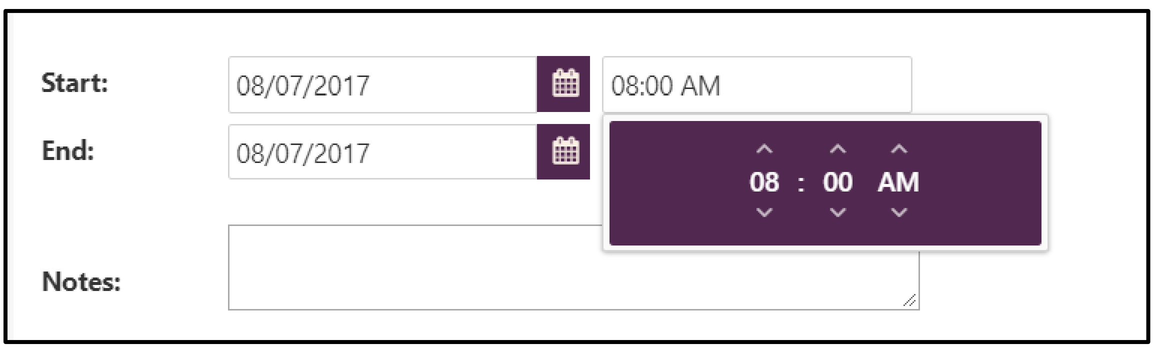


Tip: By typing in the selection boxes, the options will filter so that users can type to search.

The start and end date and times will default to today's date from 8:00 AM to 9:00 AM. Click on the calendar icon next to the start or end date to modify the date. Users may manually enter dates in MM/DD/YYYY format.



To modify the start and end times, click in the field for the start or end time. Use the up and down arrows to adjust the hour, minutes and AM/PM fields. Users may manually enter time in XX:XX XM format.

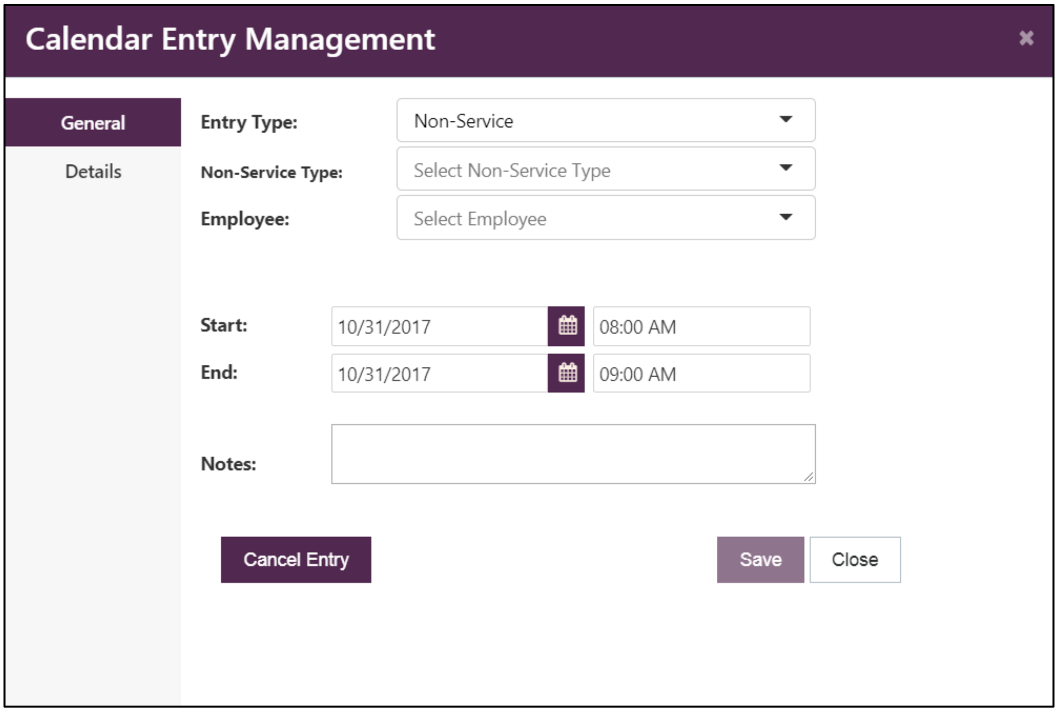


Start and end times will adjust by 15 minute increments. If the end date and time is adjusted to a date and time prior to the start time, the start time will be readjusted to equal the new end date and time.

A note can be added to the visit. This note is the same one visible within the Clinical application on the Task Details or on the Clinical Task List. This note is also marked as "for employee" and displayed in the administrative portal of Staff & Service Management.

Non-Service Entries

To create a non-service entry, change the Entry Type dropdown to Non-Service at the top of the Entry Management window.



Choose a non-service type and an employee. Unassigned is not an available choice.

The start and end date and times will default to today's date from 8:00 AM to 9:00 AM. Click on the calendar icon next to the start or end date to modify the date.

To modify the start and end times, click in the field for the start or end time. Use the up and down arrows to adjust the hour, minutes and AM/PM fields.

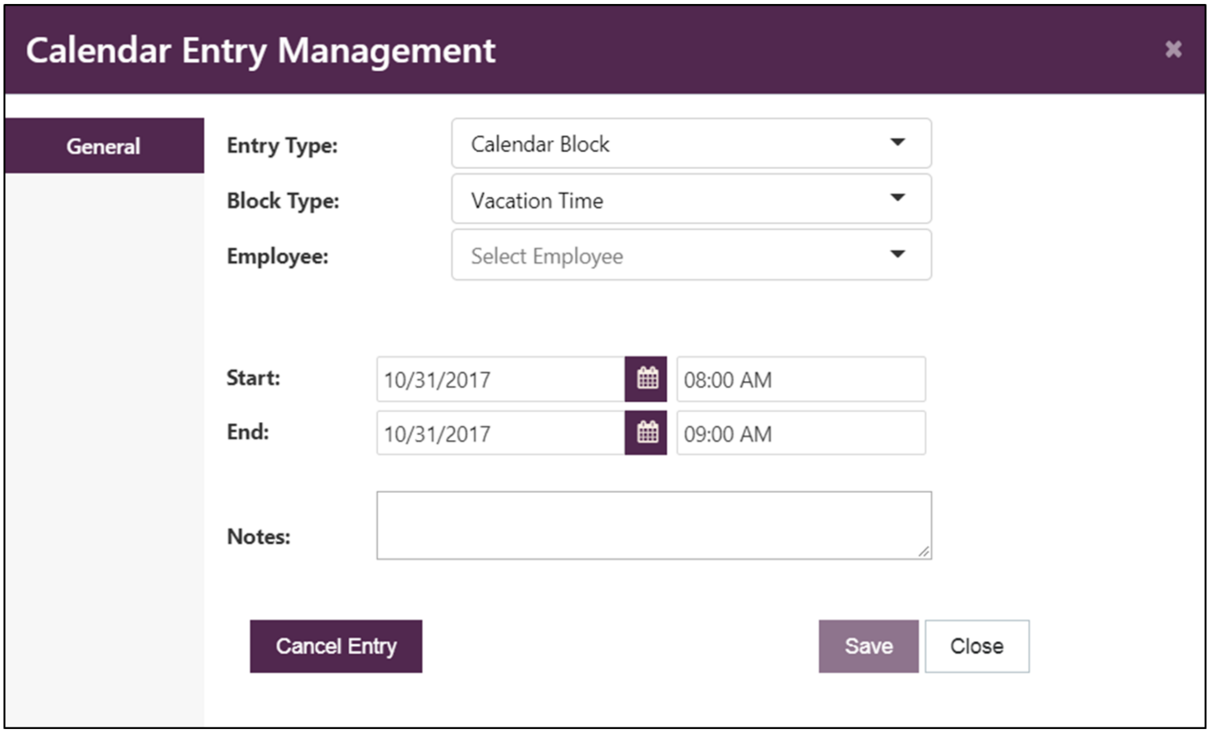
Start and end times will adjust by 15 minute increments. If the end date and time is adjusted to a date and time prior to the start time, the start time will be readjusted to equal the new end date and time.

A note can be added to the non-service entry. The entry and the note will be visible within the Clinical application on the Task Details or on the Clinical Task List. Clinicians assigned to non-service entries will see the non-service entries in their task lists for completion. Non-service entries cannot be marked as complete in Team Scheduling.

Calendar Block Entries

Calendar blocks can be entered in Team Scheduling or in Staff & Service Management. Calendar blocks are utilized to help avoid scheduling for the timeframe on the block. If service entries or appointments have not yet been released in SSM, the appointments will be changed to unassigned when released if they overlap with a calendar block. This currently only applies to unreleased appointments.

To create a calendar block in Team Scheduling, change the Entry Type to Calendar Block.



Choose a calendar block type and an employee. Unassigned is not an available choice.

Calendar block types can be configured in SSM under **Admin Tools | Manage Application Data | Employee Data | Employee Calendar Block Types.**

Calendar blocks added in Team Scheduling or in SSM will be documented in both applications. Calendar blocks for employees show in SSM in the **Employee Profile | General | Calendar Blocks** panel. The SSM Description field corresponds with the Team Scheduling Notes field. A calendar block cancelled in Team Scheduling will be deleted in SSM.

Editing Entries

Users may modify entries several ways within Team Scheduling. Entries may be modified by editing the entry in the Entry Management window, dragging and dropping the entry, using the quick entry options on a specific entry, or utilizing the bulk entry edit options available on each employee's entry list.

Rules govern how a user may edit entries based on the entry type or status. Entry rules are layered. If the first rule is met, all the remaining rules are superseded by the first rule. A quick outline of these rules follows:

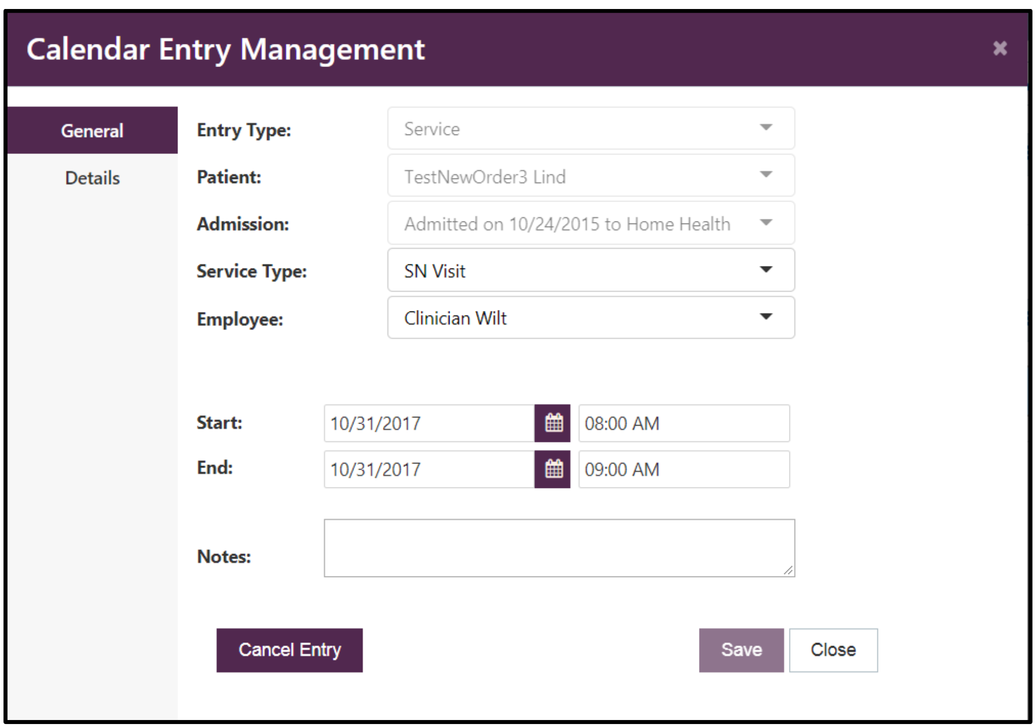
1. User has no access to the patient admission for the service entry.
    a. User cannot open the entry.
    b. User cannot modify the entry.
2. The entry is not schedulable or is complete.
    a. User cannot modify the entry.

3. The entry is started.
    a. User cannot modify the entry, except to add a departure date/time to an entry with a telephony service type.
4. The entry is a calendar block.
    a. User cannot drag or drop the entry. User can only modify the calendar block type, cancel or modify the dates and times. Calendar blocks cannot be modified through the bulk modification options.
5. The entry is a non-service entry.
    a. User cannot change the entry to an unassigned employee.
6. The entry is a standard service entry not covered by any of the prior rules.
    a. User cannot change the patient or admission on an entry once it has been created. If the patient or admission needs to be modified, the entry should be cancelled and a new entry created with the proper patient and admission.

Entry Management Edits

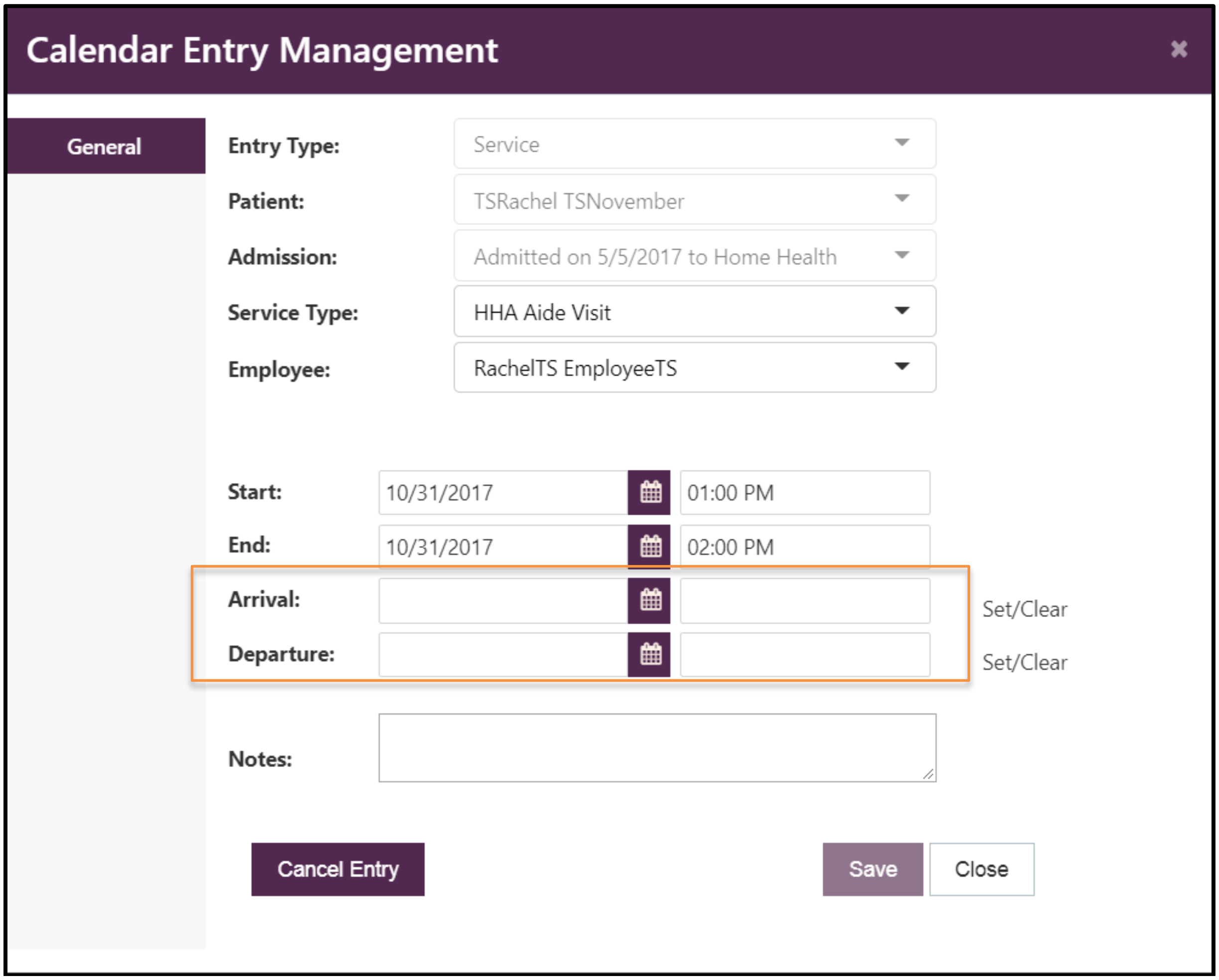
Open an existing entry by clicking on it.

The Entry Management window displays. Edit as desired and select Save. If you wish to discard changes or close the window, select the Close button in the lower right or the X in the upper right.



Entries with a Telephony Discipline

Entries for a Discipline that is defined as a **Telephony Discipline** in the Discipline setup in Crescendo Clinical will display Arrival and Departure dates and times.

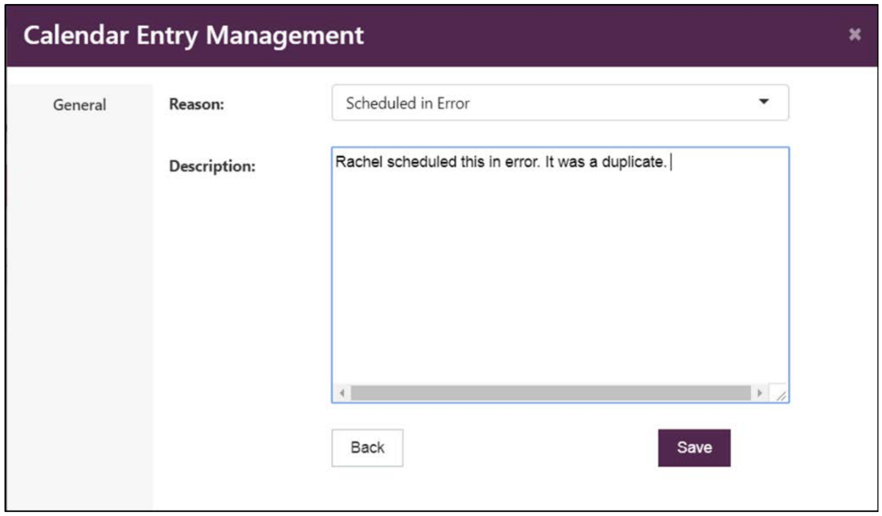


Clicking **Set** will auto-fill the scheduled start and end times into the arrival and departure time fields. The date and time pickers can be used to select a time if it differs from the scheduled time, or the user can manually type a time. Times entered must be in XX:XX XM format. Once an arrival time has been saved on an entry, it is considered started and only the departure time can be modified.

Clear will remove any arrival and departure times already entered. An entry cannot be saved with a departure time but no arrival time.

Cancellation of an Entry

To cancel an entry from the Entry Management window, select the Cancel Entry button on the bottom left.



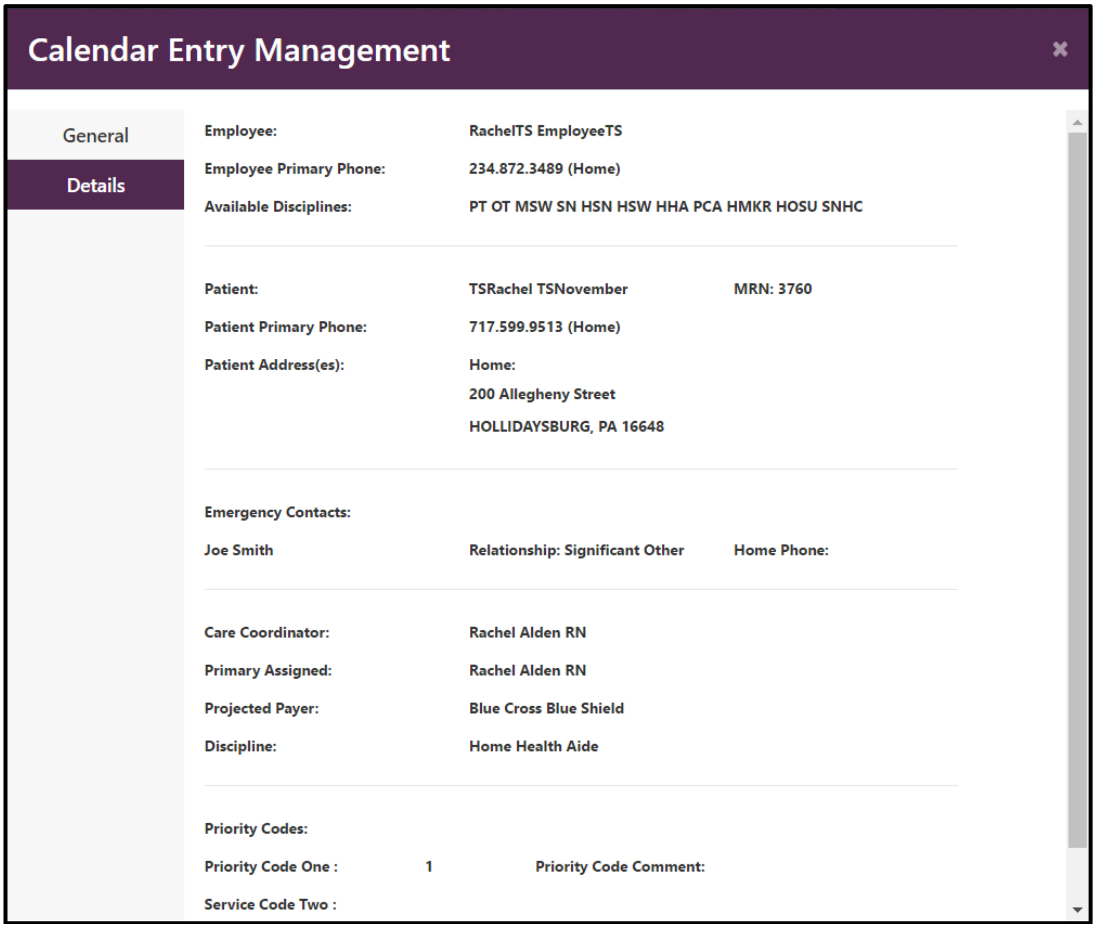
A cancel reason is required. Select Save to cancel the entry. Select Back to cancel the action (not cancel the entry) or select X to close the window.

Details Tab

The Details Tab of the Entry Management window will display detailed information for service entries. Information on the Details Tab includes:

- Employee Name
- Employee Primary Phone Number & Phone Type
- Disciplines that the Employee can Perform
- Patient Name
- Patient MRN
- Patient Primary Phone Number & Number Type
- Patient Address & Address Type
- Patient Emergency Contacts, Relationship to Patient & Contact Home Phone
- Care Coordinator Assigned to the Admission
- Primary Assigned to the Discipline for that Admission
- Projected Payer (if determined)
- Discipline of the Visit
- Priority Codes Assigned on the Patient’s Admission

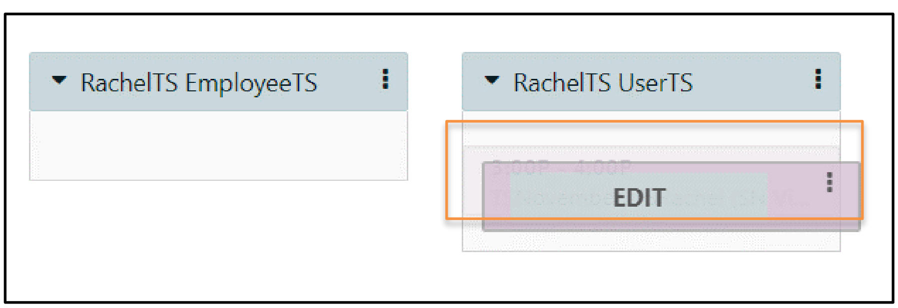
Only phone numbers flagged as primary will display for patients and employees.



Please note that the Details Tab does not update until the entry is saved. Changes must be saved in order to see the updated information in the Details Tab.

Drag & Drop Edits

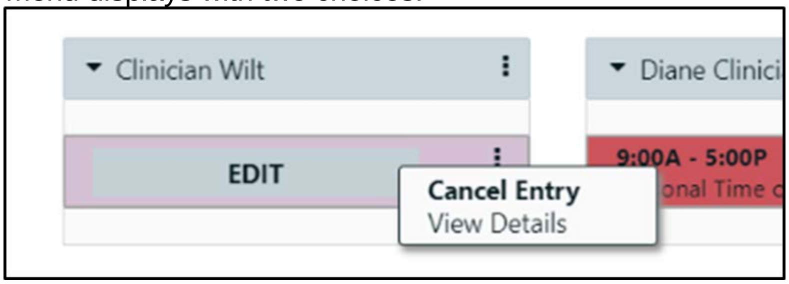
Entries may be dragged and dropped between employees on a team, unassigned lists, and dates if the dates of the unassigned lists and the team differ. To move entries, click on the entry, hold down and drag it to the list where you want to drop it. When the entry is in the right position to be dropped in the list, a faint copy of the entry will show in the list. Release to drop the entry.



Quick Entry Options

To view the Quick Entry Options, hover over an entry and click on the menu icon.

A Quick Entry Option menu displays with two choices:

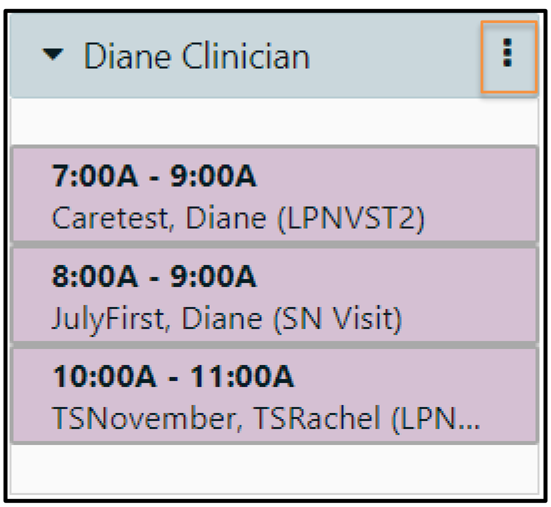


To cancel the entry, select the Cancel Entry option. The Entry Management window will display with fields to enter the required Cancel Reason and a Cancel Description. Select to Save and cancel the entry.

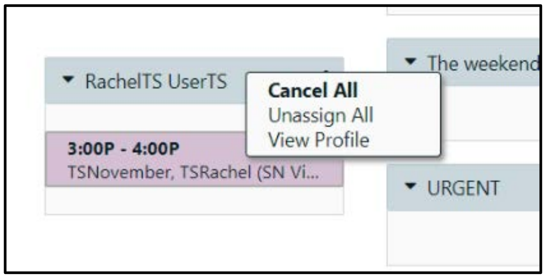
To view the entry details, select the View Details option. The Entry Management window will display with the Details Tab open.

Bulk Edit of Entries

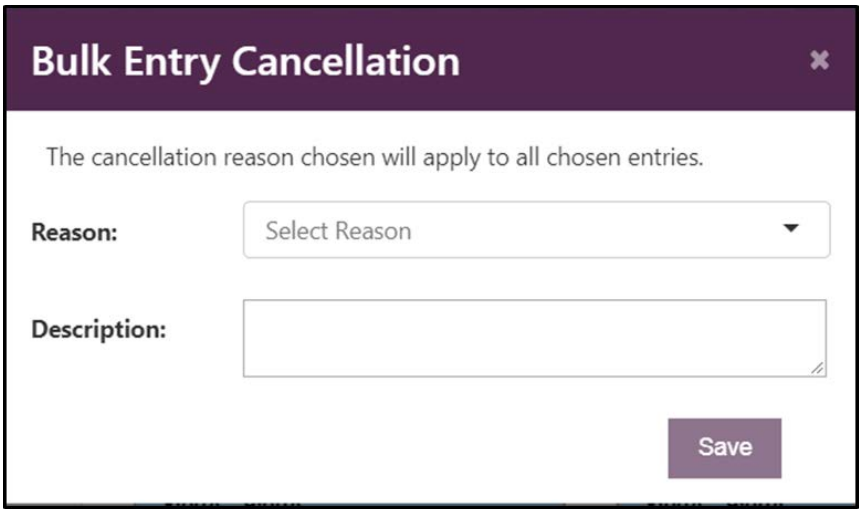
Users can bulk edit entries in an employee's list for the date displayed. Click on the menu icon to the right of the employee's name above the employee's list.



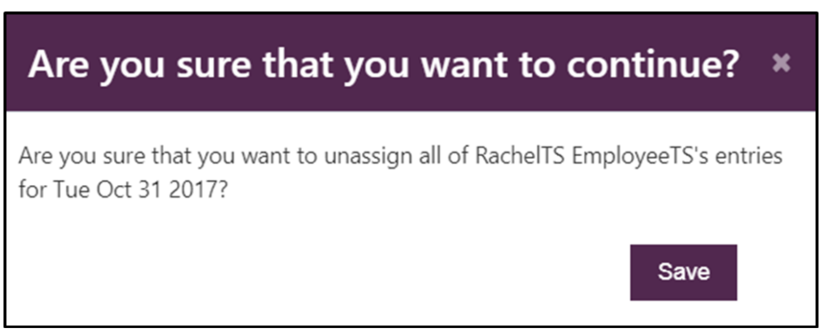
The Bulk Edit Options display.



If the user selects to Cancel All, a Bulk Entry Cancellation window will display. A cancel reason is required to save. The cancellation reason and description entered will be applied to all entries cancelled by this action.



If the user selects to Unassign All, a window will display asking the user to confirm the action. To continue, click Save. To cancel, click the X in the upper right.

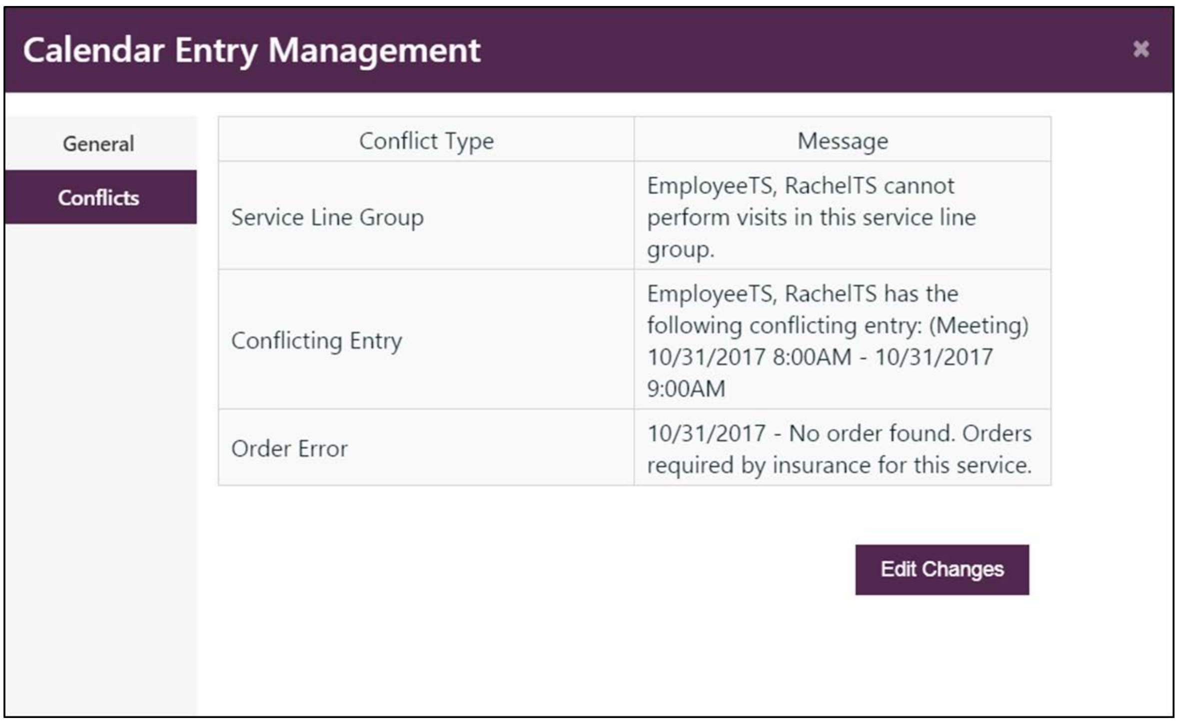


If the user selects to View Profile, the user will be redirected to the employee's profile.

Conflict Checks

When an entry is created or edited, the system will check for conflicts and display any conflicts to the user. Users may or may not have permission to override the conflicts displayed based on the user's configured permissions in Staff & Service Management's User Profile under **Admin Tools | Manage Users**. If the user cannot override the change, the override button will not be available and the change will not be saved.

Conflicts will be checked when an entry is saved and displayed in a Conflicts tab on the Entry Management window.



Conflict Type	Message
Service Line Group	EmployeeTS, RachelTS cannot perform visits in this service line group.
Conflicting Entry	EmployeeTS, RachelTS has the following conflicting entry: (Meeting) 10/31/2017 8:00AM - 10/31/2017 9:00AM
Order Error	10/31/2017 - No order found. Orders required by insurance for this service.

If the user cannot or does not want to override the displayed conflicts, the user can select Edit Changes to modify the entry and save.

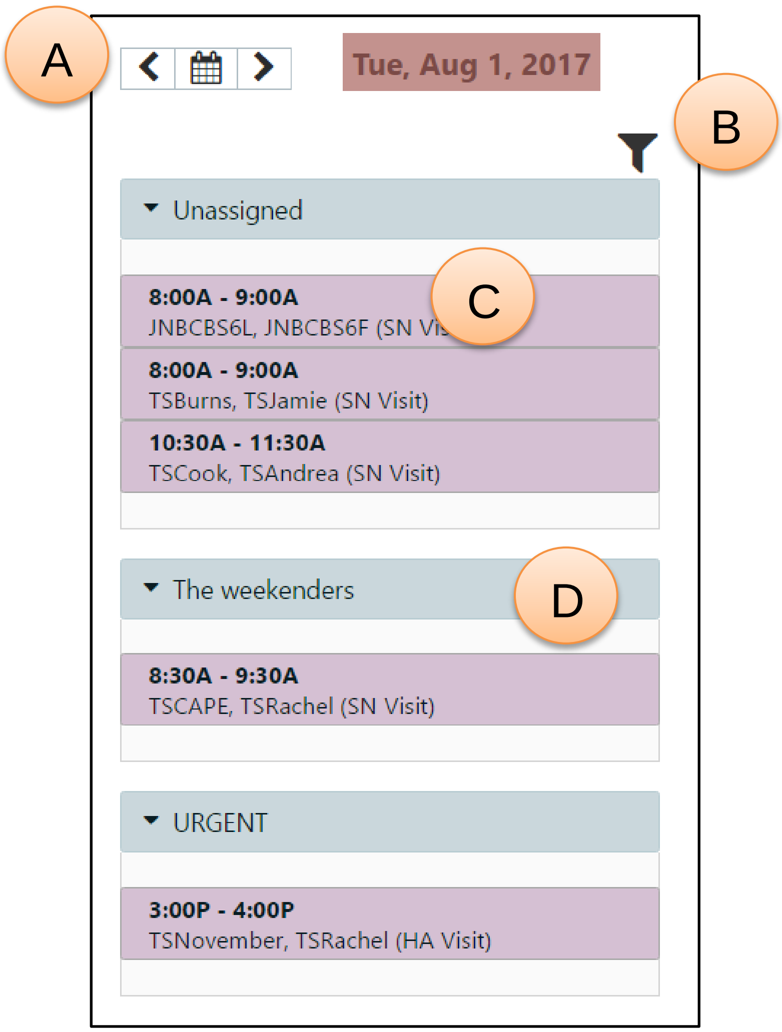
The following conflict types could be displayed in Team Scheduling:

- Employee Block
  - Block configured in SSM in the **Patient Profile | General | Employee Block** panel or in the **Employee Profile | General | Patient Blocks** panel.
  - Permission to override configured under **Admin Tools | Manage Users | Select User Profile | Admin Privileges | Employee Block Conflict.**
- Availability
  - Availability configured in SSM in the **Employee Profile | General | Availability** panel.
    - If no availability has been configured on the employee's profile, no conflict message will display.
    - Please ensure that effective dates are properly set on the availability.

- Permission to override configured under **Admin Tools | Manage Users | Select User Profile | Admin Privileges | Availability Conflict.**
- Calendar Block
  - Permission to override configured under **Admin Tools | Manage Users | Select User Profile | Admin Privileges | Calendar Block Conflict**.
- Conflicting Entry
  - Permission to override configured under **Admin Tools | Manage Users | Select User Profile | Admin Privileges | Conflicting Appointment**.
- Max Hours
  - Max hours configured in SSM in the **Employee Profile | Payroll Options** panel.
    - If max hours have not been configured on the employee's profile, no conflict message will display.
    - Max hours will be calculated from the start of week configured for the account to the end of that week (midnight to midnight).
    - The conflict displays when the entry scheduled meets or exceeds the max hours configured.
    - Max hours calculations do not include cancelled entries and entries marked as order entry, OASIS or HIS.
  - Permission to override configured under **Admin Tools | Manage Users | Select User Profile | Admin Privileges | Overtime Conflict**.
- Required Attribute
  - Attributes (Languages, Religions & Skills) are configured in Crescendo Clinical on the **User Profile** and the **Patient Profile**. On the User Profile, attributes are located under Setup. On the Patient profile, attributes are located on the first page of the profile.
    - Required attributes are configured in SSM in the **Patient Profile | Specifications | Patient Requirements List panel.** Mark required attributes as required.
  - Permission to override configured under **Admin Tools | Manage Users | Select User Profile | Admin Privileges | Required Requirements Conflict.**
- Authorization Coverage
  - Permission to override configured under **Admin Tools | Manage Users | Select User Profile | Admin Privileges | Authorization Conflict.**
- Order Coverage
  - Permission to override configured under **Admin Tools | Manage Users | Select User Profile | Admin Privileges | Order Conflict**.
- Invalid Service Line Group
  - No permission to override.
  - Ensure that employee is configured with "Can Visit" permission in the service line group for that patient's admission.
- Invalid Service Type
  - No permission to override.
  - Ensure that employee is configured with the discipline related to the service type chosen for the entry.

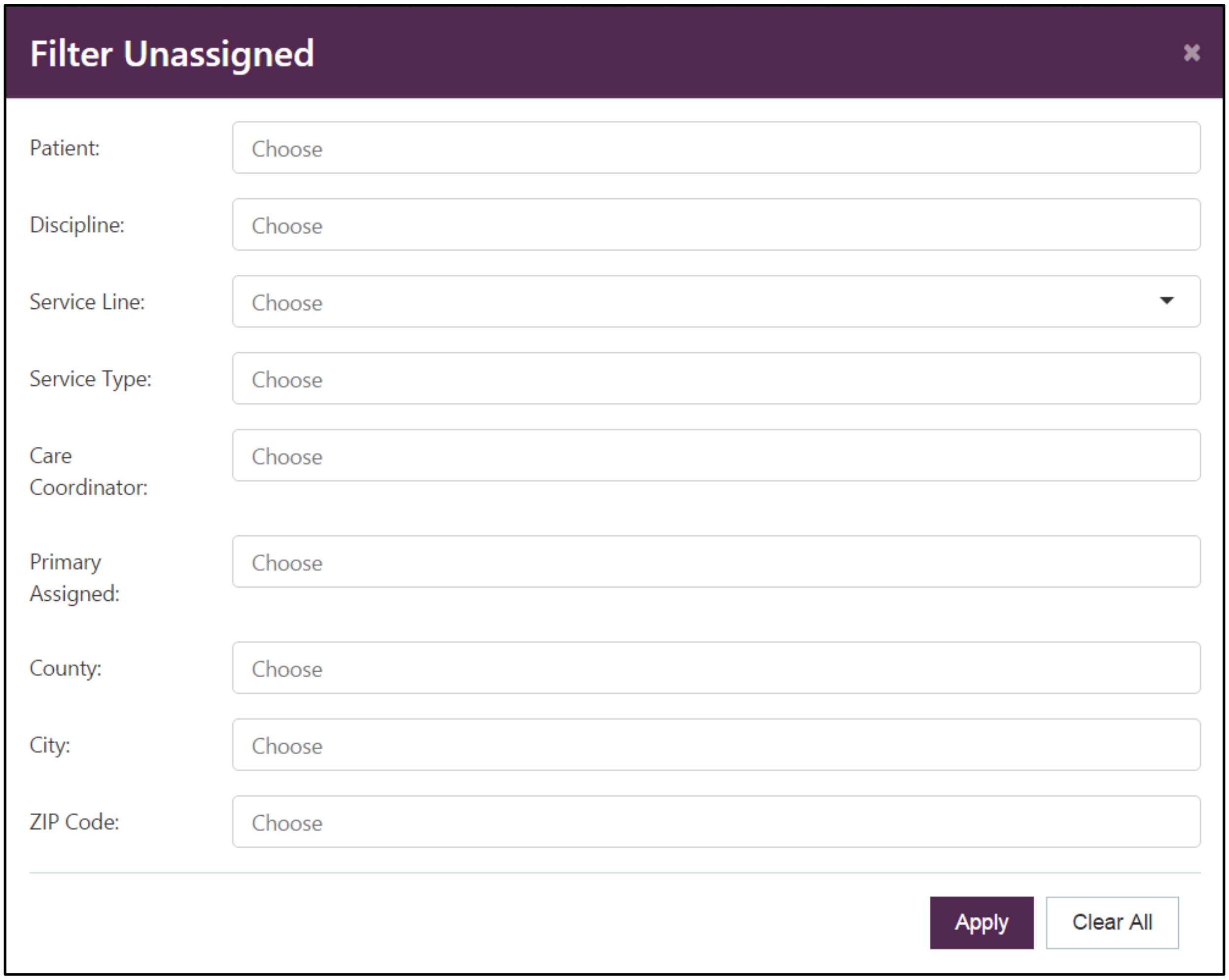
Creating & Managing Unassigned Lists

Team Scheduling displays Unassigned entries on the right side of the screen with an independent date picker **(A)** to allow the user to choose a date that differs from the team schedule date. The unassigned entry list **(C)** displays all unassigned entries for the account unless the user applies filters **(B).** In addition to the standard unassigned entry list, users can configure unassigned lists **(D)** to help categorize and prioritize unassigned entries to fill.



Unassigned List Filters

By clicking the filter icon above the unassigned lists, the user can filter entries in all of the unassigned lists. The following window displays:



All filters except the Service Line filter allow multiple selections. Click in the box and scroll or type to find the needed option and click to select and add it to the search box. Each selection within a filtered type adds to the search as an “OR” filter, meaning that you would filter for Patient A or Patient B or Patient C. Each individual filtered type adds to the filter as an “AND” filter, meaning that you would filter for entries with Discipline A and Service Type A and Care Coordinator A.

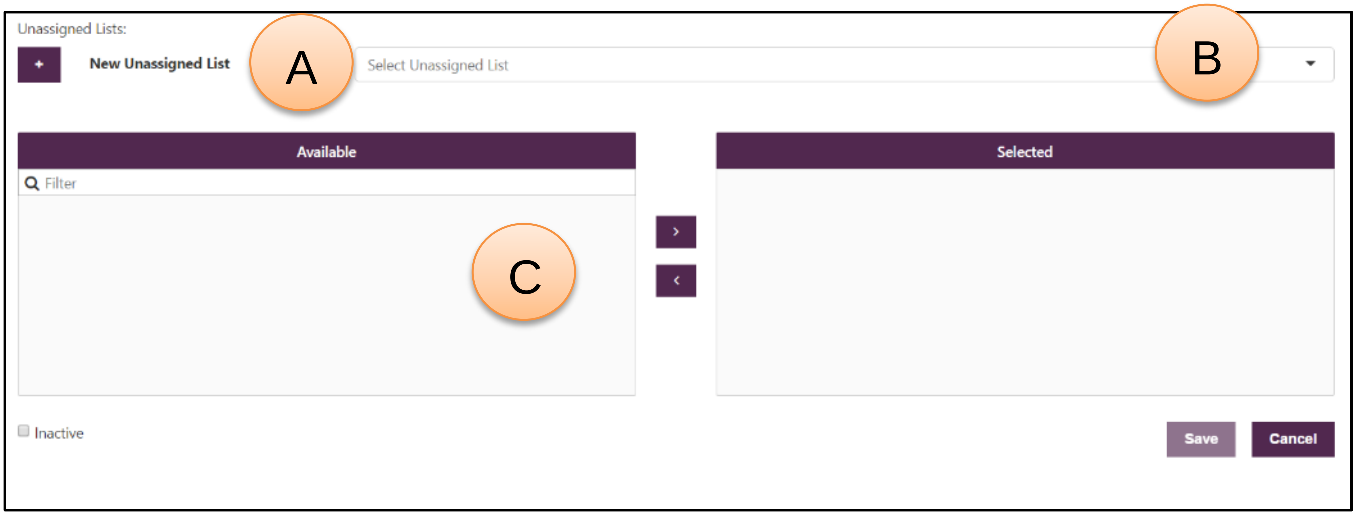
Each filter’s search is independent of each other. For example, selecting a patient does not filter the discipline options to display only disciplines applicable to that patient.

County, City & ZIP Code filters apply to the patient’s current address.

To apply filters, choose the desired filter options and select Apply. To clear filters, select **Clear All** and then select **Apply**.

Creating & Editing Unassigned Lists

Users can create and modify unassigned lists under **Setup | Unassigned Lists** in Team Scheduling.

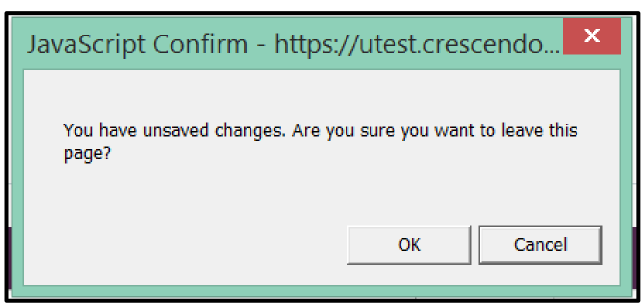


A) Allows the user to add a new unassigned list.
B) Allows the user to select an existing unassigned list to edit.
C) Lists available teams to add to the unassigned list.

To add a new unassigned list, click the  icon next to the words "New Unassigned List." After clicking the plus icon, the Select Unassigned List box changes to say "Enter Unassigned List." Enter the Unassigned List name.

Active, unselected teams will display in the Available list. Drag and drop or select and use the arrow buttons to choose which teams will use the unassigned list.

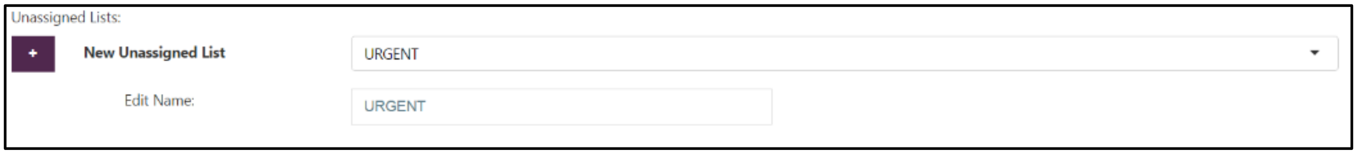
If the user navigates away from the page without saving, an error message will appear. Clicking OK will discard changes and continue the navigation.



Editing an Existing Unassigned List

To view or edit an existing unassigned list, click in the unassigned list drop-down at the top of the page. A drop-down list of existing names will appear. The user may also type in the box to search by name. Click on an unassigned list to select it.

When selected, the unassigned list details will display. Teams using the unassigned list will display in the Selected box. A new option will appear under the unassigned list name to allow edits of the name.



The save button will be disabled until changes have been made. Changes will be discarded by clicking Cancel.

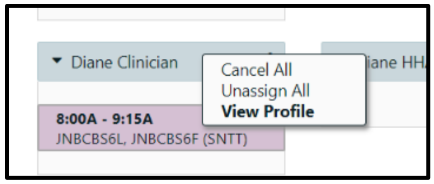
An unassigned list may be inactivated by selecting the Inactive checkbox at the bottom of the screen and saving the change. Inactive unassigned lists will display in the drop-down list with a red asterisk indicating that the list is inactive.

Users may wish to re-activate an unassigned list. To reactivate, deselect the inactive checkbox at the bottom of the screen and select Save.

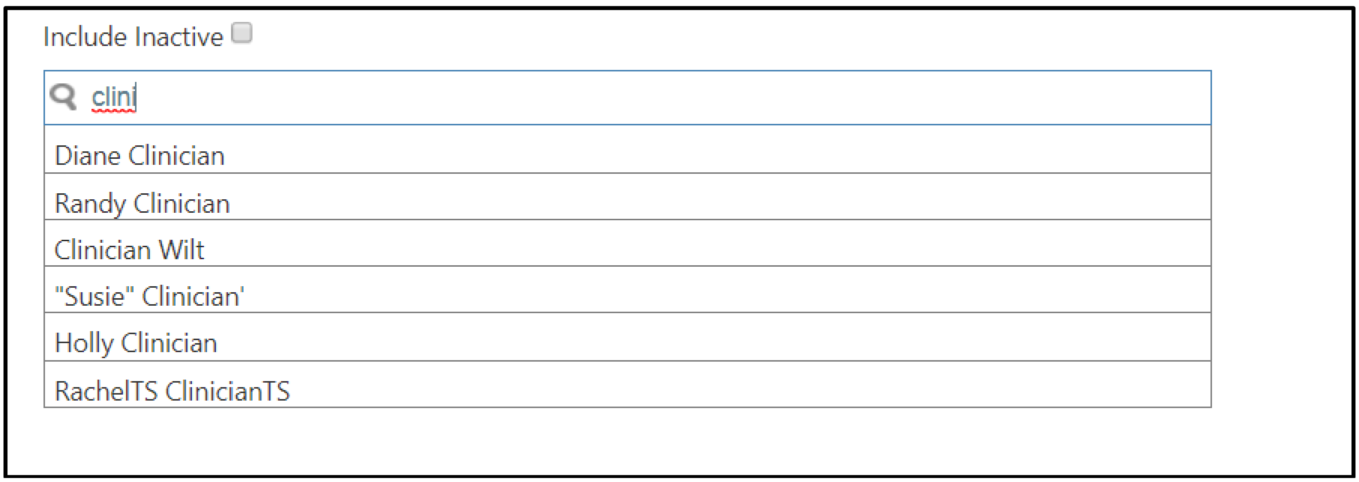
Viewing User Profiles

By navigating to **Setup | User Profile** or by clicking the menu option on an employee list in the Team Scheduling view, users can view data specific to other users within the Team Scheduling application.

From the Team Scheduling view, select **View Profile** to open that user's profile.

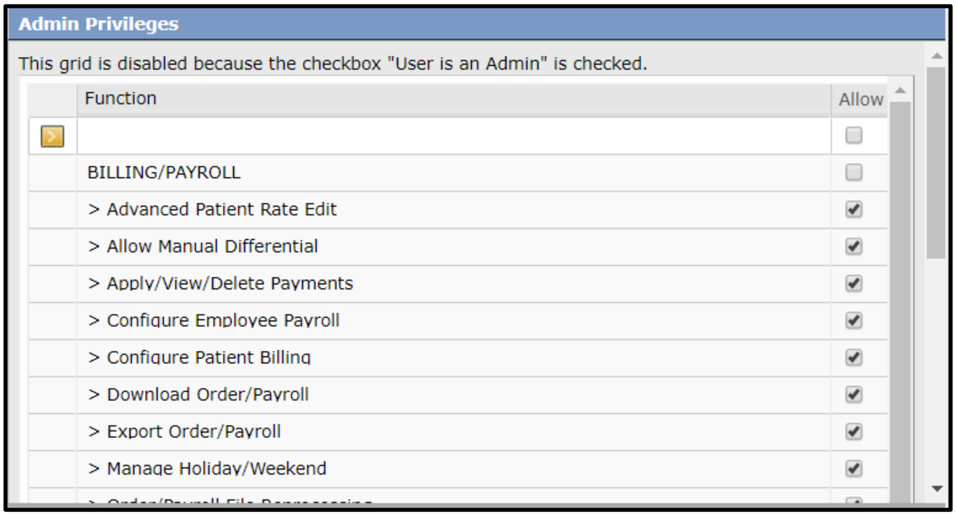


On the **Setup | User Profile** page, users can choose to include inactive users in search results and type in the search box. Search results begin to display after typing a minimum of three characters. Click to select a profile to view.



Data displayed in the profile must be edited in Crescendo Clinical's User Profile or in Staff & Service Management's User and Employee Profiles. The User Profile in Team Scheduling displays read-only data.

All users with Team Scheduling access can view the General Tab of the User Profile. Additional levels of access can be assigned through SSM's **User Profile | Admin Privileges** panel.



Permissions controlling Team Scheduling User Profile Access:

- View Users
  - Without this permission, only the General Tab will be visible.
- View SSN
  - Without this permission, the SSN will not be visible.
- View Pay Rates
  - Without this permission, the user cannot view the **Payrol | General** or **Payroll | Service Type Hourly Pay Rates** sections.

General

The General Tab of the User Profile displays:

- Friendly Name
- External ID
- Birth Date
- Age
- Gender
- Social Security Number
- Profile Create Date
- Hire Date
- First Service Date
- Last Service Date (Most Recent Service Date)
- Emergency Contacts & Contact Information
- Referral Source
- Employee Status

Attributes

The Attributes Tab of the User Profile displays:

- Alternate IDs
- Certifications

- Client Blocks
- Inservice Training Hours
- Languages
- Race & Ethnicity
- Religions
- Reminders
- Service Area
- Skills
- Telephony

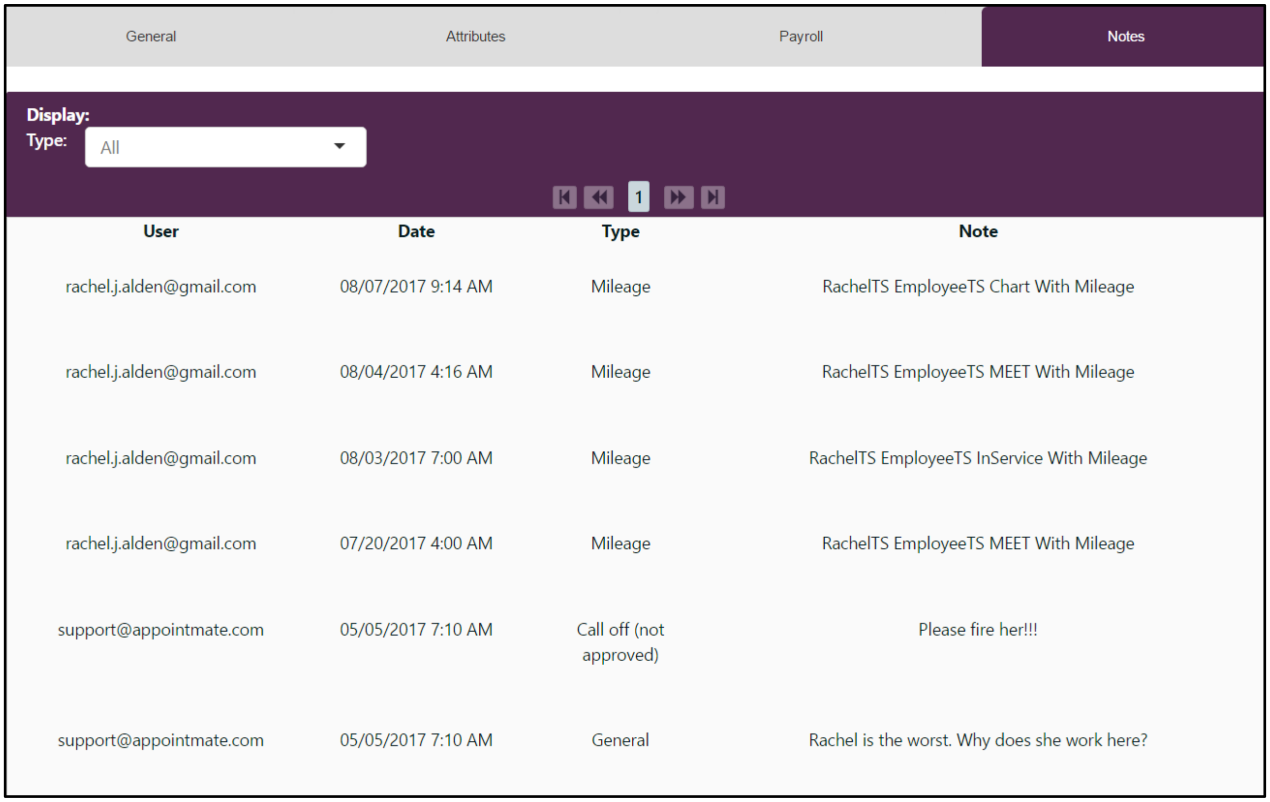
Payroll

The Payroll Tab of the User Profile displays:

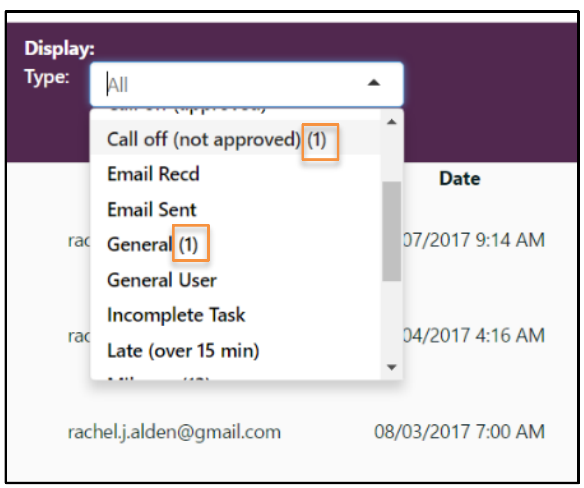
- General
    - Employment Type
    - Method of Pay
    - Default Hourly Pay Rate
    - Pay Frequency
    - Max Hours
- Calendar Blocks
- Productivity
- Availability
- Service Type Hourly Pay Rates

Notes

The Notes Tab of the User Profile displays comments entered in Staff & Service Management.



The notes can be filtered by Type. In the Type drop-down, a count of the number of notes of that type for the employee is listed next to the Type name.



Up to 20 notes will display on one page. Use the arrows to change pages.

