# Table of Contents

Call Schedule ...................................................................................................................... 3
To update Call Schedule .................................................................................................. 3
  Step 1 - www.vanderbiltchildrens.com ....................................................................... 3
  Step 2 - For Professionals .......................................................................................... 3
  Step 3 - Call Schedule and Physician List ................................................................. 3
  Step 3 - Quick Links ................................................................................................... 4
  Step 4 - Call Schedule ................................................................................................. 4
  Step 5 - Log In ............................................................................................................. 5
  Step 6 - Call Schedule ................................................................................................. 6
  Step 7 - Desired Division ............................................................................................ 7
  Step 8 - Update ............................................................................................................ 8
  Step 9 - To add People ................................................................................................ 9
  Step 9 - To remove People ........................................................................................ 11
  Step 9 - To Manage Categories ................................................................................ 12
    Step 9 - To Manage Categories: Pencil ................................................................... 14
    Step 9 - To Manage Categories: Red X ................................................................... 15
    Step 9 - To Manage Categories: New Category ....................................................... 16
  Step 10 - To Update Call Schedule .......................................................................... 20
  Step 11 - To Remove a Date From Call Schedule: Save .......................................... 23
    Step 11 - To Remove a Date From Call Schedule: Confirm .................................... 24
  Step 12 - To View Current Call Schedule ................................................................. 25
  Step 13 - Close to View Your Practices Current Schedule ....................................... 26

To View/Print a Call Schedule Report .............................................................................. 28
  Step 1 - Reports ......................................................................................................... 28
  Step 2 - Desired Report .............................................................................................. 30
  Step 3 - Attending Calls ............................................................................................. 31
  Step 3 - Attending Calls: Calendar .......................................................................... 32
  Step 3 - Attending Calls: Result: .............................................................................. 33
  Step 3 - Attending Calls YTD .................................................................................. 34
  Step 3 - Attending Calls YTD-Chart ......................................................................... 35
  Step 3 - Attending Calls YTD-Pie Chart .................................................................. 36
  Step 3 - Attending Calls-Pie Chart ......................................................................... 37
  Step 3 - Attending Calls-Pie Chart: Calendar ............................................................ 38
  Step 3 - Attending Calls-Pie Chart: Result ............................................................... 39
  Step 3 - Fellow Calls YTD ...................................................................................... 40
  Step 3 - Fellow Calls YTD-Chart ............................................................................ 41
  Step 3 - Totals (By Name and Category) .................................................................. 42
  Step 3 - Totals (By Name and Category): Calendar .................................................. 43
  Step 3 - Totals (By Name and Category): Result ...................................................... 44
  Step 3 - Totals Last Month ....................................................................................... 45
  Step 3 - Totals Next Month ...................................................................................... 46
  Step 3 - Totals This Month ....................................................................................... 47
  Step 4 - Print Report: Select Format ......................................................................... 48
  Step 4 - Print Report: Select Name of Printer ............................................................ 49
To Navigate Call Schedule ........................................................................................................ 50
Step 1 - Previous or Next Month ....................................................................................... 50
To create/add a Note to Call Schedule................................................................................... 51
Step 1 - Notes..................................................................................................................... 51
Step 2 - New ....................................................................................................................... 52
Step 3 - Desired Content ................................................................................................. 53
Step 3 - Calendar ............................................................................................................... 54
Step 3 - Background Color .............................................................................................. 55
Step 4 - OK ......................................................................................................................... 56
Step 5 - New ....................................................................................................................... 57
Step 6 - Name of Note ...................................................................................................... 58
Step 7 - View Note Information ....................................................................................... 59
To Create/Add a Note to Someone’s Scheduled Day .............................................................. 60
Step 1 - Update .................................................................................................................. 60
Step 2 - Desired Name & Desired Category ...................................................................... 61
Step 3 - Desired Note ....................................................................................................... 62
Step 4 - Save ....................................................................................................................... 63
Step 5 - Confirm ................................................................................................................ 64
Step 6 - Close ...................................................................................................................... 65
Step 7 - Display of Note .................................................................................................... 66
The Following document will act as a step-by-step guide for Managers on UPDATING and ADDING in Synergy.

Call Schedule

To update Call Schedule:

Step 1 - www.vanderbiltchildrens.com:
Go to www.vanderbiltchildrens.com

Step 2 - For Professionals:
Click: “For Professionals”

Step 3 - Call Schedule and Physician List:
Click: “Call Schedule and Physician List”
Note: Can click link from left navigation window or link in the middle of the page
Step 3 - Quick Links:
Click: “Quick Links”

Click here

Step 4 - Call Schedule:
Click: “Call Schedule”

Click here
Step 5 - Log In:
Log in with VUNet ID and Epassword
Step 6 - Call Schedule:
Click: “Call Schedule”
Step 7 - Desired Division:
Select: Desired division (i.e. “Test Division”) from drop-down box

Select from here
Step 8 - Update:
Click: “Update” to add or make changes to your practice call schedule

*Note: For direct access; go to next page for further instruction*

or

Click: “Categories” to create or edit your practice categories

*Note: For direct access; go to page 8 for further instruction*
Step 9 - To add People:

Click: Add
Step 9 - To add People:
Type: name of Person to add (i.e. “add” for Addi, Brian J)
Select: Desired name of Person
Step 9 - To remove People:
Select: Desired name of person (i.e. Addi, Brian J)
Click: Remove
Note: Pencil= user has permission to update the person
Step 9 - To Manage Categories:
  Click: Manage Categories
  Note: Pencil = permission to update the category
Step 9 - To Manage Categories:

Click: Pencil or Red X from desired name of category (i.e. CT)
Click: “New” button for creation of a new category
Click: “Close” button to close window

Note: Pencil = update the category
Red X = delete category
Step 9 - To Manage Categories: Pencil:
Change: Desired fields
Click: “OK” button to save changes
Click: “Close” button to close window
Note: Pencil = update the category
Step 9 - To Manage Categories: Red X:
- Click: “OK” button to remove category
- Click: “Cancel” button to close window
Note: Red X = delete category
Step 9 - To Manage Categories: New Category:
Click: “New” button to create new category
Click: “Close” button to close window
Step 9 - To Manage Categories: New Category:
Select: Desired Designates from drop-down box
Click: “OK” button to **save**
Click: “Cancel” button to **close window** with out saving
Step 9 - To Manage Categories: New Category:

Type: Content of fields
Click: “OK” button to save
Click: “Cancel” button to close window without saving

Note: Create as many categories as needed, there is no limit.

Creating a new Category
Enter the first Description as the short one that will show up on the call schedule calendar (remember, on line the long description will show up when someone holds the mouse arrow over the short description)
Enter the Long Description with as much information as needed (this will not cause a space issue when printing)
Enter Start Time and End Time for the category as military time (or use AM/PM) so the on line calendar will be correct at all times.
Enter Sort Order if you want to be sure your categories always show up in the same order (example: 1 will put that category at the top and 99 will put the category at the bottom of each day where it is used)
Enter the Pager number including area code for your practice if there is an On Call Pager. If no on call pager for your practice, enter phone number to call and be sure each physician’s pager number is correct under Contact Information.
Select Pager Type from the drop down menu IF the pager is capable of receiving text pages, if not, leave blank.
Select the General Category from the drop down menu (physicians will be Community Attending Call)
Background Color can be changed to your preferences (each category can be a different color)
Text Color can be changed to your preferences (each category can be a different color)
Allow multiple occurrences in a single day is used for categories such as vacation, out of office etc when there may be more than one
This is a public category needs to be checked for any categories that everyone should see. Leave blank for only you to view.
Active should always be checked unless you want a category NOT to show up in the drop down menu when updates are being made.
Step 9 - To Manage Categories:
Click: “Close” button to save changes/additions
Step 10 - To Update Call Schedule:
Click: “Update”
Step 10 - To Update Call Schedule:
Select: The doctor (or person) name  
Select: the Category you are updating for the person  

Note: Each category for a person must be selected separately  
Click: Desired day for the person and category selected  

Note: Prev and Next at the top of the calendar will take you to the previous month or next month if entering/changing multiple months at a time  

Note: Categories can be added/edited from this screen  
Select: Each person, category and days until everyone has been entered (or save after each one)  

Note: When you select another person or category the previous one will not be on display, but it will be saved when selecting Save  
Click: “Save” button and you will see your changes listed in chronological order
Step 10 - To Update Call Schedule:

After Clicking: “Save” button from previous screen you will see your changes listed in chronological order

Note: The status column details whether you are adding, removing, or updating an entry

Note: If you decide you do not want a specific change, click the red X in the far left column

Click: “Confirm” button and the updates are saved

Result: Selections will be green (when returned to previous screen)
Step 11 - To Remove a Date From Call Schedule: Save:
Select: The physician/person (in the People and Category list) to be changed
Select: Saved date to remove from Call Schedule
**Note:** Saved date(s) are green
Date(s) to be removed are red
Click: Save
**Note:** Confirm that the dates are correct
Step 11 - To Remove a Date From Call Schedule: Confirm:

After Clicking: “Save” button from previous screen you will see your changes listed in chronological order

Note: The status column details whether you are adding, removing, or updating an entry
Note: If you decide you do not want a specific change, click the red X in the far left column
Click: “Confirm” button and the updates are saved
Result: Selections will be white (when returned to previous screen)
Step 12 - To View Current Call Schedule:
Select: Name
Select: Category
Select: “Overlay Current Schedule” check box
Select: Filter “Filter on Selected Category” check box
or
“Filter on Selected Person” check box
Note: Can filter by either category or person
Result: Highlights schedule of person in green
Note: To reset uncheck “Overlay Current Schedule”
Note: For the Call Schedule, our colors denote the following:

Note: To save space, we’re showing an abbreviated name (three letters of last name, first letter of first name). Hovering over these initials will display the full name.
This change should help you ensure you have all necessary categories covered. To select a date when you’re looking at the overlay, you must click directly above the overlay area.
Step 13 - Close to View Your Practices Current Schedule:
Click: “Close” button to view your practices current call schedule
Step 13 - To View Current Call Schedule:
You now are viewing your current practice call schedule
To View/Print a Call Schedule Report:

Step 1 - Reports:
   Click: Reports
## Icon Legend

<table>
<thead>
<tr>
<th>Delete</th>
<th>Edit</th>
<th>Note</th>
<th>Text Page</th>
<th>PDF Export</th>
<th>Print</th>
<th>Search</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Delete Icon" /></td>
<td><img src="image" alt="Edit Icon" /></td>
<td><img src="image" alt="Note Icon" /></td>
<td><img src="image" alt="Text Page Icon" /></td>
<td><img src="image" alt="PDF Export Icon" /></td>
<td><img src="image" alt="Print Icon" /></td>
<td><img src="image" alt="Search Icon" /></td>
</tr>
</tbody>
</table>
Step 2 - Desired Report:
Select: Desired report from drop-down box

Note: Community practice information will be listed under the last four categories called Totals...
Step 3 - Attending Calls:
Type: Desired start and end date (format: **mm/dd/yyyy**)
or
Select: “Select” link to display a calendar in order to select the desired date(s)
Step 3 - Attending Calls: Calendar:
Select: Desired date
Step 3 - Attending Calls: Result:

Note: Result is shown below
Step 3 - Attending Calls YTD:
Select: “Attending Calls YTD” from drop-down box
Note: Result is shown below
Step 3 - Attending Calls YTD-Chart:
Select: “Attending Calls YTD-Chart” from drop-down box
Note: Result is shown below
Step 3 - Attending Calls YTD-Pie Chart:
Select: “Attending Calls YTD-Pie Chart” from drop-down box
Note: Result is shown below
Step 3 - Attending Calls-Pie Chart:
Select: “Attending Calls-Pie Chart” from drop-down box
Type: Desired start and end date (format: mm/dd/yyyy)

or
Select: “Select” link to display a calendar in order to select the desired date(s)
Step 3 - Attending Calls-Pie Chart: Calendar:  
Select: Desired date
Step 3 - Attending Calls-Pie Chart: Result:
Note: Result is shown below
Step 3 - Fellow Calls YTD:
Select: “Fellow Calls YTD” from drop-down box
Note: Result is shown below
Step 3 - Fellow Calls YTD-Chart:
Select: “Fellow Calls YTD-Chart” from drop-down box
Note: Result is shown below
Step 3 - Totals (By Name and Category):
Select: “Totals (By Name and Category)” from drop-down box
Type: Desired start and end date (format: \texttt{mm/dd/yyyy})
or
Select: “Select” link to display a calendar in order to select the desired date(s)
Step 3 - Totals (By Name and Category): Calendar:
Select: Desired date
Step 3 - Totals (By Name and Category): Result:
Note: Result is shown below
Step 3 - Totals Last Month:
Select: “Totals Last Month” from drop-down box
Note: Result is shown below
Step 3 - Totals Next Month:
Select: “Totals Next Month” from drop-down box
Note: Result is shown below
Step 3 - Totals This Month:
Select: “Totals This Month” from drop-down box
Note: Result is shown below
Step 4 - Print Report: Select Format:
  Select: Format from drop-down box
  Click: “Print Report” icon
Step 4 - Print Report: Select Name of Printer:
Select: Name of printer from drop-down box
Click: “OK” button to print report
Note: You will need to adjust your Explorer print settings/page setup if it does not print all on one page
Note: Short categories work best for printing (example POC instead of typing out Physician On Call)
To Navigate Call Schedule:

Step 1 - Previous or Next Month:
Click: Left or right arrow to move to previous or next month for viewing and/or editing
To create/add a Note to Call Schedule:

Step 1 - Notes:
Click: Notes
Step 2 - New:
- Click: “New” button
- Click: “Close” button to cancel note
Step 3 - Desired Content:
Type: in desired content
Note: Select: “Select” link to display a calendar in order to select the desired date(s)
Step 3 - Calendar:
Select: Desired date
Step 3 - Background Color:
Select: Desired color
Click: “OK” button to save color selection
Click: “Cancel” button cancel color selection
Step 4 - OK:
   Click: “OK” button to save note
   Click: “Cancel” button to cancel note
Step 5 - New:
Click: “New” button to save note
Click: “Close” button to cancel note

Click from here
Step 6 - Name of Note:
   Click: Name of note to view note information
   Note: Only Description of note will show on calendar
Step 7 - View Note Information:
Click: “Close” button to close note information
To Create/Add a Note to Someone’s Scheduled Day:

Step 1 - Update:
Click: Update
Step 2 - Desired Name & Desired Category:
Select: Desired name from People column
Select: Desired category from Categories column
Click: Note icon from the scheduled day

Note: The day must be green or purple
Step 3 - Desired Note:
Type: Desired note
Click: “OK” button to save note
Click: “Cancel” button to cancel note
Step 4 - Save:
  Click: “Save” button to save note
  Click: “Close” button to close window without saving note
Step 5 - Confirm:
Click: “Confirm” button to save note
Click: “Cancel” button to cancel note
Click: Red X to cancel the note
Step 6 - Close:
Click: “Close” button to close window and save note(s)
Step 7 – Display of Note:

Notice: The saved note for CT Addison, B for July 10th