ONCALL USER GUIDE

4.7.2023

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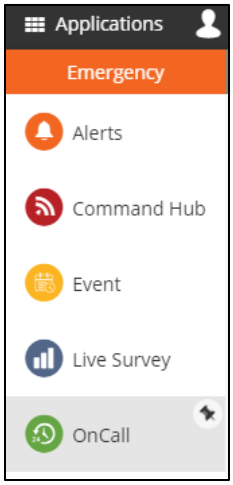
Overview

OnCall is SimplyCast's schedule management tool that can be used to automatically reach the currently scheduled on-call personnel at a facility, ensuring you have additional resources available at all times. If on-call staff members cannot be reached at any given time, a fallback number can be specified to provide users with assistance.

The OnCall tool allows you to create any number of contact scheduling groups and helps you to determine whether there are any gaps in your scheduling, providing cues whenever there is no one scheduled for a particular shift. In the case of an illness or other unforeseen absence, the tool also allows you to override the current OnCall schedule to skip or replace that particular group member.

OnCall Dashboard

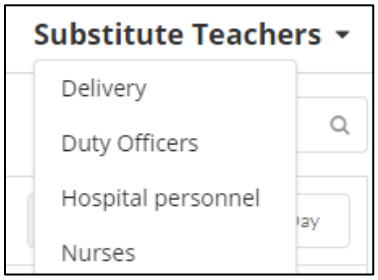


The OnCall Dashboard can be accessed through the Applications dropdown menu in the platform under OnCall. On the far left of the screen you will see a menu containing four different tabs that make up the channel. OnCall is the first of these tabs. The OnCall tab displays a calendar where you can see the scheduled on-call shifts of your various personnel, with the ability to view the details of each shift and the staff member scheduled as well as the ability to schedule new members and override certain members' shifts if necessary.

When entering the OnCall application for the first time, you will see an empty calendar indicating there are "No Groups Found." In order to view existing shifts, you must first choose an OnCall group to display.

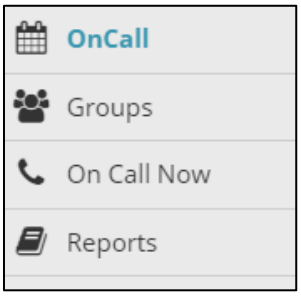
[**Note:** A group is essentially an ensemble of staff whose members are required to be on call at the same facility or for the same period of time.]

To choose an existing OnCall group to view the schedule for:



- Locate the Choose a Group dropdown menu that appears at the top right corner of your screen, underneath the black toolbar.
- Click on the dropdown which will bring up a list of all the groups that you have permission to view and/or edit the on-call schedules for.

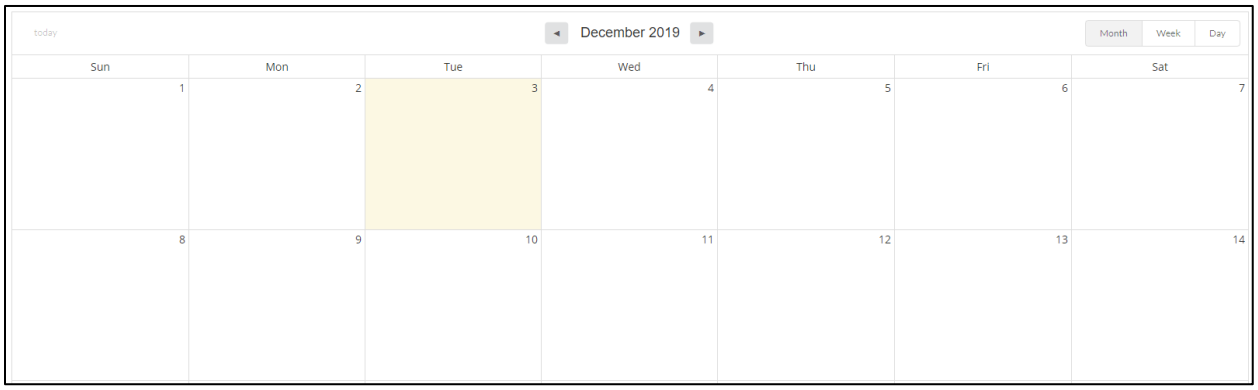
- Select the group that you wish to view the schedule for, and it will bring up a calendar with all of the scheduled shifts within that particular group.



Before you are able to view any group information on the calendar, you must first create a new OnCall group. In order to create a group, you must proceed to the Groups tab located in the menu at the far left of your screen. Refer to the *New Group Setup* section to learn how to set up a new OnCall group.

[**Note:** After choosing a group from the dropdown menu, the Choose a Group text will be changed to the name of the OnCall group you have selected.]

The OnCall Calendar will now appear on your dashboard. The OnCall Calendar provides you with a detailed view of each on-call shift scheduled for each day and the staff members who are scheduled for those shifts. The calendar allows you to view the details of each shift and the scheduled on-call staff member(s).



The OnCall calendar allows you to:

Switch Calendar Display Formats

The OnCall Calendar is able to display dates in three separate formats:

- **Month View:** With this option, the calendar will display date boxes for every day in a given month.
- **Week View**: With this option, the calendar will display a breakdown every day of a particular week, hour by hour.
- **Day View**: With this option, the calendar will display a breakdown of a single day, hour by hour.

To switch between calendar display formats:

- Navigate to the top right-hand side of your screen directly underneath the search bar and above the calendar where you will find three boxes displaying either Month, Week, or Day.
- Click your desired option and the calendar view will automatically adjust to that format.

View Different Timeframes

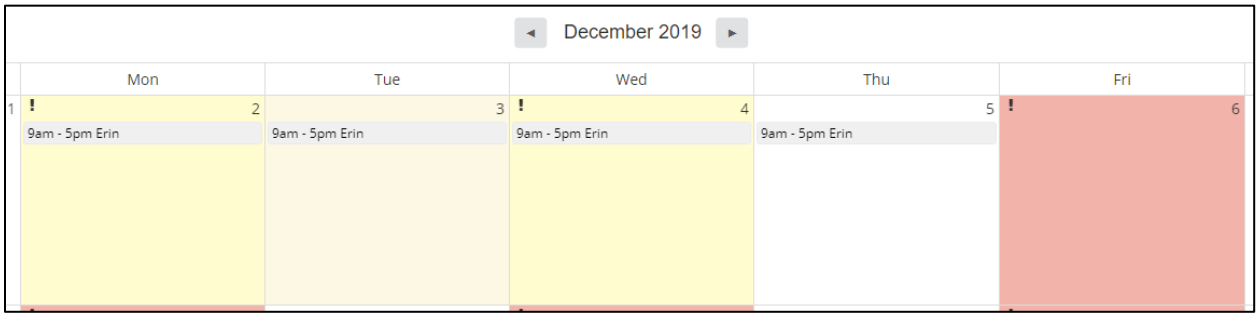
To view your on-call shifts beginning on different dates than the ones currently displayed:

- Locate the current date selection at the top of the calendar grid in the middle of the page which will display either the month and year, the week range, or the specific day, depending on the calendar format selected.
- On either side of the current date selection you will see two gray arrow buttons. Click on the left-hand arrow to switch to the previous date or date set.
- Click on the right-hand arrow to proceed to the next date or date set.
- This allows you to view past and future shifts' start and end dates.

Note the Colored Warnings

Each day block in the OnCall Calendar has been given a specific background color depending on the staffing level for that day. If there is a sufficient number of on-call shifts scheduled for the day, according to the minimum and ideal staffing thresholds, the day block will be its normal white color.

However, if there is a shortage of on-call staff on a particular day, the color of that day block will appear either yellow or red with a small exclamation point (!) in the upper left corner of the block.



- **Yellow:** If a calendar day block's background appears yellow, this means that while the minimum on-call staffing threshold has been met, the ideal number of scheduled on-call personnel has not been met for that shift.

- **Red:** If a calendar day block's background appears red, this means that there is neither the minimum or ideal number of on-call staff scheduled for this date and that it is strongly recommended that at least the minimum staffing threshold be met.

[**Note:** The day block for the current day will be highlighted in a pale, yellow color, though will not have an exclamation point (!) in the upper left corner.]

Refer to the *Thresholds Tab* section for more information about creating thresholds.

Search the Shift Schedule

If you wish to view all shifts for a particular OnCall group member:

- Use the search bar located in the top right-hand corner of the calendar, above the calendar display format options.
- Type in the name of the member you wish to search for in the search bar.
- The results will begin to filter on the calendar automatically.

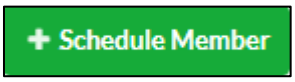
Schedule a Member to a Shift

Scheduling members to on-call shifts is an integral part of the OnCall application.

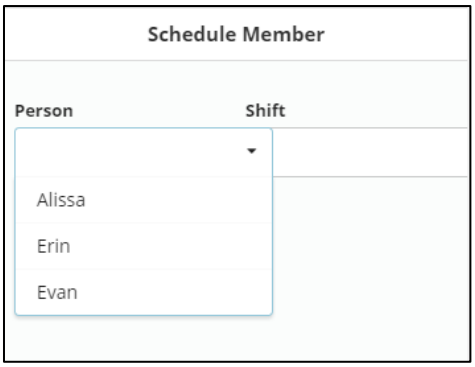
There are two ways to assign a member to a shift:

Schedule Member Button

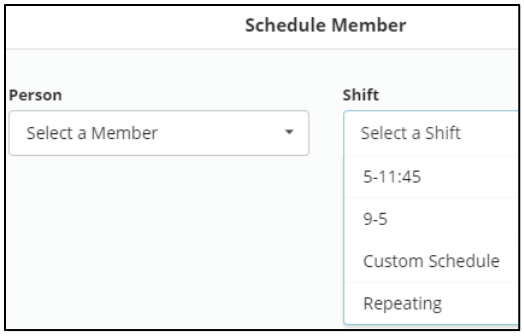
To schedule a member for a specific on-call shift:



- Navigate to the top left-hand side of the OnCall Calendar screen where you will see the green Schedule Member button.
- Click this button to open a sidebar on the right side of the screen.
- In the first field appearing in this sidebar, you are asked to choose which group member to assign to a shift. Make a selection from the available options in the Person dropdown menu. If there are no options available, you have not added any members to your OnCall group. Refer to the *Members Tab* section for more information on adding members to groups.



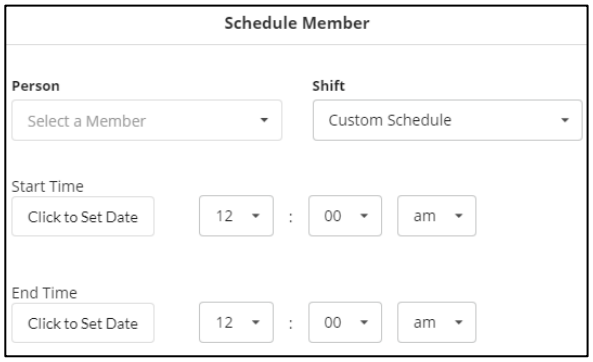
- Next, in the Shift field, you can configure the shift for the chosen group member. The options appearing in this dropdown menu are: Custom Schedule, Repeating, as well as any shifts you have created specifically for this group (refer to the *Shifts Tab* section for more information about per-group shifts).



Custom Schedule

This shift option refers to a shift that will only occur once in the calendar, for which you can determine a specific Start and End Time.

If you choose this option in the Shift dropdown menu:



- Two sets of fields will appear below in the Schedule Member sidebar to configure the Start and End Times of the shift.
- Click the Click to Set Date section on the left side of the Start/End Time field sets, and a calendar will appear where you can type in the date (mm/dd/yyyy) you would like the shift to begin or end, or simply click the desired day block in the calendar dropdown to select the start/end date.
- Alternatively, click Clear if you do not want to select a date to close the calendar dropdown.
- Choose your Start/End times in the fields to the right of the Click to Set Date fields.
- Select your hour, minute, and AM/PM settings via the corresponding dropdown menus.
- Click the blue Create button at the bottom of the sidebar to schedule the group member to the configured shift and close the sidebar or click Close to close the sidebar without scheduling the group member to the shift.

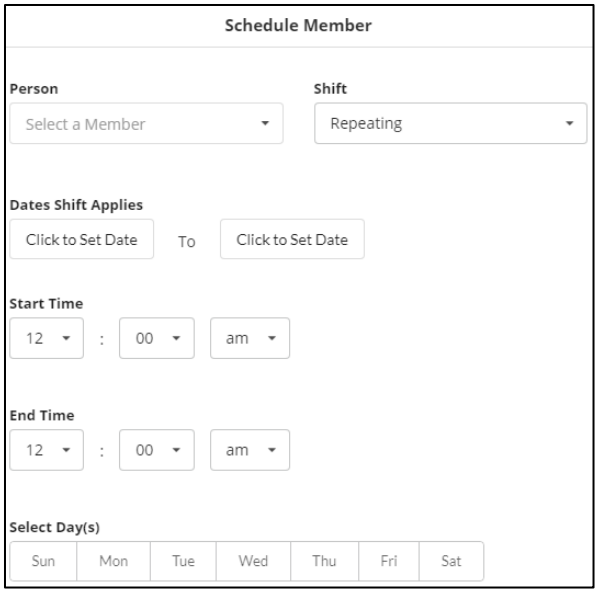
The shift you created will now appear in the OnCall calendar.

Repeating

This shift option refers to a shift that will be a regularly recurring shift which will appear on the schedule until the specified End date.

If you choose this option in the Shift dropdown menu:

- Determine how long the repeating shift schedule remains in effect by filling in the Date Shift Applies field that appears below the two dropdown menus.

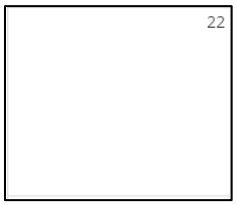


- Select the Click to Set Date fields to bring up a dropdown calendar where you can type in the start and end dates for the shift. Or, simply choose these dates by clicking the appropriate day blocks in the calendar dropdown.
- Alternatively, click Clear to close the calendar dropdown without selecting any dates.
- Choose your Start/End times in the field sets below the Dates Shift Applies section. Select your hour, minute, and AM/PM settings via the corresponding dropdown menus.
- Click on the days of the week you would like your shift to apply to in the Select Day(s) field.
- Once a day is selected the box will turn a darker gray. To deselect a particular day, click the box again and the color will revert to white.
- Click the blue Create button at the bottom of the sidebar to create the shift and close the sidebar or click Close to close the sidebar without creating the shift.

The shift you have created will now appear in the OnCall calendar.

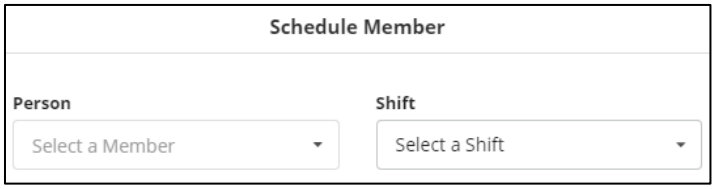
[**Note:** An example of a repeating shift a group member can be scheduled to could be a standard 9:00AM to 5:00PM shift occurring Monday to Friday, beginning October 1st and ending on the 31st of that month.]

Schedule by Calendar Day



To schedule group members for a shift, click on any day in the calendar grid, which will open the Schedule Member sidebar.

In the sidebar, you will see two fields where you can choose which OnCall group member you wish to schedule to a shift and the type of shift you would like to schedule them for.



In the first field appearing in this sidebar, make a selection from the available group member options in the Person dropdown menu. If there are no options available, you have not

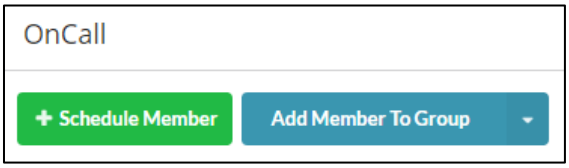
added any members to your OnCall group. Refer to the *Members Tab* section for more information on adding members to groups.

Next, in the Shift field, you can configure the shift for the chosen group member. The options appearing in this dropdown menu are: Custom Schedule, Repeating, as well as any shifts you have created specifically for this group (refer to the *Shifts Tab* section for more information about per-group shifts).

Refer to the two previous sections in this guide to learn more about the Custom Schedule and Repeating shift types.

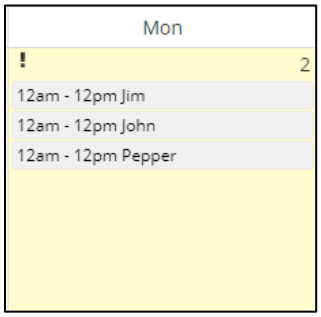
Add Member to Group

To add a new contact to a specific OnCall group:



- Navigate to the top left-hand side of your screen where you will see a blue Add Members to Group button located beside the green Schedule Member button.
- Click this button and you will be directed to the setup page for the specific group in the Groups tab on the far left of your screen. Refer to the *New Group Setup* section for more information about adding members to an OnCall group.

View Shift Details



To view the details of a shift appearing in any day block in the calendar, click the name of the on-call member and their scheduled shift time appearing in a calendar block. The Event Details sidebar will open from the right of your screen, in which you can see details regarding the scheduled group member's contact information and shift schedule.

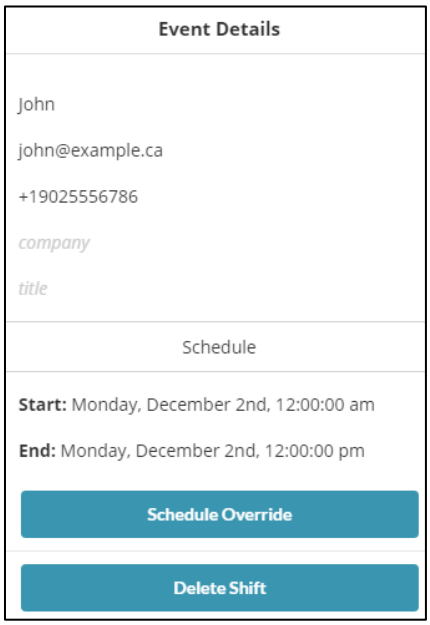
In this sidebar you can see:

OnCall Group Member Information

At the top of the Event Details sidebar, you are able to see the information pertaining to the member covering that particular on-call shift.

You can see:

- **Name:** The name of the scheduled OnCall group member
- **Email:** The email address associated with the scheduled OnCall group member (if available)
- **Phone Number:** The phone number associated with the scheduled OnCall group member (if available)
- **Company:** The company associated with the scheduled OnCall group member (if available)
- **Title:** The job title of the scheduled OnCall group member (if available)



[**Note:** The contact information will only appear in this section if it is available in the contact's CRM profile.]

Schedule

Below the group member information section, you will be able to view the details of the shift you selected.

In this section you can see:

- The start date and time of the scheduled OnCall group member's shift
- The end date and time of the scheduled OnCall group member's shift

Schedule Override

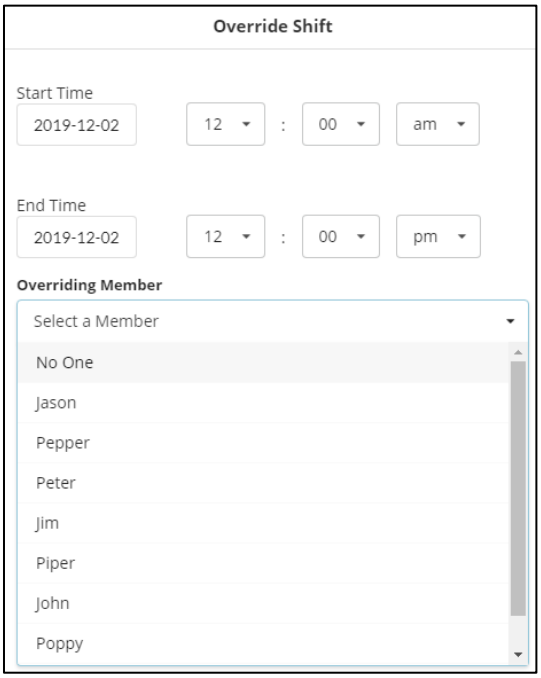
The blue Schedule Override button appears below the shift schedule information Event Details sidebar. This button allows an administrator to override the selected on-call shift either fully or partially by removing the scheduled OnCall group member and replacing them with someone else, or by removing the group member and leaving the shift uncovered.

To override a shift:

- Click the blue Schedule Override button and a new sidebar will appear from the right side of the screen.
- Select the start and end times for which you need a schedule override by clicking on the respective date fields in the sidebar and choosing the date from the dropdown calendar that appears.

- Choose your Start/End times in the field sets beside the Date fields. Select your hour, minute, and AM/PM settings via the corresponding dropdown menus.

[**Note:** By default, the entire length of the shift will be shown in the Start and End Times fields, but you can alter the times by clicking on either of the fields and selecting the date and times you need the override to cover using the calendar dropdown.]



- Choose another OnCall group member to cover the overridden shift from the Overriding Member dropdown menu that shows the list of available group members.
- There is also the option of selecting "No One" in the dropdown, meaning that if this option is selected, the overridden shift will go uncovered.
- Click the blue Complete Override button at the bottom of the Override Shift sidebar to implement the shift override or click Close to close the sidebar, canceling the override.

Delete Shift

Below the Schedule Override button, you will see the blue Delete Shift button, which will allow you to remove this particular group member's shift from this day in the OnCall calendar.

To do this:

- Click the blue Delete Shift button in the Event Details sidebar.
- The shift will automatically be deleted from the OnCall calendar.

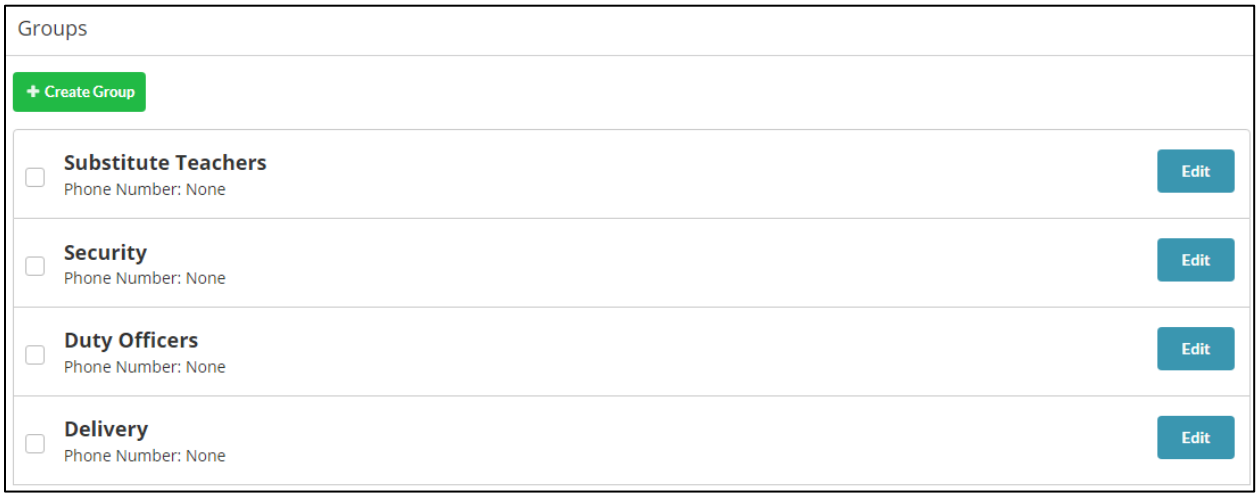
Groups

In the menu on the far left of your screen in the OnCall application, Groups is the second tab that appears. This tab allows you to create and manage your different OnCall groups.

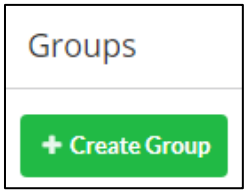
In the Groups tab, you can:

View the List of Groups

When you enter the Groups tab in the OnCall application, this is where you can view a list of all of your OnCall groups as well as any available group numbers that have been connected to them. If there are no groups listed, this means you have not yet created one.



Create a New Group



In order to create a new OnCall group, click on the green Create Group button that appears in the top left of the Groups tab in the OnCall application. To learn more about creating a new group, refer to the *New Group Setup* section.

Navigate Multiple Group Pages

To view a group that does not appear on the first page of the list:

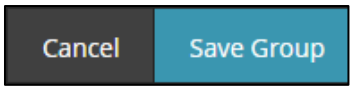
- Navigate down to the bottom of your screen where you will find the page numbers indicating the total number of groups you have created.
- Click either the page number you would like to visit, to proceed to the next page of groups or click the Next button which will take you to the next page of groups.
- If you know the page number you would like to go to, enter the page number in the provided field and select Go.
- Choose how many groups to display at a time by clicking on the "Showing..." link located to the right of the number of displayed groups.

Edit Existing Groups

Once you have created a group, it will appear in a list below the green Create Group button on the main Groups page.

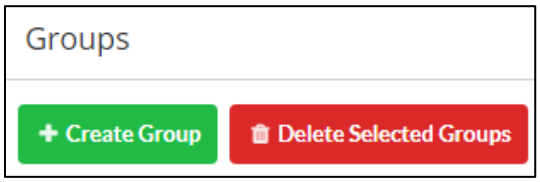
To edit an existing OnCall group:

- Click the blue Edit button located on the far right of the screen across from the corresponding group name.
- The Group Setup page will open where you are able to modify the group's settings. Refer to the *New Group Setup* section for more information about group settings.
- Click the blue Save Group button at the bottom of the page to save your edits or click Cancel to return to the main Groups page without making any changes.

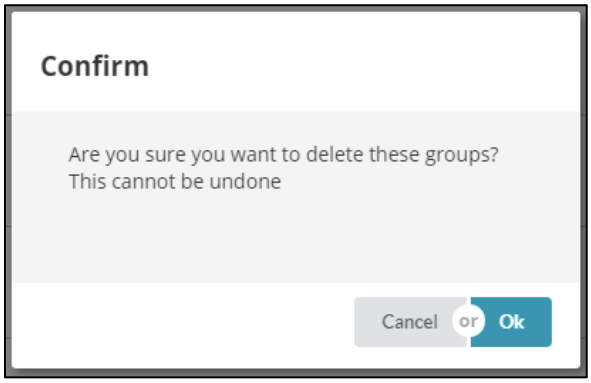


Delete Groups

To delete an existing group:



- Check off the small box that appears to the left of the group name in your list of groups.
- A red Delete Selected Groups button will appear next to the green Create Group button, which you can click to delete the group and all its information.
- A pop-up window will appear asking you to confirm the deletion of the group. Click the blue OK button to confirm the deletion or click Close to close the pop-up window without deleting the group.



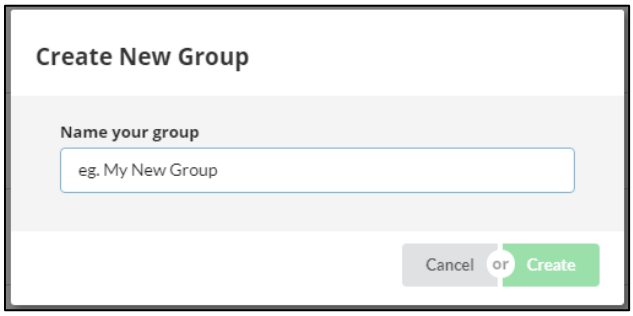
[**Note:** Delete multiple groups at once by checking off the boxes of all the groups you wish to delete and click the Delete button.]

New Group Setup

To create a new OnCall group:

- Click on the green Create Group button that appears at the top left of your screen.

- A pop-up window will appear asking you to provide a name for your new group.
- Once you have entered a name for the new group, click the green Create button to proceed to the group setup page or Cancel to return to the main Groups page without creating a new group.

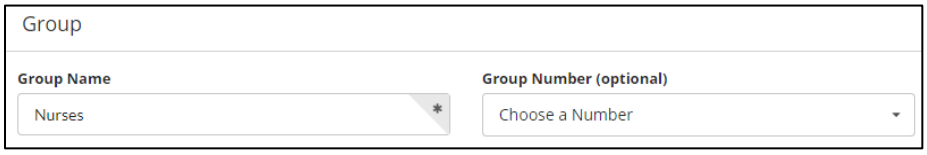


Group Information

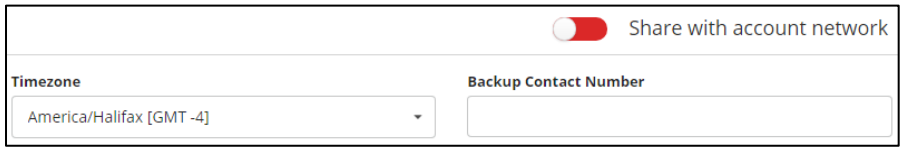
After naming your new group and clicking Create, you will be brought to the group setup page.

The first section at the top of this page asks for five pieces of information:

- **Group Name:** This field is located at the top left of the group setup page and allows you to modify the name you have created for your group. This field must be filled in order to create the new group.
- **Group Number (optional):** This field is located next to the Group Name field at the top of the group setup page. This field is where you can choose a phone number via which any scheduled OnCall group member can be reached when they are on duty. Choose the desired phone number from the dropdown menu. This is an optional field.



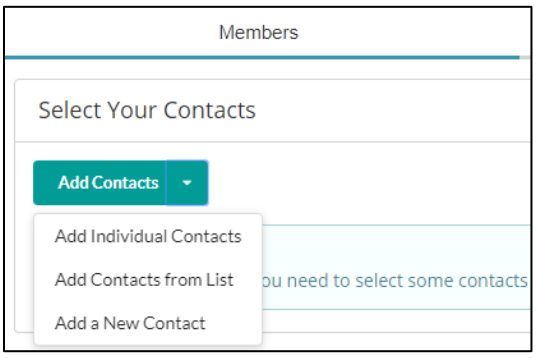
- **Time Zone:** This field is located next to the Group Number field on the top of the group setup page. This is where you can choose which time zone your group will be operating in.
- **Backup Contact Number:** This field is located on the top of the group setup page on the far right, next to the Time Zone field. This is where you can enter a backup phone number for the group, which can be used whenever none of the current OnCall group members are able to be reached via the primary group number. Enter the desired backup phone number into the textbox provided. This is an optional field.
- **Share with Account Network:** This toggle is located above the Backup Contact Number field on the far right of the group settings section. This is an option you can enable if you would like all the users in your account network to be able to view this OnCall group. If not enabled, the OnCall group will only be viewable within the current account. Refer to the *SimplyCast Account Networks User Guide* for more information.



Members Tab

Once you have filled out the Group Information fields at the top of the Group Setup page, there are four tabs located just below. The first of these tabs on the left side of your screen is the Members tab.

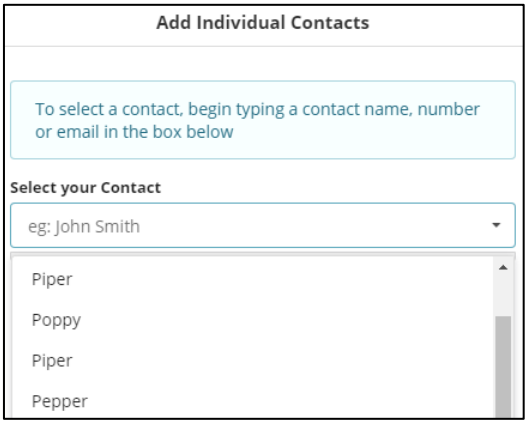
By clicking this tab, a section will appear where you can select the contacts you would like to be a part of your group.



You will see a blue Add Contacts button that, when clicked, will give you three options by which you can select your contacts to add to the OnCall group: Add Individual Contacts, Add Contacts From List, and Add New Contact.

Add Individual Contacts

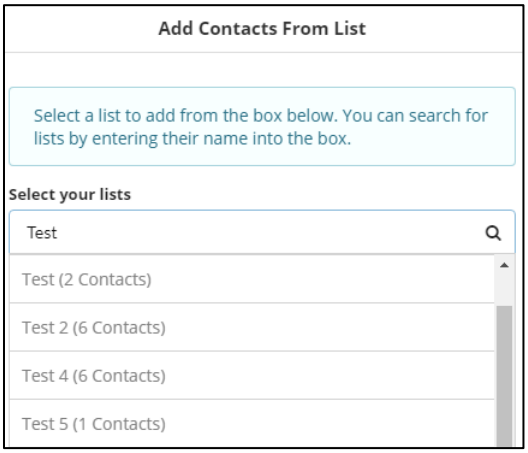
If you choose Add Individual Contacts, you can manually choose which contacts currently existing in the CRM you wish to add to the group.



Clicking this option in the Add Contacts dropdown will open a sidebar at the right of your screen where you are able to type in the name, phone number, or email of the CRM contact you would like to add to the group. As you begin typing in the search bar, search results will automatically be filtered. Choose the desired contact from the dropdown list of options and their name will appear below the field. Keep adding contacts this way until you have all the contacts you want.

Once you have finished, click the blue Add Contacts button at the bottom of the sidebar to add your contacts to the group. Or, click the Cancel button to close the sidebar without adding any contacts.

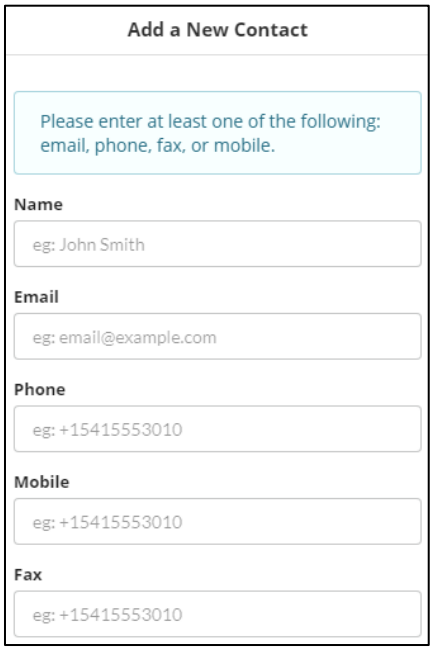
Add Contacts From List



To select your group members based on pre-defined lists found in your CRM, first choose Add Contacts from List from the blue Add Contacts button's dropdown menu which will open a sidebar allowing you to choose one or more lists of contacts from the dropdown field. Typing in the name of the list you are searching for will filter the lists automatically.

Continue adding lists this way without closing the sidebar and once you have finished, click the blue Add Lists button at the bottom of the sidebar to add the lists. Or click the Cancel button to close the sidebar without adding any lists.

Add New Contact



This option allows you to create a new contact who is not already in your CRM and add them to your group.

Once this option is selected, a sidebar will appear allowing you to enter the name, email, phone number, and/or mobile phone number of the contact in the corresponding fields.

[**Note:** The only requirement for creating a new contact is to enter a name and at least one piece of contact information.]

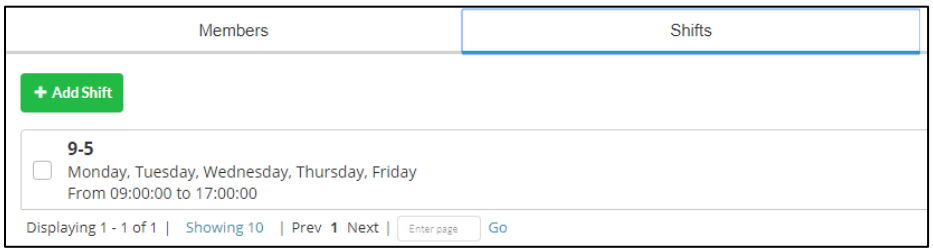
Click the green Create and Add Contact button at the bottom of the sidebar to close the window or click Cancel to return without adding the contact.

As well as being added to the current OnCall group, the new contact you added will also be added to your CRM where they will be available to be added to any future groups.

Shifts Tab

Once your contacts have been selected, you can then add pre-defined shifts to the OnCall calendar for them to be assigned to.

[**Note:** Though you are always able to create custom or repeating shifts on an individual basis to assign a group member to on the calendar, defining shifts in this section allows you to be more efficient in your scheduling by simply allowing you to choose one of these shifts when scheduling your staff instead of manually configuring a person's shift each time you wish to schedule them.]



To create a custom shift, proceed to the Shifts tab located the second tab to the left next to the Members tab.

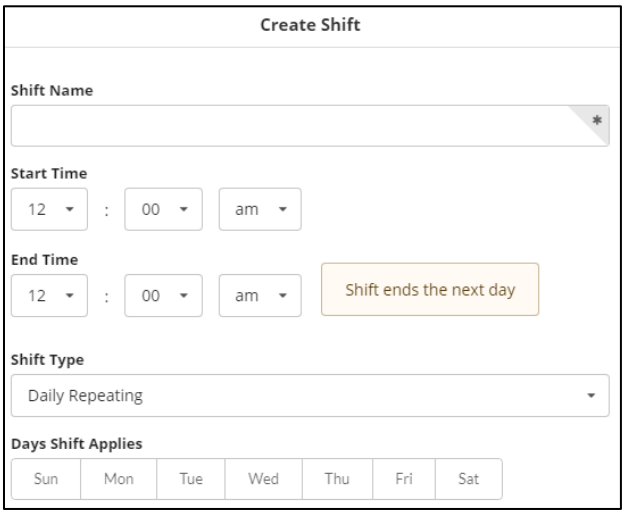
Once you click the tab, a section will appear where you can add and edit your various custom shifts.

In this tab you can:

Add a Shift

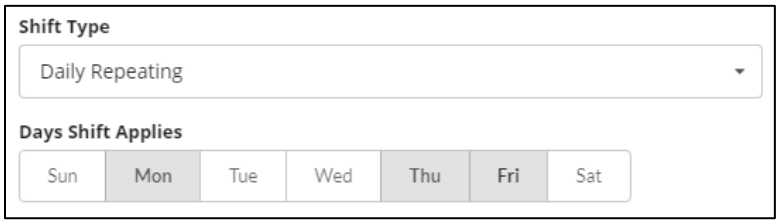
To add a new custom shift to the OnCall group:

- Navigate to the green Add Shift button located at the top of the Shifts section underneath the Members tab on the left side of the page.
- Click this button to open the Create Shift sidebar on the right-hand side of the page.
- Insert a name into the Shift Name field that appears at the top of the sidebar. This is a required action.
- Determine your Start and End times for this new shift by using the dropdown menus located below the Name Shift field to choose the hour, minutes, and AM/PM settings for the shift.

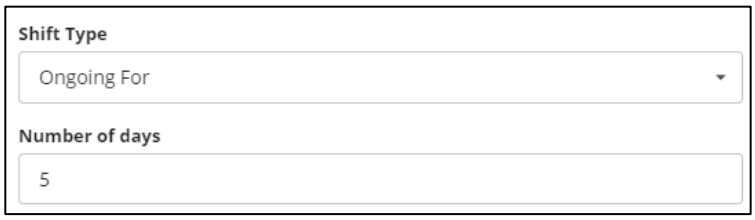


[**Note:** You are able to create 24-hour shifts by selecting the same time in both the Start Time and End Time fields. A note will appear saying the shift will end the next day.]

- Next, determine the type of shift you are creating by making a selection from the Shift Type dropdown menu. There are two options to choose from: Daily Repeating and Ongoing For.
  - Choose the Daily Repeating option to display the Days Shift Applies section you can use to determine which days of the week the shift pertains to. Click on the day(s) of the week you would like the shift to occur. Once a day is selected, the box will turn a darker gray to indicate that the day has been selected. To deselect a particular day, click the box again and the color will revert to the original white color.



  - Choose the Ongoing For option to display the Number of Days field where you can determine for how many days the created shift will be in effect for. Enter in your desired number of days into the field provided.



- Once you have configured the shift to your liking, click the blue Create button at the bottom of the sidebar to save your changes and add the new shift to the Shifts tab. Or, click Close to close the sidebar without creating a new shift.

Navigate Multiple Shift Pages

Your custom shifts will appear in a list below the green Add Shift button in the Shifts tab. If you have a lot of custom shifts, they may be displayed on multiple pages.

To navigate through multiple pages of shifts:

- Look to the bottom of your screen where you will find the page numbers indicating the total number of shifts you have created.
- Click either the page number you would like to visit to proceed to another page of shifts or click the Next button, which will take you to the next page of shifts.
- If you know the page number you would like to go to, enter the page number in the provided field and select Go.
- Choose how many shifts to display at a time by clicking on the "Showing..." link located to the right of the number of displayed shifts.

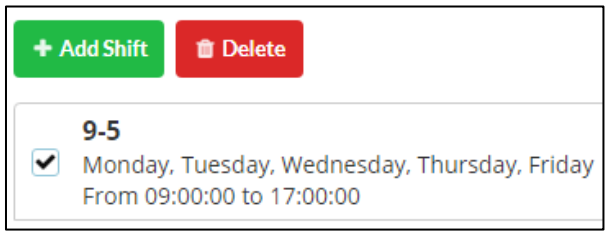
Edit Shifts

To edit an existing shift:

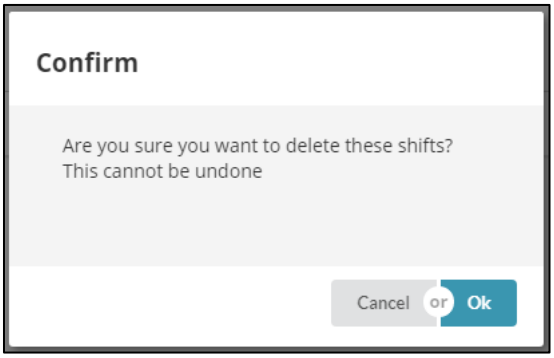
- Click the gray Edit button located at the far right of the screen across from the corresponding shift name.
- The Create Shift sidebar will open where you are able to modify the shift name, the start and end times, and the days of the week to which the shift applies.
- Click the blue Save button to save your changes or Close to close the sidebar.

Delete a Shift

To delete an existing shift:



- Check off the small box that appears to the left of the shift name in the list.
- A red Delete button will appear above the list next to the green Add Shift button that you can click to delete the shift and all its information.
- A pop-up window will appear asking you to confirm the shift deletion. Click the blue OK button to finish deleting the shift or click Cancel to close the pop-up window without deleting the shift.



[**Note:** Select multiple shifts at once by checking off the boxes of all the shifts you wish to delete and clicking the Delete button.]

Thresholds Tab

The third tab in the group setup process is the Thresholds tab. This is where you can determine the minimum and ideal staffing levels required for each shift. For example, say you had an on-

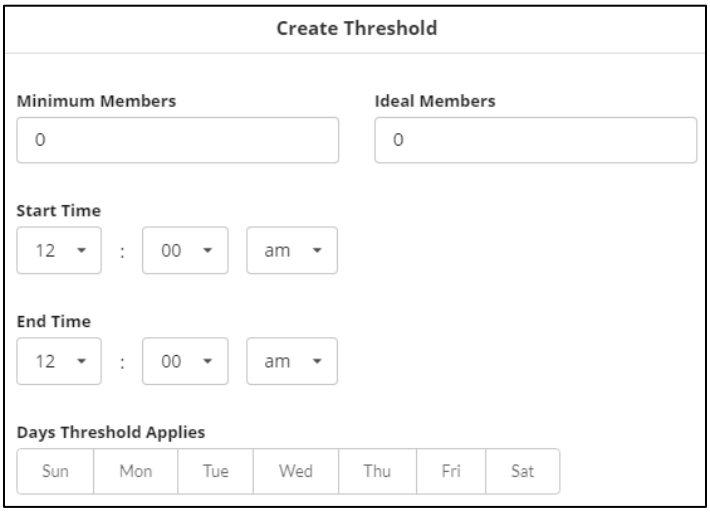
call shift at a hospital where you constantly need personnel on call to fill certain staffing positions at a moment's notice.

Through the Thresholds tab, you can determine specific times of the day/week where a specific number of group members need to be scheduled or on duty in order to be able to fully cover any situation that may come to pass. You can also edit existing thresholds as needed.

In this tab you can:

Add a Threshold

To add a new staffing threshold:



- Click the green Add Threshold button that appears on the left side of your screen under the Members tab.
- A sidebar will show up at the right side of the screen where you can configure a new threshold.
- At the top of the sidebar there are two fields that ask you for the minimum and ideal number of group members needed in order to effectively cover the specified period of time.
- Use the arrow buttons, which will appear as your mouse hovers over either field, to set your minimum and ideal staffing number.
- Determine the Start and End Time of the threshold by selecting the hour, minutes, and AM/PM settings from the corresponding dropdown menus in these fields located below the Minimum and Ideal Members fields.

[**Note:** Start and End times for thresholds may vary from the standard start and end times of the shift depending on the busiest hours of your business or facility. Using a hospital as an example, say the emergency room intake is typically steady during a 5:00-11:45PM shift except for between the hours of 7:00PM and 9:00PM where there is usually a higher intake volume. This is where you can implement a higher minimum staffing threshold and why you can choose a specific start and end time for this period requiring heavier staffing levels.]

- Once you selected your start and end times for the threshold, you must determine for which days the threshold will be applied. Click on the day(s) of the week that you would like to include in the threshold below the Start and End Times fields.

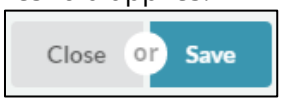
- Once you select a day, the box will turn a darker gray to indicate that the day has been selected. To deselect a particular day, click the box again and the color will revert to the original white color.
- Click the blue Save button at the bottom of the sidebar to create the threshold for the OnCall group or click the Close button to close the sidebar without creating a threshold.

[**Note:** You can create multiple thresholds that overlap with others. However, in doing so, each threshold will stack on top of one another. For example, say you created a threshold for Mondays that required a minimum of two group members to be on call between the hours of 9:00AM-5:00PM, with an ideal of three, and you created another threshold requiring a minimum of one staff member on call Mondays between 2:00-5:00PM with an ideal of two. Stacked thresholds mean, that between the hours of 2:00-5:00PM on Mondays, you will now require a minimum of three staff members and the ideal of five.]

Edit a Threshold

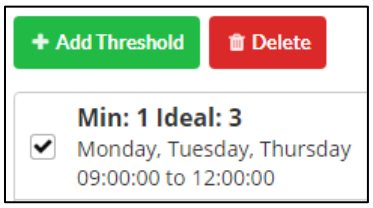
To edit an existing threshold:

- Click the gray Edit button located at the far right of the screen across from the corresponding threshold name.
- The Create Threshold sidebar will open where you are able to modify the threshold name, the start and end times, as well as the days of the week to which the threshold applies.
- Click the blue Save button to save your changes or the Close button to close the sidebar without making any changes.



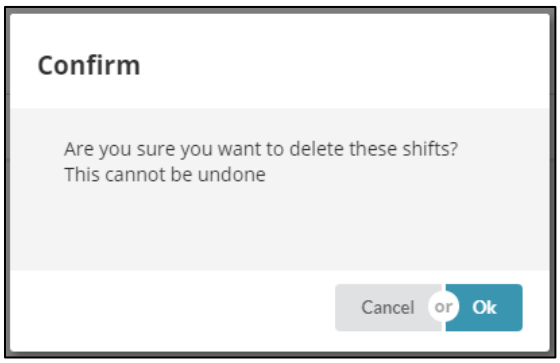
Delete a Threshold

To delete an existing threshold:



- Check off the small box that appears to the left of the threshold name in the list.
- A red Delete button will appear next to the green Add Threshold button, which you can click to delete the threshold and all its information.

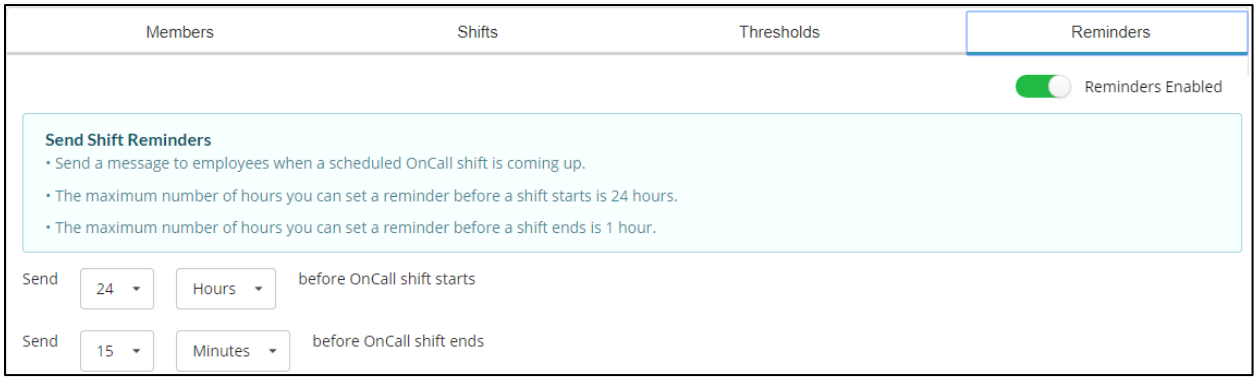
- A pop-up window will appear asking you to confirm the threshold deletion. Click the blue OK button to finish deleting the threshold or click Cancel to close the pop-up window without deleting the threshold.



[**Note:** Select multiple thresholds at once by checking off the boxes of all the thresholds you wish to delete and clicking the Delete button.]

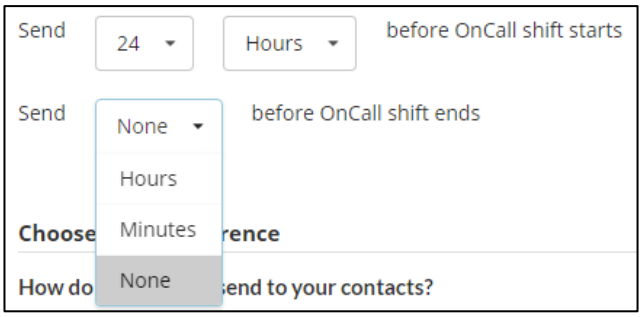
Reminders Tab

The Reminders tab allows you to send a message to your OnCall group members whenever their shifts are about to begin and/or about to end. When you click on this tab you must first enable this function either by clicking the blue Click to Enable button in the middle of the section or by clicking on the toggle button right below the Reminders tab so that it is positioned to the right and colored green.



Once enabled, a new section will appear where you will be asked how many hours or minutes before the OnCall shift starts/ends that you would like to send the reminder to your contact(s). Choose your preferred options from the dropdown menus provided.

[**Note:** You must select your increment of time from the dropdown menu provided before another field will appear where you can choose the value. The maximum number of hours you can set a reminder to send before the OnCall shift begins is 24 hours, and the maximum number of hours you can set a reminder to send before the shift ends is one hour.]

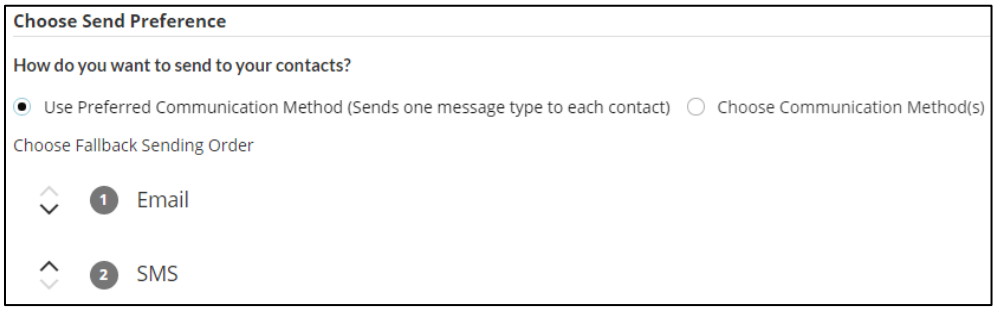


The second section on this page allows you to determine the method(s) via which you wish to send the reminder message to your OnCall group members: email or SMS.

There are two ways your scheduled members can be contacted: Use Preferred Communication Method and Choose Communication Method(s).

Use Preferred Communication Method

Choosing to send your OnCall reminder via a contact's preferred method of contact means that the reminder will be sent once: only through the channel that the contact has indicated he or she would like to receive messages from.

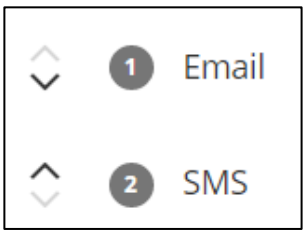


[**Note:** Each contact's preferred method (if known) is noted in their personal CRM profile.]

To choose to send the OnCall reminder to your recipients' preferred communication method:

- Click the radial button found underneath the Choose Send Preference header for Use Preferred Communication Method.
- Determine the Fallback Sending Order.

Fallback Sending Order



The fallback sending order refers to the order of the channels to which the reminder will be sent to each contact who has NOT indicated a preferred method of contact.

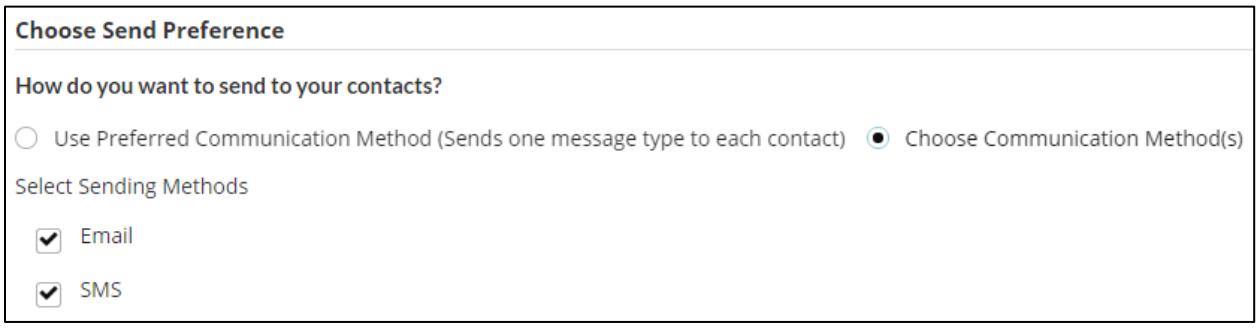
To determine the fallback sending order:

- Click the arrow buttons next to the two options (email and SMS) until they are in the order you would like them to be used. For example, if your fallback sending order is ranked email and then SMS, the system will look for an email address in the contact's CRM profile first and, if it finds one, the reminder will be sent via that delivery method. If the system does not see an email address then it will look for a mobile phone number in the profile to which to send the reminder via SMS.

- The system will keep searching in the order of devices you select until it finds a delivery method that it can use to send the reminder to the contact.

Choose Communication Method(s)

Choosing to send your OnCall reminder through the Choose Communication Method(s) option means that you can manually choose which delivery methods to use to send the reminder to all your chosen contacts. This option could result in more than one reminder being sent out to a single contact.



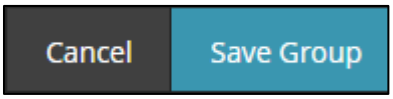
To select the Choose Sending Method(s) option:

- Click the radial button that's located underneath the Choose Sending Preference header.
- Check off the delivery method(s) you would like to use to send your reminder from the list below (email and/or SMS).
- Depending on how many options you have checked off, each of your contacts will receive the reminder through each of those methods, provided that contact information is available in their CRM profile.

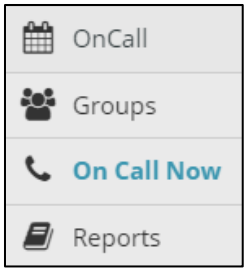
[**Note:** For example, say you checked off both email and SMS as your sending methods of choice. The reminder will then be sent out via email and SMS to every one of your chosen contacts. This means if a contact has provided an email address and a mobile phone number in their CRM profile, they will receive the same reminder twice: once via email and again via SMS.]

Once you have finished configuring your OnCall group, click the blue Save Group button at the bottom right side of your screen to save the group and return to the main Groups page. Or, click the Cancel button also located at the bottom right of your screen to return to the main Groups page without saving this current group.

Once you save your group, you are now able to manage it in the OnCall calendar by selecting it from the Groups dropdown menu in the upper right-hand corner of the screen.



OnCall Now



In the menu on the far left of your screen in the OnCall application, On Call Now is the last of three tabs in the list that appears. This tab provides you with a comprehensive view of each of the members in all your groups who are currently on call.

The list of current on call personnel is broken down into six columns of information:

OnCall Now

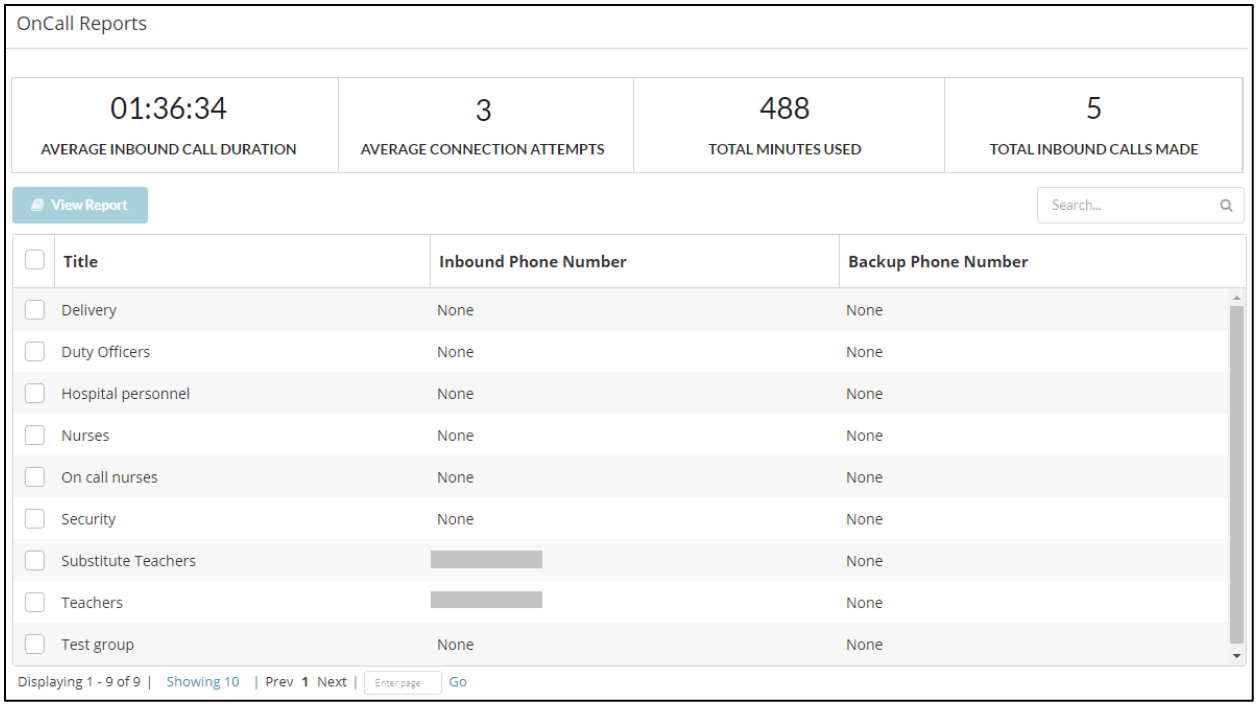
Name	Group	Start	End	Mobile Number	Phone Number
Erin	Teachers	Dec 03 2019 09:00	Dec 03 2019 17:00		
Peter	Nurses	Dec 03 2019 16:00	Dec 04 2019 00:00		
Pepper	Security	Dec 03 2019 16:00	Dec 04 2019 00:00		

- **Name:** The name of the OnCall group member
- **Group:** The OnCall group that the member belongs to
- **Start:** The Start Date and Time of the member's on-call shift
- **End:** The End Date and Time of the member's on-call shift
- **Mobile Number:** The mobile phone number of the on-call member (if available)
- **Phone Number:** The phone number (could be the same as the mobile) of the on-call member (if available)

Clicking the name of any OnCall group member in this table will direct you to their CRM contact profile where you can manage their contact information. Refer to the *SimplyCast CRM User Guide* for more information about contact management.

Reports

The final tab located on at the left side of your page is the Reports tab. Clicking on this tab will direct you to the main Reporting dashboard for the OnCall application where you can view the call logs for each of the OnCall groups in the account network.

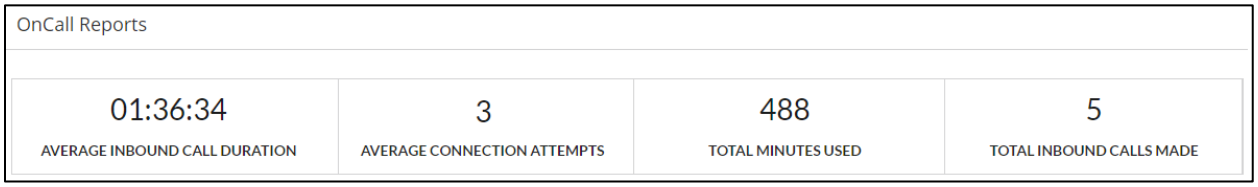


On this page you can:

View the Call Log Summary

The first section in the OnCall reporting dashboard displays a summary of the calls being received by the OnCall tool as a whole.

There are four items in this section:



- **Average Inbound Call Duration:** The average length of time callers spent on the phone being connected with and speaking with an OnCall group member (in minutes)
- **Average Connection Attempts:** The average number of attempts made to connect with an OnCall group member
- **Total Minutes Used:** The total number of billable minutes used
- **Total Inbound Calls Made:** The total number of times that an OnCall group number was dialed

View the List of Call Logs by Group

Below the Call Log Summary section, you will see a table listing each of the OnCall groups within the system where you can view individual call log information.

Title	Inbound Phone Number	Backup Phone Number
Delivery	None	None
Duty Officers	None	None

For each OnCall group you can see:

- **Title:** The name on the OnCall group
- **Inbound Phone Number:** The associated OnCall group phone number (if any)
- **Backup Phone Number:** The designated backup phone number associated with the OnCall group (if any)

Navigate Multiple Pages of Group Call Logs

If you have created enough OnCall groups, they will be displayed on multiple pages in the OnCall Reports dashboard.

To view a group that does not appear on the first page of the list:

- Navigate to the bottom of your screen where you will find the page numbers indicating the total number of OnCall groups you have call logs for.
- Proceed to another page of reports by clicking either the page number you would like to visit or the Next button, which will take you to the next page.
- If you know the page number you would like to go to, enter the page number in the provided field and select Go.
- Choose how many OnCall groups to display at a time by clicking on the “Showing...” link located to the right of the number of displayed group call logs.

Displaying 1 - 9 of 9 | Showing 10 | Prev 1 Next | Enter page Go

Search/Sort Call Log Reports

If you are trying to find a particular OnCall group to view the call log information for, use the search bar located at the top right of the table of groups, underneath the summary information.
As you type in the name of the OnCall group you are searching for, the results will automatically filter.

You are also able to sort your group call log reports by any of the information columns in the table by clicking on the column name in the table. Once clicked, your list of call log reports will reorder automatically. Sorting by the Title column will sort the reports alphabetically, while clicking Inbound Phone Number or Backup Phone Number will sort the reports in chronological order.

View a Group Call Log Report

To view the call log report for a particular OnCall group:

- Select the group you would like to see the report for by clicking on the checkbox in the table next to that particular group.
- The blue View Report button on top of the group table will become active and able to be clicked on once you have chosen an OnCall group.
- Click View Report and you will be directed to the call log report for that particular group.

Summary

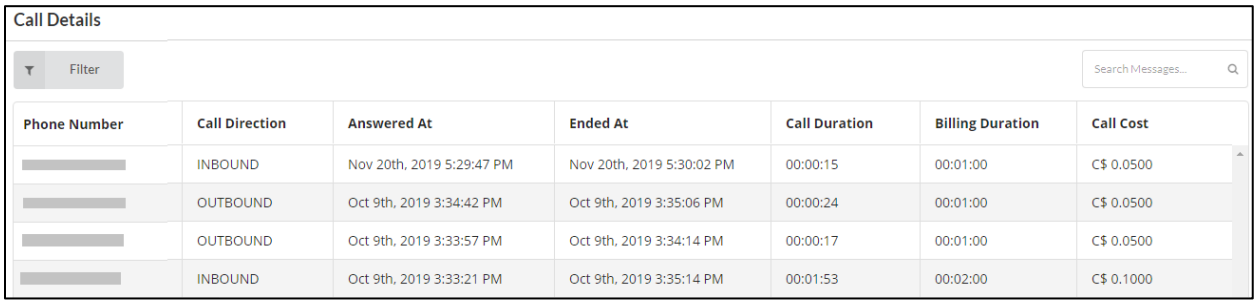
The first section you will see in the call log report of the chosen OnCall group is the Summary section.

This page will display four boxes with the following information:

- **Average Inbound Call Duration:** The average length of time callers spent on the phone being connected with and speaking with an OnCall group member (in minutes)
- **Average Connection Attempts:** The average number of attempts made to connect with an OnCall group member
- **Total Minutes Used:** The total number of billable minutes used
- **Total Inbound Calls Made:** The total number of times an OnCall group number was dialed

Call Details

The second section in a OnCall group's call log report is the Call Details section where you can see a table of all the inbound and outbound calls made to the OnCall group and their duration.



Call Details

Filter

Search Messages...

Phone Number	Call Direction	Answered At	Ended At	Call Duration	Billing Duration	Call Cost
	INBOUND	Nov 20th, 2019 5:29:47 PM	Nov 20th, 2019 5:30:02 PM	00:00:15	00:01:00	C$ 0.0500
	OUTBOUND	Oct 9th, 2019 3:34:42 PM	Oct 9th, 2019 3:35:06 PM	00:00:24	00:01:00	C$ 0.0500
	OUTBOUND	Oct 9th, 2019 3:33:57 PM	Oct 9th, 2019 3:34:14 PM	00:00:17	00:01:00	C$ 0.0500
	INBOUND	Oct 9th, 2019 3:33:21 PM	Oct 9th, 2019 3:35:14 PM	00:01:53	00:02:00	C$ 0.1000

There are seven columns of information in this table:

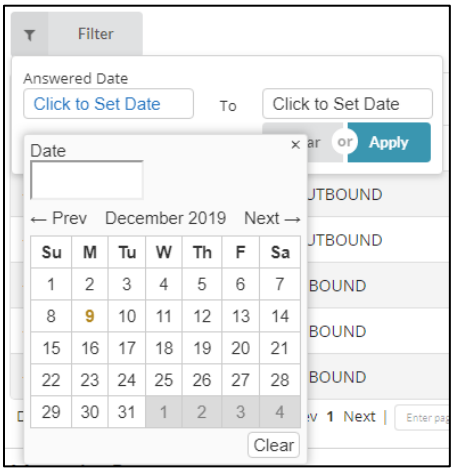
- **Phone Number:** The phone number that dialed into the OnCall group or was dialed out to by the OnCall system
- **Call Direction:** Whether it was an external user dialing into the OnCall system (inbound) or the system dialing out to an OnCall group member (outbound)
- **Answered At:** The date and time a connection was made
- **Ended At:** The date and time the connection ended
- **Call Duration:** The length of time the call was connected for
- **Billing Duration:** The length of time the system is billing for (rounded up to the nearest minute)
- **Call Cost:** The total cost of the call

Filter a Report

You have the ability to filter your OnCall group's call log report to show calls made on a particular date or within a certain date range.

To filter your calls:

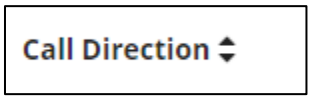
- Find the gray Filter button that is located at the top left-hand side of the call log table.
- Click the Filter button and a dropdown menu will appear in which you will see two boxes that say Click to Set Date.
- Click on either Click to Set Date box and another dropdown menu will show up with a Date field.
- Manually insert the date and time you would like to filter your calls from.



- Below the Date field there is a calendar you can also use to choose the date that you would like to filter calls from.
- Click the blue Apply button to implement the filter or click Clear if you do not wish to filter your call log report.
- Applying a filter will close the dropdown menu and turn the Filter button green. To clear a filter, click this button again and choose the Clear option.

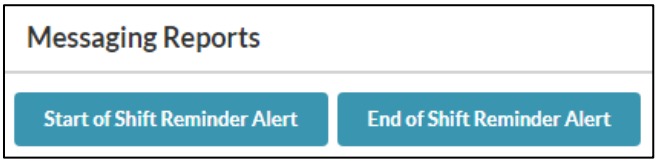
Search/Sort the Call Log Report

If you are trying to find a particular call in the call log report, use the search bar located at the top right of the table of calls, underneath the summary information. As you type in the phone number or call direction you are searching for, the results will automatically filter.



You are also able to sort your call log report by any of the information columns in the table by clicking on the column name in the table. Once clicked, your list of calls will reorder automatically according to the column information.

Messaging Reports



The third section in the call log report is the Messaging Reports section. This section contains two blue buttons that you can click to be directed either to the alert report for the start of shift reminder alerts sent out to OnCall group members or the report for the end or shift reminder alerts. Refer to the *SimplyCast Alerts User Guide* for more information on alert reports.

Download a Report

To download the entire call log report for an OnCall group to your device, there is a blue download button located on top of the Summary section on the right-hand side of the report.

When you click the download button:

- A dropdown menu will appear with two file formats to choose from.
- Choose to download the report in either CSV or XLSX format by clicking the appropriate option in the dropdown menu.
- You will be directed to a page with all your requested downloads that will show the name of the report, the status, the file type, and the date it was created.

- Select the call log report from this table and click the Download button to complete the download process.
- The page will continue to refresh until the requested download is complete.

Knowledge Check

1. A small hospital requires that there be a doctor and a nurse on call every evening from 5-11:45PM, Monday to Friday. Although if need be, there can be only one person on call per evening.
    a. Create an OnCall group for this hospital that includes two doctors and two nurses. Also set up the shift, threshold, and reminder for this group.
    b. In the OnCall Dashboard, schedule a week's worth of OnCall shifts (Monday to Friday) from 5-11:45PM for your new group, with one doctor and one nurse scheduled per day.
2. On Wednesday evening, the scheduled on-call doctor has come down with a case of the flu and cannot get out of bed.
    a. Override this doctor's shift for Wednesday night and replace it with the other doctor in your group.
    b. What would have happened had there not been another doctor available to cover this shift?
3. A third doctor has come to work at this small hospital and they are able to take on some on call shifts.
    a. Add a new doctor contact into your OnCall group who exists already in the CRM.
    b. Schedule this new doctor to a repeating shift schedule for Monday, Wednesday, and Friday from 9AM-5PM for an entire month.
4. What does it mean when a day block in the OnCall calendar has a red-colored background?
    a. How can you change the background color of the day block back to its normal white?
5. When creating a reminder for an OnCall shift, what does the term "Fallback Sending Order" refer to?

Document History

Version Number	Date	Changes
1.0	1.17.2020	Document Finalized