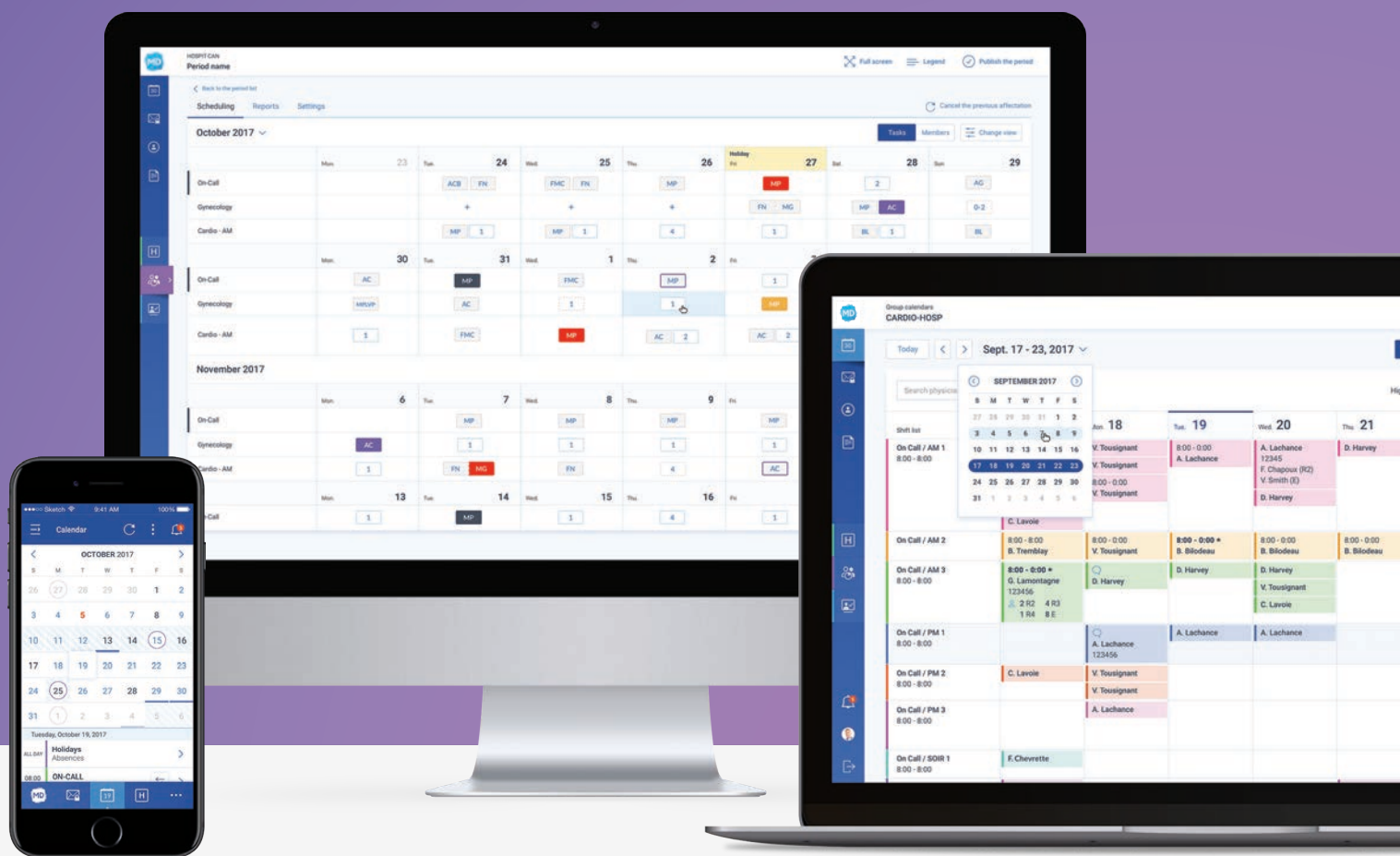


## Automate the Creation and Distribution of Your Medical Service Schedules



Used by 40,000 healthcare professionals  
in more than 200 health facilities

The physicians responsible for creating the schedule for their medical service must take into account a multitude of factors: absences, contractual agreements, research requirements, skills, personal constraints, etc.

Petal Scheduling addresses the complexity of physician scheduling with an automated and flexible script that saves the scheduler time while giving them full control through manual adjustments.

The schedule is produced quickly, shared instantly, accessible from any device and updated in real-time when shifts are traded.



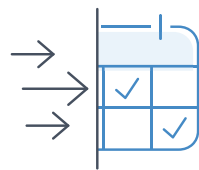
# The Petal Scheduling Solution

Composed of **4 modules** that complement each other, the Petal Scheduling solution greatly simplifies scheduling creation, distribution and management.

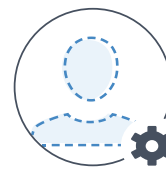
Schedules are generated using an automated script that respects both a physicians' absences and the rules of the medical service. Once created, schedules are kept up-to-date in real-time and are accessible anywhere with iOS and Android mobile apps. Physicians can send absence and shift change requests directly from any device. These features are significant time savers for the medical team and scheduler, who maintain control over the requested changes at all times.

## PetalScheduling

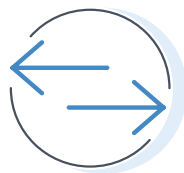
Schedule Management for Physicians



Module 1  
**Schedule Digitalization**



Module 2  
**Absence Management**



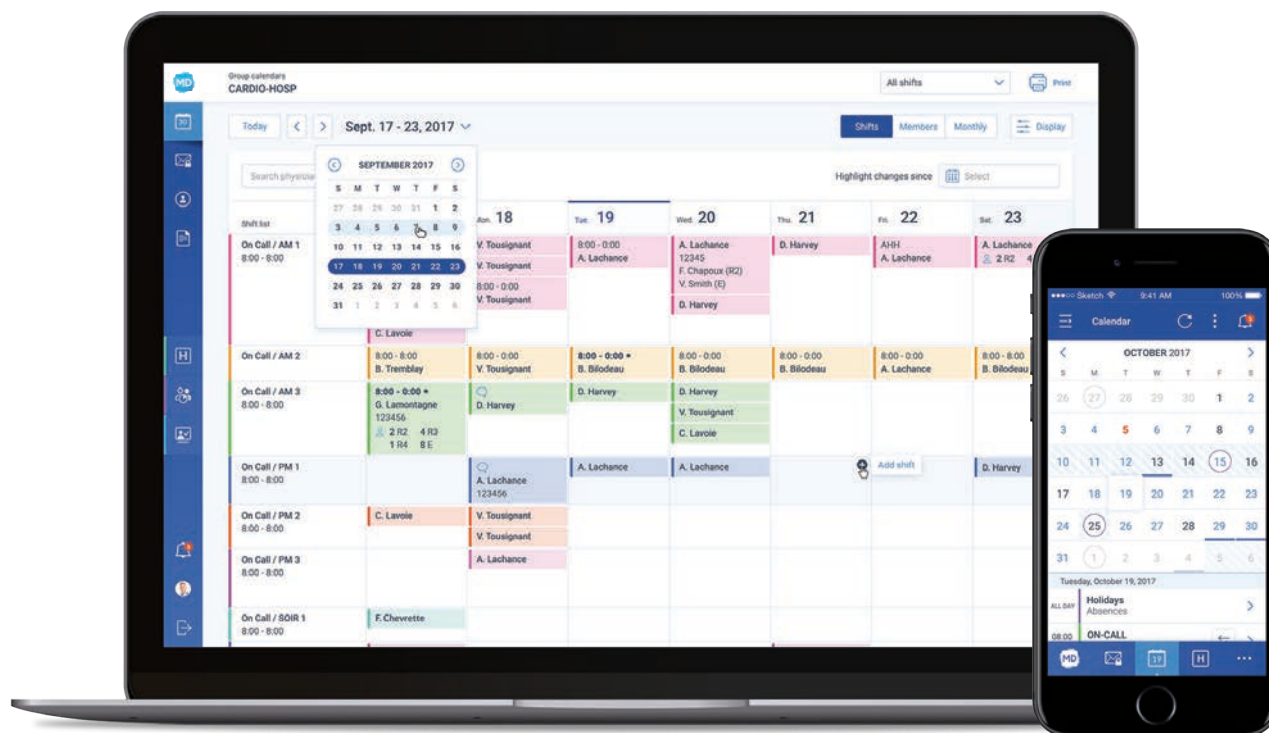
Module 3  
**Shift Trade**



Module 4  
**Schedule Automation**

# Schedule Digitalization

Say goodbye to wasted time and errors caused by paper schedules.



The **Schedule Digitalization** module guarantees a schedule updated in real-time and accessible from any device (smartphone, tablet or computer). Physicians can receive notifications via email on their mobile device whenever a change is made.

## Key Features

- 24/7 access to individual and medical service schedules
- iOS and Android mobile apps
- Instant notifications
- Changes to schedules applied in real-time
- Synchronization with external calendars (Google, Outlook, etc.)

## Operation

The **Schedule Digitalization** module allows medical services to switch from a paper schedule or a non-specialized computer agenda (such as Outlook) to an interface designed specifically for physicians. Physicians will have access to their personal schedule and medical service schedule from any device using iOS and Android apps. They can receive instant notifications for any changes or requests, depending on the preferences chosen in their profile.

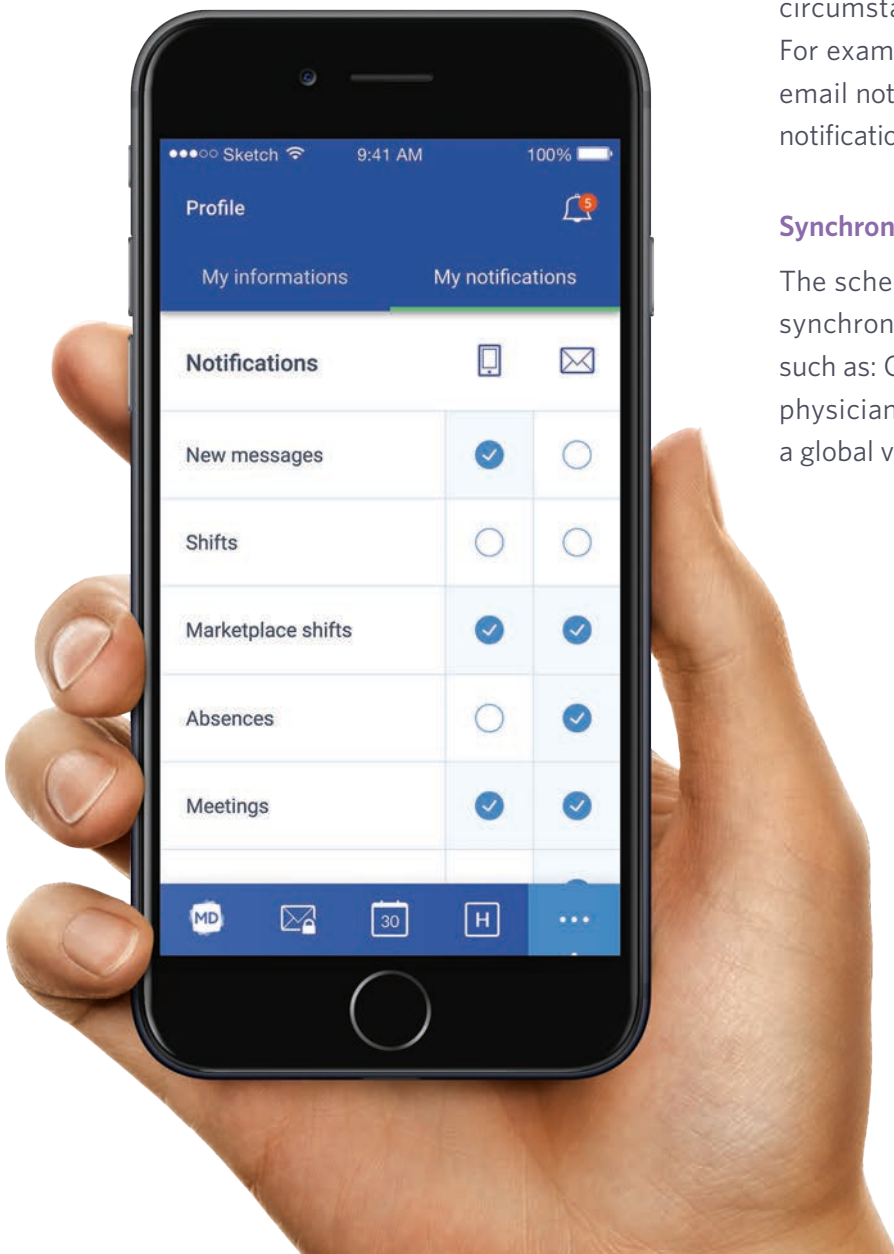
Each shift change is implemented in real-time, eliminating the need for physicians to communicate changes manually. The **Schedule Digitalization** ensures a valid schedule at all times and is accessible anywhere, eliminating multiple steps and communication errors.

### Customizable Instant Notifications

From their profile, physicians can choose in which circumstances they prefer to receive notifications. For example, a physician may choose to receive email notifications when a shift is offered, but mobile notifications for events.

### Synchronization with External Calendars

The schedule generated in Petal Scheduling can be synchronized with other calendars used by physicians, such as: Google Calendar, Outlook or iCal. This way, physicians can consult a single calendar to have a global vision of their schedule.



## Benefits for the Scheduler

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- Shares the schedule with all medical service physicians simultaneously when planning is complete
- No longer needs to manually communicate schedule changes
- Uses a calendar designed specifically for physicians
- Is always aware of changes to the schedule with instant notifications

## Benefits for Medical Service Physicians

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- Have access to a schedule that is always up-to-date and easy to access from any device
- Avoid the risk of errors related to consulting an outdated schedule
- Are informed in real-time of changes to the schedule
- Can respond quickly to different requests for schedule changes

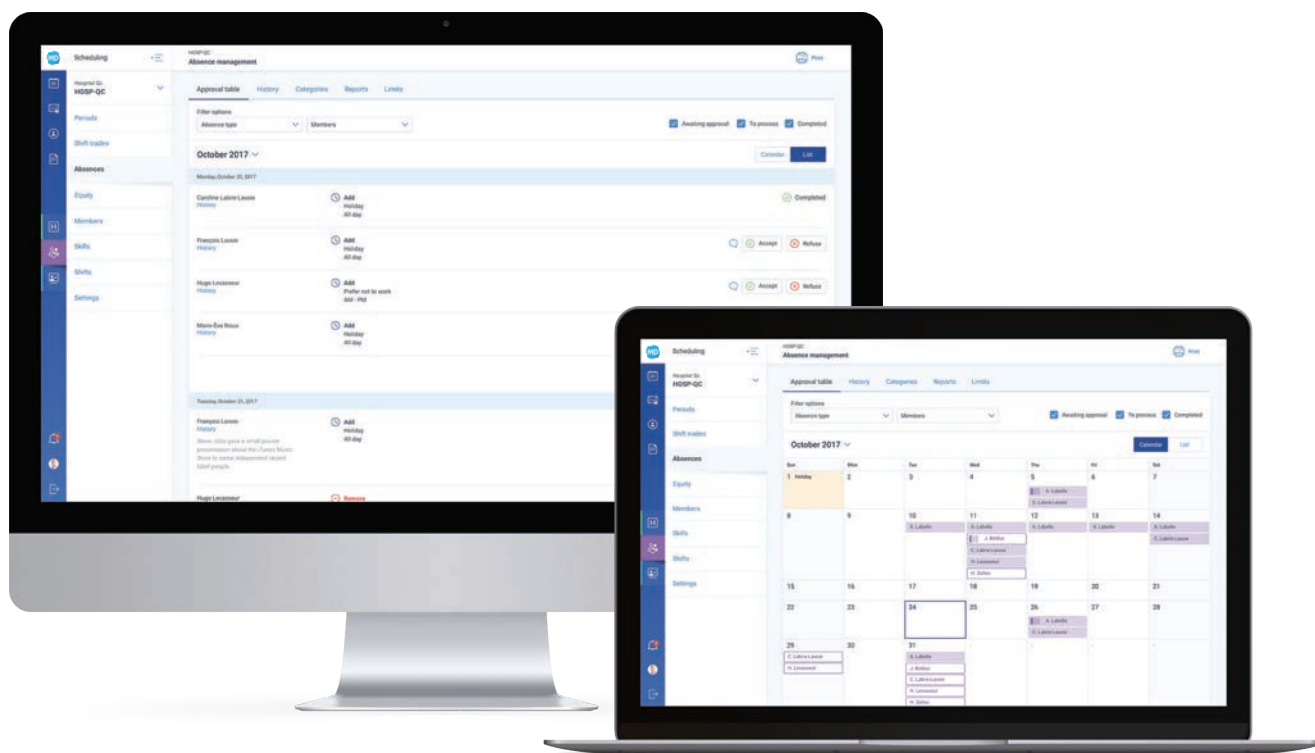


## Did you Know...?

Petal Scheduling is hosted on Microsoft Azure's renowned cloud servers for maximum security and confidentiality. The solution complies with Canadian PIPEDA safety standards, as well as several international standards such as ISO 27001, HIPAA, FedRAMP, SOC 1 and SOC 2.

# Absence Management

Save time by centralizing physicians' absence requests.



The **Absence Management** module allows physicians to autonomously enter their absence requests from any device. This operation saves time for the scheduler, who no longer has to coordinate requests from several tools (paper, email, telephone, electronic document, etc.).

## Key Features

- Absence request entry by physicians
- Absence request approval
- Absence reports
- Absence limits

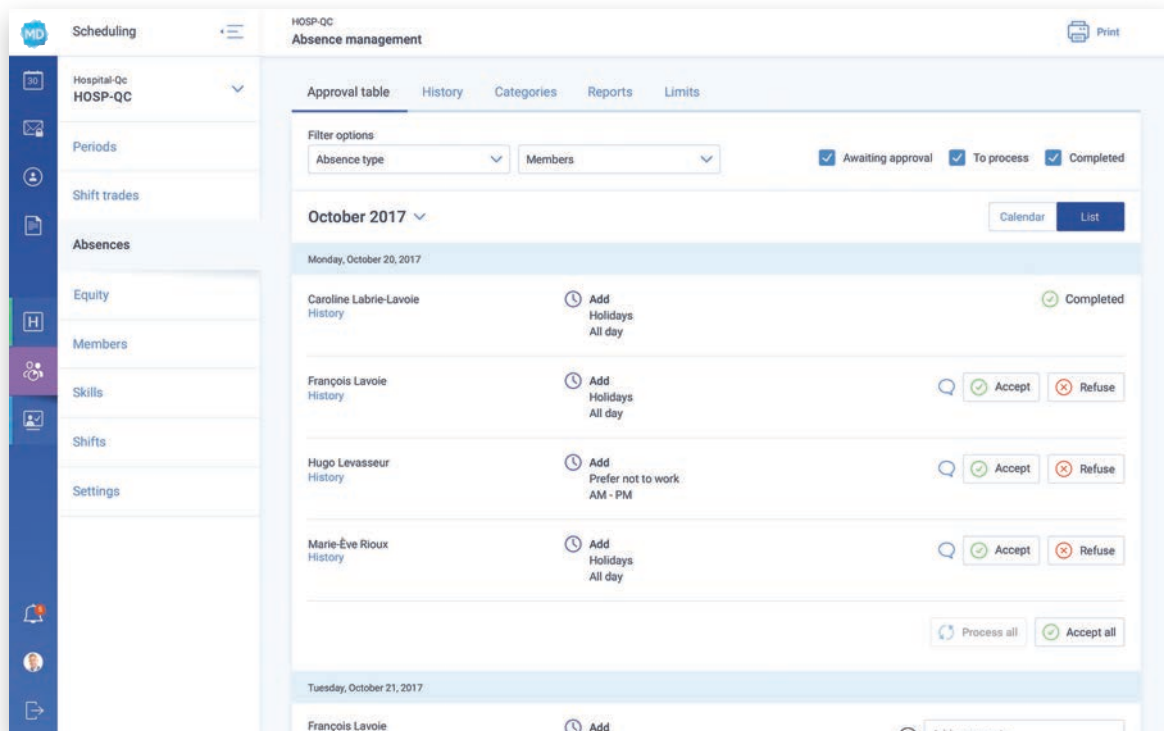
## Operation

The **Absence Management** module not only benefits the scheduler, but also all physicians in the medical service. Physicians enter their own absence requests from any device, which means they gain autonomy while ensuring that the scheduler has the most accurate data at all times. As for the scheduler, they easily view the absence requests of all the physicians without having to group them manually.

The centralization of absence requests is a significant time saver when planning schedules. Absence requests are not scattered over multiple media (voicemail, papers, email, electronic documents, etc.) when scheduling. Entry of absences by physicians is done directly from the calendar for one or more departments. Absences may be entered not only for the current period, but also for future periods. For example, a physician may designate an absence five months in advance, even if his medical service operates in three-month periods.

### Absence Request Approval

The scheduler can choose whether or not to approve physician absence requests before they become effective or they can choose which type of absences require approval. In either case, they can receive notifications to be informed of changes to the schedule.



## Absence Report

The **Absence Management** module also offers the possibility of producing customized absence reports according to the types of absences and the chosen time period. The scheduler can generate a summary file for the entire medical service, while physicians can produce reports of their own absences.

Total absences - Joanne Potvin			✕
Holidays			11
October 5 to 15, 2017	All day		10
October 25, 2017	All day		1
Personal			2
October 31 to November 4, 2017	AM		2
Conferences			1
March 4, 2017	All day		1
Total :			14

## Benefits for the Scheduler

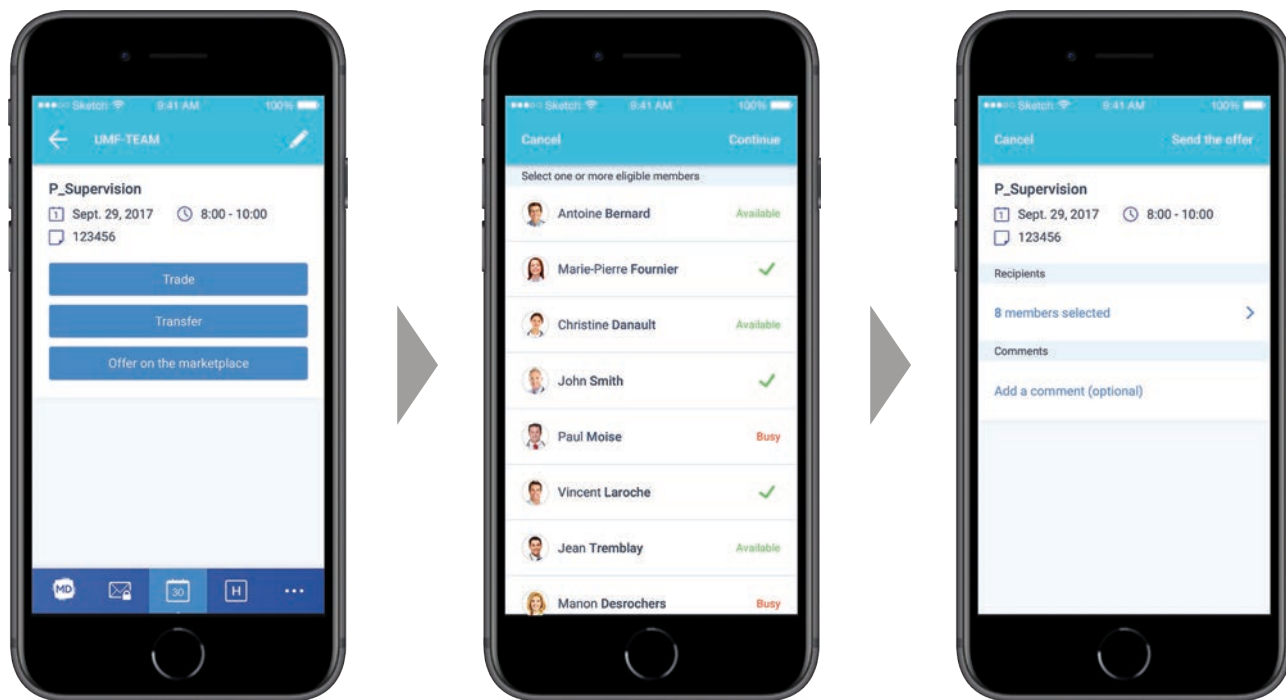
- No longer required to manually enter physician absence requests
- Centralizes absence data in the scheduling tool
- Receives instant notifications when an absence is requested

## Benefits for Medical Service Physicians

- Can quickly submit absence requests from any device, for all departments to which they are attached
- Are assured that the scheduler works with the most accurate absence data
- Receives instant notifications when an absence request is approved or rejected

## Shift Trade

Simplify the shift trade process between physicians.



The **Shift Trade** module eases the coordination task related to shift trades between physicians within the medical service. According to the permissions granted by the scheduler, physicians can autonomously trade their shifts between specific individuals, or offer them to all physicians within the medical service.

### Key Features

- Shift trades between physicians
- Virtual marketplace to offer shifts to all physicians within the medical service
- Complete shift trade history
- Customization of rights granted to physicians for shift trades

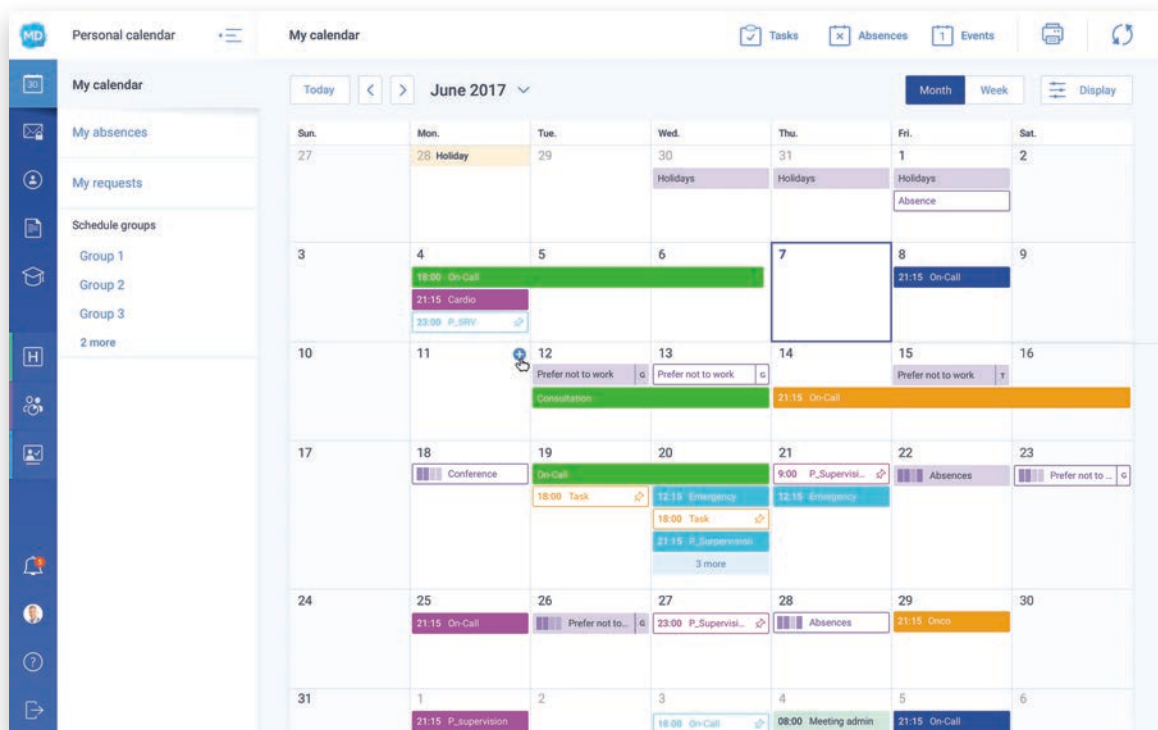
## Operation

The **Shift Trade** module allows a shift to be offered to a physician or the entire medical service without the scheduler having to coordinate the exchange. The scheduler can, however, determine the level of autonomy granted to the physicians for the trades. For example, they can configure Petal Scheduling so that some shifts require approval before being traded.

Requests for shifts can be sent directly from the physicians' personal calendar. Physicians can track the status of their requests from any device and receive notifications when they are approved or denied. Regardless of the approval method chosen by the scheduler, this module speeds up and facilitates the processing of shifts for the entire medical service.

### Virtual Marketplace to Offer Shifts

In addition to offering physicians the opportunity to autonomously trade work shifts, this module allows a shift to be displayed in a virtual marketplace in order to offer it to the entire medical service. As soon as a physician accepts the offered shift, the schedule is automatically updated and a notification is sent to the concerned users. As with any schedule change request, the scheduler may choose whether to approve the change before it becomes effective.



## Benefits for the Scheduler

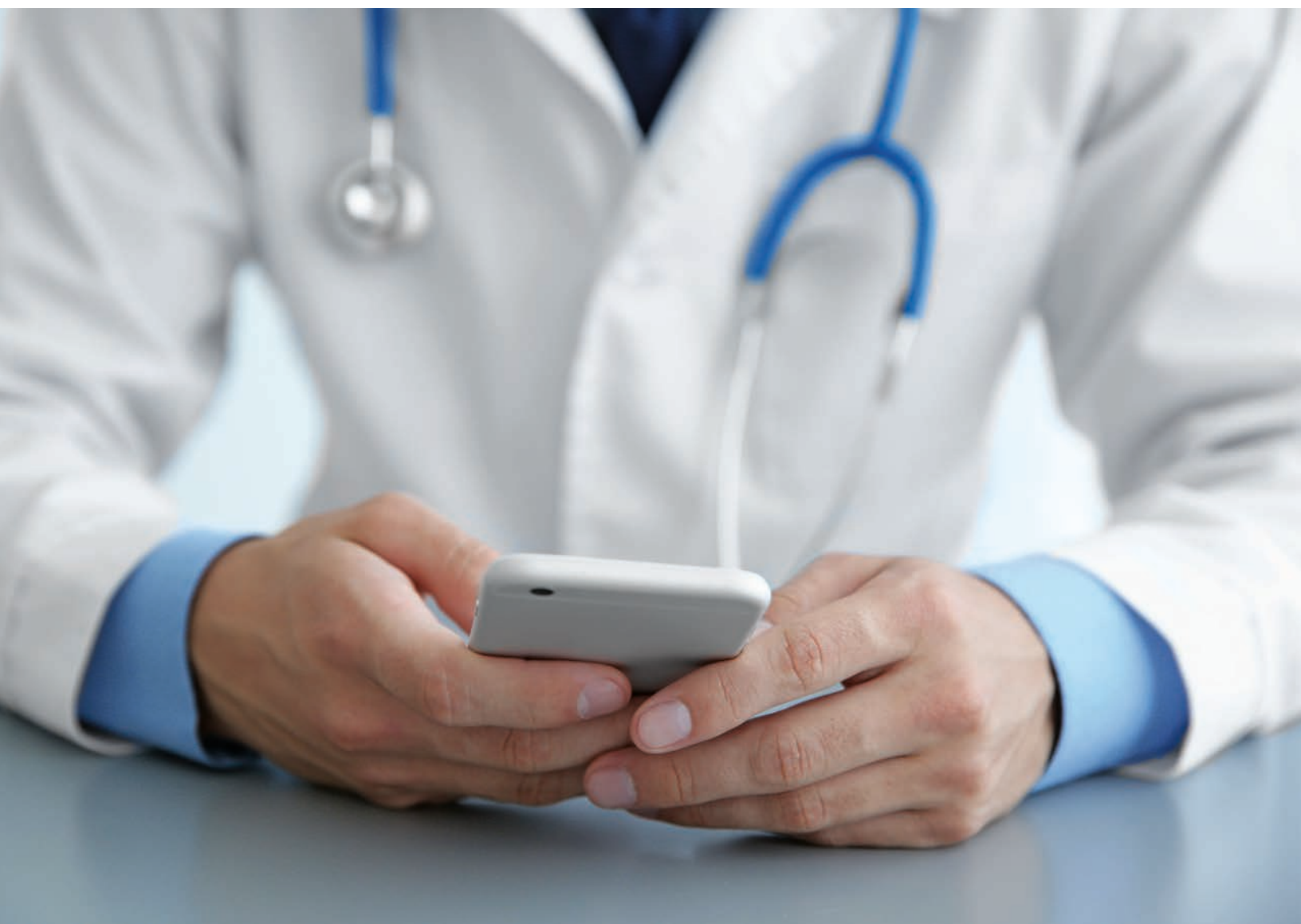
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- Saves time by delegating shift trades
- Keeps control of schedule at all times with flexible approval criteria
- Is informed of all shift trades through notifications

## Benefits for Medical Service Physicians

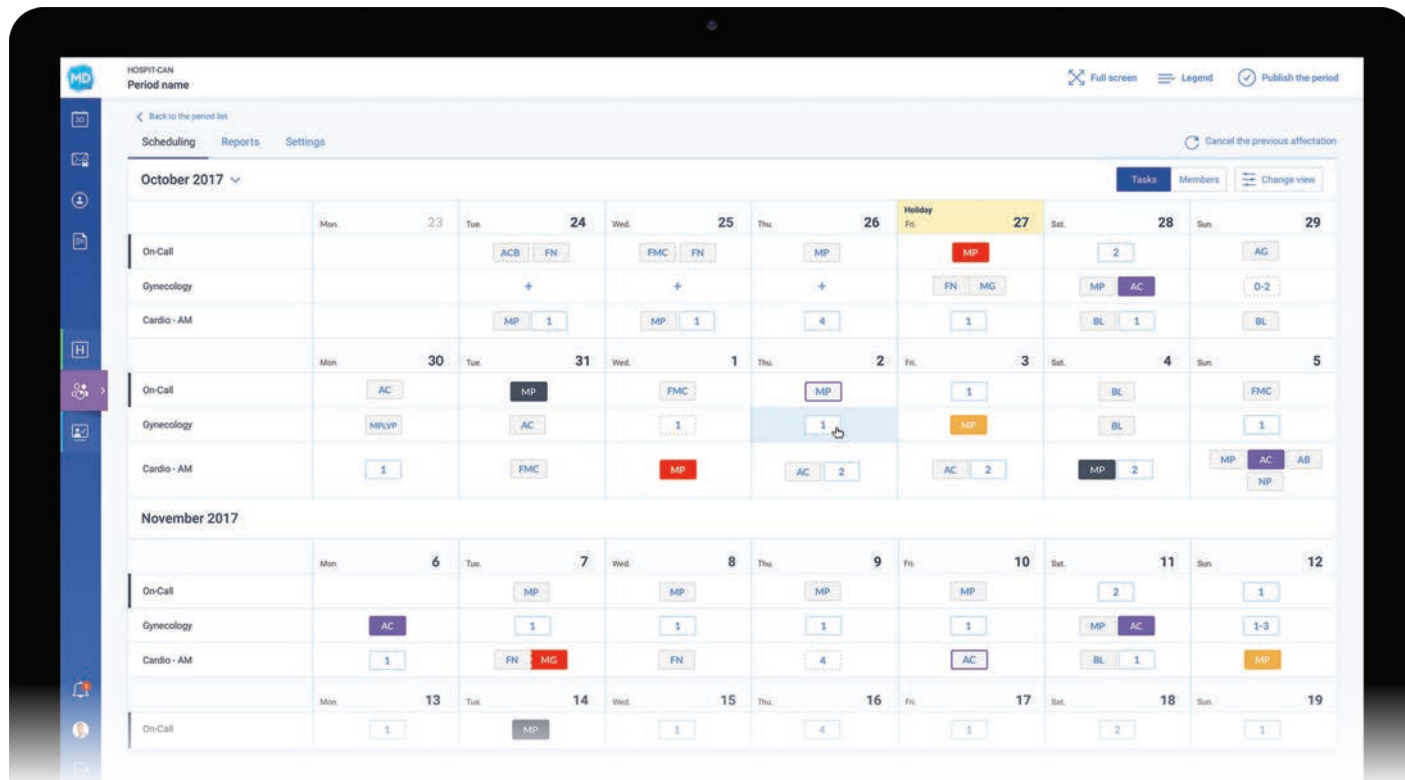
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- Gives greater autonomy in managing shifts
- Provides access to a virtual marketplace that allows physicians to offer shifts to the entire medical service



# Schedule Automation

Generate an optimal schedule and save time with an automated procedure.



The **Schedule Automation** module is the most complete module of the Petal Scheduling solution. Using complex algorithm that takes into account the rules of the medical service, individual rules for the physicians, absences and the desired distribution of shifts, this module automatically generates an optimal schedule that can be adjusted manually if necessary.

## Key Features

- Automated scheduling script
- Group and individual rules
- Shift accounting with distribution management
- Flexible planning variables (absences, task blocking, and skills)
- Shift assignment follow-up for each physician
- Exportable equity reports (Excel)
- Weekly schedule template
- Manual shift edits

# Operation

The **Schedule Automation** module saves the scheduler significant time by quickly providing an optimal distribution of shifts. The automated Petal Scheduling script produces a schedule that takes into account planning variables specific to the reality of the medical service, such as physician unavailability, individual and group rules, the desired distribution of shifts, contractual agreements of physicians, research requirements and skills. The scheduler can make manual changes to the schedule which has been suggested by the automated script at any time.

This module also makes it possible to produce weekly templates of a typical physician’s schedule. These templates are flexible and can be used for certain physicians or shifts only. The automated script then proposes a distribution of shifts based on the templates and other planning components.

## Group and Individual Rules

Group and individual rules are one of the components taken into account when automatically distributing shifts. For example, these rules make it possible to: limit the number of shifts assigned during a specific period; prevent two physicians from working simultaneously; or impose a minimum time buffer between two types of shifts.

Group and individual rules can be configured according to two levels of applicability. They can be strong, which means that the system will always apply these rules, or soft, which means that the system will try its best to comply with these rules.

**Examples of group and individual rules**

- No more than 13 assignments per month for Dr. A
- No more than 3 consecutive days of assignment for Dr. B
- No physician can work 2 weekends in a row
- Dr. C cannot work at the same time as Dr. D
- No assignments on Mondays and Fridays for Dr. E
- Minimum of 2 days between two shifts
- Only one member of a designated team can do X, Y or Z shift at a time

Shift Accounting with Distribution Management

The **Schedule Automation** module displays the count of the different types of shifts in real-time when they are assigned. It also makes it possible to establish shift distribution objectives for each physician according to their skills, their contracts or the rules established by the medical service.

For example, the scheduler may set the following goal: all medical physicians should be assigned a minimum of 10 specific shifts (e.g. On-call duty), with the exception of a particular physician, who must only do 5, because of his/her specialty or contractual agreement. During the creation of the schedule, the scheduler will be able to see where the different physicians are in relation to this objective and adjust the distribution of shifts as needed.

Assignment

Shift name

Wednesday, October 26, 2017

Day 08:00 - 10:00

Shift description

Affected members (0/1)

	Absences	Constraints	Equity	
Gonthier M. (MG)			0	
00:00 - 07:00 123456 1 comment				
Increase the required maximum				

Eligible members (4)

	Absences	Constraints	Equity	
Gonthier M. (MG)			0	
François A. (AF)	SYS	day on-call	0	
Gonthier M. (MG)	SYS		2	
Gonthier M. (MG)	V	Shift name	8	

Non-eligible members (20)

Cancel

Save

Exportable Equity Reports (Excel)

The scheduler can extract a summary file showing how many shifts were assigned to each physician as of the time the schedule was published. It can also produce a report that reflects the current distribution of shifts, that is, that takes into account shift trades made since the schedule was first published. If necessary, the scheduler can compare these two reports to see how the current distribution differs from the original distribution.

## Benefits for the Scheduler

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- Saves time with automated scheduling
- Produces an optimal schedule in accordance with group and individual rules
- Ensures an accurate transmission of the rules for the medical service during a change of scheduler
- Addresses scheduling issues as they come up through the automated step-by-step process

## Benefits for Medical Service Physicians

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- Are assured to receive shifts compliant with defined rules and sent requests
- Benefit from a fair distribution of specific shifts within their medical service
- Ensures the durability of the medical service rules and the planning process during a change of scheduler





# 6 reasons to choose Petal Scheduling

## 1. User Experience Adapted to the Reality of Physicians

The details of each of our features have been thoroughly analyzed with physicians and schedulers in order to effectively address the daily challenges of medical services.

## 2. Turnkey Service

An experienced consultant gathers information on the group of physicians, creates rules for the medical service and produces the first schedule in collaboration with the scheduler.

## 3. Satisfaction Guaranteed

The general experience of physicians is reflected in a 98% satisfaction rate for the entire implementation process, that is, from the first encounter to the online implementation of the solution.

## 4. High-Level Expertise

The Petal Scheduling solution is part of the large family of productivity tools developed by PetalMD, a company with more than 60 employees, including a service and technical support team dedicated to improving the efficiency of healthcare facilities.

## 5. High Standards

All solutions developed by PetalMD are hosted on Canadian servers in the secured Microsoft cloud and meet PIPEDA security standards. System enhancements are included with PetalMD maintenance.

## 6. Post-Implementation Technical Support

Once the implementation is completed, Petal Scheduling users have access to technical support through our online and telephone request system. In addition, an online help centre is available at all times.

# Satisfied Users

*“Before, schedulers would print out their department’s schedule, give it to the medical staff office personnel, who would then enter it into the Intranet. Each modification forced physician responsables to redo schedule’s communication processes. With Petal Scheduling, the onus is now on the physicians to make changes to their schedule easily accessible for medical staff office personnel, and avoid to redo schedule’s communication processes”*

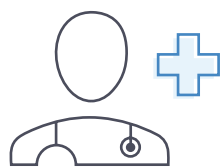
Chief of Staff for an emergency department, Petal Scheduling user

*“The software automatically builds a schedule with shifts that are more spread out, which positively affects a physician’s work life balance as they have more time to rest between shifts.”*

Physician and master planner for an emergency department, Petal Scheduling user

*“I’ve experimented with other vendors and what I like about PetalMD is that they offer you a platform, but the planner still has full control of creating and managing the schedule.”*

Physician and master planner for an emergency department, Petal Scheduling user



**40,000**  
Healthcare Professionals



**1,400**  
Hospital Departments



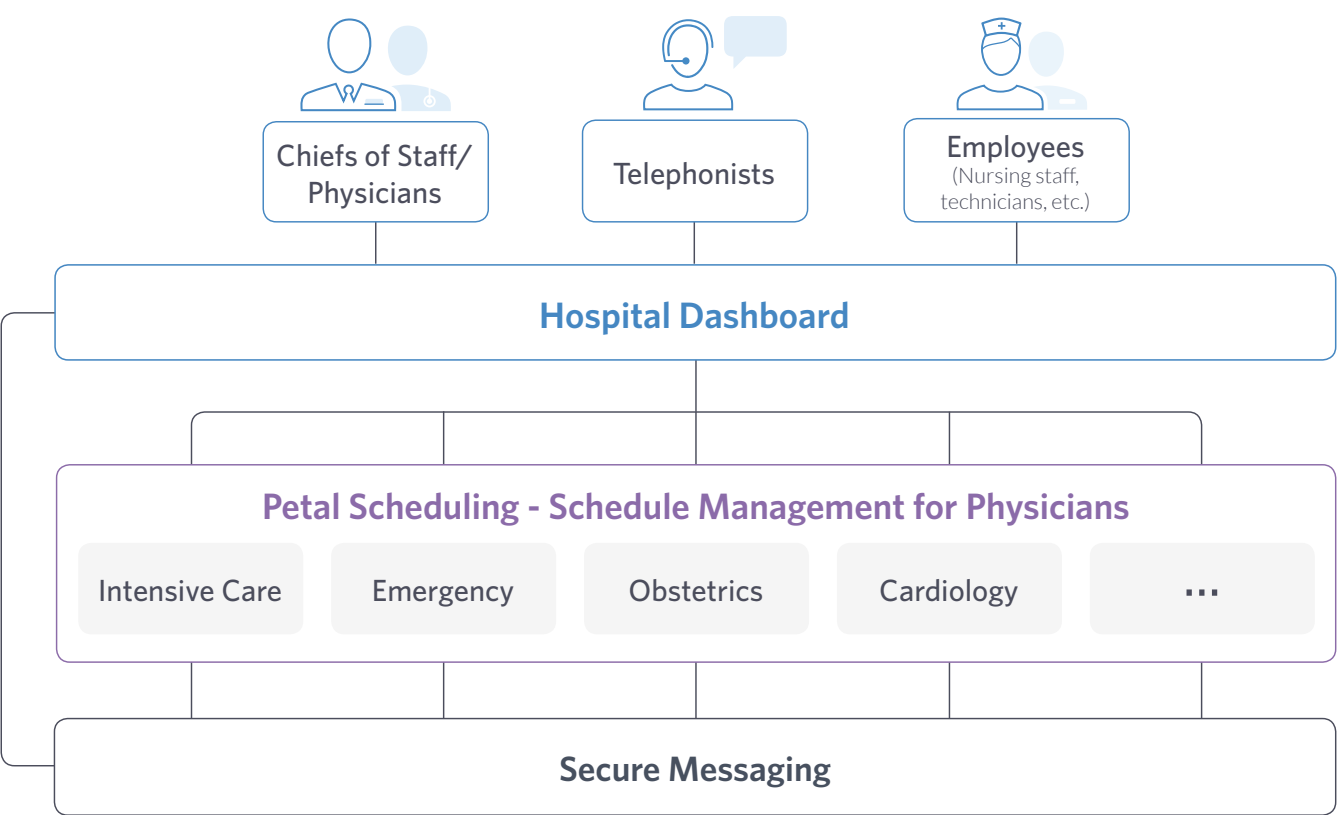
**200**  
Healthcare Facilities

# Complementary Solution to Petal Scheduling

## The PetalMD's Hospital Platform

Designed to optimize the performance of hospitals, this solution centralizes physician shifts for all medical services to consolidate and facilitate the communication of on-call and clinical tasks lists.

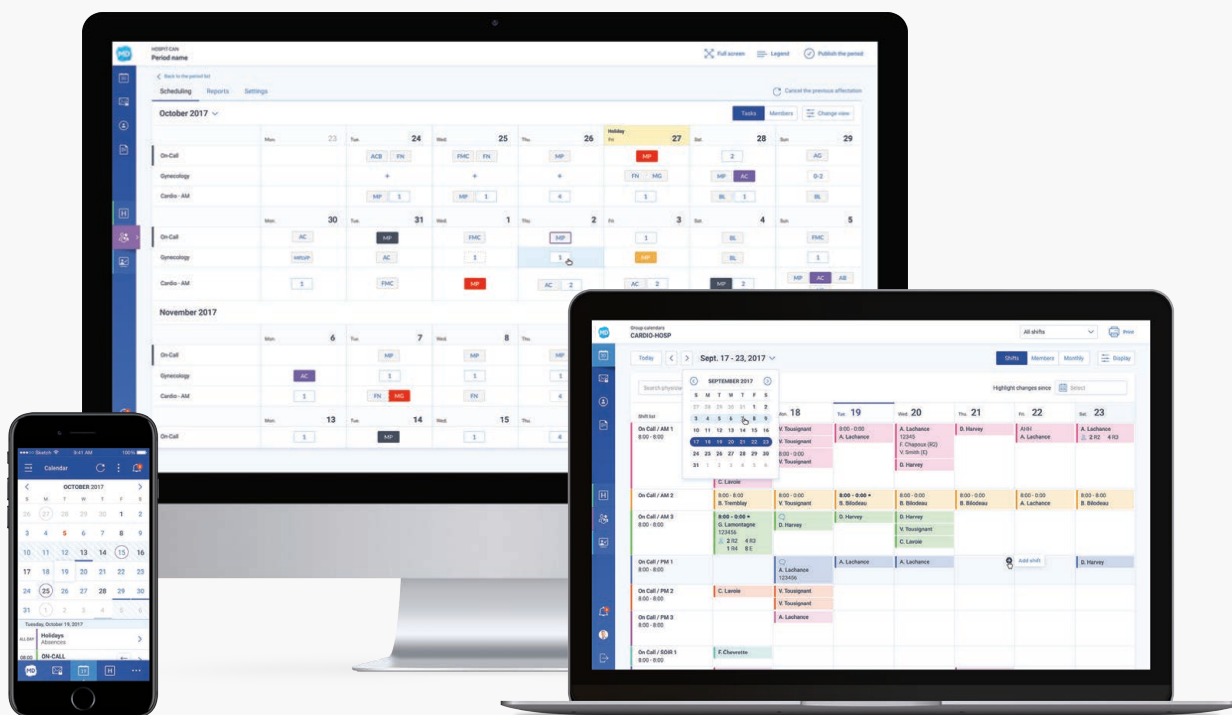
Staff have access to an on-call list from their mobile device, as well as secure messaging that ensures the confidentiality of exchanges between different staff members. The PetalMD's Hospital Platform also offers online appointment scheduling and automated patient reminders.



# Discover Petal Scheduling with a Custom Demo

You will see the features of Petal Scheduling in action and be able to ask your questions to one of our specialized consultants. This will allow you to better understand how these productivity tools fit the reality and special characteristics of your medical service.

*Call us at 1-888-949-8601 to request a demonstration!*



A Canadian leader in the digital health sector, PetalMD develops innovative web solutions to simplify the daily tasks of physicians, improve the efficiency of health facilities and facilitate healthcare access.

For more information, contact a specialized advisor at 1-888-949-8601.

[petalmd.com](http://petalmd.com)

