



**SPINFUSION**

Software powering medicine.

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# Momentia Scheduler

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*User Manual*



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# I. GETTING STARTED

## A. Setup Instructions

1. To use SpinFusion you must have a recent version of Java (1.5 or higher required). Your system will run much faster if you have the newest version of Java, so please visit Java's website even if you already have a current version. Java is available as a free download from the Sun Microsystems website at [www.java.com](http://www.java.com).
2. If you don't already have Adobe Acrobat Reader (for viewing PDFs) installed go to <http://www.adobe.com> and download the newest version for free.
3. Go to <http://www.SpinFusion.com> in your browser. Under "Momentia Scheduling" click the **Live Login (Scheduling)** link on the left. You will be prompted for a group name, user name, and user password.
4. Login usernames and passwords were distributed at training. If you cannot remember your login information there is a box to enter your email on the login page and your password will be emailed to you.
5. When you login for the first time a One-Time Browser Compatibility Test will open. Please read the pink box to make sure you have a current version of Java. Otherwise, click the link for Sun's Java Website and download the newest version of Java for free.
6. To turn your pop-up blocker off for this site, in your web browser go to **Tools, Pop-Up Blocker, Pop-Up Blocker Settings**. Either type in [www.SpinFusion.com](http://www.SpinFusion.com) and click **Add/Allow** or click **Always Allow Pop-Ups from this Site**. This needs to be done in order to view and open PDFs within the program.
7. After you have completed these steps and the One-Time Browser Compatibility Test page shows your computer has passed each step, there is a button at the top of the screen that says click here to login. Once on the login screen bookmark the page. After you login, if you want, you may change your password.



### One-Time Browser Compatibility Tests

Please read through test results below. When you are ready, please [click here](#) to login.

Test Name	Test Results	Notes
Checking OS Version	Windows XP	None.
Checking Browser Version	Firefox v1.0+	None.
Checking Java Plug-In	See Notes	<div style="border: 1px solid red; padding: 5px; text-align: center;">Java Version: 1.6.0_07 from Sun Microsystems Inc.</div> <p>In the pink box above, you will see the version of your Java Runtime Environment (JRE). In order to use Momentia, you need to have a version that is <b>1.4.2_07 or above</b>. If you don't have java installed, you will see a red "X" or some other error in the box.</p> <p>To obtain the latest version of Java (Windows) go to: <a href="#">Sun's Java Website</a></p>
Checking Javascript	Passed	None.
Checking Cookies	Passed	None.
Checking Popup Blocker	Passed	None.
Checking Adobe Reader	Passed	Version 6.0 or higher found.
Checking Screen Resolution	1680 x 1050	This value will be included in web address for sizing your window. To change later, use the 'Settings' menu option.

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## B. Logging In

1. Login site: <http://www.SpinFusion.com>. In the left panel, under “Momentia Scheduling” click **Live Login**.



Software Solutions ::  
Products »  
Testimonials »  
Client Support Area »  
Schedule a Demo »

Company ::  
Careers @ Spinfusion »  
Spinfusion Headlines »  
Contact »

Momentia Scheduling ::  
**Live Login (Scheduling) »**  
Momentia Sync »  
Request A Demo »

Volätus Recruiting ::  
Live Login (Recruiting) »  
Demo Login »

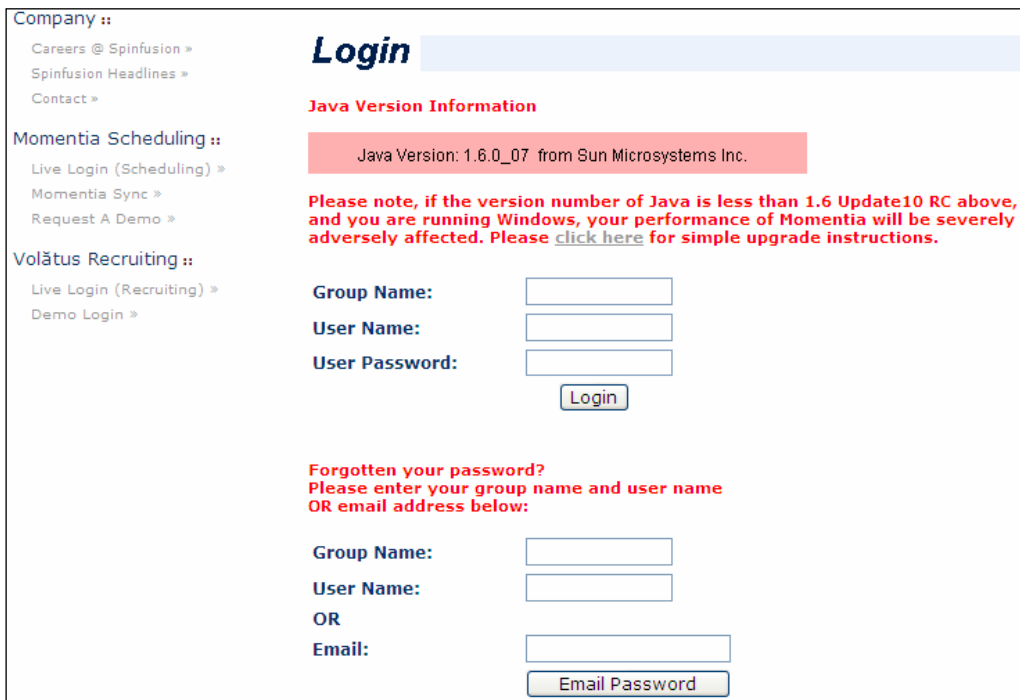
### Innovate

Spinfusion designs and markets full-lifecycle software solutions for healthcare providers. Founded in 1999, Spinfusion fuses the rigor of clinical practice with the entrepreneurial foundation of a Silicon Valley managed enterprise.

Spinfusion offers a full range of innovative solutions from **Momentia**, our flagship anesthesia staff scheduling solution, to **Volätus**, our web-based medical recruiting solution.

Through the application of innovative technology, Spinfusion's products improve efficiency and drive down the cost of healthcare, enabling providers to focus on clinical care instead of operational issues.

2. After clicking **Login** and passing the “One Time Browser Compatibility Tests” you will see the page below.
  - a. **Group Name:** your client specific group name (if you don't know yours, please contact your administrator)
  - b. **User Name:** First three letters of your last name, First letter of your first name. i.e. Matthew Mendez = MENM.
  - c. **User Password:** Distributed to you during training. If you cannot remember your password, either enter your group name and username or your email and your password will be sent to you.
3. Click **Login**.



### Login

**Java Version Information**

Java Version: 1.6.0\_07 from Sun Microsystems Inc.

**Please note, if the version number of Java is less than 1.6 Update10 RC above, and you are running Windows, your performance of Momentia will be severely adversely affected. Please [click here](#) for simple upgrade instructions.**

**Group Name:**

**User Name:**

**User Password:**

Login

**Forgotten your password?**  
Please enter your group name and user name  
OR email address below:

**Group Name:**

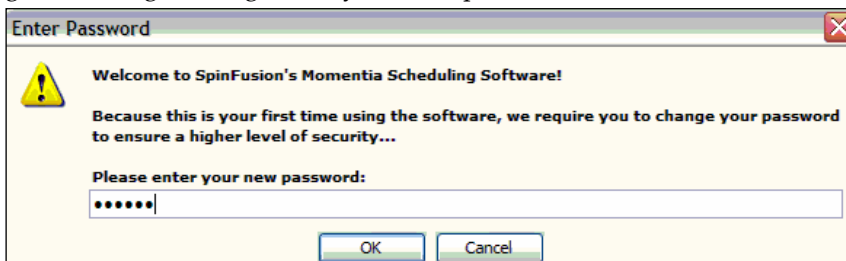
**User Name:**

OR

**Email:**

Email Password

4. The first time you log in you will need to choose a new password, which will replace the random number you were given during training. Enter your new password here and click **Ok**.



Enter Password

**Welcome to SpinFusion's Momentia Scheduling Software!**

Because this is your first time using the software, we require you to change your password to ensure a higher level of security...

Please enter your new password:

.....

OK Cancel

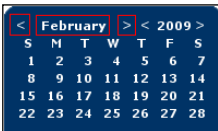
## II. SCHEDULES

### A. Viewing Schedules

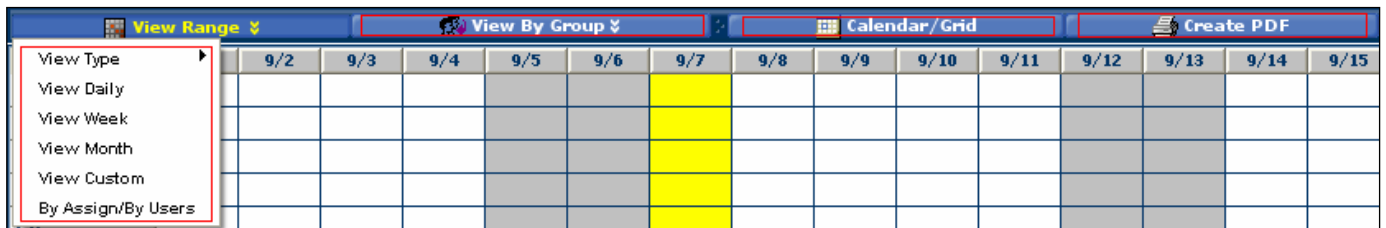
1. To view a schedule click **View \*Group\*** on the left hand side of the screen. A treeview of schedules will open.
2. Choose a schedule. Once clicked, a calendar/grid will appear on the screen.



3. To change months, use the calendar in the lower left side of the screen. Use the arrows to move from month to month. To choose a month click on the name of the month.

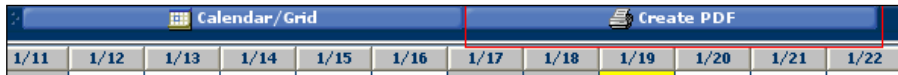


4. There are various options above the schedule to allow you to modify how the schedules are displayed including **View Range** (which allows you to filter a schedule by your own name, change the date range, or switch the display to view by assignments), **View by Group** (which allows you to filter a schedule by specific groups), **Calendar/Grid** (which swaps the view from a calendar to a grid or vice versa), and **Create PDF** (to save, print or email a PDF copy of the schedule).



## B. Printing & Emailing Schedules

1. In order to print a schedule, follow the steps above to locate and view the desired schedule and dates of interest. Use the menu choices above the schedule to change the how it is displayed if desired.
2. Click the **Create PDF** button above the schedule (see screen shot above).



3. Choose any specific page setup preferences as to how the schedule will display once as a PDF (scale, remove empty lines, orientation, etc.).
  - a. To print your schedule, click the **Create PDF** button. Adobe Reader will launch and your PDF will open in a new window. Print the PDF.
  - b. If you would like to email your schedule. Before clicking create PDF, check the box under the heading **Email PDF Copy** and then click **Choose Recipients**.

**Create PDF Page Setup**

**A. Scaling Options (Choose One)**

Fit To 1 Page

Pages Wide: 1

Pages Tall: 1

Full Size

**B. Empty Grid Rows**

Remove Empty Rows

**C. Email PDF Copy**

**Choose Recipients**

**D. Printout Footer**

**E. Printout Orientation**

Portrait

Landscape

**F. Export to Excel**

Export to Excel

**Create PDF** **Cancel**

4. Choose the recipients either by clicking individual checkboxes, **Selecting All**, or by using the group drop down. Once you've selected a group click **Select Group**. Boxes will now be checked for all staff in that group. Click **Send Email**.

**Choose users to email to:**

**Send Email** **Select All** **Deselect All** **Select Group:**

ANDM  MORK  culj  nemk

ARBF  NATN  danj  olcb

AWAH  NORJ  dowl  pacf

BENC  PAQS  edib  palr

BERS  PART  emar  paub

smis

Acute Pain

Acute Pain

Attending

CA1

CA2

CA3

**Cardiac Pool**

CHRI Call Pool

CHRI Call Weekd

smis

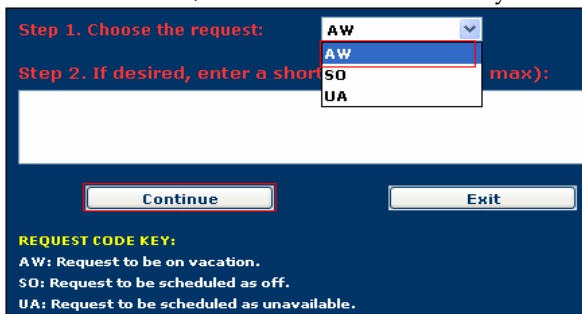
### III. SCHEDULE REQUESTS

#### A. Making Schedule Requests

1. To make a request click **Requests** from the treeview on the left hand side of the screen.
2. Next click the schedule you wish to place a request on (Leave Requests, Call Requests, etc.)
3. Using the calendar on the bottom left of the page, choose the month and the date range of your request (1st and last day). If this is a one day request, choose the same day twice. Check to make sure the dates have appeared at the bottom of the calendar and then hit the submit button (green arrow).



4. On the window that opens, there will be a drop down menu where you can pick the type of request you would like to make. If desired, enter a short note about your request. Click **Continue**.



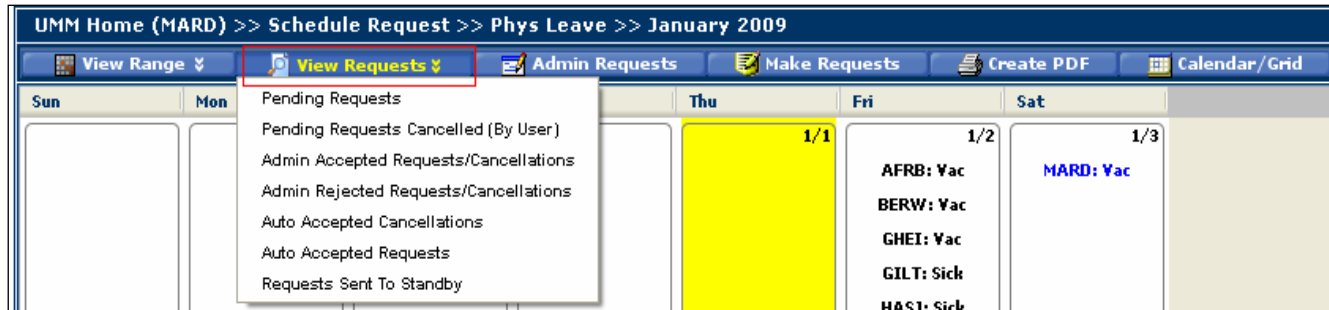
5. Your request now is in a pending 'queue' and will appear on the request calendar. You will receive an email when your request has been approved or denied.

Purple/Pink=Pending (Not yet approved),  
 Red=Cancellation,  
 Black=Approved,  
 Blue=Your Approved Requests.

5/17	5/18	5/19
STAB: VAC	COHN: OFFR	COHN: OFFR
COHN: OFFR	CROR: VAC	CROR: VAC
CROR: VAC	AZIM: VAC	AZIM: VAC
AZIM: VAC	LARD: VAC	LARD: VAC
LARD: VAC	LIAT: MTG	LIAT: MTG
LIAT: MTG	ZORM: OFFR	LAKH: CAG
KIRJ: MTG	KIRP: OFF	KIRP: OFF
ZORM: OFFR	LUNP: Kaiser	GRIM: OFFR
BLAM: MTG	HARI: VAC	LUNP: Kaiser
LARD: VAC	LARD: VAC	HARI: VAC
		LARD: VAC

#### B. Viewing Schedule Requests

You can use the **View Requests** menu to view logs of any previously accepted or rejected requests, as well as canceled requests and requests sent to standby.



## IV. TOOL DESCRIPTIONS

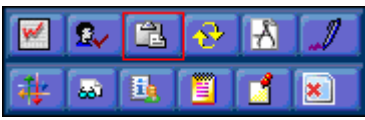
### A. User Info

The User Info gear shows your user name, password, phone numbers, email address, etc. Please check this info and correct any errors especially the email address. This is how you will receive vacation confirmation and will be your official departmental email address. This is also where you would change your password. Make sure to click Save Changes on the top of the screen once you have made your updates.



### B. Stat Manager

This gear allows explicit storage of statistics that can be decremented or incremented as assignments are entered on to the schedule. This tool is useful for vacation banks, quarterly call allocations, etc. Users can view their stats here.



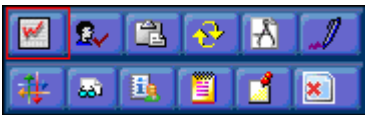
### C. Publish Schedules

The Publish Schedule gear is the list of schedules and the dates that users can view the schedules up to. For example, if the date set is 2009-02-28, users will not be able to see schedule information for March, but they will be able to see all data before and inclusive of Feb, 28.



### D. Reports

The Reports gear allows you to run miscellaneous reports about your call and leave.



### E. Forms

This tool can be used for getting holiday call preferences, or for per diems to enter extended shifts as two examples.



### F. Lottery

This tool allows administration of a lottery for assignment of call and/or vacation similar to the style of the NFL draft.



## **G. Swapping Assignments**

This tool allows swapping of assignments.



## **H. Bulletin Board**

This is used in conjunction with the swaps and allows users to 'Drop' assignments for anyone in the group (or per diems) to pick up.



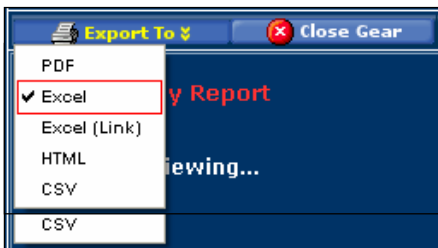


### A. Generating Reports

1. To run a report, click on the Reports icon from the tools in the lower left of the screen.
2. Click on the report you wish to generate.
  - a. Reports are available in both the main window as well as in the treeview on the left side of the screen.
3. When prompted, select the dates you wish to run the report for from the calendar on the bottom left of the screen.
4. Click **Generate Reports**, **Submit**, or the green arrow to run the report.
5. Some reports may automatically appear after simply clicking on the report name. Since all reports appear in a new browser window, be sure you have disabled any pop-up blocker features of your web browser since this will prevent reports from being displayed.

### B. Exporting Reports to Excel

1. To create and export a report to Excel, click on the Reports Info icon from the tools in the lower left of the screen.
2. Choose the report you wish to export.
3. From the drop down menu at the top click on **Export To**. From here select Excel, Excel (Link), or CSV.

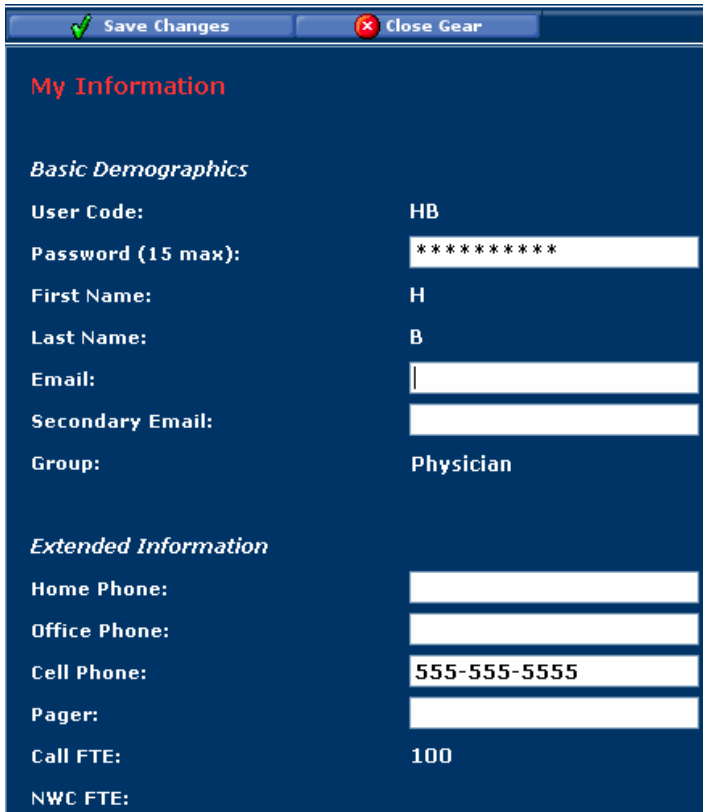


4. Select the beginning and ending dates of your report range.
5. Click Submit or the green arrow.
6. If you chose Excel as your export format a box will open asking whether you would like to open the file or save the file. Click **Ok**.
  - a. This will open the report in the same design format as the pdf, but in an excel file where you can copy and paste data
7. If you chose Excel link, a webpage will open in which you will need to click a link to either save the file or open the file.
  - a. This will open the report in the same design format as the pdf, but in an excel file where you can copy and paste data
8. If you chose CSV as your export format a box will open asking whether you would like to open the file or save the file. Click **Ok**.
  - a. This format will remove any design features from the report and will give you straight data.
9. Remember that next time you generate a report during it will use whatever your last export format was. You will need to change the export setting back to PDF to return to seeing PDF reports.

## VI. USER INFO

### A. Changing Your Email Address & Password

1. To view or edit your user information, click on the User Info icon from the tools on the lower left hand side of the screen. A screen with your user information on it will open.
2. Here you can make changes to your personal information, including your password. To change your password, type your new password into the password box where it currently shows stars.
3. Click **Save Changes** when you are finished.



The screenshot shows a user profile form titled "My Information" with a dark blue background. At the top, there are two buttons: "Save Changes" with a green checkmark icon and "Close Gear" with a red 'x' icon. The form is divided into two sections: "Basic Demographics" and "Extended Information".

**Basic Demographics**

User Code:	HB
Password (15 max):	*****
First Name:	H
Last Name:	B
Email:	<input type="text"/>
Secondary Email:	<input type="text"/>
Group:	Physician

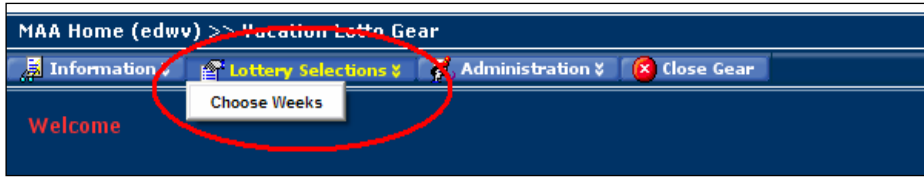
**Extended Information**

Home Phone:	<input type="text"/>
Office Phone:	<input type="text"/>
Cell Phone:	555-555-5555
Pager:	<input type="text"/>
Call FTE:	100
NWC FTE:	

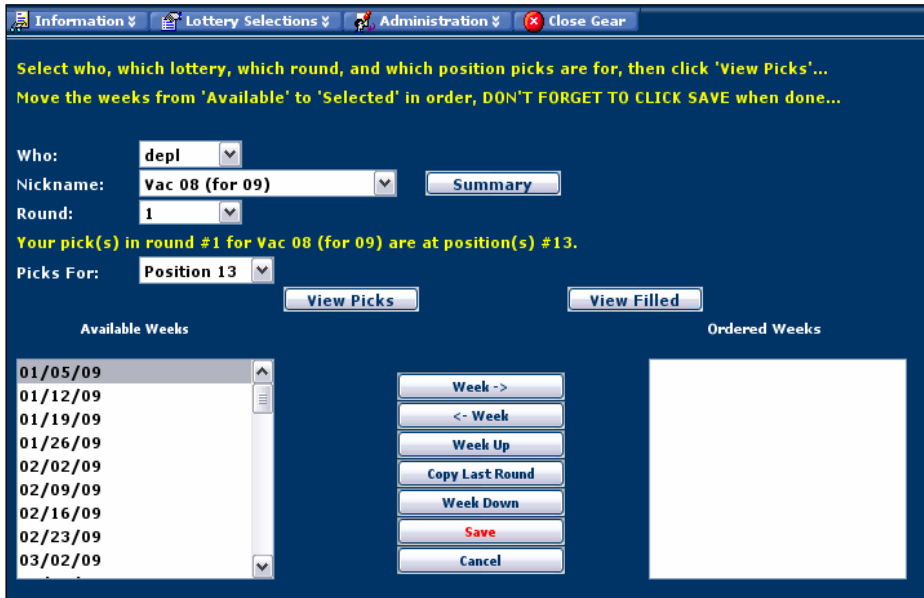
## VII. LOTTERY

### A. Making Lottery Picks

4. From the menu choices at the top of the screen select **Lottery Selections** and then **Choose Weeks**.
5. Choose **Who**.
6. Choose **Nickname**.
7. Choose **Round**.



8. Move weeks from the **Available Weeks** box to the Ordered Weeks box by clicking the **Week →** button.
9. The week at the top will be the first choice.
10. Click **Summary** to view Summary Report.
11. Click **View Filled** to view picks filled in earlier rounds.

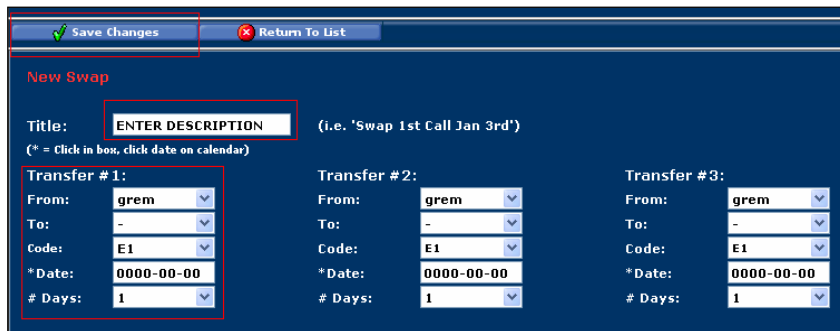


The screenshot shows the main interface for making lottery picks. At the top, there are navigation tabs for 'Information', 'Lottery Selections', 'Administration', and 'Close Gear'. Below the tabs, there are instructions: 'Select who, which lottery, which round, and which position picks are for, then click 'View Picks'...' and 'Move the weeks from 'Available' to 'Selected' in order, DON'T FORGET TO CLICK SAVE when done...'. The form includes fields for 'Who' (set to 'depl'), 'Nickname' (set to 'Vac 08 (for 09)'), and 'Round' (set to '1'). There is a 'Summary' button next to the Nickname field. Below these fields, it says 'Your pick(s) in round #1 for Vac 08 (for 09) are at position(s) #13.' and 'Picks For: Position 13'. There are 'View Picks' and 'View Filled' buttons. The 'Available Weeks' section is a list box containing dates from 01/05/09 to 03/02/09. The 'Ordered Weeks' section is an empty box. Between these two sections are several buttons: 'Week ->', '<- Week', 'Week Up', 'Copy Last Round', 'Week Down', 'Save', and 'Cancel'.

## VIII. SWAPPING ASSIGNMENTS

### A. Entering a New Swap

1. Choose the Swap icon in the lower left corner of the screen.
2. Click the New Swap button at the top the next screen that appears.
3. Enter a swap description.
4. Use the drop down menus to find the names of people involved in the trade.
5. Manually type the swap dates or click in the date box and then click on the calendar on the bottom left to automatically enter dates.
6. Select the code which you are swapping.
7. Click Save Changes.



Save Changes Return To List

New Swap

Title:  (i.e. \*Swap 1st Call Jan 3rd)  
(\* = Click in box, click date on calendar)

Transfer # 1: From: grem To: - Code: E1 \*Date: 0000-00-00 # Days: 1

Transfer # 2: From: grem To: - Code: E1 \*Date: 0000-00-00 # Days: 1


Transfer # 3: From: grem To: - Code: E1 \*Date: 0000-00-00 # Days: 1

### B. Changing an Existing Swap Status

In order for a swap to be approved by the administrator, each of the people involved must approve it. If someone else enters a swap in which you are involved it will appear on your queue list.

1. To view your queue list click the **Swap** icon in the lower left of the main screen. Then, choose the **Change Status** icon (the arrow) in the row of the swap that you want to accept or reject.



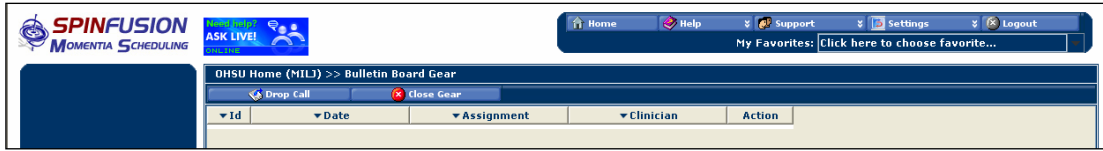
Id	Title	Time Stamp	Status	User	User	User	Action
2232	VAH call this weekend	2008-07-15 14:28:45.0	Accepted	Nyed	Yeej	-	  
2231	Swap VA call this weekend	2008-07-14 16:26:12.0	Rejected	Chej	Nyed	Yeej	  
2185	Swap E2 7/24/08 for E2 7/25/08	2008-07-10 12:55:45.0	Accepted	ABRM	HANK	-	  
2090	Transfer SatD to Matt	2008-07-02 10:35:20.0	Accepted	ABRM	ZORM	-	  

2. Change the status to **Accept** or **Reject** and then click **Save Changes**.

## IX. BULLETIN BOARD

### A. Dropping a Call

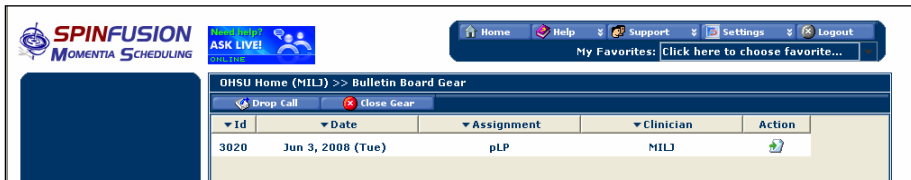
1. On the bottom left hand side of your screen choose the bulletin board button:
2. Click the drop call button.



3. Pick the type of call and date of call that you want to drop. Click Save Drop. Confirm the drop.



4. The dropped call will appear on the bulletin board list.

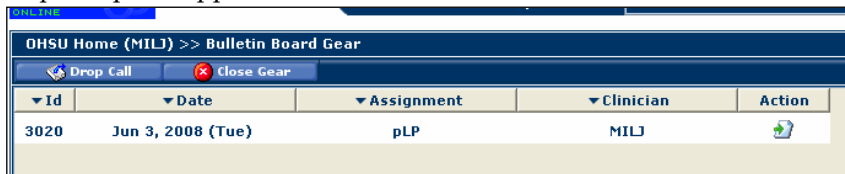


5. When looking at the Call Schedule, the call you have dropped will show up with a dark blue back ground. If you are looking at a call that someone else has dropped, it will say open.

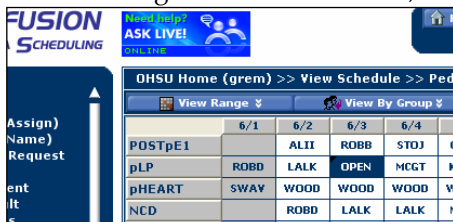


### B. Picking up a Call

1. To pick up a dropped call click the button under the word action.



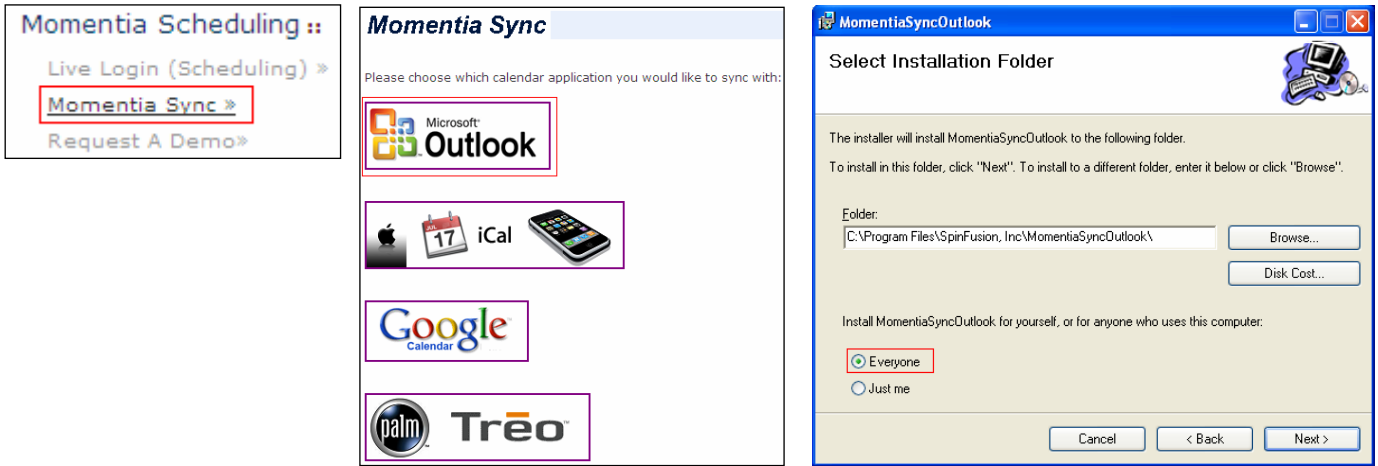
2. When looking at the Call Schedule, a call that someone else has dropped will say open.



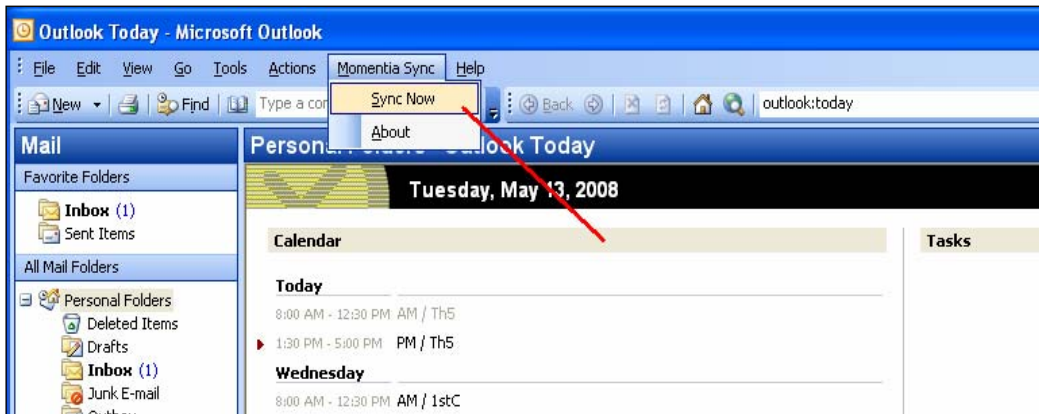
## X. SYNCHING WITH MOMENTIA

### A. Synching Outlook Calendar

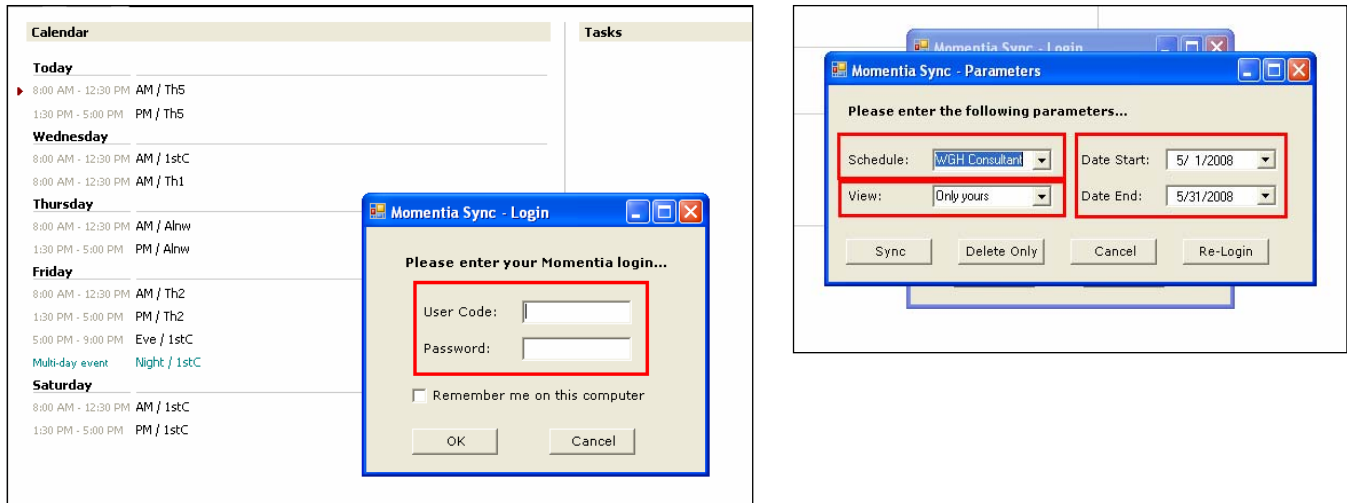
1. Click on the **Momentia Sync** link located under Momentia Scheduling on the left hand side of the login screen. Then click on the picture for Microsoft Outlook. Run and extract the program that opens. **\*\*NOTE: If you are asked where to install for Everyone or Just Me, you \*must\* choose Everyone**



2. Open Outlook. Click **Momentia Sync** and then **Sync Now**.

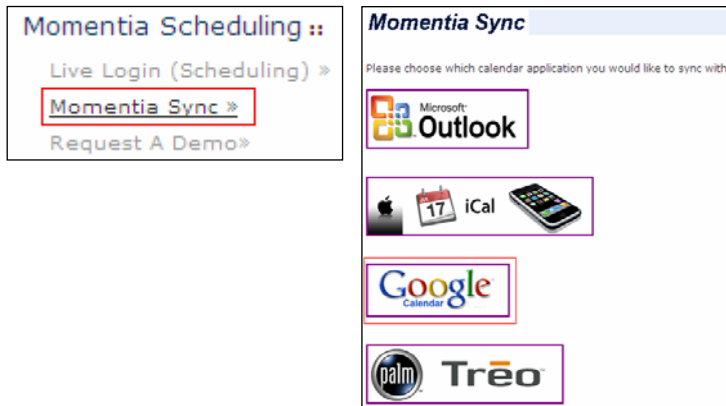


3. Enter your SpinFusion username and password. Choose which schedule and dates you would like to sync. Click **Sync**.

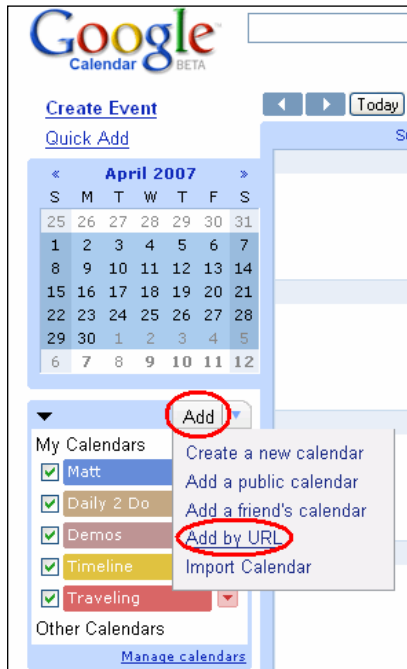


## B. Syncing Google Calendar

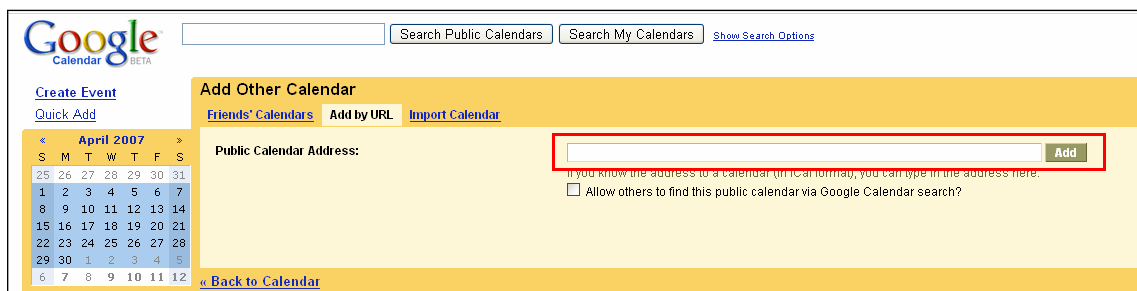
1. Click on the **Momentia Sync** link located under Momentia Scheduling on the left hand side of the login screen. Then click on the picture for Google Calendar.



2. Follow the steps shown on the next screen by selecting the specific schedule to sync, the number of past days to sync, and the number of future days to sync. Click **Subscribe** to continue.
3. Click on **Add** and **Add by URL** as demonstrated below:

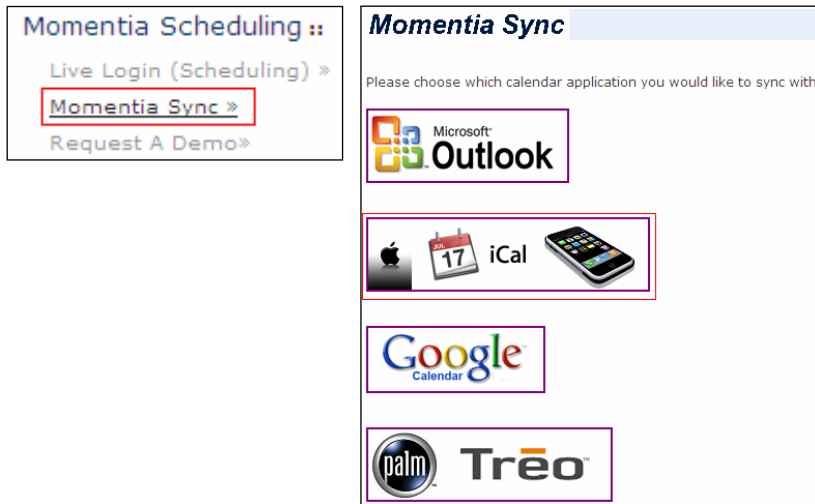


4. Enter the address written down into the box and click **Add** button. Google will grab calendar and it will appear on your list. Calendar will update once every 24 hrs. (Optional) Open a browser on your mobile phone to <http://mobile.google.com> to view your Google Calendar on your phone.

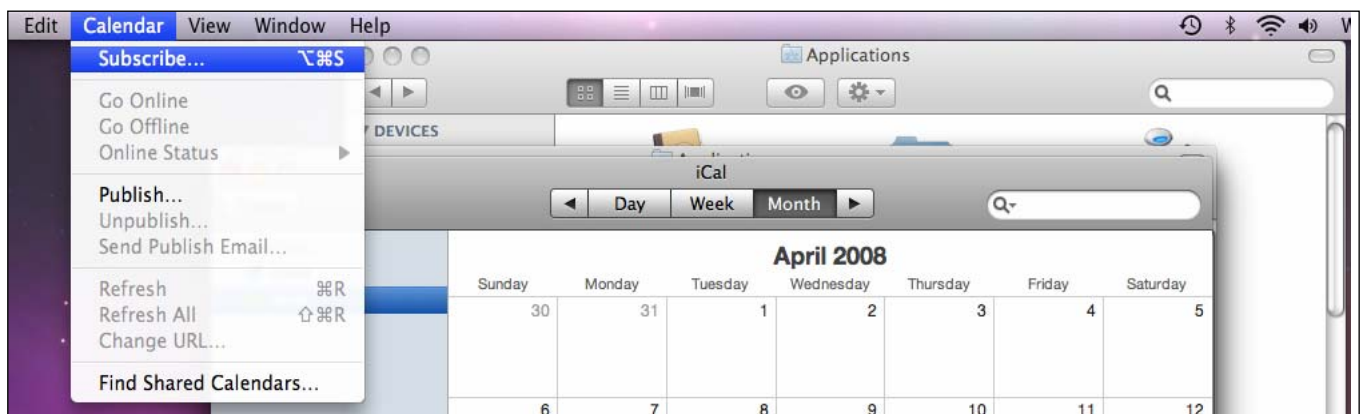


## C. Synching iCal (and iPhone)

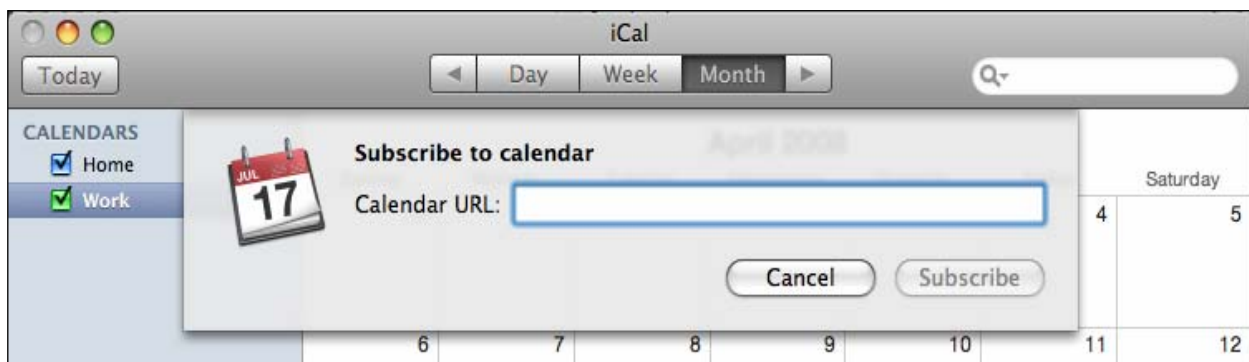
1. Click on the **Momentia Sync** link located under Momentia Scheduling on the left hand side of the login screen. Then click on the picture for iCal Calendar.



2. Follow the steps shown on the next screen by selecting the specific schedule to sync, the number of past days to sync, and the number of future days to sync. Click **Subscribe** to continue.
3. Inside iCal on your Mac, choose **Calendar** and **Subscribe**:



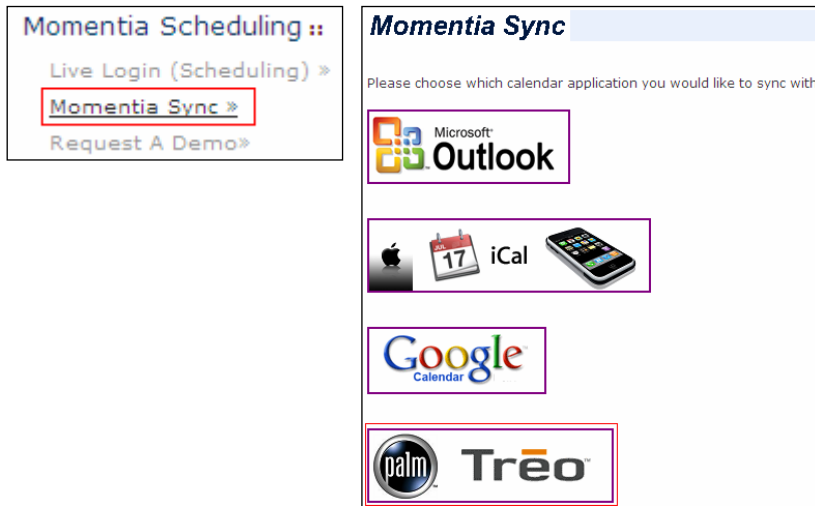
4. Enter the address written down into the box and click **Subscribe** button. iCal will grab calendar and it will appear on your list of calendars. Calendar will update regularly.



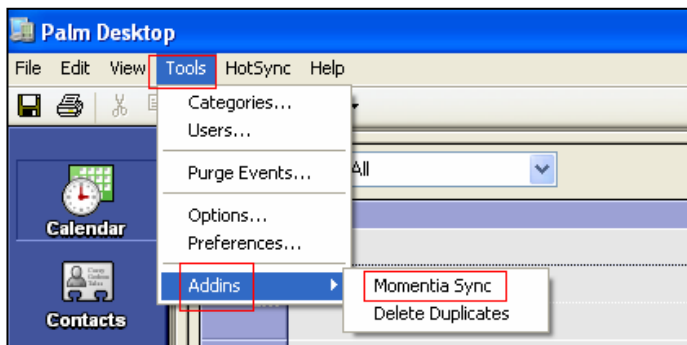
5. (Optional) Use iTunes to sync the subscribed calendar with your iPhone. Instructions on <http://www.apple.com>.

## D. Synching Palm Desktop

1. Click on the **Momentia Sync** link located under Momentia Scheduling on the left hand side of the login screen. Then click on the picture for Palm Treo. Run and extract the program that opens. Click install palm version. Click **Done**.



2. Open Palm Desktop. Choose **Tools, Addins, MomentiaSync** from Palm Desktop Menu.



3. Enter your SpinFusion username and password. Chose which schedule and dates you would like to sync. Click Sync.

