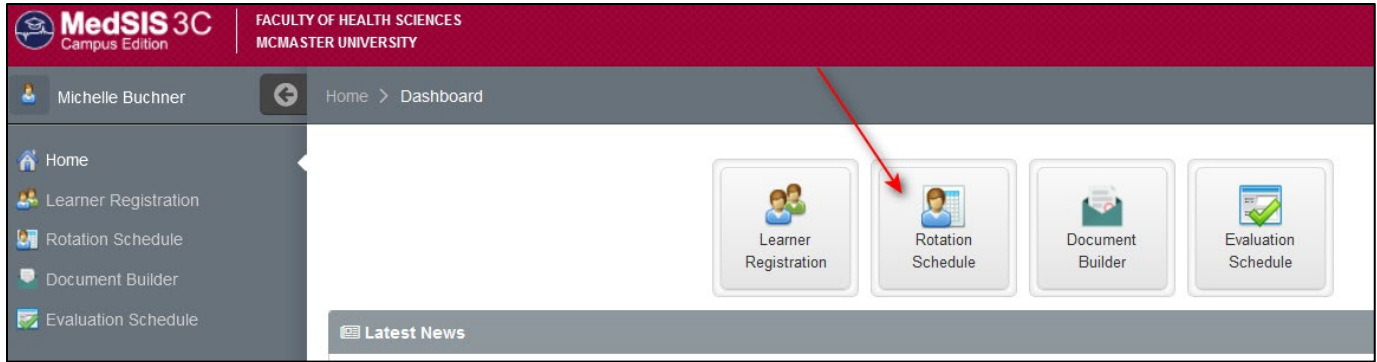# User Guide – How to Schedule Courses/Rotations

Target Audience: Administrators

Updated *October 25, 2022*

COURSE/ROTATION SCHEDULING

1. From the Homepage of MedSIS, click on Rotation Schedule, then Learner Schedule

SET COURSE/ROTATION SCHEDULE DATES

By default, the dates on the course/rotation schedule will start/end 6 months prior/after today's date. Upon the first time that you enter the schedule, please update your dates to September 1 – August 31 of the current academic year.

SCHEDULE COURSES/ROTATIONS

1. Expand Rotations/Locations Menu on right hand side of Rotation Schedule
2. Find the Course/Rotation you want to schedule from the list
3. Drag & Drop the Course/Rotation from the right-hand menu over to a learner in the schedule.
   - **Important Note: Please drag the location of the course/rotation along with it. This will make it easier and then you will not need to individually update the location later. To view which locations are attached to each course, click on the arrow (>) button beside the rotation.

ADD SUPERVISOR TO COURSES/ROTATIONS

1. Double click on the course/rotation to open the rotation editor
2. In the supervisor tab, select "add supervisor"

3. Under the supervisor column, search for the supervisor in the prepopulated list
   *If the supervisor does not appear in the prepopulated list, they need to be added to the system. This can be done within the rotation. Please see section below "Adding New Supervisors to the System".
4. Select the supervisor on the list
5. Input the percentage of time the supervisor will spend supervising this learner in this rotation
   a. If the student selected is evaluating one supervisor for this course/rotation, put 100%
   b. If the student selected is evaluating two supervisors for this course/rotation, put 50/50%

6. Under the column "Categories", select "**Contributor**" (this will trigger a teacher evaluation). For Nursing, Graduate Studies, and Physiotherapy, please **always select Contributor** as the supervisor category.
7. Once the supervisor, time % and categories columns are entered, select the green check mark to finalize the supervisor addition.

Note: If you wish to edit any of these details, click on the name of the supervisor and the fields will be editable. You can also use the red (x) in the far-right hand column to remove the supervisor entirely.

Adding New Supervisors to the System

If you are searching for a supervisor and they are not appearing in the list, they need to be added to the system.

1. Click on blue "+ Add Supervisor" button at the bottom of the dropdown

2. Fill out first name, last name, CPSO (if applicable), email address and role for the supervisor
   - **Role legend:**
     - Physician: This is a licensed physician. In Ontario, all physicians will have a CPSO number.
     - Allied Health Professional: Any Healthcare Provider/Professional that does not have a CPSO number (Registered Practical Nurse, Physiotherapist, Chiropractor, etc.)
     - Student: This is an individual currently enrolled as a student in a UGME or FHS program
     - Trainee: This is an individual currently enrolled as a trainee/resident in a PGME program, including fellowships

+ Add Supervisor

First Name *	
Last Name *	
CPSO#	
Email *	
Role *	--Select--

Save | Cancel

3. Select "save" and the new supervisor will appear in the rotation. This supervisor now has an account created in MedSIS. **Please do not use this field to update email addresses** for supervisors, it will create an entirely new account. For updating supervisor email addresses or names, please submit a JIRA MedSIS ticket.
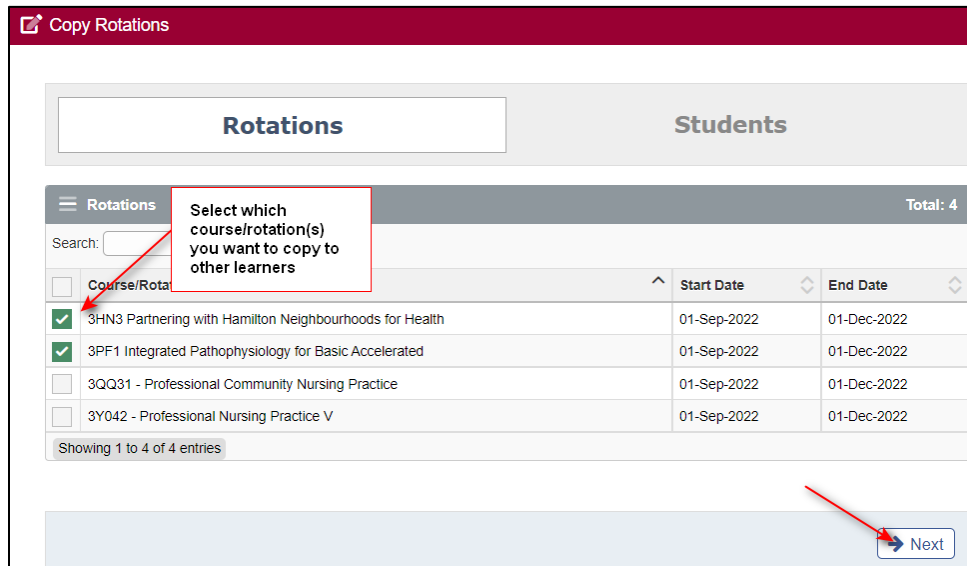
COPY COURSES/ROTATIONS TO OTHER LEARNERS

1. Find course/rotation that you want to copy, and select copy icon

2. Select which courses/rotations you want to copy to other learners, and click Next

3. Use the filters to refine your search (for example, if you want to copy this course/rotation to only Year 4 learners, please use the filters to select only Year 4).

4. Select the learners you wish to copy the previously selected courses/rotations to. Click Save.
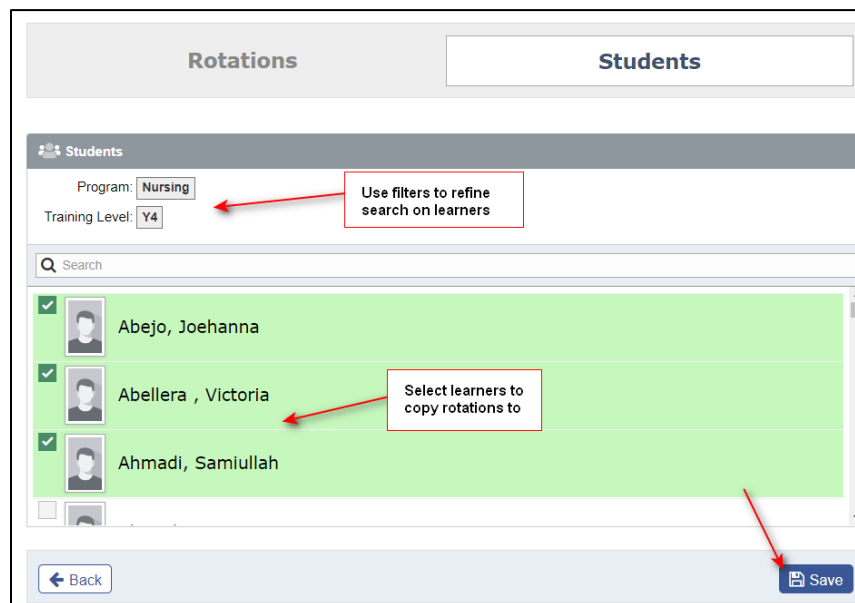
PUBLISH COURSES/ROTATIONS

Course/Rotations must be published for learners to be able to view the rotation in their schedule and evaluations to be sent out. The system is set-up right now to auto-publish all changes in the FHS schedules.

In rare circumstances, a course/rotation that is unpublished will have a red triangle in the top left corner.

If you see a rotation that has a red triangle and is correct, right-click on the rotation and select "publish".

BULK EDIT COURSES/ROTATIONS

Bulk Edit allows you to make changes to multiple courses/rotations at once. Supervisors and locations can be bulk edited.

1. Hold CTRL (on windows) or CMND (on apple devices) and select the course/rotation you would like to edit - a black line will appear around the selected courses/rotations to indicate which ones are being edited

2. Let go out CTRL and select "Edit Bulk" at the top right-hand corner of the course/rotation schedule

3. Add in supervisor(s) and/or location(s):
   - To add a supervisor, follow the same steps as adding a supervisor into a rotation
   - To add a location, select the (+) beside the primary column

4. Select which Bulk Save Option you would like:

| Bulk Save Option	What will happen
Add Changes to data that already exists	This will add another layer of supervisors/locations to the courses/rotations. What exist will remain and the new information will be added in addition to it.
Override all data	This will wipe all supervisor/location information in those courses/rotations and replace it with the edits.
Clear Fields	This clears all supervisor and location fields

- If a rotation already has a supervisor/location and you only update the supervisor field and select override changes it, will it erase the location that is there.

5. Select "Save" and all selected courses/rotations will be bulk edited

DELETING COURSES/ROTATIONS

1. Right-click on the course/rotation and select delete. The course/rotations will now appear as a faded red rotation. Note, this is not completely deleted yet. The system has measures in place to ensure a course/rotation is not deleted accidentally.

*If you accidently deleted a course/rotation and need it restored, right-click on it and select "rollback". This will restore the deleted rotation
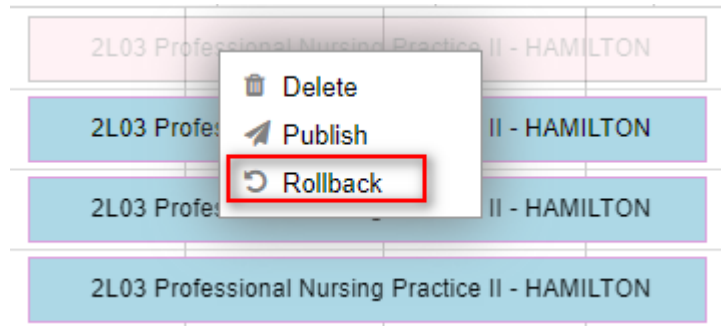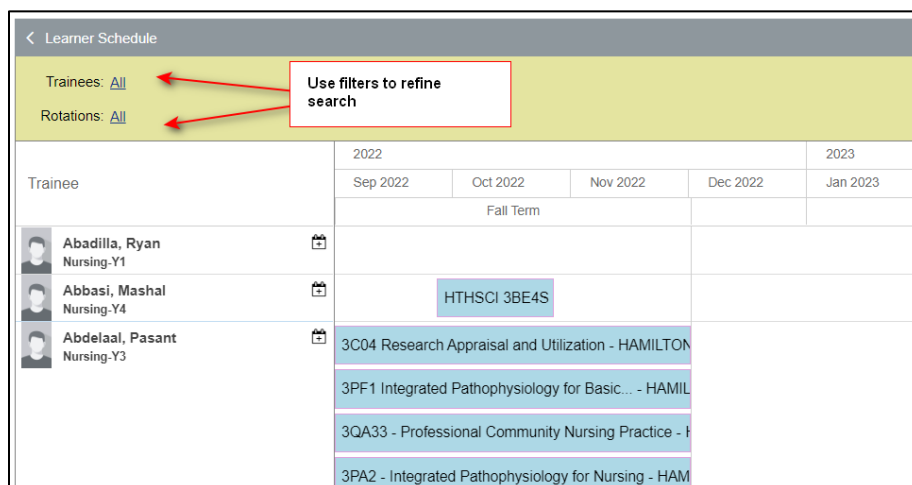

2. If you want to delete the course/rotation entirely, right-click on it and select "publish". This will completely delete the course/rotations from the schedule. If you wish to delete multiple courses/rotations at once, complete step 1 for all the needed courses/rotations. Once they are all faded red, select "publish" in the top right-hand corner. The system will show you how many courses/rotations are to be deleted and ask you to select "yes" or "no". Select "yes" if you wish for all the red faded courses/rotations to be deleted.
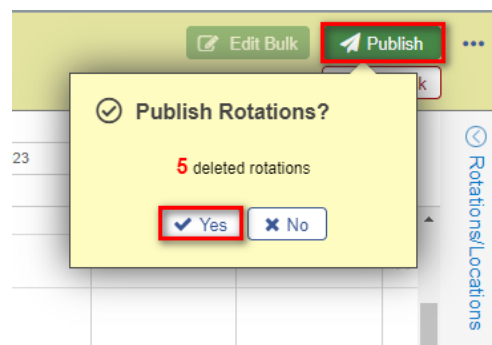
*Note, courses/rotations cannot be restored past this step, they need to be created again

FILTERING COURSE/ROTATION SCHEDULE

After you have created courses/rotations in the schedule, you can use the filters along the top of the rotation schedule to refine your search. You may filter by attributes of the Learners (e.g. program, year level, learner name), or by Rotations (name of Course/Rotation, Location, Supervisor, etc).

QUESTIONS?

If you have any questions or difficulties with this process, please submit a ticket at medsishelp.mcmaster.ca