

Understanding Vacation and Temporary Overrides - Admin Panel

Purpose: Explain what a Vacation or Temporary Override is in Phone Copilot, why it is useful, and where to find it in the Admin area.

What is a Vacation or Temporary Override

A Vacation or Temporary Override lets you replace a scheduled on-call doctor with another doctor for a limited time window. It is a quick way to handle unplanned time off, short leaves, or one-time swaps without changing the main on-call schedule.

- You set a **From** date and time and a **To** date and time.
- You choose the **Existing On Call Doctor** to be replaced.
- You choose the **Replacement On Call Doctor** who will cover during that period.

During the selected window, Phone Copilot treats the replacement doctor as the on-call doctor. Outside that window, the original schedule remains unchanged.

When to use it

- A doctor calls in sick or takes an urgent personal day.
- A one-off shift trade is needed for a few hours or days.
- You want a fast change that does not modify the base schedule for the month.

Where to find it

1. Sign in to **Phone Copilot** Admin.
2. Open **Admin**.
3. Go to **On-call Schedule Management**.
4. Select **Vacation/Temporary Changes**.

What you will see on the page

The page shows a table of overrides that are active or upcoming from the current time. Typical columns include:

- **From DateTime**
- **To DateTime**
- **On Call Doctor**
- **Replacement On Call Doctor**

Actions available per row:

- **Edit** to change dates or doctors.
- **Delete** to remove an override.

There is also an **Add** button to create a new override.

Permissions

Only users with schedule administration access can add, edit, or delete overrides.

Tips and good practices

- Use overrides for short or unexpected changes. Use the main schedule for long term or recurring updates.
- Keep time windows tight to the actual absence. This reduces confusion for the front office.
- Avoid overlapping overrides for the same doctor and time window.
- Review the list regularly to make sure expired overrides are cleaned up.
- Confirm that the replacement doctor is enabled as an on-call provider in your organization settings.

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