



## Getting Started with QGenda for Schedule Owners/Admins: Viewing and Managing On-Call Schedules

QGenda is Northwestern Medicine's enterprise on-call scheduling application. Schedule owners and admins use QGenda to create and manage schedules of their practices' physicians and APPs.

### Getting started

First, schedule owners must be pre-approved by NM to set up a QGenda account. Fill out [this form](#) to get started, or call MyNM Service Center at 312.926.4357.

Once you have an account, log-in using the below steps:

1. **Log-in via the QGenda website from a computer** (required for creating schedules)
  - a. Visit [QGenda.com](https://qgenda.com).
  - b. Click on the "Customer Access" button in the top right-hand corner.
  - c. Log-in

**If you are employed and you have an nm.org email:** Click Single Sign-On and enter your nm.org email and NM credentials.

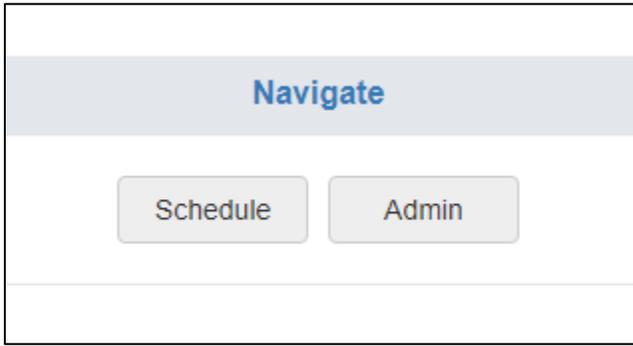
**If you are an Independent and you do not have an nm.org email:**

- (i) Click the "Customer Access" button in the top right-hand corner to go to the login screen.
- (ii) Click "Create Account" in the bottom right corner and enter your information. Use the email address to which your invite email was sent in order to properly link your account.

2. **Download QGenda mobile app for [iOS](#) and [Android](#).** You can use the mobile app to view and swap published schedules.

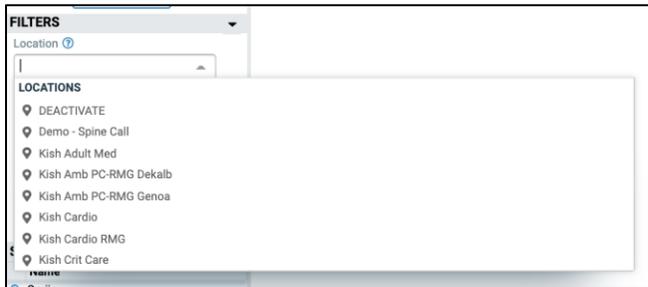
### Navigating Qgenda

**Admin Tab:** Create and manage schedules of clinicians in your practice by clicking "Admin."

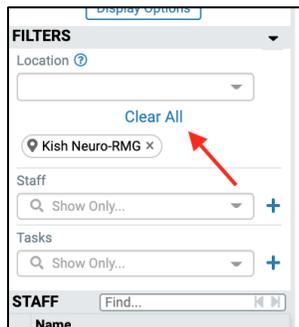


**Apply filters to narrow search by location, staff or tasks**

You can apply as many filters as you would like. When you want to filter by location, you will see a list of locations to select:



To remove a filter or change locations, click "Clear All."



To learn more about how to create filters, click the blue question mark in the bottom right corner of your screen, select "Tutorials," and click "Admin 1 | View & Filter."

**Schedule detail window:** To make an assignment, click on an open cell in the Admin grid to view scheduling details.

 A screenshot of the "Admin" schedule grid. At the top, there is a navigation bar with a left arrow, a date selector set to "10/11/2021", a week selector set to "2", a "Weeks" dropdown, and a "Go" button. Below this is a grid with columns for "MON OCT 11", "TUE OCT 12", and "WEDNESDAY OCT 13". The first row of the grid shows the task "Kish Neuro-RMG Call 7a-7a" for each of these days.
 

	MON OCT 11	TUE OCT 12	WEDNESDAY OCT 13
Kish Neuro-RMG Call 7a-7a	Grujic 7a-7a	Grujic 7a-7a	Grujic 7a-7a

## Scheduling details

MONDAY SEP 27
Kish Neuro-RMG Call 7a-7a
— x

Assigned Staff	Status	Lock	Strike	Track	Start	End	Credit	Notes	Private
Grujic (Grujic) 7a-7a	<input type="checkbox"/> <input checked="" type="checkbox"/> Pub	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7:00 am	7:00 am	1		<input type="checkbox"/>

▼ Available Options Schedule

Staff	Status	Lock	Strike	Track	Start	End	Credit	Notes	Private

▼ Conflict Options Schedule Reason

Staff	Status	Conflicts							

▼ Ineligible Options Schedule

Staff	Status	Lock	Strike	Track	Start	End	Credit	Notes	Private
He (He) 7a-7a	<input type="checkbox"/> <input checked="" type="checkbox"/> Pub	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7:00 am	7:00 am	1		<input type="checkbox"/>
Morker (MorkerM) 7a-7a	<input type="checkbox"/> <input checked="" type="checkbox"/> Pub	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7:00 am	7:00 am	1		<input type="checkbox"/>

Apply To: Duration
9/27/2021 through 9/27/2021
Su Mo Tu We Th Fr Sa
Cancel Submit

**Status:** The status of an assignment determines who is able to see it.

- Open circle indicates draft status, visible only in the Admin tab.
- Circle with check mark is saved, visible only in the Admin tab
- Pub means published, and is visible to everyone with view access.

**Options**

Status	Lock	Strike	Track
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Pub	<input type="checkbox"/> <input checked="" type="checkbox"/>

**Start and end times:** You can adjust the start and end times of an assignment by selecting the hour, minute and “am” or “pm.” Then click Set or type the time in the time box (7am, for example.) **Note:** Do not stagger your times like 7a-6:59p. QGenda will be able to accept overlapping times so the schedule can read 7a-7p with the next assignment starting at 7p.

**Start**

⌚
8:00 am
↕

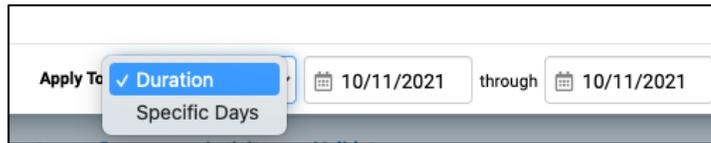
Clear
Default

12	00	am
01	05	pm
02	10	
03	15	
04	20	
05	25	

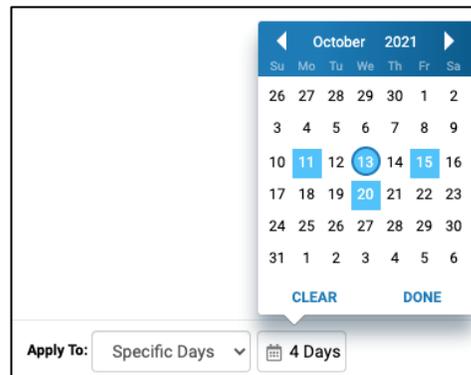
Set

## Duration

- a. A **range** of dates can be selected by modifying both date fields. This will assign the same person to all dates in the range.

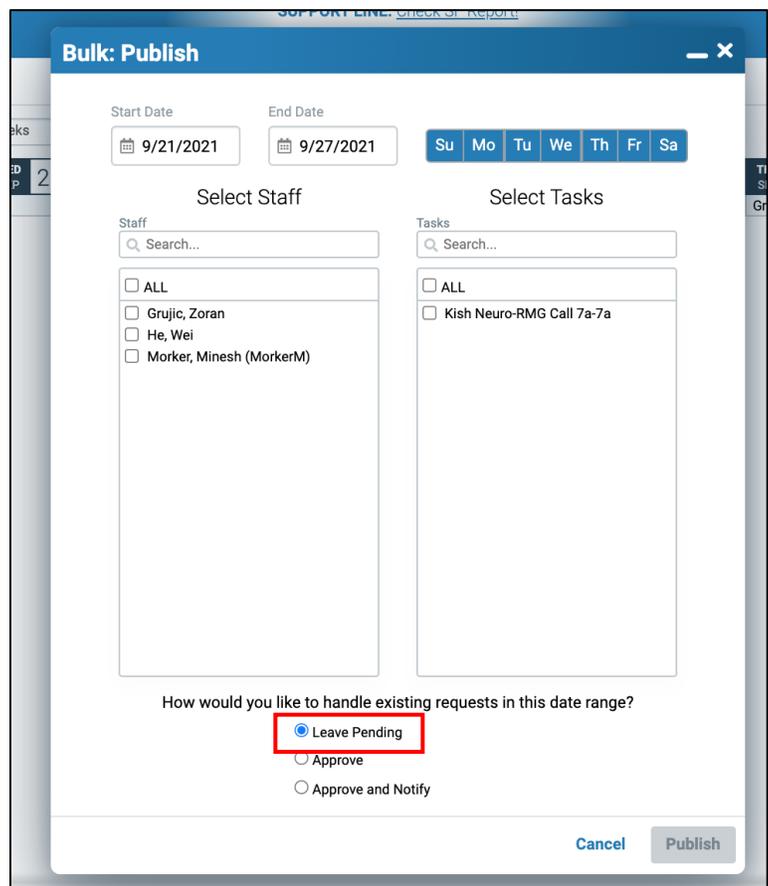


- b. Specific days can be selected by clicking the Calendar icon and selecting the dates to assign a clinician.



## Publish a schedule

1. Click the Bulk button in the Admin tab.
2. Select Publish.
3. Select start and end dates of the schedule you wish to publish.
4. Choose staff and tasks.
5. Click Publish button in the bottom right of window.
6. Leave the default selection to "Leave Pending" to the question, "How would you like to handle existing requests in this date range?"



## Getting help on QGenda.com

**Admin tutorials:** Find in-app tutorials by clicking the question mark icon located in the bottom right of the Admin tab. New schedule owners should review tutorials for more information.



### QGenda Help Center Resources:

- [Common Tips](#)
- [Bulk Actions](#)
- [Fill Mode](#)
- [Schedule Detail Window](#)

## QGenda mobile app

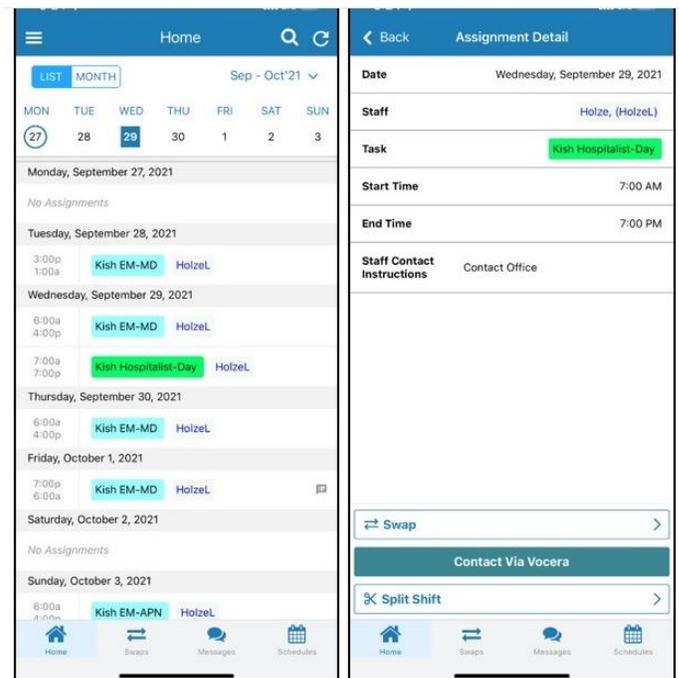
**Swapping schedules and shift-splitting:** Use QGenda mobile app to swap and update existing schedules.

**Swap 1-Way or 2-Way:** Use this function to adjust single shift coverage or make a 1:1 shift swap between clinicians.

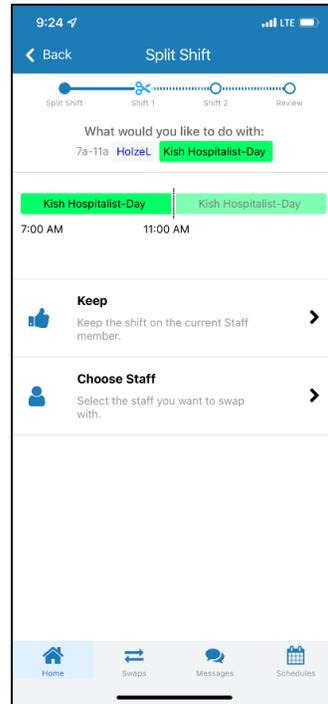
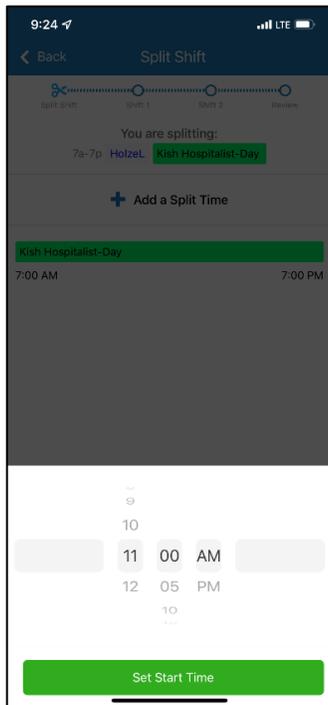
- On the mobile-app go to “Swap” then tap “Add Swap.”
- Follow on-screen instructions to complete the swap. No approval/publishing is needed when complete.

**Split Shift:** Use this function to adjust shift coverage for a single day. For example, change the 7 am to 7 pm shift from one clinician, one shift, to two clinicians covering two shifts; one from 7 am to 11 am, and the other from 11 am to 7pm.

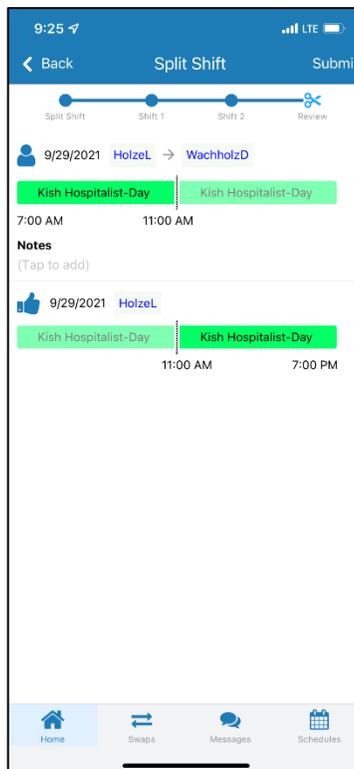
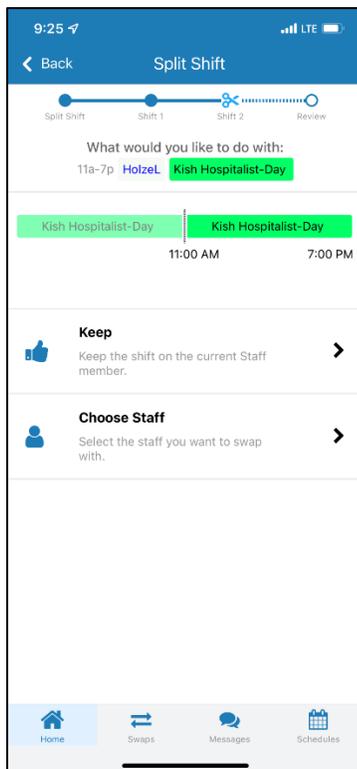
- On QGenda mobile-app go to Schedules > Standard Views: Schedule by Task > Tap the scheduled assignment to split > tap Split Shift.



- b. Select a time to split the shift, then choose the already-scheduled clinician to keep the shift, or select a new clinician.



- c. Do the same process to schedule the second half of the split.



- d. Tap Submit in the top right to complete the shift-splitting process. Repeat for additional splits within these two shifts.