Schedule View, Swap, Request, Approval (for Providers, Schedule Owners)

Updated: 5.2025

Purpose: To provide an overview of the schedule views and processes for providers to make changes to their schedule.

Content:

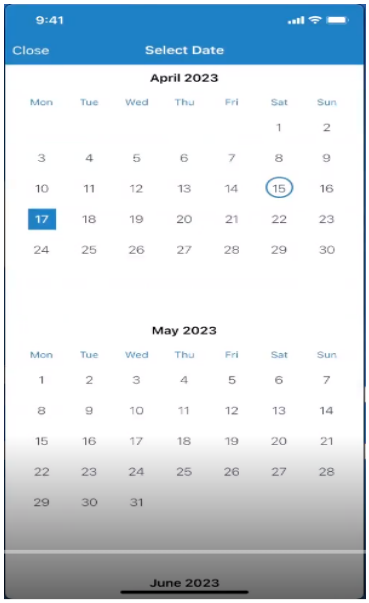
1. Schedule Changes – real time syncs:

- Always check schedules in QGenda.
- Schedules should not be printed/distributed as static copies will not reflect the real-time updates
- Approved changes to On Call schedules are updated real time in QGenda.
- If integrated with Vocera, changes in QGenda are synched real time to Vocera.

2. QGenda Schedule view options from the QGenda Mobile App:

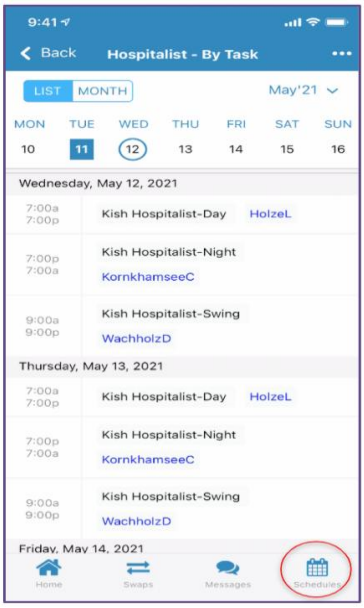
a. Open the QGenda mobile app. The homepage will default to a list view of your schedule.
b. Scroll up or down or slide right or left in the date bar for additional days.
c. Toggle to Month to view future or past schedules. Select a day and the List schedule will display for that time frame.
d. To move ahead or back by months, tap the month shown in the upper right, and multiple months will display. Scroll to the desired month, select a day and again the list schedule will display for that time frame.

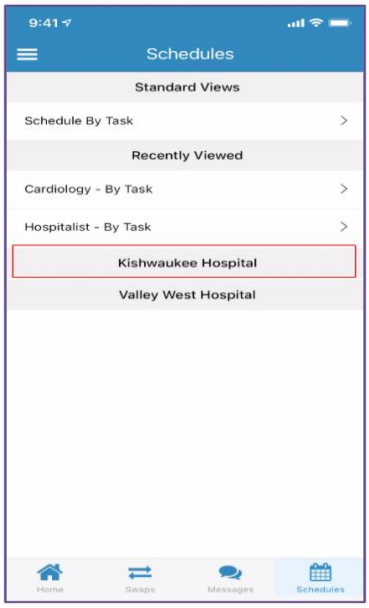
DEFAULT VIEW - Your Schedule:

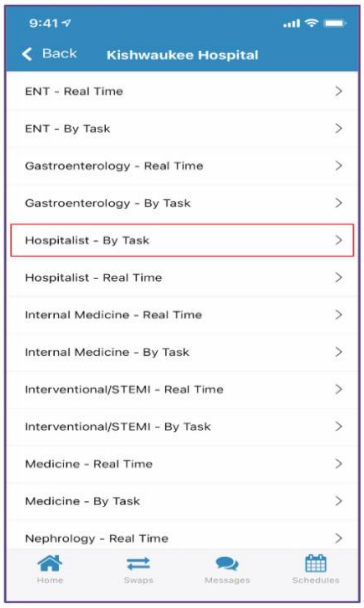


VIEW OPTION - All Groups Schedules:

a. Select "Schedules" icon at bottom of the home screen.
b. View all schedules by selecting "By Task".
c. View who is on-call at the current time when you select "Real Time".



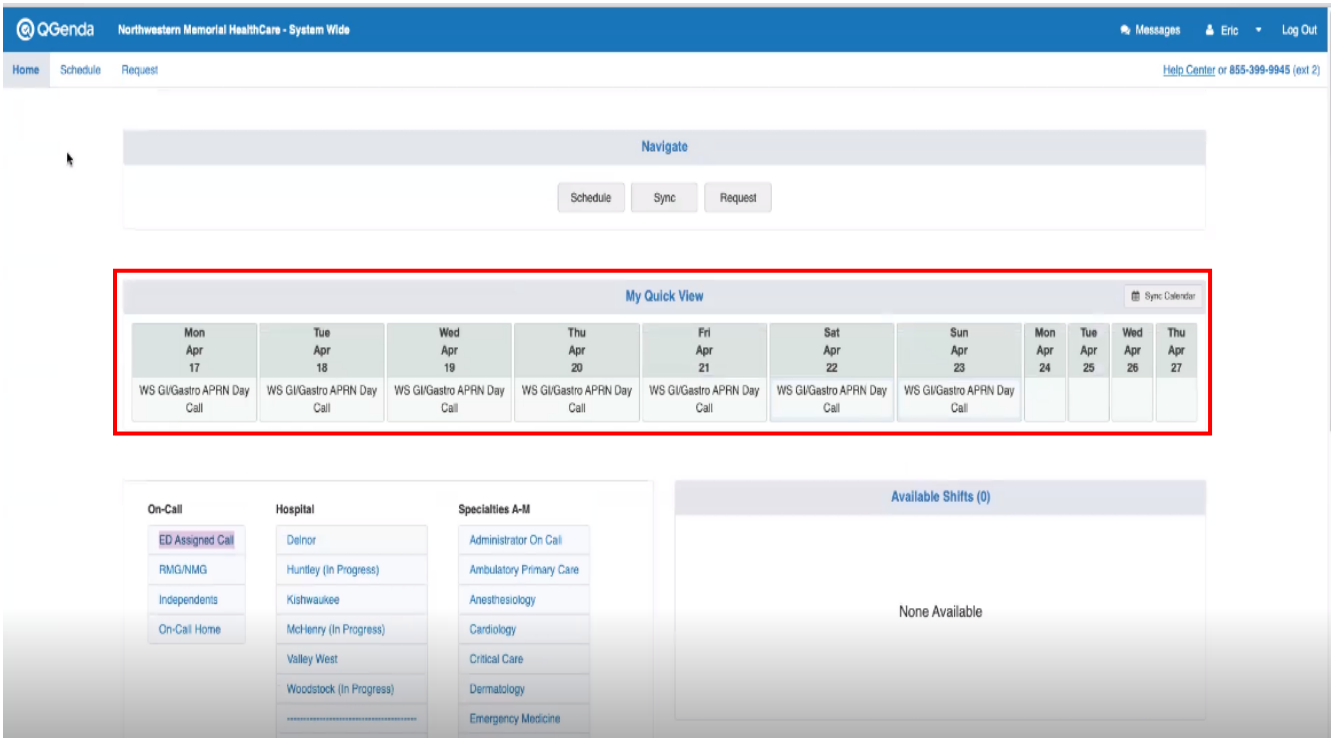




3. QGenda Schedule view options from QGenda Homepage on Desk-top:

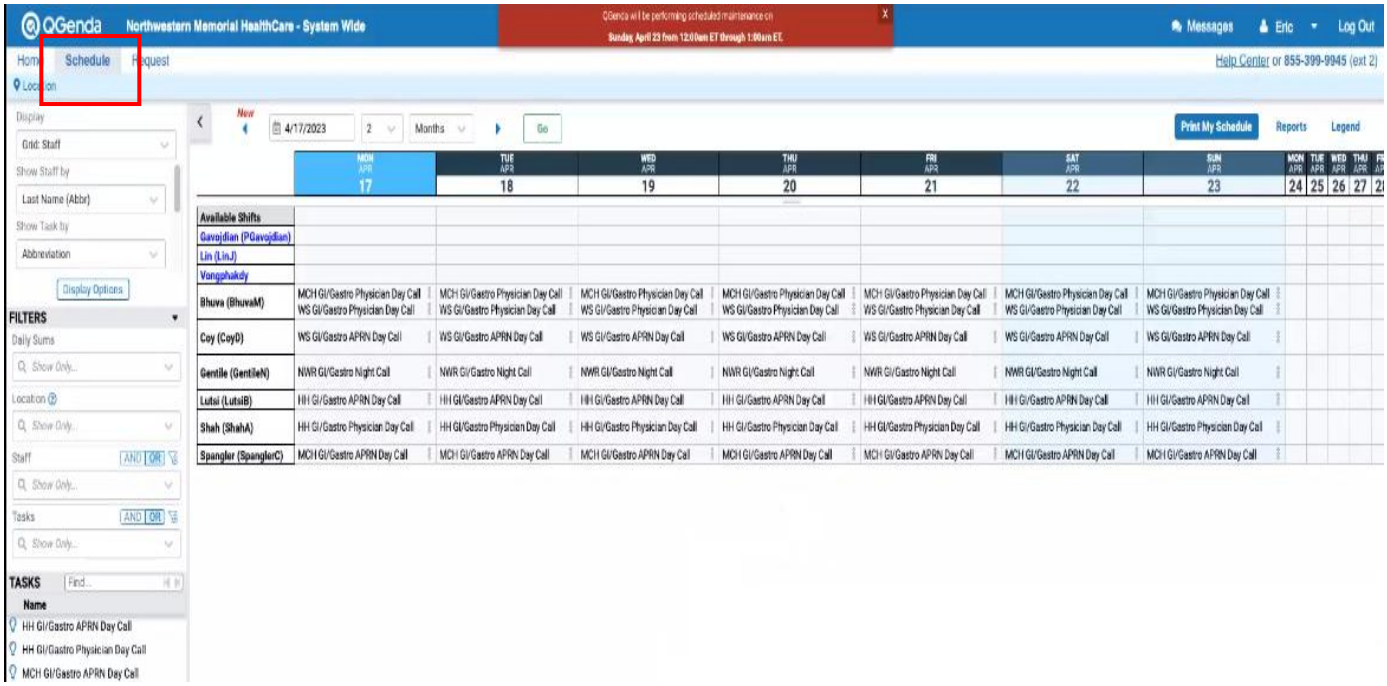
a. Go to QGenda.com and sign in to your account to access the QGenda homepage.
b. The homepage will default to your schedule. My Quick View on the desktop page offers an 11-day snapshot of your schedule. The calendar will update schedule changes automatically

DEFAULT View – Your Schedule



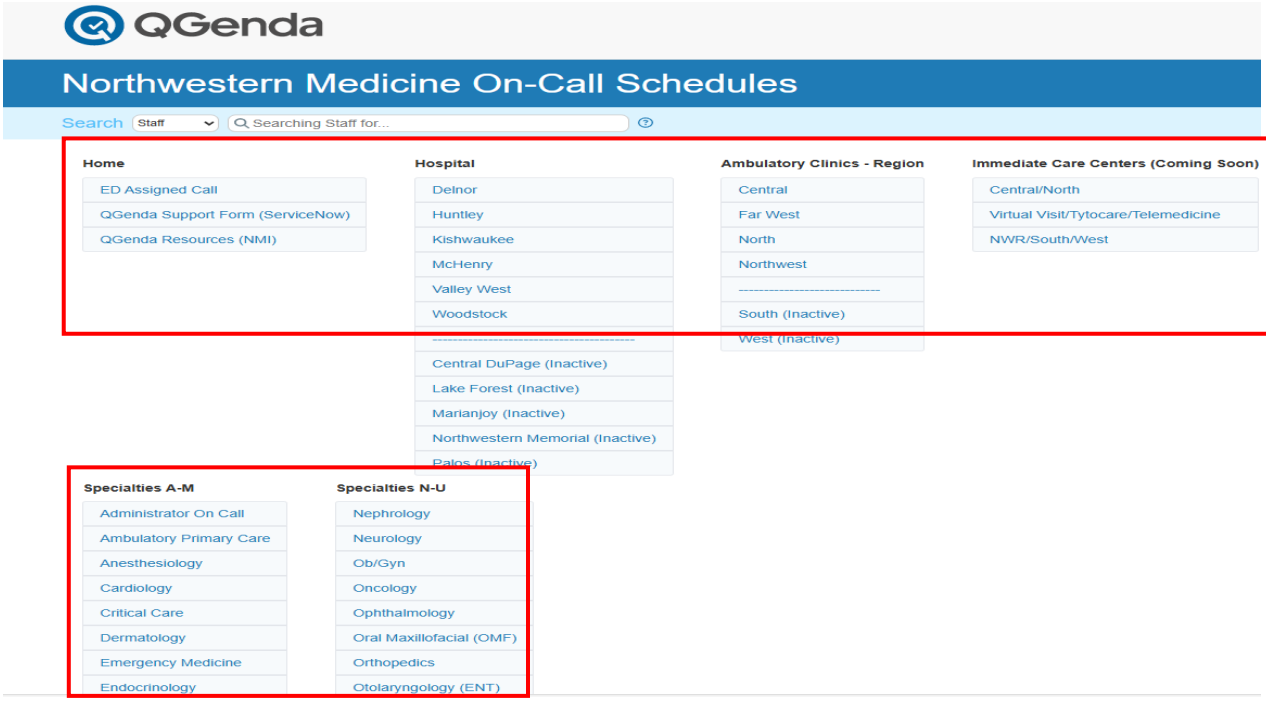
VIEW OPTION - Your Specialty Practice Group Full Schedule:

- Select the "Schedule" tab to view your group's schedule.
- Swap shifts or enter shift Requests from this Tab



VIEW OPTION - Other Practices On Call Schedules:

- From the main Homepage use the blue link boxes to select a site or specialty
- A new page will open showing real time tasks
- See Tip Sheet: 'Find-Contact an On Call Provider in QGenda' for additional methods and steps to search for an On Call provider.

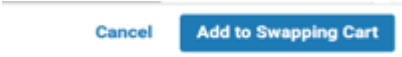


4. SWAP Process:

1. The Swap function enables a scheduled shift trade with another provider.
    a. Swap capability depends on the practice's configuration.
    b. Schedule Owners may be asked to make swaps on behalf of their providers.
2. Swap Options:
    a. 1-Way: Move assignment from one person to another for 1 shift or multiple shifts.
    b. 2-Way: Trade assignments between 2 people same day or across days.
3. Swap Steps:
    a. Once a swap is submitted by the first provider, the other provider involved will receive an email notification from QGenda asking them to login and approve or deny the swap. NOTE: When setting up your account, set the personal notification option and Login at least once to receive an email.
    b. Once the other provider accepts/approves the swap (depending on the practice's configuration for swaps), the change will either:
        - Automatically appear on the schedule.
        - Be sent to the Schedule Owner for final approval, then the schedule will update.
4. Swap from QGenda.com or the QGenda mobile app.

    Swap from QGenda.com:
    a. Select Schedule Tab.
    b. Select a date or data range that you are assigned to.
    c. Click the three dots in the shift box to bring up the swap options.

    d. Select Swap 1-Way or Swap 2-Way and follow the prompts to complete the swap request.
    e. Click "Add to Swapping Cart" at lower right.



    f. Click "Submit Swap" at top right of the Swapping Cart.

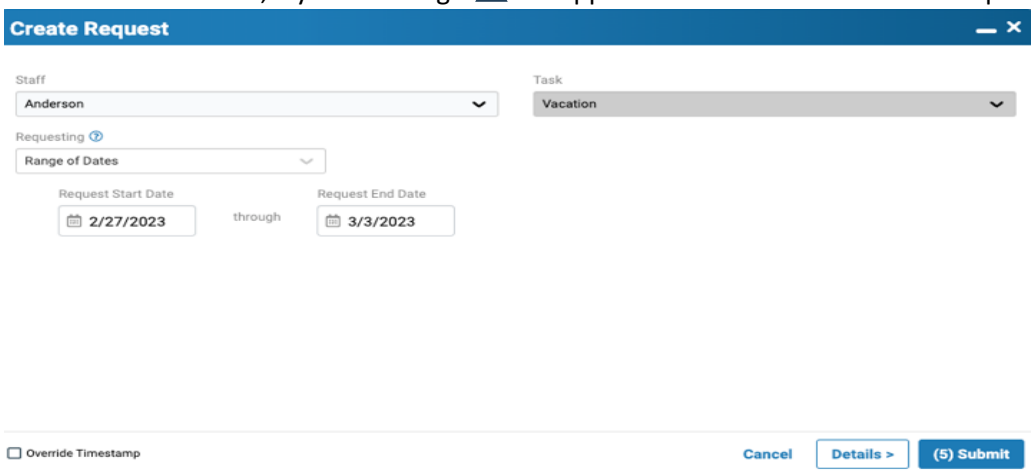
    Swap from QGenda Mobile App:
    g. Select the "Swaps" icon at bottom of the screen.
    h. Tap the green "Add Swap" button.
    i. Use the calendar at the top to navigate to the correct day.
    j. Select the assignment you want to swap.
    k. Choose the staff member to receive the assignment.
    l. Tap "Submit" at the top right and the swap will be sent for approval.

5. Cancel a submitted swap:
    a. Go to "Pending" at the top on the app, or in the panel at the bottom on the desktop.
    b. Click "Others' Approval".
    c. Click "Cancel".

5. REQUEST shifts or Time-Away:

1. The Request function allows you to ask for specific shifts in QGenda.
    a. The request process is only applicable to specialties configured with Advanced Scheduling.
    b. If you have this function, you will see a "+ Requests" icon at the bottom in the mobile app, and there will be a Request Tab at the top on the desktop view.
    c. You can Submit and Cancel Requests from the web or the mobile app.

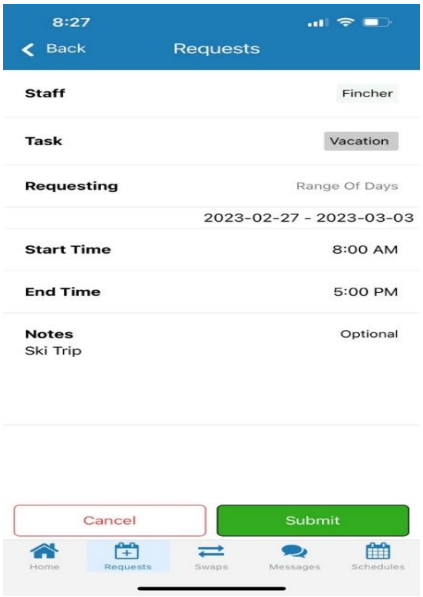
2. Submit a Request from QGenda.com:
    a. Go to the "Request" tab in the Navigate bar.
    b. Click the blue "New Request" button at the top of the schedule view.
    c. Select your name from the "Staff" dropdown (this may fill in automatically).
    d. Select the Task that you want to request from the "Task" dropdown.
    e. Use the "Requesting" dropdown to request specific dates or a range of dates.
    f. Use the calendar picker to select the date(s) for your request.
    g. Depending on your group's configuration, you may need to enter more information, such as a note or a start and end time.
    h. Select "Details" bottom right for a summary of the request and add/edit notes.
    i. Click "Submit" bottom right corner and the request will be sent for approval.
    j. On the schedule view, a yellow triangle ⚠ will appear in the cell to indicate the request is pending approval.



3. Cancel a submitted Request from QGenda.com:
    a. Go to the "Pending" panel at the bottom of the Schedule tab.
    b. Select "Cancel Request" in the "Actions" column on the right.

4. Submit a Request from QGenda mobile app:
    a. Tap the "Requests" icon at the bottom. In the pop-up, Click the green "Add Request" button.
    b. Tap "Select" next to "Staff" to add your name (this may fill in automatically).
    c. Tap "Select" next to "Task" to specify the task you want to request.
    d. Tap "Select" next to "Requesting" to specify if you want to request a range of dates or specific days.
    e. Depending on your group's configuration, you may need to enter more information, such as a note or a start and end time.
    f. Tap "Next" at bottom to go to the next screen where you will select your request date(s).

g. Tap the green “Submit” button at the bottom and the request will be sent for approval.



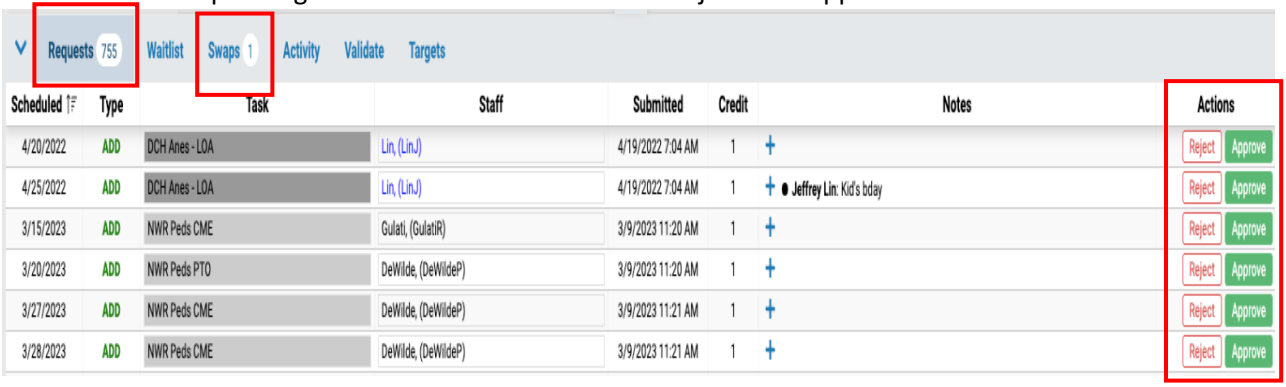
5. Cancel a Request from QGenda mobile app:
   a. Go to the “History” section of the Requests tab.
   b. Tap on the request you want to cancel.
   c. Tap “Undo Request”.

6. APPROVAL for Swaps and Requests:

1. The Approval step is applicable to Schedule Owners if Swap/Request functionality was configured for their practice to require final approval by the Schedule Owner before activating a swap.

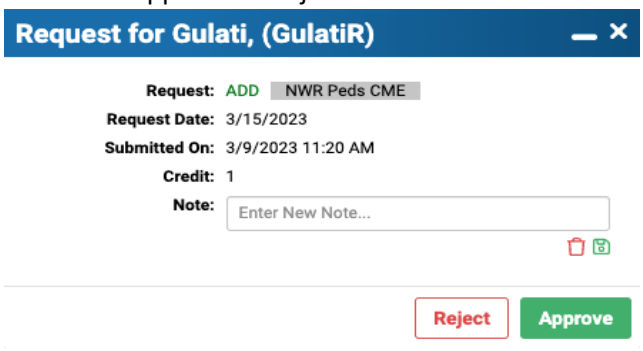
2. There is no time limit to complete an Approval. Swaps or Requests remain pending until the approval is made.

3. Approval can be made from QGenda.com or the QGenda mobile app.
   Approval from Qgenda.com - Option 1:
   - Go to the Admin Tab.
   - In the Activity Bar at the bottom of the screen select “Requests” or “Swaps”.
   - View the pending list and under Actions select “Reject” or “Approve”.



Approval from QGenda.com - Option 2:

a. Open the Admin Tab.
b. A shift with a pending request has a yellow triangle. Click the triangle for the pop-up to Reject or Approve.
c. Select the Approve or Reject.



4. **From QGenda mobile app -** View detailed resources for those process steps:
   a. Swapping Approval on Mobile App
   b. Requesting Approval on Mobile App

7. QGenda Learning Resources:

a. Go to QGenda.com and select the Schedule Tab.
b. Click the "**?**" at lower right for additional information in the QGenda Resource Center: Instructions and interactive tutorials (NOTE: Tutorials do not have sound).
c. Click the Help Center in upper right for detailed information on features and how to use them.