Scheduling Process Steps (for Schedule Owners)

Updated: 5.2025

Purpose: To provide an overview of the key scheduling process steps to enter schedules into QGenda. Detailed instructions for all functions available in QGenda can be found in QGenda Learning Resources on the Schedule, STATs, and Admin tabs.

Content:

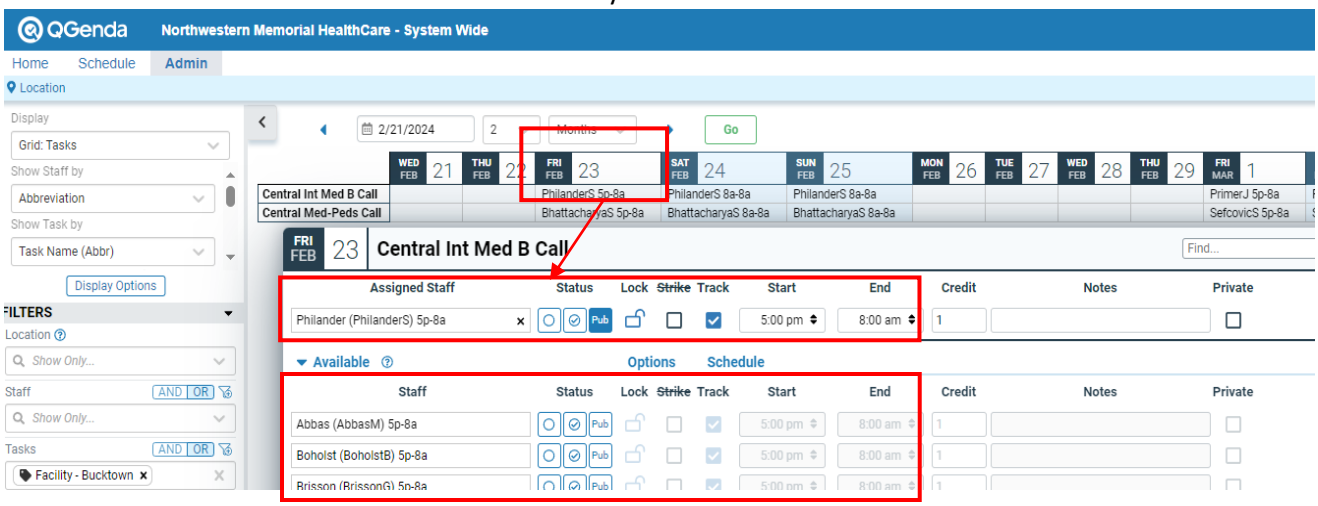
Create and Manage Schedules:

1. **Access:**
   a. Go to QGenda.com and log in to your account.
   b. Select the Admin Tab at the top for the schedule. Schedule Owners will only see schedules that they are permissioned to create assignments for.

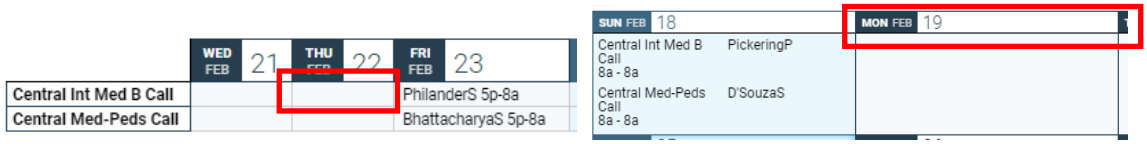
2. **Schedule View:** Customize how the schedule looks.
   a. Use the drop-down under Display to select various layouts. The “Grid: Tasks” display is recommended for entering assignments.
   b. Select from various Filter options.
      - Multiple filters can be applied to a view. Apply filters to narrow search by location, staff, or tasks.
      - To filter by location, use the list of locations to select from.
      - 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 of your screen, select “Tutorials” then “Admin 1 | View & Filter”.

3. **Create a Schedule:**
    a. Select the Admin tab at the top.
    b. Select the provider(s) from one of the following methods:
        - Drag and drop - a name from the Staff List on the left to a task cell. If a provider is not eligible for that task, a warning pop-up will display. Continue to click other cells to fill as needed. Click the X in the Fill box at the top to stop.
        - Pop-up – Recommended for scheduling multiple providers to the same shift, for example multiple providers that take their own call or for scheduling the provider(s) for an extened time frame.
            - Click in an empty shift cell on the Schedule grid that provider(s) need to be assigned to.
            - From the pop-up, select the provider(s), shift times, and days, then click submit. See details below under '5. Assignment Duration'.
        - Copy – see 'Use the COPY function'. See details below under '7. Copy function'.
        - IMPORTANT - for VOCERA SITES: If QGenda is integrated to Vocera, the Call tasks must be populated with providers so that the names will display in Vocera.

4. **Adjust Start or End Times for a shift** See additional details below under '7. Split a Shift':
    a. Change Start and End times of an assignment as needed for special requests, holiday, or shift splits.
    b. **EXAMPLE USE**: Change the configured typical shift hours for specific days or Holidays.
        - **Holidays**: Special Note - if the task isn't configured for coverage on certain days of the week (example: weekend task is not configured for days, but the weekend person will cover the Monday Holiday), the Drag and Drop function will not work. (example: cannot drag a provider to the Monday date cell). Follow the 'Schedule a Shift' steps further below.
    c. Adjust Hours for a shift:
        - Click on the name in populated cell.
        - A Schedule Detail Window pop-up will display showing the provider list with start and end times.
        - Select the provider by clicking in the name box. Select another provider from list if splitting the shift.
        - Set the Shift hours by clicking the arrows in Start and in End. Select the hour, minute, and "am" or "pm"
        - NOTE: Do not stagger 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.
        - NOTE: Shift hours cannot be greater than 24 hrs. If a provider is covering more than 24 hrs. for a shift, schedule the additional hours as a second entry.



d. Schedule a Shift - for a day not part of typical task type:
   - Go to the desired day.
   - From Grid: Tasks display - click in the open cell.
   - From Calendar: Task display - click in the box with the date.



- In the Pop-up, click 'Select Task"
- Follow the steps to select the provider and adjust the start/end times to schedule the shift.

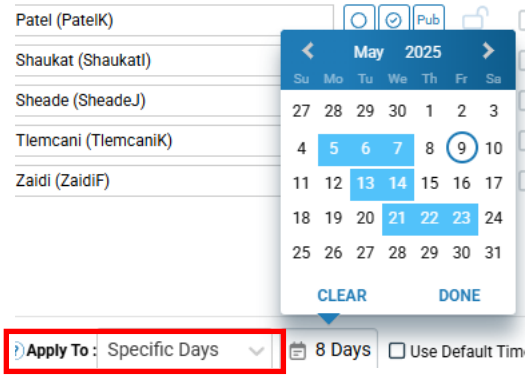
5. Assignment Duration:

a. To schedule for multiple days – in the Pop-up, select 'duration' in the banner at bottom. The default is the date selected.

b. To select a **range** of dates, adjust both date fields. This will assign the same person to all dates and days in the range.

c. To select and apply to only specific days throughout the range, click the days to exclude. Blue indicates the days it will apply to.

d. To select specific dates in the time range, Toggle to Specific Days, click the Calendar icon, then select the dates to assign.



6. COPY function to fill additional shifts:

a. To access the Copy function from the Options Menu in a cell:
   - Hover over the cell to copy and 3 vertical dots will display. Click the dots.
   - From the pop-up menu, select Copy (or other desired function form that Options Menu).
   - Fill other shifts by clicking in the cell(s).
   - NOTE: Copy from the 3-dot menu will also copy the time range and "status" of saved or published.

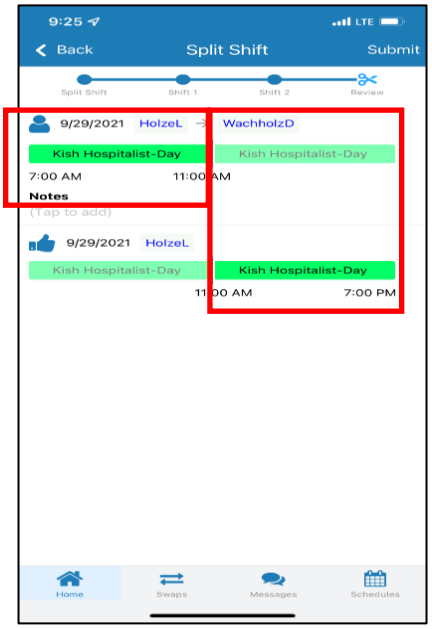
b. To use Copy from the Staff List on the left side of Admin tab.
   - Click the provider's name to display the 3 vertical dots, click the dots.
   - Select Copy. A Fill Mode box opens at the top. The provider becomes 'attached' to the cursor.
   - Fill other shifts by clicking in the cell(s).
   - End this action by clicking the X on the left in the Fill Mode box at the top.

7. **Split a Shift:** Adjust shift coverage for a single day.

   Example: change the 7am-7pm shift from one provider covering the shift, to two providers sharing the shift; one covers 7am-11am, and the other covers 11am-7pm.

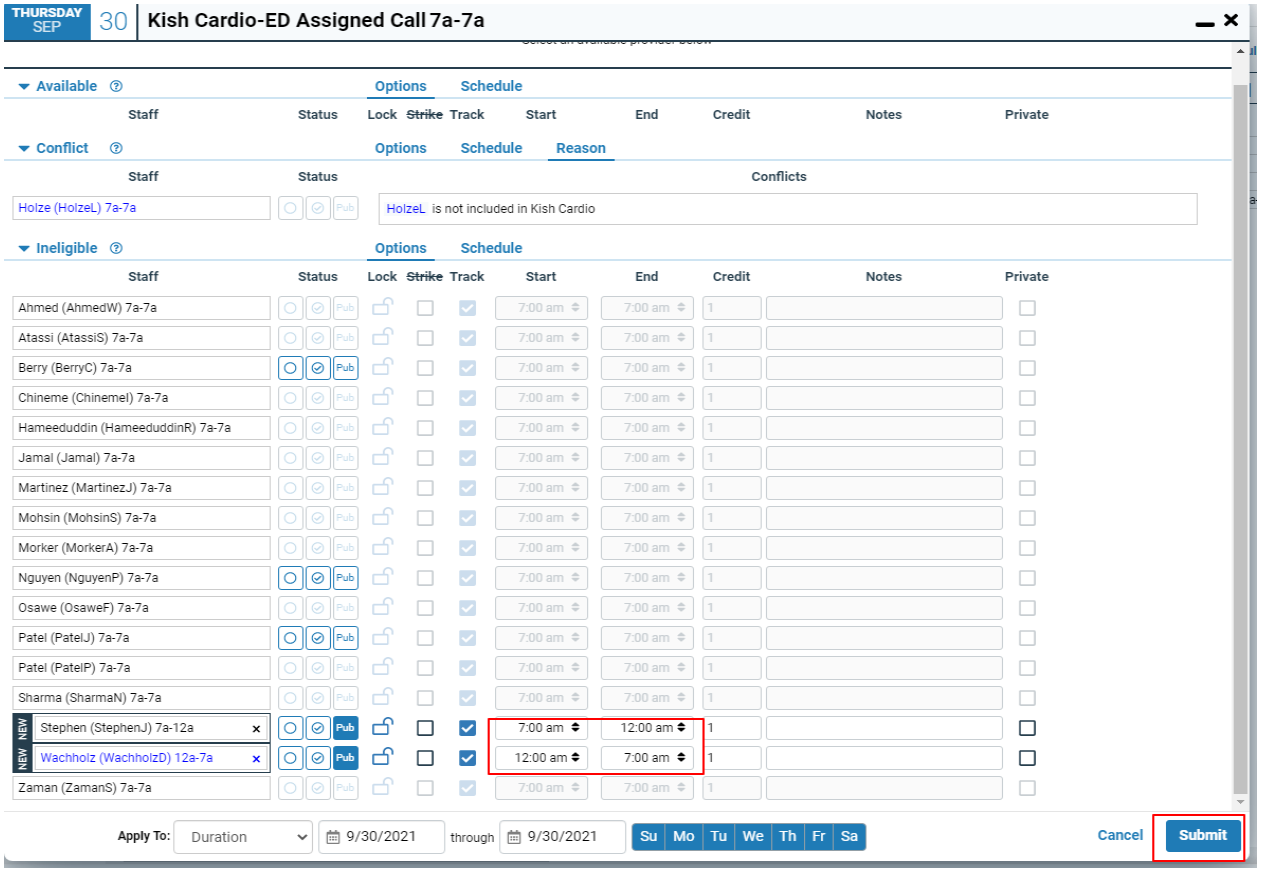
   a. QGenda Mobile App - Split shifts:

   - Go to Schedules.
   - Tap "Standard Views: Schedule by Task"
   - Find and tap the scheduled assignment to split.
   - Tap "Split Shift".
   - Select the time to split the shift.
   - Choose the already-scheduled provider to keep the shift or select a new provider.
   - For the second half of the shift, follow the same process; select the time, choose another provider.
   - Tap "Submit" at top right to complete the shift-split process.
   - Repeat time and provider selection steps if additional splits within these two shifts are needed.
   - Shift will display the two providers and assigned hours.



   b. Desktop Qgenda.com - Split shifts:

   - Find and click in the shift cell to split.
   - In the pop-up, select the provider and coverage time for the split. (if shift is assigned, adjust the current provider as needed and time of the first split).
   - Repeat steps by selecting the provider and time for the second part of the split.
   - Click "Submit"



8. Shift Edits – Add, Remove, Change a Provider and Add a Note

a. Add a provider(s) by clicking a shift cell to get the pop-up. Click the names of the providers to add.

- NOTE: When a new provider joins a schedule group in which the providers all take their own call and all are scheduled, the new provider must be added to the applicable call task(s). Follow the steps to get the pop-up, select the provider, then assign the provider to the applicable shifts.

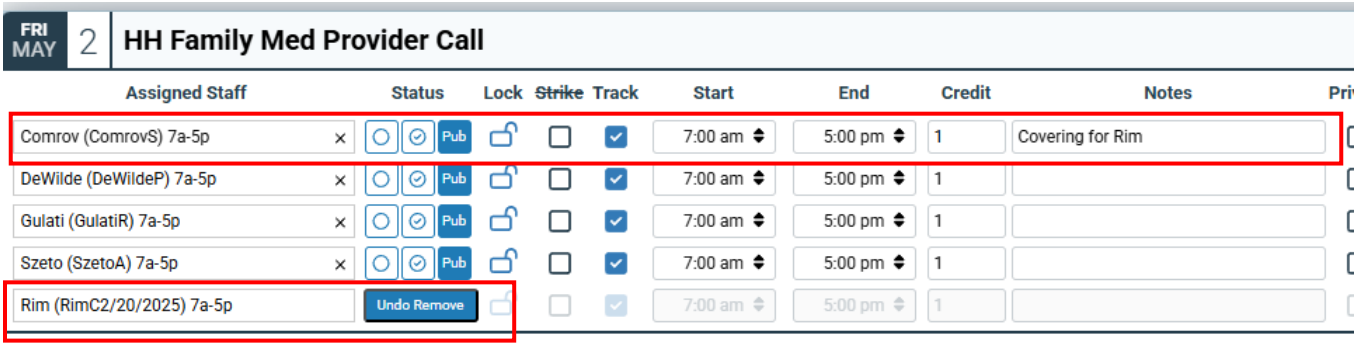
b. Remove a scheduled provider's future assignment that has PTO or other time away:

- Click in the cell where the provider is scheduled.
- A pop-up screen displays showing the assignments.
- Click the X in the Assigned Staff box for that provider.
- That provider row will fade, and the status will toggle to Undo Remove.
- If applicable, select another provider to assign to the shift by clicking their name.
- Click Submit.

c. Provider Takes Own Call – Covering Provider is added with Note:

- For schedules with Schedule Instructions that 'providers take their own call' and all providers are scheduled, enter a Note for the provider covering for the person that was removed to say who they are covering for. See example below.
- If providers that take their own call are not scheduled (Contact Instruction only) – add the note in the scheduled Placeholder to say who is covering for who.

EXAMPLE: Providers are all scheduled for a shift since they take their own call during the week.
The provider on PTO is removed, and the provider covering has a note stating who they are covering for.

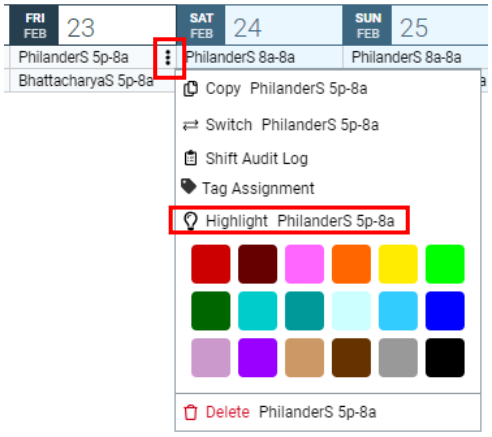


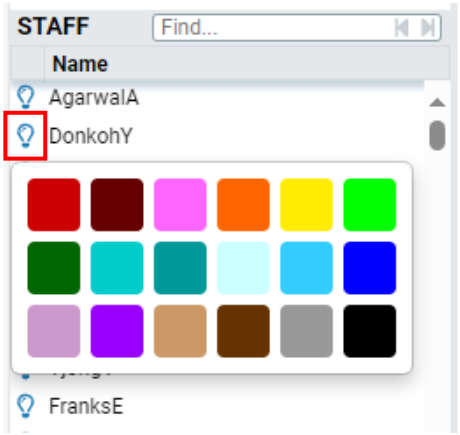
9. Placeholder Scheduling for Provider Takes Own Call

a. When providers take their own call, typically a placeholder is scheduled so a note can be added if someone is covering.
b. See detailed process step in Tip Sheet: Scheduling-Placeholder Scheduling for Provider Takes Own Call

10. Color/Highlight assignments:

a. Highlight specific shifts so they stand out in the schedule view.
b. Highlighting assigned shifts is especially useful for Holidays or other special assignments.
c. Hover to the right side in a populated cell brings up three dots.
d. Click the dots to bring up feature options including the highlight feature.
e. Select the option or color.
f. Highlight providers by clicking the bulb to the left of the provider in the Staff list, then click the color desired.

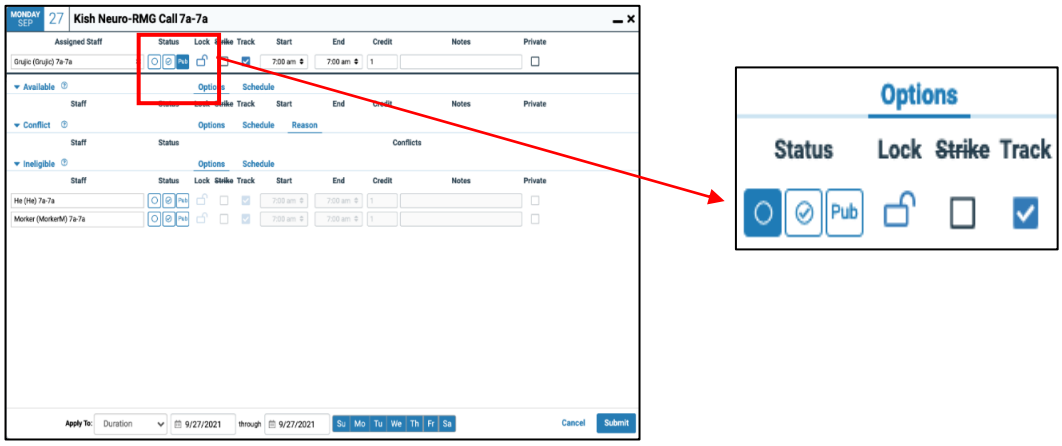




11. Select a Status for an assignment:

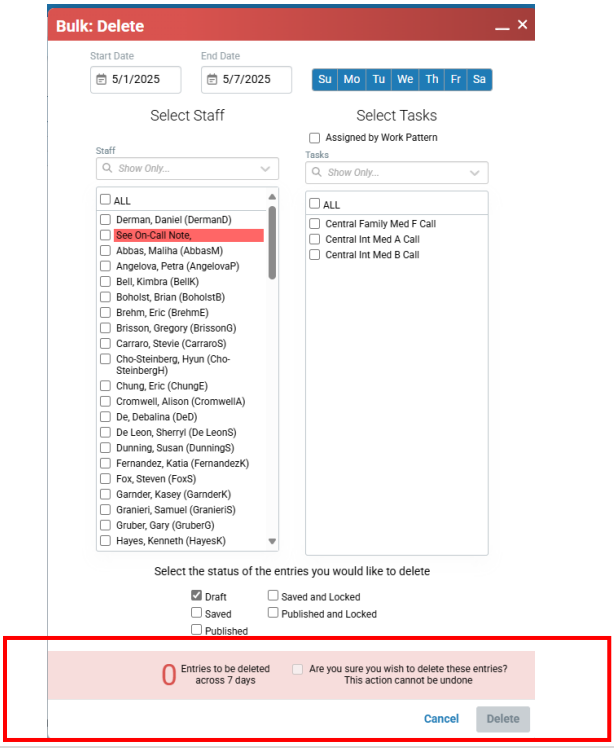
a. Select a status for the assignment by clicking in the pop-up, or from the cell by clicking the open circle or circle with a checkmark.
b. The status of an assignment determines who can see it.

- Open Circle - indicates draft status, visible only in the Admin tab.
- Circle with Check Mark - indicates saved, visible only in the Admin tab.
- Pub - indicates complete, visible to everyone with view access.
- ~~Strike~~ - Use this to change an assignment, but keep the original visible in the Admin tab.



12. **Publish a Schedule – Bulk Mode:** Finalize the schedule so it is active for viewing from the Schedules tab, on the mobile app, and the On Call Landing page.
    a. Go to the Admin tab, Click “Bulk” at top.
    b. Select “Publish” from the pop-up.
    c. Select start and end dates of the schedule to publish. Deselect days as needed by clicking the blue boxes.
    d. Select Staff and Task(s) from the lists.
    e. At: “How would you like to handle existing requests in this date range?” keep default of “Leave Pending”.
    f. Click “Publish” button in the bottom right of window.

13. **Delete Assignments – Bulk Mode:**
    a. NOTE: there is no ‘Undo’ button, so confirm choices before completing a delete activity.
    b. Single - Click in a cell to pull up the three dots, click the dots, and select delete.
    c. Bulk – Select Bulk function at upper right, select delete, select the dates, staff, tasks, and status. Confirm the choices by verifying the number of entries as a checkpoint before clicking “Delete”.



14. **Pending Actions in Admin tab:**
    a. Complete other pending actions by selecting the activity in the Admin banner at the bottom of the screen.
    b. A number next to the activity indicates there is a pending action.
    c. The Schedule Owner will only see activity for schedule groups they are permissioned for.

Provider Groups with On Call tasks integrated to Vocera for the contact method.

- If QGenda is mapped to Vocera, the Call tasks must be populated with providers so that the names will display.
- Vocera cannot display who is covering for a provider that is on PTO or other time away. Notes can be entered in QGenda to be viewed when searching for an On Call Provider from QGenda.

Applicant Pending Status

1. Providers with credentials pending may need to be assigned to future shifts after their credential date.
2. The Applicant will display in the schedule group and be highlighted. They can be scheduled by the Schedule Owner, but their names will not be visible to users checking schedules until after the credential date.
3. After the Applicant is credentialed, the icons noting the pending status will no longer show in the assigned shift(s).

Skill Providers for Tasks:

1. Providers must be 'skilled' for the tasks that they can be assigned to.
2. See detailed process steps in Tip Sheet: Scheduling-Skill Provider in QGenda Settings

Download a Schedule from QGenda:

1. A schedule may need to be downloaded to send to practices that do not access QGenda. This is applicable for Schedule Owners that schedule the private/independent practices for On Call and need to send the QGenda shift assignments back to the practice for their reference.
2. Download steps:
    a. On the Admin Tab, select Reports in the upper right.
    b. Report Type - Use the drop-down to select 'Grid by Task' or 'Calendar by Staff' (depending on view preference)
    c. Format – use the drop-down to select excel.
    d. Start Date & End Date – use the calendar icons to select the dates for the report.
    e. Click Run Report to get the download.

Reports:

1. QGenda has a variety of reports available to facilitate automated tally of shift assignments and other tracking.
    a. Go to the Admin tab.
    b. Click Reports at the upper right and complete the entries in the pop-up box.
    c. Save reports in your profile.
2. Contact QGenda Support to create customized reports to meet your needs.

QGenda Learning Resources:

a. Go to Qgenda.com and select the Schedule, Admin, or Stats tab for resources specific to the respective 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.