

Scheduling Process Steps (Schedule Owners)

Updated: 5.2024

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 the QGenda Learning Resources on the Schedule, STATs, and Admin tabs.

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Create and Manage Schedules:

1. Access:

- a. Go to QGenda.com and sign-in to your account.
- b. Select the Admin Tab at the top.
- c. A view of your schedule will display. Schedule Owners will only see schedules that they are permitted to create assignments for.

2. Schedule View: Customize how the schedule looks.

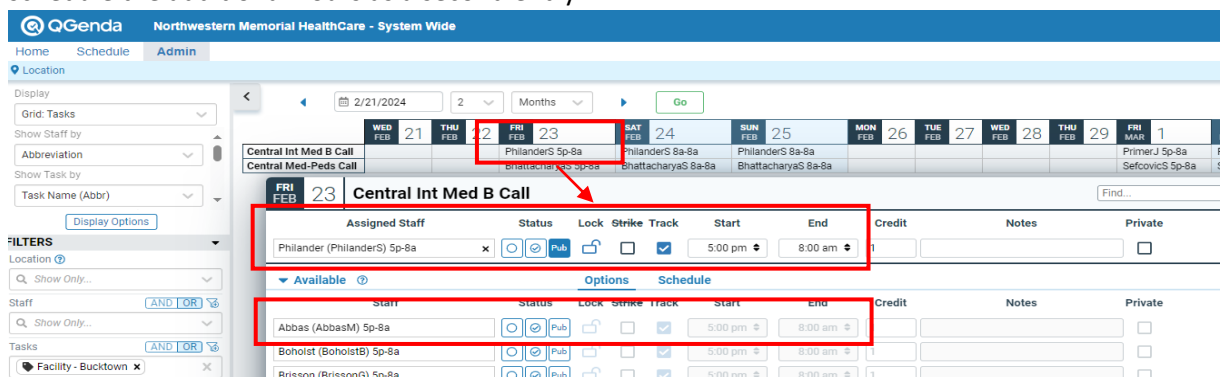
- a. Select from the drop-down under Display for different layouts while working with the schedule. The “Grid: Tasks” display is recommended for entering assignments.
- b. Select from various Filter options.
 - Multiple filters can be applied to a view.
 - Apply filters to narrow search by location, 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:

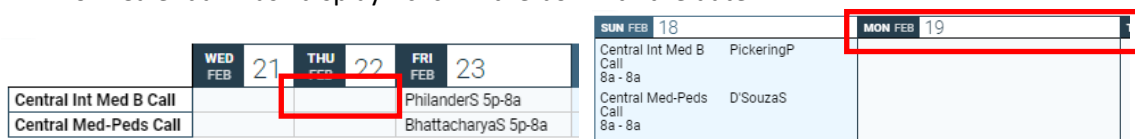
- a. Select the Admin tab at the top.
- b. Select a provider from one of the following methods:
 - Drag and drop a name from the Staff List on the left to a cell. If a provider is not eligible for that task, a warning pop-up will display. Continue to click other cells to fill as needed. Click the X in the Fill box at the top to stop.
 - Click in an empty cell on the Schedule grid. From the pop-up, select a provider, shift times, and days (see details in ‘6. Assignment Duration’ below), and click submit.
 - Copy – see ‘Use the COPY function’. See details in ‘7. Copy function’ further below.

4. Adjust Start or End Times (see also ‘Split a Shift’ section further below):

- a. Change Start and End times of an assignment as needed for special requests, holiday, or shift splits.
- b. **EXAMPLE USE:** Change in 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 pop-up displays showing the provider list and start 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.



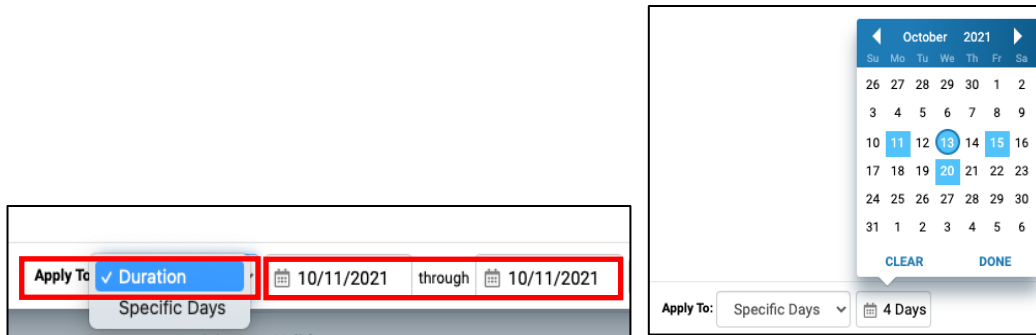
- d. Schedule a Shift - for a day not part of typical task type:
 - Go to the desired day.
 - From Grid: Tasks display - click in the open cell.
 - From Calendar: Task display - click in the box with the date.



- 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:

- To schedule a person for multiple days - select 'duration' in the banner at bottom of the screen.
- To select a **range** of dates, adjust both date fields. This will assign the same person to all dates in the range.
- Specific days can be selected by clicking the Calendar icon, then select the dates to assign.



6. COPY function to fill additional shifts:

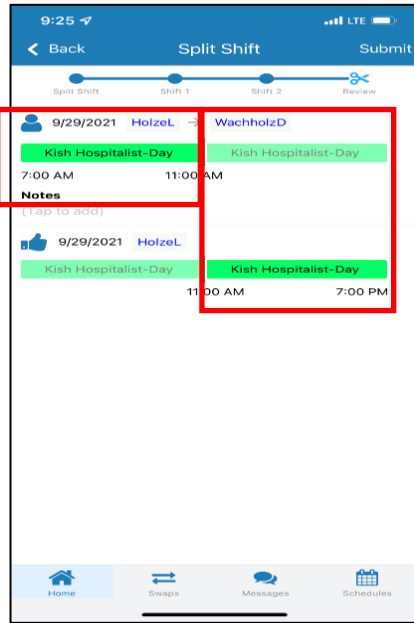
- To access the Copy function from the Options Menu in a cell:
 - Hover over the cell to copy to display the 3 vertical dots, click the dots.
 - From the pop-up menu, select copy (or other desired function from that Options Menu).
 - Fill other shifts by clicking in the cell(s).
 - NOTE: Copy from the 3-dot menu will also copy the "status" of saved or published.
- To use Copy from the Staff List on the left side of Admin tab.
 - Click a provider 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 a 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 is needed.
- Shift will display the two providers and assigned hours.



b. Desktop Qgenda.com - Split shifts:

- Find and click in the shift cell to be 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 times for the second part of the split.
- Click “Submit”

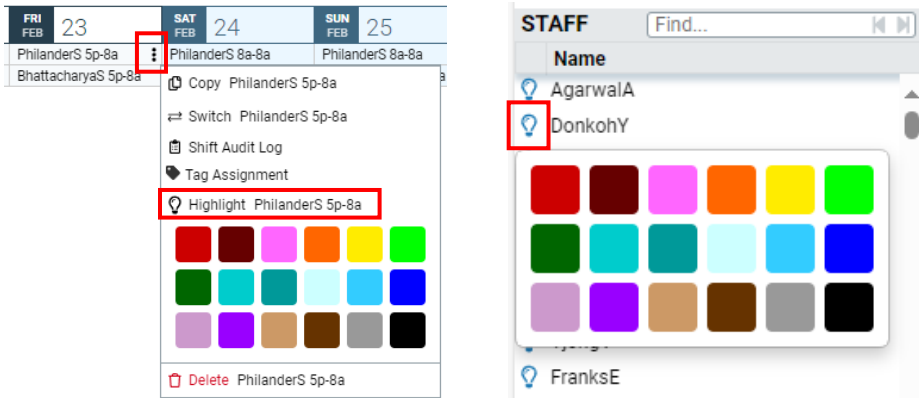
THURSDAY SEP 30 Kish Cardio-ED Assigned Call 7a-7a

Available	Options	Schedule
Staff	Status	Lock Strike Track Start End Credit Notes Private
<p>Conflict</p> <p>Options Schedule Reason</p> <p>Staff Status Conflicts</p> <p>Holze (HolzeL) 7a-7a <input type="radio"/> <input type="radio"/> Pub HolzeL is not included in Kish Cardio</p>		
<p>Ineligible</p> <p>Options Schedule</p>		
Staff	Status	Lock Strike Track Start End Credit Notes Private
Ahmed (AhmedW) 7a-7a	<input type="radio"/> <input type="radio"/> Pub	<input type="checkbox"/> <input checked="" type="checkbox"/> 7:00 am 7:00 am 1
Atassi (Atassis) 7a-7a	<input type="radio"/> <input type="radio"/> Pub	<input type="checkbox"/> <input checked="" type="checkbox"/> 7:00 am 7:00 am 1
Berry (BerryC) 7a-7a	<input checked="" type="radio"/> <input type="radio"/> Pub	<input type="checkbox"/> <input checked="" type="checkbox"/> 7:00 am 7:00 am 1
Chineme (ChinemeI) 7a-7a	<input type="radio"/> <input type="radio"/> Pub	<input type="checkbox"/> <input checked="" type="checkbox"/> 7:00 am 7:00 am 1
Hameeduddin (HameeduddinR) 7a-7a	<input type="radio"/> <input type="radio"/> Pub	<input type="checkbox"/> <input checked="" type="checkbox"/> 7:00 am 7:00 am 1
Jamal (Jamal) 7a-7a	<input type="radio"/> <input type="radio"/> Pub	<input type="checkbox"/> <input checked="" type="checkbox"/> 7:00 am 7:00 am 1
Martinez (MartinezJ) 7a-7a	<input type="radio"/> <input type="radio"/> Pub	<input type="checkbox"/> <input checked="" type="checkbox"/> 7:00 am 7:00 am 1
Mohsin (MohsinS) 7a-7a	<input type="radio"/> <input type="radio"/> Pub	<input type="checkbox"/> <input checked="" type="checkbox"/> 7:00 am 7:00 am 1
Morker (MorkerA) 7a-7a	<input type="radio"/> <input type="radio"/> Pub	<input type="checkbox"/> <input checked="" type="checkbox"/> 7:00 am 7:00 am 1
Nguyen (NguyenP) 7a-7a	<input checked="" type="radio"/> <input type="radio"/> Pub	<input type="checkbox"/> <input checked="" type="checkbox"/> 7:00 am 7:00 am 1
Osawe (OsaweF) 7a-7a	<input type="radio"/> <input type="radio"/> Pub	<input type="checkbox"/> <input checked="" type="checkbox"/> 7:00 am 7:00 am 1
Patel (PatelJ) 7a-7a	<input checked="" type="radio"/> <input type="radio"/> Pub	<input type="checkbox"/> <input checked="" type="checkbox"/> 7:00 am 7:00 am 1
Patel (PatelP) 7a-7a	<input type="radio"/> <input type="radio"/> Pub	<input type="checkbox"/> <input checked="" type="checkbox"/> 7:00 am 7:00 am 1
Sharma (SharmaN) 7a-7a	<input type="radio"/> <input type="radio"/> Pub	<input type="checkbox"/> <input checked="" type="checkbox"/> 7:00 am 7:00 am 1
NEW Stephen (StephenJ) 7a-12a	<input type="radio"/> <input checked="" type="radio"/> Pub	<input type="checkbox"/> <input checked="" type="checkbox"/> 7:00 am 12:00 am 1
NEW Wachholz (WachholzD) 12a-7a	<input type="radio"/> <input checked="" type="radio"/> Pub	<input type="checkbox"/> <input checked="" type="checkbox"/> 12:00 am 7:00 am 1
Zaman (ZamanS) 7a-7a	<input type="radio"/> <input type="radio"/> Pub	<input type="checkbox"/> <input checked="" type="checkbox"/> 7:00 am 7:00 am 1

Apply To: Duration 9/30/2021 through 9/30/2021 Su Mo Tu We Th Fr Sa Cancel **Submit**

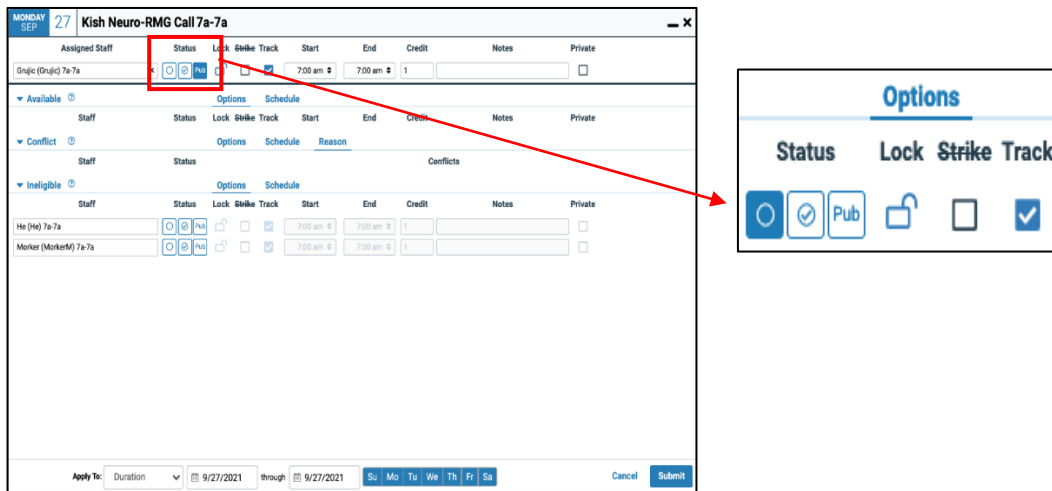
8. Color/Highlight assignments:

- 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.



9. 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.



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

Bulk: Publish

Start Date: 2/21/2024 End Date: 2/27/2024 Su Mo Tu We Th Fr Sa

Select Staff Select Tasks

Staff: ALL, Agarwal, Anju (AgarwalA), Donkoh, Yaw (DonkohY), Helm, Scott (HelmS), Hewell, Charles (HewellC), Pappas, Heien (PappasH), Patel, Mayank (PatelM), Franks, Ellen (FranksE), Odishoo, Tracey (OdishooT), Anwar, Khalida (AnwarK), Arora, Hardeep (AroraH), Babigumira, Edward (BabigumiraE), Barlock, Bridget (BarlockB), Doe, John (Example [Doe]), Forster Ivy, Kelly (Forster IvyK), Gruss, Jason (GrussJ), Gulabani, Aditi (GulabaniA), Ippolito, John (IppolitoJ), Jafri, Syed (JafriS), Jones, Dorothy (JonesD), Kashani, Kelly (KashaniK), Khan, Shazia (KhanS), Kim, Daniel (KimD), Lee, John (LeeJ), Lew, Jennifer

Tasks: ALL, MCH GI Physician Night Call 7p-7a, Central Family Med F Call, zzCentral IM/FM Call Wknd BU, zzCentral IM/FM/Med-Peds Mgr Call Wknd, Central Int Med A Call, Central Int Med B Call, Central Med-Peds Call, Central/North Geriatrics Call, Central/North Ped APRN Call Fri 5p-8a, Central/North Peds Call Wkday 8a-5p, Central/North Ped Call Wknt/Wknd, Central/North Ped MD Call Fri BU 5p-8a, Central/North Ped Call Sat AM 8a-1:30p, Evanston Student Health Call 8:30a-8:30a, Galter Internal Med Call, Galter Internal Med Call BU, Lavin Internal/Family Med Call, Lavin Internal/Family Med Call BU Wknd

How would you like to handle existing requests in this date range?

Leave Pending
 Approve
 Approve and Notify

Cancel Publish

11. Delete Assignments – Bulk Mode:

- NOTE: there is no ‘Undo’ button, so confirm choices before completing a delete activity.
- Single - Click in a cell to pull up the three dots, click the dots, and select delete.
- 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”

12. Pending Actions in Admin tab:

- Complete other pending actions by selecting the activity in the Admin banner at the bottom of the screen.
- A number next to the activity indicates there is a pending action.
- The Schedule Owner will only see activity for schedule groups they are permitted for.

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.