

Swap or Request Shifts or Time Away (Providers and Schedule Owners)

Updated: 5.2024

Purpose: To provide an overview of the Swap and Request processes which allows providers to make changes to their schedule.

Content:

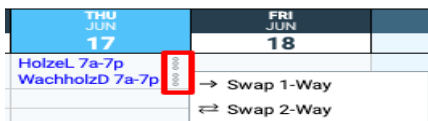
- [Swap Process to trade a shift with another scheduled provider](#) (pages 1-2)
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SWAP Process:

1. The Swap function enables you to trade a scheduled shift with another provider.
 - a. Give away, pick up or trade shifts by selecting 1-Way or 2-Way swaps.
 - 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
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 they approve the swap, depending on the practice’s configuration, 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".

REQUEST Process:

- 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.

Create Request — x

Staff: Anderson

Task: Vacation

Requesting: Range of Dates

Request Start Date: 2/27/2023 through Request End Date: 3/3/2023

Override Timestamp

Cancel Details > (5) Submit

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.

The screenshot shows the 'Requests' form in the QGenda mobile app. The form is titled 'Requests' and has a blue header with a 'Back' button. The form fields are as follows:

Staff	Fincher
Task	Vacation
Requesting	Range Of Days 2023-02-27 - 2023-03-03
Start Time	8:00 AM
End Time	5:00 PM
Notes	Optional Ski Trip

At the bottom of the form, there are two buttons: 'Cancel' (white with red border) and 'Submit' (green). Below the buttons is a navigation bar with icons for Home, Requests, Swaps, Messages, and Schedules.

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”.

APPROVAL Process 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. Approvals 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”.

Scheduled	Type	Task	Staff	Submitted	Credit	Notes	Actions
4/20/2022	ADD	DCH Anes - LOA	Lin, (Lin,)	4/19/2022 7:04 AM	1		Reject Approve
4/25/2022	ADD	DCH Anes - LOA	Lin, (Lin,)	4/19/2022 7:04 AM	1	Jeffrey Lin: Kid's bday	Reject Approve
3/15/2023	ADD	NWR Peds CME	Gulati, (GulatiR)	3/9/2023 11:20 AM	1		Reject Approve
3/20/2023	ADD	NWR Peds PTO	DeWilde, (DeWildeP)	3/9/2023 11:20 AM	1		Reject Approve
3/27/2023	ADD	NWR Peds CME	DeWilde, (DeWildeP)	3/9/2023 11:21 AM	1		Reject Approve
3/28/2023	ADD	NWR Peds CME	DeWilde, (DeWildeP)	3/9/2023 11:21 AM	1		Reject 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.

Request for Gulati, (GulatiR)

Request: **ADD** NWR Peds CME

Request Date: 3/15/2023

Submitted On: 3/9/2023 11:20 AM

Credit: 1

Note:

Reject
Approve

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

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.