



QGenda Schedule Overview - Schedule Owners/Admins: View and Manage Provider Schedules

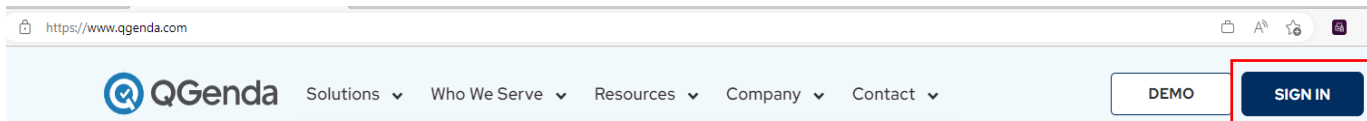
QGenda is Northwestern Medicine’s enterprise on-call and scheduling application. Schedule owners and admins use QGenda to create and manage schedules of their practices’ physicians and APPs.

Getting started

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://www.qgenda.com).
 - b. Click on the “Sign In” button in the top right-hand corner.



- c. Log-in

A screenshot of the QGenda login form. At the top is the QGenda logo. Below it is an email input field with the text "Email" above it and "LDICKSON@nm.org" inside. Below the input field is a blue "Continue" button. At the bottom of the form, it says "New to QGenda? [Create an Account](#)".

- **The email associated to your NM profile should populate:**
 - Click “Continue”.
 - If an email does not populate, or to change the email used, click “Create Account” in the bottom right corner and enter your information.

2. View QGenda Resources to learn the scheduling processes:

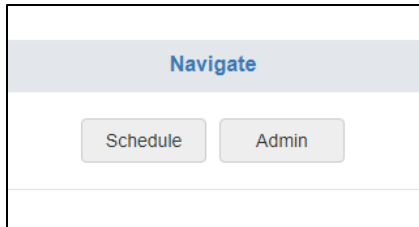
- Tutorials accessed from the blue question mark in lower right on the Schedule and Admin Tabs
- Additional articles under the [Help Center](#) in upper right on the Schedule and Admin Tabs

3. Download QGenda mobile app for [iOS](#) and [Android](#)

- Schedule Owners can use the mobile app to view and swap published schedules for a provider

I. QGenda Website from a computer: Navigating Qgenda

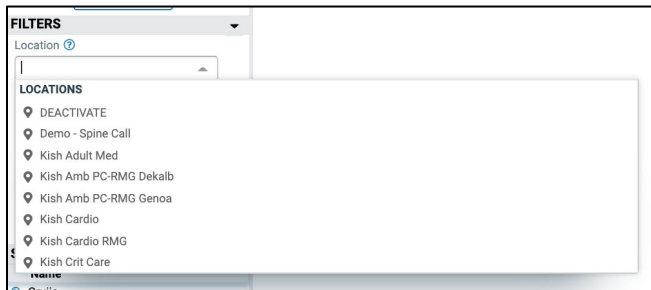
Admin Tab: Create and manage schedules of clinicians in your practice by clicking “Admin.”



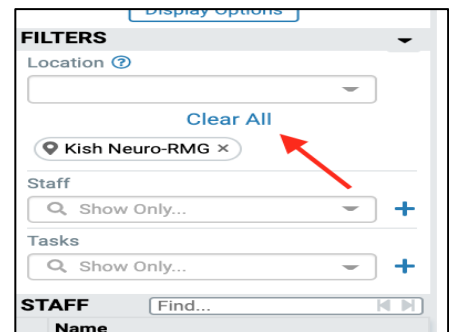
a. **Schedule:** A view of your schedule will display

b. **Filters:** To narrow a view of the schedule - 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:



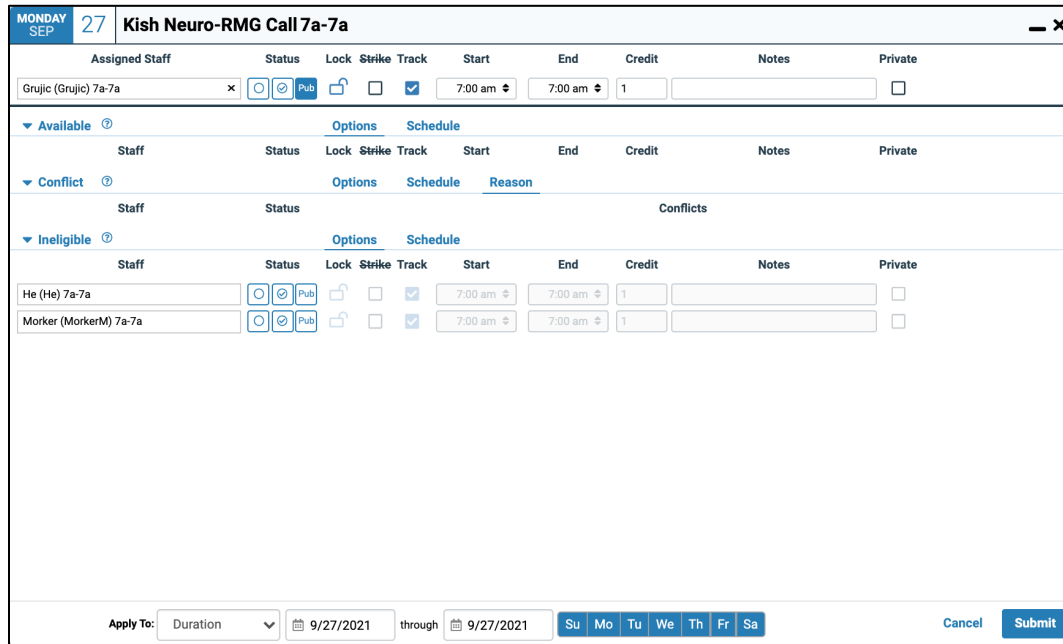
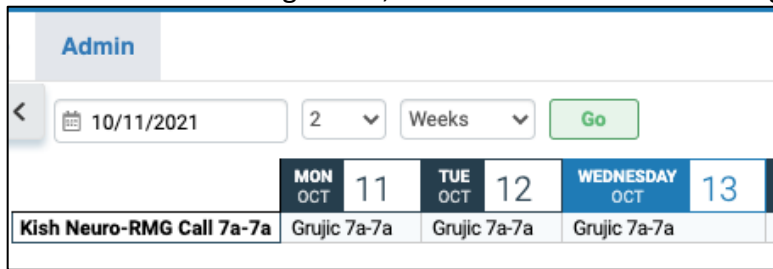
- To remove a filter or change locations, click “Clear All.”



- 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:

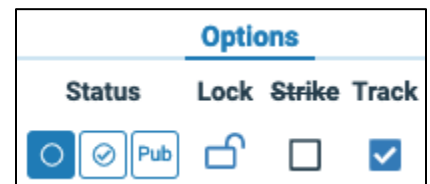
a. To make an assignment, click into a cell in the Admin grid to view scheduling details.



b. Complete the assignment by selecting a provider and status

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.



c. **Start and end times:**

- (1) Adjust the start and end times of an assignment by selecting the hour, minute, and “am” or “pm.”
- (2) Click Set, or type the time in the time box (7am, for example.) **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.

Start		
🕒	8:00 am	
Clear	Default	
12	00	am
01	05	pm
02	10	
03	15	
04	20	
05	25	
Set		

Duration (in banner at bottom of the screen)

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

Apply To: **Duration** (selected)
Specific Days

📅 10/11/2021 through 📅 10/11/2021

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

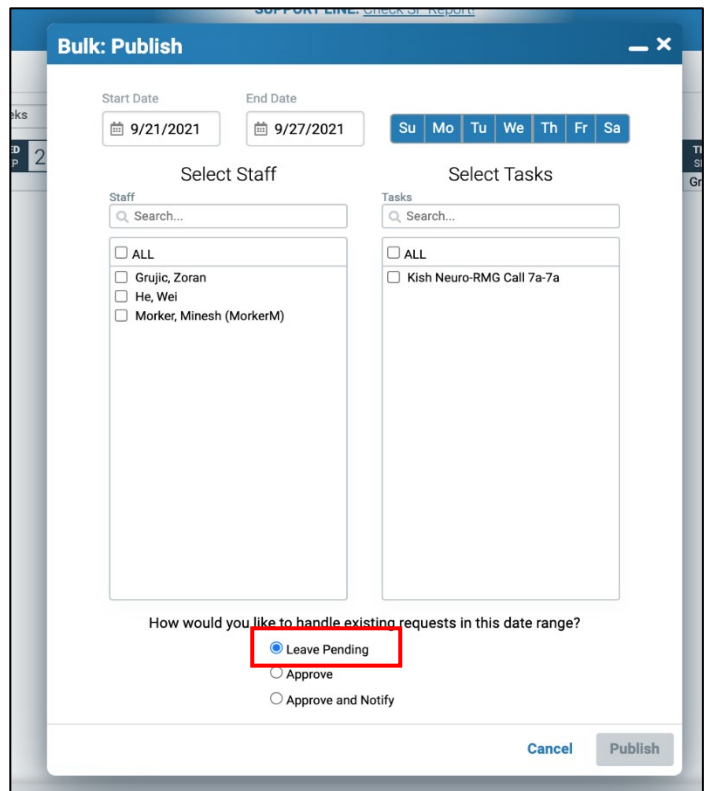
October 2021

Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

CLEAR DONE

Apply To: Specific Days (dropdown) 📅 4 Days

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. At question: "How would you like to handle existing requests in this date range?" keep the default of -"Leave Pending"-

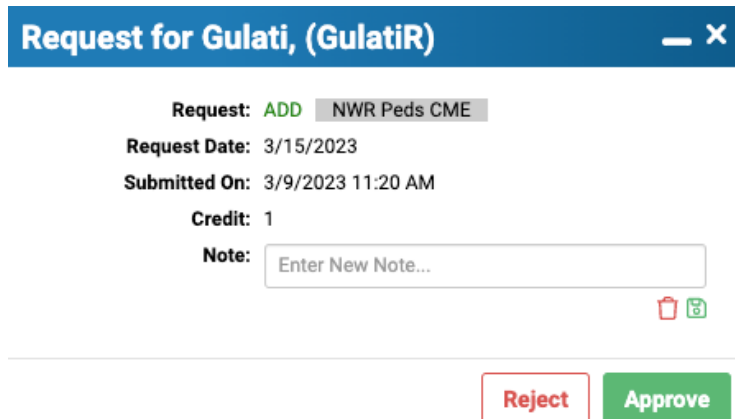


Approve Swaps or Requests – 2 options from the Admin Tab:

1. View requests at the bottom of the screen and select the action: Approve or Reject

Scheduled	Type	Task	Staff	Submitted	Credit	Notes	Actions
4/20/2022	ADD	BCH Anes - LOA	Lin, (Lin.)	4/19/2022 7:04 AM	1		Reject Approve
4/25/2022	ADD	BCH 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

2. Click on the yellow triangle displayed in the assignment itself to bring up a pop-up window to Approve or Reject



3. Note: There is not a time limit for Approvals – requests will remain pending until the approval response is completed.

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](#)

II. QGenda mobile app

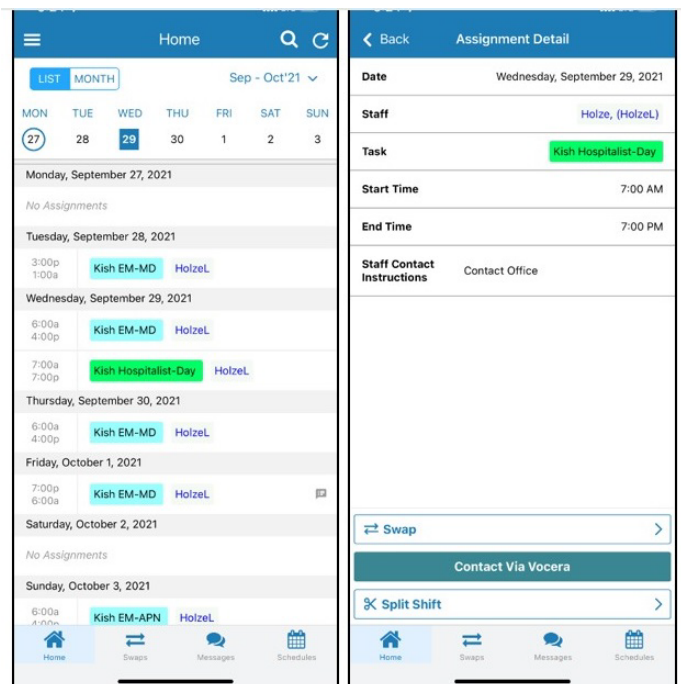
Swapping schedules and shift-splitting: Use QGenda mobile app to swap and update existing schedules. Schedule Owners may be asked to make swaps on behalf of their providers.

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

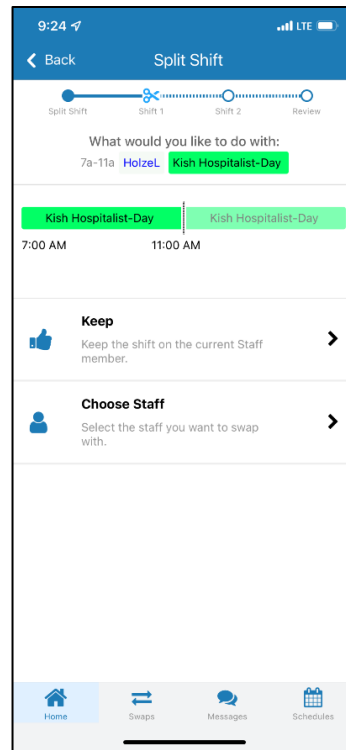
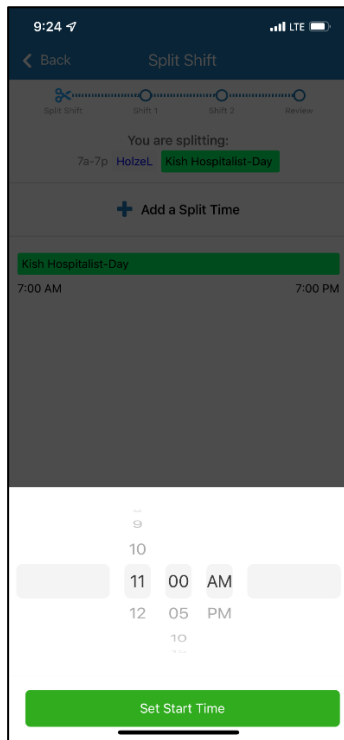
- On the mobile-app go to “Swap” then tap “Add Swap.”
- Follow on-screen instructions to complete the swap.
- No approval/publishing is needed when complete.

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.

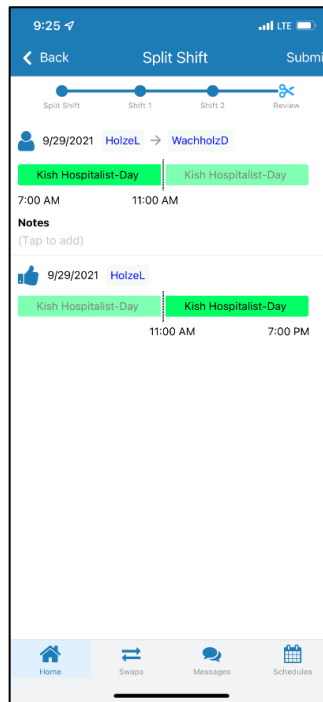
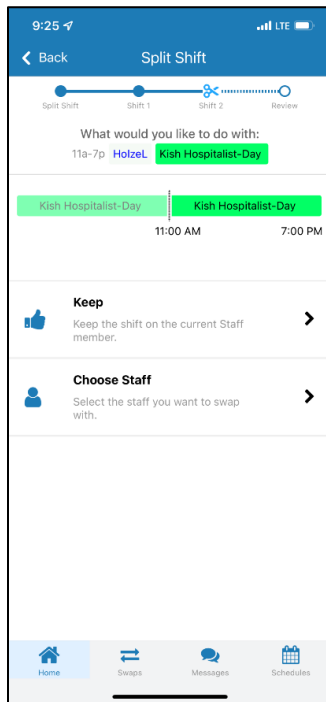
- b. On QGenda mobile-app go to Schedules > Standard Views: Schedule by Task > Tap the scheduled assignment to split > tap Split Shift.



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



- d. Do the same process to schedule the second half of the split.
- e. Tap Submit in the top right to complete the shift-splitting process. Repeat for additional splits within these two shifts.



- f. Approvals for Swaps or Requests can be made from the Mobile App – review the QGenda resources for those process steps:
[Swapping Approval on Mobile App](#)
[Requesting Approval on Mobile App](#)

Ongoing Support for Schedule Owners:

1. **NM Request forms:** For changes - access the IT request forms from NM Service Now:
[QGenda Scheduling Requests Forms](#)
 - Add Provider to existing schedule
 - i. Note: providers are auto-provisioned via the onboarding process and logic rules. If they do not appear on the schedule once provisioning is complete – use this form to add them
 - ii. Note: Off-boarding – follow current processes to submit forms. Providers will be removed from QGenda once termination is fully processed.
 - Add schedule owner to an existing schedule
 - Create a new schedule
 - Modify and existing static number (contact # used in place of scheduling providers)
2. **For design modifications to On Call** – Open an NM Service Now request for the Clinical Communication Application team (Note: some provider on call groups are linked to Vocera groups, code alerts, etc., thus require NM App Team review and approval of any changes)
3. **For system technical questions** - Contact the QGenda Help Center
 - Call: 855-399-9945 ext2
 - Email: Support@QGenda.com
4. **For Advanced Scheduling technical modifications** (Example – automation rules changes) - contact QGenda Advanced Support: AdvancedSupport@QGenda.com