View Tab – to view the schedule (page 2)

Legend
1. Locked - a shift was requested and approved
2. Note: the shift assignment has a note attached; the note can be viewed by hovering over the assignment

Selecting a Date Range: The default is always the current week with Monday as the start date
- Select the start date by clicking in the box and selecting a date on the calendar
- Select the range you wish to see using the drop down boxes
- Select the View By drop down box you wish to use
- Once you've made your selections, click “Go”

Staff Box and Task Box
- The drop down box allows you to select the Staff/Task filter you wish to print, export, or view on the screen.
- Next to each staff/task are three icons:
  - 🌟 Highlight: when turned on, the person of interest will appear throughout the schedule in a bright blue color
  - 🗣️ Show: shows that person on the scheduling screen. The icon at the top of the list will show all
  - 🗋️ Hide: hides that person on the scheduling screen. The icon at the top of the list will hide all.
- If you’d like to view the entire schedule, choose the “All Staff” staff filter and “All Tasks” task filter

Swap Tab – to swap an assignment with a colleague (page 3)

Entering Swaps
- To move a task to another staff member you can click on a task and drag it to the person you’d like to swap with or use the 🕒 button next to the task you wish to trade.
- Click the Submit Swap button in the top left corner, the swap will immediately appear on the schedule with the pending symbol 🕒

Viewing Swap Requests
- Swap Summary – Shows the swaps that you have made since being logged into the system
- Swaps Pending My Approval – Shows all swaps that require your attention. This is where you will go to approve or reject a swap between yourself and another staff member.
- My Swap History– Shows all swaps you have ever made including those that are pending and approved

Request Tab – to request a clinical area or time away (page 4)

Entering Requests
- Click in the cell associated with your name on the specified date. A box will appear listing all of the tasks that you can request
- Click on the task you are trying to add
- If the requested is allowed, it will appear on the schedule with the pending symbol 🕒

Viewing Requests You Have Made
- Request Summary- Shows the requests you have made since being logged in to the system
- My Request History – Shows all requests you have made, including those that are pending or approved
  - Each request will describe if it is an addition or removal, what date the request is for, a note field that will allow you to send a short note for the admin, the status of the request
  - If the request is still pending, the option to cancel the request will also be displayed
- My Request Limits- you will be able to see how many requests you have made as well as how many you are allowed to make
View Tab – to view the schedule

Selecting a Date Range

Staff Box

Task Box

The View Tab – to view the schedule
The Swap Tab – to swap an assignment with a colleague

Don’t forget to submit

The Swap Tab – to swap an assignment with a colleague

Entering Swaps

Viewing Swap requests
The Request Tab – to request a clinical area or time away

The Request Tab – to request a clinical area or time away

Entering Requests

Viewing Requests you have made
Admin Tab – to make the schedule and respond to requests (page 8)

Legend
- Pending – these tasks have not yet been published
- Saved – you have saved these assignments, but it is not published
- Locked – you have approved and locked this task in place; drag & drop will not move these tasks
- Note – a note is attached to this
- Drag & Drop – the ability to move tasks in this manner can be enabled or disabled
  - If the displayed date range is too large this is automatically disabled to help prevent mistakes

Selecting a Date Range
- Select the date range you wish to display
  - A large displayed range will take longer to load and process any changes
- You must click on a day inside the calendar and the “Go” button to finalize your selections
- View by: changes the view of the schedule in the middle screen

Task Filters
- Ensure the Task Filter with your name is selected before making your schedule
  - QGenda will prompt with a reminder if you try to proceed with the All Tasks filter

Making the Schedule – button definitions
- Make Schedule – use this button to alert QGenda to make a schedule for the highlighted week
- Reset – use this button to delete the schedule for a week
  - Please use this sparingly and only if you are absolutely certain of your utilization
    - there is NOT an undo button
- Save – saves the pending schedules you have already created
- Publish – publishes the pending schedules you have created for a specified date range
- Validate – validates the schedule has been fully created for the highlighted week
  - You can also use the Make Schedule button (100% solution will display if fully created)
- See next page for detailed instructions on how to make the schedule

To Select a Week
- Click on the date squares here to select a week; selected week will appear in yellow

Answering Requests
- Swaps Pending Approval and Requests Pending Approval will be listed here
  - If the window is hidden click on the tab you wish to see
- To respond to swap approvals
  - Only swaps agreed to by both parties will come to you to approve or reject
  - Click the approve or reject button to respond; input a note in the requester box to both faculty members as desired
- To respond to requests individually
  1. Is the requested date(s) less than 30 days out?
    - Does it affect clinical care/assignments?
    - If YES to both, email Dr. Horowitz and do not respond to the request
  2. Otherwise, use division criteria to make a decision then click either the Approve or Reject button to respond to the swap/request
    - Input a note back to the faculty member in the Note comment box as desired
    - An automated email will go to the faculty member with your decision
iii. If you approve, the request will show on the schedule as published and locked

2. To respond to multiple requests at once: Batch Approval (optional)
   a. This will be easier for some types of requests, such as “no call”
   b. When you make a schedule over dates with pending requests, QGenda will treat all unanswered requests as if they are approved
      i. This allows you to see the effect of requests on clinical assignments before approving them
   c. When publishing the schedule you will have the option to approve all requests for the time period at one time

How to Make a Schedule (page 8-9)

1. Ensure you have selected the appropriate date range and task filters first (see page 8)
2. Click to select the first day of the week you wish to make a schedule for (see pink box on page 8)
   1. The week you have chosen will change color from grey to yellow
3. Click the Make Schedule button
   1. QGenda will now make the schedule according to the rules for your area
4. When a decision point requiring your input arises, a white Schedule Summary box will appear (page 9 diagram)
   o The assignment and date QGenda could not automatically fill are noted
   o Reasons why QGenda did not assign other providers are listed by person

   1. To assign task to a provider anyway, click the override button in the row with their name
   2. To close this clinic/area (alerts administrative staff to process closure)
      i. Click on the Override link next to the CLOSED row
      ii. QGenda will NEVER automatically close an area
   3. DO NOT use the ignore function
      i. This will tell QGenda not to assign this area, but will not alert anyone to close it
      ii. If you accidentally do this, remember to assign the task to someone manually by drag and drop: drag the task from the task list to a cell in the highlighted week

5. After you make your decision, click the Make Schedule button again
   1. Continue with steps 3 and 4 until the Schedule Summary box shows 100% Solution
   2. Press the small x in the top right of the Schedule Summary message box to close it
6. Review the schedule that was just created
   1. If you want to change something, drag and drop tasks accordingly
   2. You can assign other tasks by dragging them over from the Tasks list (below Task Filters)
   3. The schedule is still pending at this stage. It will auto-save periodically, but it is a good idea to click the Save button (next to Make Schedule) to save your work
7. Start back at step 2 to make the next week’s schedule or proceed to publish the schedule
How to Publish a Schedule (page 10)

1. Once you are ready to publish the schedule for everyone to see, click the Publish button on the admin tab to display the Publish Schedule window (page 8 diagram)
   a. You can only publish tasks and individuals you are an administrator for
2. Choose the date range you are ready to publish
3. Choose the tasks you are ready to publish by clicking the boxes next to them
4. For all requests not yet approved in the date range specified, you can choose to approve them as a batch or leave them pending (to approve or reject individually)
   a. See the Approving Requests section for more information on uses for this function
5. After making all of your selections, click the Publish button to publish the schedule
   a. To see what is published use the View tab
   b. As changes are made, you can re-publish the schedule

Statistics Tab – to report based on time, person(s), task(s) (page 11)

Data Range and Report View
- Select the start and end dates you wish to display
  a. You must click on a day inside the calendar
- View by: changes the view of the schedule in the middle screen
  a. There are expanded view options in this tab; spend some time looking at these

Staff Filters
- Check the boxes next to names of people you wish to see statistics for, or choose a staff filter from the dropdown menu (each division has a staff filter)

Task Filters
- Check the boxes next to tasks based on which task(s) and day(s) of the week you want to display
  o All boxes can be checked and unchecked
  o Check the “All” columns at the top to view all tasks for that day of the week
  o Check the first “All” column in each row to easily view that task for all days of the week

View and Export
- View Stats button will refresh the middle table with your selections from the filters on the left
- Export Stats will export the middle screen to Microsoft Excel
The Admin Tab – to make the schedule and respond to requests

Selecting a Date

To select a week

Making the schedule

Task Filters

Answering Requests

Legend

The Admin Tab – to make the schedule and respond to requests
## How to Make a Schedule: Schedule Summary Box

<table>
<thead>
<tr>
<th>Schedule Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>40% Solution</td>
</tr>
<tr>
<td>18 Solved</td>
</tr>
<tr>
<td>26 Unsolved</td>
</tr>
</tbody>
</table>

### Under Assigned: Grady Endocrine Clinic on Mon 8/3/2015 (# Needed: 1)

<table>
<thead>
<tr>
<th>Name</th>
<th>Status</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ellis</td>
<td>Closed</td>
<td>Conflicts with Staff Availability 12/16/14 - 12/16/14</td>
</tr>
<tr>
<td>Lindsay</td>
<td>Blocked by APTO on Mon 8/3/2015</td>
<td></td>
</tr>
</tbody>
</table>

#### Assignment and date requiring decision
- Do not use Ignore
- To close the clinic

### Under Assigned: Grady High Risk OB Clinic on Fri 8/7/2015 (# Needed: 1)

<table>
<thead>
<tr>
<th>Name</th>
<th>Status</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Badell</td>
<td>Reserved for EUHM Perinatal &amp; Consults 8/7/2015</td>
<td></td>
</tr>
<tr>
<td>Ellis</td>
<td>Blocked by Grady Perinatal (RPC) AM &amp; on Fri 8/7/2015</td>
<td></td>
</tr>
<tr>
<td>Lindsay</td>
<td>Blocked by APTO on Fri 8/7/2015</td>
<td></td>
</tr>
</tbody>
</table>

#### Providers and why they were not assigned
- To assign to a provider anyway

### Remaining To Be Assigned:
- Set Admin PM Thu 8/6/2015
- Set Admin PM Mon 8/3/2015
- Set Admin AM Mon 8/3/2015
- Set Admin PM Tue 8/4/2015
- Set Admin AM Tue 8/4/2015

### The week's schedule is made and ready for your review

100% Solution
How to Publish a Schedule

- Date range to publish
- Tasks you can publish
- How to handle pending requests (Batch approval)
- Publish the schedule
The Statistics Tab - to report based on a time period, person(s), or task(s)