



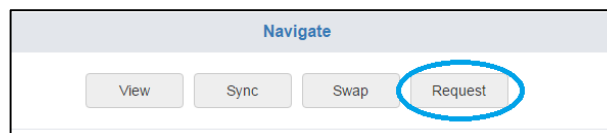
Request Manual

Request Tab

The Request Tab allows scheduled users to submit additions or removal of assignments to the schedule. QGenda provides your group with a powerful engine for managing requests. This article shows how to submit scheduling requests using the system.

Getting Started

To enter the Request Tab, click the "Request" link on the home page (after logging into QGenda), or click the Request tab at the top of the screen.



If you do not have the Request Tab as one of your options, your profile does not have requesting privileges. Contact your administrator if you think that this is an error.

Navigation in the Request Tab is similar to the navigation in the View Tab. The task box and staff box can be used to show or hide staff members or tasks on the request scheduling grid.

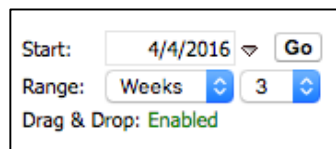
Making Schedule Requests

Adding A Task

QGenda makes it easy to make requests for adding tasks to your schedule. The word "task" refers to both working events, such as Clinic time and Call, and non-working events like Vacation and CME time. Each group is unique, so not all groups allow requests for every task.

To request the addition of a task to your schedule, follow the steps below:

- Select the date you wish to start viewing the schedule by clicking on a day within the calendar that appears when clicking on the date. Use the range drop down menu to manipulate how far into the future you wish to view from the specified start date.
 - **Note:** When selecting a start date, you *must* select a date in the calendar to tell QGenda what date you would like to start viewing schedule. **Navigating to the month in the calendar is not specific enough.**

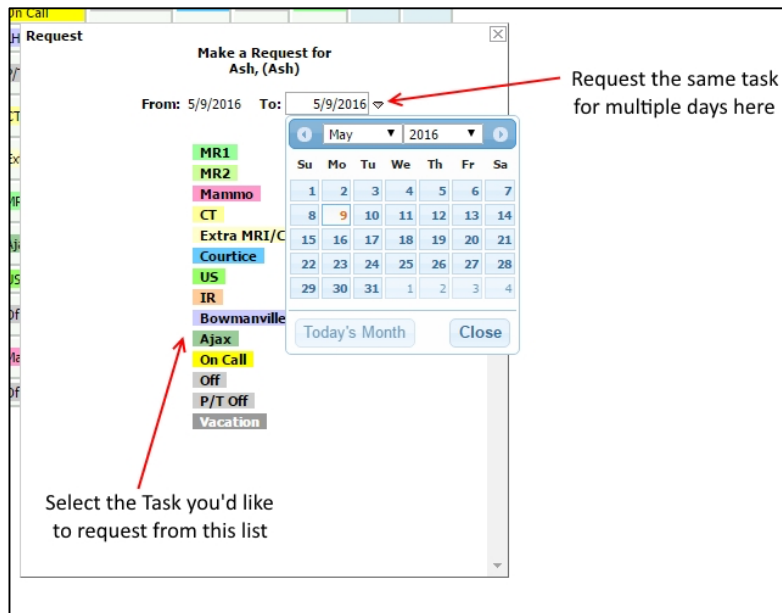


- Locate your name along the left side of the requesting grid.
- Click the cell where the date you want your request to start intersects with your name.

	May Mon 2	May Tue 3	May Wed 4	May Thu 5	May Fri 6	May Sat 7	May Sun 8	May Mon 9	May Tue 10	May Wed 11	May Thu 12	May Fri 13	May Sat 14	May Sun 15
Ash	CT	IR	Off	Off	IR			IR	CT	Off	IR	Off		
Conn	US On Call	Off	US	Ajax	Mammo			Off	Extra MRI/CT	MR1	Mammo	MR2		
Donaldson	MR1	Mammo	LHB	Off	CT On Call			MR2 On Call	Off	Courtice	Off	MR1		
Gustafson	LHB	Off	Mammo	Courtice	Ajax			LHB	Off	Mammo	MR1	Off		
Isaac	P/T Off	LHB	MR1	P/T Off	Off			P/T Off	MR2 Tumor Board	US	P/T Off	US On Call		
Jones	Ajax	Off	CT On Call	IR	LHB			CT	Off	IR	LHB	Off		
Kim	Off	Extra MRI/CT	Ajax	LHB	P/T Off			Extra MRI/CT	Mammo On Call	LHB	Ajax	P/T Off		
Lacey	Off	US	P/T Off	Mammo	Off			MR1	US	P/T Off	MR2 On Call	LHB		
Levine	Mammo	MR2 On Call	Off	Off	MR2			Ajax	MR1	Off	US	Courtice	On Call	On Call

For example, if you are Dr. Ash and would like to make a request for May 9th, you would click in the cell circled in blue. Note that schedule that has already been published will appear in the grid. If the schedule has not yet been published, the grid might be blank.

- A list of tasks that you are able to request will appear.
 - If you want to request the same task for multiple days in a row, you can tell QGenda here. For example, if you are taking two weeks of vacation, you can select the date range of your vacation by changing the end date in the "To" box (see picture below).
 - Note:** For the majority of groups, vacation does not need to be requested on the weekends. If this is the case, QGenda will not schedule on weekends surrounding vacation weeks. Please ask your scheduler for more information.
- Once you have selected the date range for the request, click on the task that you would like to request from the list.



Request the same task for multiple days here

Select the Task you'd like to request from this list

After you select the task to request one of three things will happen:

1. If the request is **allowed and requires administrative approval**, it will appear in the grid with the pending symbol: ⚠️
 - Your admin will be immediately notified that a new request has been made. You will get a notification when it is either approved or rejected.
 - You are able to undo this request until it is approved, see section 'Undoing a Request'.
2. If the request is **allowed and does not require administrative approval**, it will appear in the grid with the lock symbol: 🔒
 - The scheduling change will be published.
 - *Note: Requests with the lock symbol next to them can only be removed by an administrator.*
3. If the request is **not allowed**, it will give a conflict in the form of a pop-up. To better understand specific conflicts, please refer to the section of this document titled 'Requesting Conflicts'.

At this point, if the request was not blocked by the system, you may add a note to the request. See the section below titled 'Adding a Note to a Request'.

Removing a Task

The ability to remove tasks is especially useful for things like cancelling clinics. Depending on the setup of your group, only some (if any) tasks will be available for removal. Tasks that are removable will have a red X next to them: ✖️

- Simply click the ✖️ next to the task that you want to remove, one of two things will happen:
 1. If the **removal requires administrative approval**, the task's name will be crossed off and the pending symbol will appear next to the task: ⚠️
 - Your administrator will be notified that a new request has been made. You will get an email when the request is approved or denied.
 2. If the removal **does not require administrative approval**, the task will disappear from the scheduling grid and the updates will be published.

	May Mon 9	May Tue 10	May Wed 11	May Thu 12	May Fri 13	May Sat 14	May Sun 15	May Mon 16	May Tue 17	May Wed 18	May Thu 19	May Fri 20	May Sat 21	May Sun 22
Ash	IR ✖️	CT ✖️	Off ✖️	IR ✖️	Off ✖️			MR2 ⚠️	Extra MRI/CT ⚠️	IR ✖️	Off ✖️	CT ✖️		

Undoing a Request

You are able to undo requests up until they are approved or denied by an administrator. Note that if the request has already been approved (it will show with a lock symbol (🔒) next to the task), and you will not be able to remove the task, only an administrator can remove the task from the schedule.

To remove a request, navigate to “My Request History” at the bottom of the Request Tab.

Request Summary	My Request History	My Request Limits
Add MR1 to Ash (Ash) on 6/20/2016	Note: <input type="text"/>	Pending Admin Approval Undo Request
Remove Extra MRI/CT from Ash (Ash) on 5/17/2016	Note: <input type="text"/>	Pending Admin Approval Undo Request
Add MR2 to Ash (Ash) on 5/16/2016	Approved	
Add CT to Ash (Ash) on 5/16/2016	Denied by Admin	

- My Request History shows a summary of all of the requests that you have made. Requests that are still pending, denoted by the “Pending Admin Approval” text to the right, may be removed by clicking the “Undo Request” link on the far right.
- A pop-up will let you know the request has been undone successfully.
- You must refresh your screen to see the change take effect in the scheduling grid.

Adding a Note to a Request

Sometimes it is useful to add a note to a request. To do this, navigate to “Request Summary” at the bottom of the Request Tab. Simply enter your note in the “Note:” field. When you click outside of the text entry field, the note will automatically be saved. The approver will be able to see your note when they log into QGenda. Depending on the settings of your group, notes may be made public once the task is published on the final schedule.

Request Summary	My Request History	My Request Limits
Add Vacation to Ash (Ash) on 6/27/2016	Note: <input type="text" value="Enter your note here"/>	
Add On Call to Ash (Ash) on 6/28/2016	Note: <input type="text"/>	
Add Vacation to Ash (Ash) on 6/21/2016	Note: <input type="text"/>	

Requesting Conflicts

One of QGenda's most useful features is its ability for real-time request feedback. The system uses tools to ensure that there is always enough coverage and to enforce requesting limits on both per-provider and group bases. QGenda provides feedback by generating conflicts when one of the requesting rules is violated. This section outlines the more common conflicts and helps explain what they mean in more detail.

Conflicts	What It Means
The request exceeds the Total Maximum of # allowed for the ***** requesting event between MM/DD/YYYY - MM/DD/YYYY	An administrator has programmed in a limit as to how many of a certain task you, as an individual , are able to request over a certain period of time. This request exceeds that limit and cannot be accepted.
The request exceeds the Daily Maximum of # allowed for the ***** requesting event.	An administrator has programmed in a limit to how many of a certain task can be requested per day across the entire group ; your request exceeds this limit and cannot be accepted.
The requested shift has already been fully assigned which may or may not be published.	The maximum number of people that are able to be assigned to a task have already been assigned to it; therefore, your request cannot be accepted.
The request is incompatible with an existing shift which may or may not be published.	The task that you requested cannot exist on the same day as one that is already on your schedule. Even if your schedule has not been published, incompatible requests will generate an conflict.

If you believe that one of the pop-up conflicts is a mistake, contact your administrator.

Limits

QGenda uses two types of limits: Request Limits and Total Limits. Each type of limit is detailed in this section, along with information on how to check which limits apply to you.

Request Limits

'Request Limits' are used to restrict the number of times you can request a specific task or group of tasks. If a request is rejected, the system will not count it toward your limit. For example, if you have a Request Limit of five vacation days, request all five, and only four are approved, you will be able to make one more request before hitting your limit.

- Request limits restrict the number of requests you are able to submit for a certain task or group of tasks within a time period.
- Denied requests do not count toward this limit.

Total Limits

'Total Limits' are used to restrict the total number of a task or a group of tasks, requested or not, that you are able to have within a time period. It is easier to think of this as the total number of a certain task that appears on your schedule within a certain time period.

- Total limits restrict the total number of a particular task or group of tasks that appear(s) on your schedule.
- Denied requests do not count toward this limit.

Checking Your Limits

QGenda makes it easy to check your limits. This can be useful for seeing how many vacation days you have left to request. To see your current limit standings, navigate to the 'My Request Limits' section at the bottom of the Request Tab.

Request Summary		My Request History		My Request Limits					
Request Event Name	Date Range	Request Limits			Total Limits				
		Current	Max	Remaining	Current	Max	Remaining		
Vacation	6/1/2016 - 6/30/2016	5	6	1	5	10	5		

'My Request Limits' shows the name of the limit, the date range for which the limit is active, and your individual standing within the limit. Note that each limit can have a Request Limit component, a Total Limit component, or both. Blackout dates cannot be viewed in My Request Limits. Check with your administrator for blackout information.