

STANDARD OPERATING PROCEDURE- GUIDELINE

COMPLEX FAMILY PLANNING DIVISION SCHEDULING

SCOPE/APPLICABILITY:

This document applies to members of the Division of Complex Family Planning, including faculty and fellows.

PURPOSE:

The purpose of this document is to standardize the process for creating and developing Complex Family Planning division schedules. Individual scheduling training is available through the OBGYN Scheduling Specialist, currently Patricia Esquibel. Physicians are responsible for understanding and adhering to the scheduling process outlined below.

PROCEDURES:

The Complex Family Planning scheduling process is as follows:

1. Submitting schedule requests
2. Creating and publishing the division schedule
3. Division schedule review
4. Making changes after the schedule is finalized

1. SUBMITTING SCHEDULE REQUESTS

- The OBGYN Scheduling Specialist will notify physicians via email when schedule requests are due for a given period. Schedule requests are typically due approximately 6 months in advance and include Professional Leave, Annual Leave, and nights when unavailable for OBGYN primary or backup call.
- Schedule requests must be entered into the OBGYN Department scheduling software (QGenda). Physicians may enter requests directly under the “Request” tab or work with the OBGYN Scheduling Specialist to ensure their schedule requests are all entered.
- All OBGYN Department physicians must provide availability at least two weekends per month when they might be scheduled to take call.
- Requests for Professional Leave must include the name of the conference or professional event.
- Requests for Professional Leave that are contingent upon conference presentation acceptance (i.e. the physician would only attend if presenting) must be entered, with a note stating this. After the conference submission is accepted or not, the schedule should be updated.
- Professional Leave requests in excess of 10 half-days per year will be considered as outlined in the OBGYN Department Administrative SOP, “Clinical FTE Work Year Professional leave accrual and use.”
- Each Complex Family Planning physician is responsible for adhering to the schedule request deadline, reviewing their schedules (work, personal, and other professional

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schedules including conferences), and submitting requests to cover all foreseeable conflicts before the deadline.

- A “conflict” is any foreseeable reason a physician would not be available to work. Examples of conflicts include travel/conferences, Professional or Annual Leave, off-campus rotations for Complex Family Planning Fellows, anticipated medical leave, and updates to existing P/L or A/L if dates have changed.
- All requests are visible in QGenda under the Request tab. If a physician does not see his/her request in QGenda, it has not been captured and it must be communicated to the OBGYN Scheduling Specialist.

2. CREATING AND PUBLISHING THE DIVISION SCHEDULE

- Within one week of the request deadline, the Division Chief, together with the Scheduling Specialist, approves schedule requests. All attempts will be made to honor schedule requests while ensuring adequate clinical coverage at UNM.
- Week 1: The Scheduling Specialist creates a preliminary schedule within one week of the request approval deadline, resolves any routine conflicts/shortages independently, and makes note of any unresolved conflicts/shortages.
- Week 2: During the following week, the Scheduling Specialist and the Division Chief work together to resolve the remaining conflicts/shortages via email or during regularly scheduled meetings.
- After the Division Chief approves the division schedule, the Scheduling Specialist publishes the schedule and provides a deadline for all physicians to report any errors.

3. DIVISION SCHEDULE REVIEW

- When the division schedule is published for review, the Scheduling Specialist publishes the schedule in QGenda, notifies all physicians and clinic schedulers via email, and provides a deadline for submitting changes.
- It is each physician’s responsibility to review the published clinic schedule by the provided deadline and to notify the Scheduling Specialist and the Division Chief of any errors or conflicts.
- Prior to the schedule change deadline, the Scheduling Specialist will work to help the physician resolve any reported errors or conflicts.
- After the schedule change deadline, the physician will be responsible for the schedule as it is.


4. MAKING CHANGES TO THE SCHEDULE AFTER IT IS FINALIZED

- If a conflict arises after the division schedule is published, the physician must communicate the conflict to the Division Chief and the Scheduling Specialist and solicit help with coverage. While the Scheduling Specialist can initiate the communication for requesting coverage, it is the physician’s responsibility to ensure coverage. This does not apply when a physician or her/his family member is sick or they are unable to communicate with other physicians to request coverage. Please refer to the OBGYN Department Administrative SOP, “Sick Leave Instructions for Faculty.”

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- Any time after the schedule is finalized in QGenda, all changes to the schedule must be routed through the Division Chief and the Scheduling Specialist in writing to ensure QGenda accurately reflects clinical coverage. Clinic schedulers are not responsible for updating QGenda. Examples include:
 - Shift trades between physicians
 - Changes approved in person by the clinic medical director and practice manager
 - Fellow schedule cancellations or rearrangements
 - Last-minute requests to cover a shift at CRH, OSIS, L&D, etc.
- Any time a physician trades or cancels a shift, the physician is responsible for making up the resulting deficits in FTE. If a voluntary trade or change results in a conflict with scheduled clinical care due to being post-call, the physician is responsible for working post-call.
- Requests that result in clinic cancellations less than 30 days prior to the scheduled clinic require approval from the Department Chair, as outlined in the OBGYN Department Clinical SOP, “Clinic Cancellation Policy.”

APPROVALS:

SOP Owner:	Lisa Hofler, MD, MPH, MBA	Date: 02/04/2021
Chair Approval:		Date: 06/21/2021
Effective Date:	June 21, 2021	