

REQUEST MANAGER - LIGHTNING BOLT SOLUTIONS AUTOMATICALLY MANAGES REQUESTS



Overview

Request Manager is a new, optional plug-in introduced by Lightning Bolt Solutions to automate the process of managing requests for absences or work preferences. While the plug-in is designed to work seamlessly with JustInTime Scheduler, the Request Manager can also be used as a standalone product.

Managing absence requests is the first and most important step in creating a fair, accurate schedule. The fundamental problem with managing absence requests without an effective collaborative tool is that the decision to grant or deny an individual's absence request is not an isolated decision, but a decision that depends on the collective absence requests for the entire group. Without a global view of all requests and without knowing how each request impacts the group or institutional requirements, individuals may make unrestrained requests that cannot be realized. Scheduling administrators may not be able to see or catch potential problems until they discover that some assignments are impossible to cover during schedule creation. The list on the right summarizes some more of the difficulties with managing requests.

The Request Manager allows you to automate the process of approving or denying absence requests based on policies or rules that the group defines. The system validates requests as they are entered providing immediate feedback to the requesting individual. It provides a means for the entire group to collaborate on a central website.

Difficulties with Managing Requests

Without an effective tool, absence request management can be error-prone and inefficient for both requesting individuals and scheduling administrators. Individuals requesting time-off face the following problems:

- Request approval process is not transparent. Why did my request get denied?
- Long turnaround time in request approvals.

The scheduling administrators face these related challenges:

- Approval of a request depends not only on one individual's request but the collective requests of the group. It may be difficult to explain or too time consuming to justify all the intricate interdependencies.
- How to ensure that enough providers are available to cover all specialized tasks? How do you make sure that the sum of requests does not result in certain activities being unassigned?
- How to ensure that requesting individuals have not exceeded their vacation/sick balance (or projected balance on a future date based on some defined accrual rate)?
- How to ensure that the distribution of absences are equitable, taking special care that requests during holidays are fairly distributed?
- Managing absence requests can take several weeks per year even in a small group.

Automatic Request Management

With Request Manager, you define the scheduling policies/rules, and the web-based application enforces them the instant requests are entered. Since the software executes your pre-defined policies mechanically, policy legislation is effectively separated from policy enforcement, allowing your group to focus on identifying an agreeable set of rules to govern your absence requests. The flexible design of Request Manager allows users to define complex custom policies (see below, right).

The web application in Request Manager approves any request automatically unless the request violates one or more of the pre-defined rules. If the system cannot approve a request due to some rule, the request enters a pending state and the user is given a description of the rule that prevented the request's approval. The scheduling administrator can override the rule by manually approving a pending request. Since most requests are valid, the system avoids involving the scheduling administrator in most cases. When the scheduler's intervention is required, *i.e.* when a request becomes pending due to a rule violation, the scheduling administrator is automatically e-mailed a summary of the event.

The process for managing requests can be summarized as follows:

1. End-users legislate what the request policies should be and LBS configures them on Request Manager.
2. Individuals enter requests on the Request Manager web application.
3. Violating requests become pending and result in an e-mail notification to the scheduling administrator. Users get immediate feedback on the validity of request.
4. Scheduling administrator determines whether to override the policy by approving the pending request.

Summary of Benefits of Request Manager

- Provides an intuitive calendar-based interface showing all requests.
- Works seamlessly with JustInTime Scheduler
- Makes request policies transparent to all. Get immediate justification on why a request is approved or denied.
- Avoids potential scheduling problems such as insufficient coverage by validating requests at the time that they are entered.
- Reduces amount of time needed to manage requests by automating the process.
- Separates request policy legislation from policy enforcement.
- Requesting individuals get immediate feedback on validity of requests.
- Enables group to interact on a central website and collaboratively derive an absence schedule.
- Facilitates communication between requesting individual and the scheduling administrator.

Examples of Absence Request Policies

- Requests are honored on a first-come-first-serve basis.
- No more than 3 neurologists can be gone on Mondays, Tuesdays and Wednesdays.
- Dr. Jones cannot be on vacation whenever Dr. Smith is on vacation.
- No request can exceed the applicable projected vacation balance, which accrues at rates specific to individuals.
- Requests are entered in phases beginning with senior staff.
- No more than 1 day-off per week per doctor.