

Description: Users will learn how to use DCI to supervise a residential program

Roles Required: Super User, Supervisor

Permissions Required: Residential Program Admin

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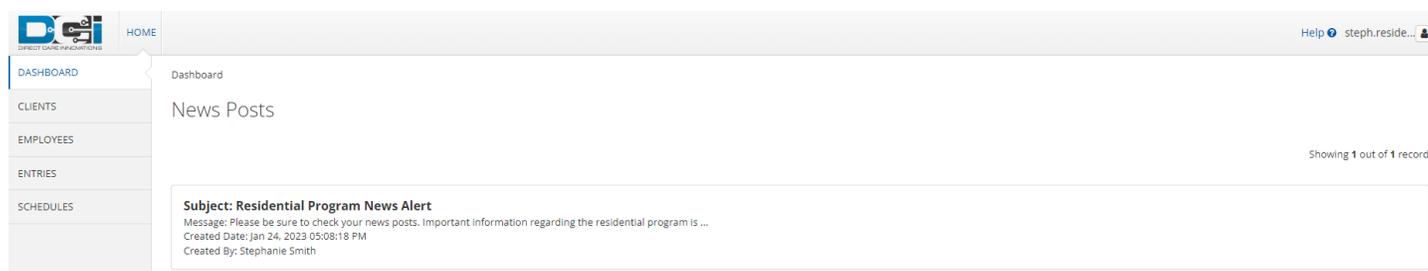
Residential Program Profile

Description: In this topic, the user will learn an overview of the residential program profile. The residential program profile is designed to record absences for clients who reside at the program and record time for employees who work there. Typically, the person who works at the front desk will log in to the residential program profile at check in and check out, so that employees can easily log their attendance in the system and clients can record absences.

Profile Overview

Dashboard

The residential program dashboard displays news posts, which are important messages from the residential program. Click on other submenu options to check in or out, or view the schedule.



Clients

From this submenu tab, record an absence for a client. Click a client's name to open the details page.

HOME Help | steph.reside...

DASHBOARD

CLIENTS

EMPLOYEES

ENTRIES

SCHEDULES

Home / Clients

Clients

Actions

New Absent

Type Client Name Type Client Id Type Cost Center

Type Service Code Select Status

Reset Search

Export

Showing 3 out of 3 records

Name	Client Id	Cost Center	Service Code	Balance	Units	Account Status
Steph Client1	1776	Steph Cost Center test	Residential Program	0.00	Monthly	Active
Steph Client2	678	Steph Cost Center test	Residential Program	0.00	Monthly	Active
Steph Client3	1778	Steph Cost Center test	Residential Program	0.00	Monthly	Active

Employees

Here, an employee can clock in and out.

HOME Help | steph.reside...

DASHBOARD

CLIENTS

EMPLOYEES

ENTRIES

SCHEDULES

Home / Employees

Employees

Actions

Clock - In

Clock - Out

Type Employee Name Type Cost Center Select Employee Type

Select Status

Reset Search

Export

Showing 6 out of 6 records

Name	Cost Center	Phone #	Type	Pay Period Balance	Unit Type	Account Status
Steph Employee1	Steph Cost Center test	(817) 453-6678	Hourly Non Exempt	0.00	Hourly	Active
Steph Employee2	Steph Cost Center test	(817) 453-2231	Hourly Non Exempt	0.00	Hourly	Active
Steph Employee3	Steph Cost Center test	(817) 460-4456	Hourly Non Exempt	0.00	Hourly	Active
Steph Employee4	Steph Cost Center test	(817) 456-4456	Hourly Non Exempt	0.25	Hourly	Active
Steph Employee5	Steph Cost Center test	(222) 222-2222	Hourly Non Exempt	0.00	Hourly	Active
Steph Supervisor1	Steph Cost Center test	(817) 453-9874	Hourly Non Exempt	0.00	Hourly	Active

Entries

View program entries and details. Employees can also be clocked in and out from this page.



Residential Program - Supervisors



HOME
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DASHBOARD

CLIENTS

EMPLOYEES

ENTRIES

SCHEDULES

Home / Entries

Entries

Id	Service Date	Ref.	Cost Center	Client/ Employee	Type	Clock - In/ Check - Out	Clock - Out/ Check - In	Service Code	Units	Unit Type	Status
34986	Jan 25, 2023		Steph Cost Center test - Steph Cost Center test	Steph Employee5	Punch	11:31 AM	11:34 AM		0.05	Hourly	Processed
33087	Sep 09, 2022		Steph Cost Center test - Steph Cost Center test	Steph Client2	Absence	12:00 AM	11:59 PM	Residential Program	0.00	Monthly	Pending
33081	Sep 01, 2022		Steph Cost Center test - Steph Cost Center test	Steph Client3	Absence	12:00 AM	11:59 PM	Residential Program	0.00	Monthly	Pending
33080	Sep 01, 2022		Steph Cost Center test - Steph Cost Center test	Steph Client1	Absence	12:00 AM	11:59 PM	Residential Program	0.00	Monthly	Pending
33062	Sep 10, 2022		Steph Cost Center test - Steph Cost Center test	Steph Employee4	Punch	04:00 PM	04:15 PM		0.25	Hourly	Unverified

Schedule

View the program schedule. All edits are made from the super user or supervisor profile.

HOME
Help steph.reside...

Home / Schedules

Your Schedule

February 19, 2023 - February 25, 2023

0 Scheduled Hours
40 Required # of Hours
0 Default Weekly Hours

■ OnCall Shifts
 ■ Scheduled Shifts
 ■ Offered Shifts

Employees	Feb 2023						
	Sunday 19	Monday 20	Tuesday 21	Wednesday 22	Thursday 23	Friday 24	Saturday 25
Steph Employee1 0 / 2 / 40							
Steph Employee2 0 / 0 / 40							
Steph Supervisor1 0 / 0 / 40							
Steph Employee3 0 / 0 / 40							
Steph Employee4 0 / 0 / 40							
Steph Employee5 0 / 0 / 0							

Edit Profile

Description: A residential program profile may be edited or updated by the supervisor (i.e., the profile is no longer in use and needs to be inactivated).



1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Residential Programs** on the submenu
4. Search for the program by typing the name in the field Type Residential Program Name and selecting it when it populates
5. Click **Search**
6. Select the program from the table by clicking anywhere in the row
7. Click **Actions**
8. Select **Edit Residential Program** from the drop-down menu
9. Make the necessary changes on the Edit Residential Program page
10. Click **Save** to continue and **Yes** to confirm

Service Accounts

Description: A client or employee service account must be established for each service code that may be used for the residential program.

Create Client Service Account

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Residential Programs** on the submenu
4. Search for the program by typing the name in the field Type Residential Program Name and selecting it when it populates
5. Click **Search**
6. Select the program from the table by clicking anywhere in the row
7. Click **Actions**
8. Select **New Client Service Account** from the drop-down menu
9. Complete the form wizard
 - a. Resd. Program Name – Auto populates
 - b. Client - Enter the client name and select it from the drop-down menu
 - c. Service Code - Select **Residential Program**
 - a. Funding Source - Select the appropriate funding source from the drop-down menu
 - d. Cost Center – Auto populates
 - e. Date – Click in the field to add start and end dates for the service account
 - f. Billing Unit – Auto populates
 - g. Rate (optional) – Defaults to 0. This number can be changed if this service account has a unique pay rate.
 - h. Account Reference (optional) – Optional reference field
 - a. Status – Defaults to active. Switch to inactive when this is no longer a valid service account.



- i. True Clock In-Out box – Select to allow real-time entries only. If not selected, historical entries can be entered.

10. Click **Save** to continue and **Yes** to confirm

Create Employee Service Account

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Residential Programs** on the submenu
4. Search for the program by typing the name in the field Type Residential Program Name and selecting it when it populates
5. Click **Search**
6. Select the program from the table by clicking anywhere in the row
7. Click **Actions**
8. Select **New Employee Service Account** from the drop-down menu
9. Complete the form wizard
 - a. Resd. Program Name – Auto populates
 - a. Employee – Enter the employee name and select it from the drop-down menu
 - b. Cost Center – Auto populates
 - c. Employee Number (optional)
 - d. Pay Rate Name (**required**) – Select from the drop-down menu
 - b. Pay Rate (**required**) – Enter employee pay rate
 - e. Effective Date - Click in the field to open the calendar and select a date
 - f. Min Units Per Punch (optional) – Enter if a minimum number of billing units must be used when the employee clocks in under this service account
 - g. Max Units Per Punch (optional) – Enter if the employee may not exceed a maximum number of billing units in one shift
 - h. Start Date (optional) – If a date is entered, the employee will not be able to make a punch before this date.
 - i. End Date (optional) – If a date is entered, the employee will not be able to make a punch after this date.
 - j. Account Reference (optional) – Optional reference field
 - k. Grace Period – Defaults to disabled. By clicking enabled, the grace period for a certification template that is linked to this service account will be permitted.
 - i. Grace Period Expiration – The date the grace period will expire based on the time frame associated with the linked certification template
 - l. Allows OverLapping Pay Rates box – Check to allow
 - m. Status – Defaults to active. Switch to inactive when this is no longer a valid service account.
 - n. True Clock In-Out box – Select to allow real-time entries only. If not selected, historical entries can be entered.



10. Click **Save** to continue and **Yes** to confirm

Manage Absences & Attendance

Description: In this topic, the supervisor will learn how to manually add an absence entry. This can be done by an employee logged into a residential program profile.

Add a New Absence Entry for a Client

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Residential Programs** on the submenu
4. Search for the program by typing the name in the field Type Residential Program Name and selecting it when it populates
5. Click **Search**
6. Select the program from the table by clicking anywhere in the row
7. Click **Actions**
8. Select **New Entry** from the drop-down menu
9. Complete the form wizard
 - a. Entry Type - Select **Absent**
 - b. Resd. Program Name - Auto populates
 - c. Account Type - Select **Residential Program**
 - d. Client - Enter the client name and select it from the drop-down menu
 - e. Check Out - Select a date and time for the check out
 - f. Check In - Select a date and time for the check in
 - g. Reason - May be required. Select from the available drop-down options
 - h. Note - Optionally add a note regarding the absence
 - i. Attachment - Optionally add an attachment regarding the absence
10. Click **Save** to continue and **Yes** to confirm

Approve Attendance

1. Log in to DCI with personal profile
2. Select **Home** from the main menu
3. Select **Residential Program** from the submenu
4. Search for the program by typing the name in the field Type Residential Program Name and selecting it when it populates
5. Click **Search**
6. Click the green **Approve Attendance** button
 - a. Select the date range and EVV Location if applicable
 - b. Click **Submit**
 - c. Click **Verify All** and **Yes** to confirm



FAQ - Why are there attendance entries missing when I generate attendance?

1. No active authorization
2. Outside the start and end date of the funding account
3. The date range overlaps with the end of one authorization and the start of another. Change the start date on the date range to the start date on the second authorization and try again.

Employee Punch Entries – Search, View, Approve, Reject, or Export

Description: Residential program entries are approved like other entries (i.e., hourly time entries).

Pending Entries

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Pending Entries** on the submenu
4. Select **Residential Program** from Select Account Type filter
5. Click **Search**
6. Click the **A** in the entry row to approve the punch or the red **R** to reject it
7. Click **Yes** to confirm
8. Click anywhere in the entry row to view the punch details
9. Export entries by clicking the **Export** button above the entries table on the right-hand side of the page
 - a. Open the .csv file from the device downloads
 - b. Excel will open
 - c. Sort and format downloaded data as needed

All Entries by Object

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click one of the following tabs on the submenu to open the object page
 - a. Employees – Shows all entries by employee
 - b. Clients - Shows all entries by client
 - c. Residential Programs – Shows all entries for the program (excludes punches not made within the program such as Training, Admin, Hourly, etc.)
 - d. Cost Centers - Shows all entries by cost center
4. Use the filters to search by specific criteria
5. Click **Search**
6. Select the object by clicking anywhere in the row
7. Select the **Entries** tab on the object details page



8. Select **Residential Program** from Select Account Type filter
9. Click **Search**
10. Export entries by clicking the **Export** button above the entries table on the right-hand side of the page
 - a. Open the .csv file from the device downloads
 - b. Excel will open
 - c. Sort and format downloaded data as needed
11. Click anywhere in the entry row on the entries table to view details
12. Click **Actions**
13. Select **Approve** or **Reject** from the drop-down menu

Manage Punch Entry for Employee

Description: In this topic, the supervisor will learn how to add or edit employee punches for those they supervise. The best practice is for employees to enter and edit their punches, however, some situations require supervisor assistance (i.e., missed punches for the residential program, approved punches that require editing, etc.).

Add a New Punch for an Employee

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Residential Programs** on the submenu
4. Search for the program by typing the name in the field Type Residential Program Name and selecting it when it populates
5. Click **Search**
6. Select the program from the table by clicking anywhere in the row
7. Click **Actions**
8. Select **New Entry** from the drop-down menu
9. Complete the form wizard
 - a. Entry Type - Select **Punch**
 - b. Resd. Program Name – Auto populates
 - c. Account Type – Select **Residential Program**
 - d. EVV Location – Select the residential program location
 - e. Employee – Enter the employee name and select it from the drop-down menu
 - f. Service Date – Click in the field to open the calendar and select a date
 - g. Check In/Check Out – Click in the fields to select service times
 - h. Check Out Date – Auto populates
 - i. Reason – May be required. Select from the available drop-down options.
 - j. Notes – Add additional information regarding the punch as needed
 - k. Attachment – Add an attachment as needed
10. Click **Save** to continue and **Yes** to confirm



The punch appears in the employee's entries list with a status of Unverified. The employee must verify the punch, which updates the status to Pending. The supervisor may then review and approve the pending entry.

Edit a Punch for an Employee

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Enter the employee name in the Employee Name field then click **Search**
5. Click anywhere on the row to open the employee details page
6. Select the **Entries** tab located below the demographics box
7. Select **Residential Program** from Select Account Type filter
8. Click **Search**
9. Click anywhere in the row to open the punch details page
10. Click **Actions**
11. Select **Edit Entry** from the drop-down menu
12. Make the necessary changes to the Entry Form wizard
13. If the organization requires a reason code when editing a punch, click the blue **Plus (+) Sign** next to the reason field
14. Select a reason from the **Add Reason Codes** drop-down that best describes why the edit is being made
15. Reason codes may require a text explanation. If this requirement is selected, a text box will appear where text must be entered.
16. Click the blue **Plus (+) Sign** next to the Add Reason Codes drop-down to add the selection to the Added Reason Codes box
17. Click **Save** to continue and **Yes** to confirm

An edited *pending* punch will change to rejected status and a new punch with unverified status is generated with the corrections. The Ref field is assigned a number that references the original punch, indicating the punch has been modified. The employee must log in to DCI and verify (acknowledge and concur with) the change(s), which updates the status to Pending. The supervisor must now review and approve the punch. Once approved, the approved or rejected entry will disappear from the Pending Entries screen and be visible under Entries for the program, or individually under Entries for the employee or client.

An edited *approved* punch will maintain the status of approved but will reflect a Compensated flag. Two new punches are created and need to be approved; one that zeroes out the original entry, and one for the correct entry. These entries can be found on Pending Entries on the submenu or in the reference entries table on the original entry's punch entry details page. The Ref field is assigned a number that references the original punch, indicating the punch has been modified.



Cancel Approved Punch for an Employee

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Enter the employee name in the Employee Name field then click **Search**
5. Click anywhere on the row to open the employee details page
6. Select the **Entries** tab located below the demographics box
7. Select **Residential Program** from Select Account Type filter
8. Click **Search**
9. Click anywhere in the row to open the punch details page
10. Click **Actions**
11. Select **Cancel Entry** from the drop-down menu to open the Cancel Entry form
18. If the organization requires a reason code when canceling a punch, click the blue **Plus (+)** **Sign** next to the reason field
19. Select a reason from the **Add Reason Codes** drop-down that best describes why the edit is being made
20. Reason codes may require a text explanation. If this requirement is selected, a text box will appear where text must be entered.
21. Click the blue **Plus (+)** **Sign** next to the Add Reason Codes drop-down to add the selection to the Added Reason Codes box
12. Click **Save** to continue and **Yes** to confirm

The updated employee punch remains in Approved/Processed/Paid status but will reflect a Compensated flag. A new entry zeroing out the original has been created. The Ref field is assigned a number that references the original punch indicating the punch has been modified.

Verify an Unverified Punch for an Employee

Description: As an alternate option to the employee verifying an unverified punch, some organizations may allow a supervisor to verify (or reject) the punch from the punch details screen on behalf of the employee.

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Enter the employee name in the Employee Name field then click **Search**
5. Click anywhere on the row to open the employee details page
6. Select the **Entries** tab located below the demographics box
7. Select **Residential Program** from Select Account Type filter and select **Unverified** from Select Status filter
8. Click **Search**
9. Click anywhere in the row to open the punch details page



10. In the Punch Details widget box, select either the **Verify** or **Reject** button by the Status field
11. Click **Yes** to confirm

Scheduling (Instance-Level Setting)

Description: In this topic supervisors will learn how to use the scheduling system. This module is an instance-level setting and is not utilized by every organization.

- Create a schedule specifically for the residential program
- View all employee shifts using the Employee Schedule tab
- Prevent scheduling overtime and over authorization
- Prevent double-scheduling of employees
- Allow efficient management of shift swapping
- Manage employee availability templates

Create New Residential Program Schedule

1. Log in to DCI with personal profile
2. Click **Scheduling** on the main menu
3. Click **Residential Programs** on the submenu
4. Search for the program by typing the name in the field Type Residential Program Name and selecting it when it populates
5. Click **Search**
6. Select the program from the table by clicking anywhere in the row
7. Click the **Employees Schedule** tab
 - a. All employees with an active service account for the specified program will be listed in the left header column of the schedule table
 - b. If a particular employee is not listed, verify that they have an active service account.
 - c. The number of consumed weekly hours, scheduled weekly hours, and max available weekly hours will appear under each employee's name.
8. To create a new schedule, use the calendar or arrow icons to go to the desired week.
 - a. To copy the same schedule as the previous week, click the **Copy** icon (two pieces of paper).
 - i. Select the **week** to copy from the drop-down and click **Ok**
 - ii. Click **Yes** to confirm
 - b. To create a new schedule shift, click the **blank cell** to open and complete the schedule form wizard:
 - i. Employee Name – Auto populates with the employee name of the selected cell
 - ii. EVV Location – Select from the drop-down menu
 - iii. Day – Auto populates the date of the selected cell but can click in the field to open the calendar and select a different date
 - iv. Start Time – Click in the field to select a shift start time
 - v. End Time - Click in the field to select a shift end time

- vi. Note – Optionally add a note for the employee
 - vii. OnCall checkbox – Check if this is an on-call shift
 1. If selected, proceed to step 16.
 - viii. Critical checkbox – Check to mark a shift as critical
 - ix. Reminder - Enter a numeric value in minutes, hours, days, or weeks
 - x. Reminder Type - Select Minutes, Hours, Days, or Weeks from the drop-down
9. Click **Schedule** and **Save** to confirm
 10. Repeat until the schedule is complete
 - a. Copy entries by dragging and dropping them into a new cell
 11. Click **Publish to make the schedule visible to employees**
 12. Review exceptions and make changes as needed
 13. Click **Publish** on the exceptions window
 - a. Changes can be made to the schedule by right-clicking on individual entries
 14. Re-publish the schedule for the employee to view the changes

View Residential Program Schedule

1. Log in to DCI with personal profile
2. Click **Scheduling** on the main menu
3. Click **Residential Programs** on the submenu
4. Search for the program by typing the name in the field Type Residential Program Name and selecting it when it populates
5. Click **Search**
6. Select the program from the table by clicking anywhere in the row
7. Click the **Employee Schedule** tab
 - a. All employees with an active service account for the specified program will be listed in the left header row of the schedule table
 - b. There are several numbers listed by each employee. Hover over each number to view what it represents.
 - i. The first number is consumed weekly hours. This is the total of all pending and approved punches for the employee for the week.
 - ii. The second number is scheduled weekly hours. This is the total hours of saved shifts for the week.
 - iii. The third number is max available weekly hours, which is set on the authorization. A warning will display if an attempt to schedule over the max available weekly hours.
8. The default view is a weekly view. To view an hourly view of one day, click **Day** or click **Today** to view today's schedule. To return to the Week view, click **Week**.
9. Navigate to other weeks by using the arrows or the calendar icon
10. Each shift will display the start time, end time, and total hours.
 - a. On-Call Shifts - Appear in dark blue
 - b. Scheduled Shifts (published) - Appear in light blue



- c. Offered Shifts - Appear in yellow
 - d. Unpublished Changes - Appear in green
 - e. Deleted Unpublished Changes - Appear in bright red
11. There are several tools available to quickly make changes to the schedule
- a. Trash icon - Clear the current schedule
 - b. Copy icon - Copy the schedule from a previous week
 - c. Printer icon - Print the schedule
12. Right-click on any schedule entry and select
- a. View - View details
 - b. Edit - Edit the entry
 - c. Delete - Delete the entry

Shift Swapping – View, Approve, and Reject Requests

Description: Employees can offer published shifts if they are unable to work the scheduled shift. Another employee with an active service account for the same residential program can claim the shift. If no one claims an offered shift, it will revert to the original employee's schedule. Shift swaps must be approved by the supervisor before they are complete. The schedule is automatically updated and re-published when a shift swap occurs. No further supervisor action is required.

1. Log in to DCI with personal profile
2. Click **Scheduling** on the main menu
3. Click **Pending Approvals** on the submenu
4. The table will list all shift swap requests for the cost centers for which the user has the supervisor role
5. Review the details of the shift swap in the table including:
 - a. Client/Program
 - b. Service Code
 - c. Initial Employee - Employee offering shift
 - d. Claimed By - Employee claiming shift
 - e. Shift Date
 - f. Shift Timings
 - g. Status
 - h. Action
6. In the Action Column, click **A** to approve the shift swap or the red **R** to reject the shift swap
 - a. Action cannot be taken until an offered shift has been claimed by another employee
7. In the schedule, the entry will change from a yellow offered entry to a light blue published entry.
 - a. Both employees will be notified that the supervisor has reviewed the shift swap if the message template is enabled

Review Employee Availability Template

Description: Employees can create availability templates so that supervisors know when they are available to work. Availability templates must be approved by a supervisor upon creation and when a template is updated. If the template is approved, supervisors cannot schedule an employee outside the hours of their approved availability template.

1. Log in to DCI with personal profile
2. Click **Scheduling** on the main menu
3. Click **Availability Templates** on the submenu
4. Use the filters to find the desired employee's availability templates, or simply scroll through the table.
5. Click anywhere in the row to open the **Availability Template Details** page
6. After reviewing the template, return to the Availability Templates page.
 - a. Click the **A** to approve the template or the red **R** to reject the template
 - b. Please note: If the template is approved, supervisors cannot schedule an employee outside the hours of their approved availability template.
7. Return to the Availability Templates page at any time to view an employee's availability

Reports

Description: There are several scheduling reports regarding the residential program available to supervisors:

- Employee Schedule Report
- Residential Program Schedule Report
- Missed Shift Report

1. Click **Reports** on the main menu
2. Hover over **Scheduling Reports** on the submenu
3. Select a report from the flyout menu
4. Use filters or click **Search** to populate all data
5. Drag and drop column headers into the order of choice
6. Click **Download** to open the download report wizard
 - a. Columns tab:
 1. Use the arrows to move items from the available columns to the selected columns
 2. Reorder columns as needed by dragging and dropping the item into place
 3. Click **Next**
 - b. Options tab:
 1. Format – Select the download file format. Choices include Excel, PDF, CSV, and Tab Delimited.
 1. If PDF is selected, the Orientation field will become available. Select Portrait or Landscape.



2. Save as Report Download Preference box – If checked, DCI will save the format and orientation preferences for subsequent downloads.
3. Click **Download** and **Yes** to confirm
7. Click the downloaded file to open
8. Enable editing and use data as needed

Message Templates

Description: Message templates are automated messages and notifications that, if enabled, are sent to users based on specific events or triggers within the system. Message templates can only be edited by a super user. They are split into two categories, messages and notifications. For more information on message templates, visit the help center. The following message templates are available for the scheduling module:

- Schedule Published
- Offered Shift
- Shift Claimed Employee
- Change in Published Schedule
- Scheduling Notify Upcoming Shift Reminder
- Scheduling Notify Failure to Punch
- Schedule Entry Rejected
- Unscheduled Punch
- Availability Template reached initial reminder deadline
- Availability Template reached reminder deadline frequency