

Create Hourly Services Schedule - Video

Description: Hourly Services Schedules are made per client. The Client Schedule Builder is designed to prevent scheduling over authorization, outside of authorization dates, and over the daily or weekly max.

Role Required: Supervisor, Superuser

Permission Required: N/A

Create New Hourly Services Schedule for Client

Hourly Services Schedules are made per client. The Client Schedule Builder is designed to prevent scheduling over authorization, outside of authorization dates, and over the daily or weekly max.

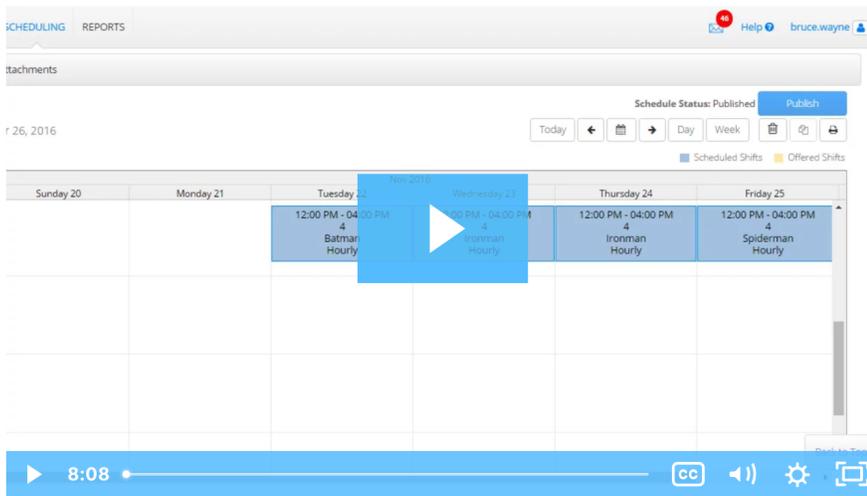
1. Log in to your personal profile
2. Click **Scheduling** on the main menu
3. Click **Clients** on the sub menu
4. Search for the client by using the filters and click the Search button
5. Select the client by clicking anywhere in the row of the search table to open the Clients Details page
6. To create a new schedule, use the calendar or arrow icons to go to the desired week or click the **Actions** button, click **New Schedule** to display the next blank week schedule
 - a. To use the same schedule as the previous week, click the **Copy** icon
 - i. Select **the week** you want to copy from the drop and click **Ok**
 - ii. Click **Yes** on the confirmation alert window
 - b. To create a new schedule shift, click the **Blank Cell** on the day you wish to create a shift for to open the Schedule form wizard
 - i. Complete the Schedule form wizard
 - ii. Client Name: Prefilled with Client Name
 - iii. Service Code: Prefilled base on the service code row the blank cell was selected
 - iv. EVV Location
 - v. Day
 - vi. Start time
 - vii. End time
 - viii. Employee: Start typing the employees name and then select the employee (Only employees with an active service account with this client and service code will appear.)
 - ix. Note - Optional
 - x. Critical: Checkbox if you want the shift to be marked as critical
 - xi. Reminder: Enter the numeric value (minutes, hours, days or weeks)
 - xii. Reminder Type: Select Minutes, Hours, Days or Weeks from the drop down
7. Click **Schedule**
 - a. Shifts cannot be saved if the employee is already scheduled for a shift
 - b. Shifts cannot be scheduled if the authorization has expired
 - c. To see an employee's full schedule, click **Scheduling** on the main menu and click **Employees** on the sub menu
8. Click **Save** on the confirmation alert window
9. Repeat until schedule is complete for all services.
 - a. Copy entries by dragging and dropping to a new cell and update the schedule form wizard as necessary
10. Click **Publish**
11. Review exceptions and make changes as needed
12. Click **Publish** on the review exceptions window

View Hourly Services Schedule for Clients

1. Log in to your personal profile
2. Click **Scheduling** on the main menu
3. Click **Clients** on the sub menu
4. Search for the client by using the filters and click the **Search** button
5. Select the **client** by clicking anywhere in the row of the search table to open the Clients Details page
6. View the client's schedule on the Clients Detail Page the current week's schedule is shown
 - a. The dates are listed across the top of the schedule
 - b. Each active funding account is listed in the far left column. Use the scroll bar to see all accounts if necessary.
7. There are several numbers listed on each service code. Hover over each number to find out what it represents.
 - a. The first number is consumed weekly hours. This is the total of all pending and approved punches for the service code for the week.
 - b. The second number is scheduled hours. This is the total hours of saved shifts for the week.
 - c. The third and fourth numbers are the maximum available daily hours and weekly hours. These are both set on the authorization. You will receive a warning if you attempt to schedule over the maximum available daily or weekly hours.
 - d. Hover over the "i" icon to see more authorization details, including the authorization end date and the remaining balance. Schedule entries can not be created beyond the authorization end date or that exceed the remaining balance of the authorization.
8. The default view is a weekly view. To view an hourly view of one day, click "Day" or click "Today" to go to today's schedule. To return to the Week view, click Week.
9. You can easily navigate to other weeks by using the arrows or the calendar icon.
10. There are several tools available to quickly make changes to your schedule.
 - a. Click the **Trash** icon to clear the current schedule.
 - i. Click the **Copy** icon to copy the schedule from the previous week.
11. Click the **Printer** icon to print the schedule.
12. Right-click on any schedule entry and select:
 - a. **View:** to view details

- b. **Edit**: to edit the entry
- c. **Delete**: to delete the entry

Click the video below to launch the video player in a new tab.



Related articles

- [Authorization Check - Video](#)
- [Scheduling Module - Residential or Parenting Program Supervisor](#)
- [Scheduling Module - Day Program Supervisor](#)
- [Scheduling Module - Group Service Supervisor](#)
- [Scheduling Module - Supervisor](#)