Scheduling Module - Employee

Description: In this topic, the user will learn how to use the scheduling module as an employee for services provided for clients and programs. The schedule is view only and serves as a reminder for scheduled shifts. Users cannot clock in or out through the schedule. Please use the normal process to clock in and out for a shift. In the scheduling module employees can do the following:

- View their shifts, even if they work for multiple clients and programs.
- Offer their shift and find someone to claim (pick up) the shift
- Claim (pick up) additional shifts
- Create an availability template for the supervisor
- Receive scheduling notifications

*Please note: The DCI scheduling module is used by some organizations. Please contact a supervisor or employer regarding usage.

Role Required: Employee (base user)

Permission Required: N/A

Contents:

Related articles

View Schedule - Web Portal

The supervisor or employer will create the employee's schedule. After the schedule has been created it will be published and will be viewable.

1. Log in to personal profile
2. Click **Home** on the main menu
3. Click **Schedules** on the submenu
4. View schedule details on the Your Schedule tab

Schedule Details

- The scheduling module displays the current week's schedule listed by all active service accounts
- To view a different week, use the arrows or the calendar icon.
- View the schedule for Today, by Day, or by Week.
- To see a detailed view of the current day's scheduled shifts, click "Today."
- Under the date, two numbers are listed (i.e., 8/12)
    - The first number is the total number of hours worked based on pending and approved punches
    - The second number is how many total hours are scheduled for the day
- Each shift will display the start and end time, total hours, and the client or program name, if applicable.
- Scheduled Shifts (published) will appear in light blue
- On Call Shifts (residential and day program only) will appear in dark blue
- Offered Shifts will appear in yellow
- My Offered Shifts (shifts the user has offered for others to pick up) will appear in red
- Click the **Printer** icon to print the schedule in a calendar or list format
- Schedule notifications may be received based on organization settings and include:
    - The schedule has been published
    - If changes are made to the schedule and it is re-published

View Schedule - Mobile App

The supervisor or employer will create the employee's schedule. After the schedule has been created it will be published and will be viewable. No actions can be taken in the mobile app. The schedule is view only.

1. Log in to personal profile
2. Click the **Menu icon** (hamburger menu) in the upper left corner
3. Click **Schedules** on the menu

4. View the schedule in a list format by week, today, or offered shifts with the following information included for each shift:
    a. Day
    b. Service Date
    c. Start Time
    d. End Time
    e. Employee Name
    f. Account Type
    g. Service Code
    h. Hours
    i. Status (Pending, Scheduled, Rejected, Offered, On-Call (residential program only)

Offer Shift

If the employee is unable to work a scheduled shift, they can offer the shift for another employee to claim (pick up). The offered shift is only available for employees with active service accounts for the client or program to claim.

*Please note: Schedule swapping is not permitted by all organizations. Please contact a supervisor or employer to verify utilization.

1. Log in to personal profile
2. Click **Home** on the main menu
3. Click **Schedules** on the submenu
4. Click the **shift** to offer to open the view schedule form wizard
5. Click **Offer Shift**
6. Click **Yes** on the confirmation alert window
7. The offered shift will turn red on the calendar and will be available for employees with active service accounts for the client or program to claim
    a. When another employee claims the offered shift, a supervisor or employer will review the schedule swap request and approve or reject it.
        i. If the schedule swap is approved, the offered shift will no longer appear on the schedule of the employee who offered it.
        ii. If no one claims the offered shift or the supervisor rejects the schedule swap, it will be added back to the original employee's schedule and they will be responsible for working the shift.
        iii. When the supervisor or employer has completed the review, the employee will receive a notification (if enabled by the organization).

Cancel Offer Shift Action

If the employee can work the shift after all, they can rescind the offer and cancel the offered shift.

1. Log in to personal profile
2. Click **Home** on the main menu
3. Click **Schedules** on the submenu
4. Click the offered shift to open the view schedule form wizard
5. Click **Reclaim Shift**
6. Click **Yes** on the confirmation alert window
7. The shift will appear blue again on the employee's schedule

View My Offered Shifts

1. Log in to personal profile
2. Click **Home** on the main menu
3. Click **Schedules** on the submenu
4. View schedule details on the Your Schedule tab
5. Click the **Checkbox** next to **View My Offered Shifts** above the calendar
    a. My Offered Shifts will appear in red

View Offered Shifts

1. Log in to personal profile
2. Click **Home** on the main menu
3. Click **Schedules** on the submenu
4. View **schedule details** on the Your Schedule tab
5. Click the **Checkbox** next to **View Offered Shifts** above the calendar
    a. Only shifts for which the user has an active service account will appear
    b. Offered shifts will appear in yellow

Claim an Offered Shift

1. Log in to personal profile
2. Click **Home** on the main menu
3. Click **Schedules** on the submenu
4. Click the offered shift to open the view schedule form wizard
5. Click **Claim Shift**
6. Click **Yes** on the confirmation alert window
7. The shift will be reviewed and approved or rejected by the supervisor or employer
    a. The shift remains yellow until it is reviewed
        i. If the schedule swap is approved, the shift will appear in blue on the schedule.
        ii. If the schedule swap is rejected, it will be given back to the original employee.

iii. When the supervisor or employer has completed the review, the employee will receive a notification (if enabled by the organization).

Cancel a Shift Claim

1. Log in to personal profile
2. Click **Home** on the main menu
3. Click **Schedules** on the submenu
4. Click the claimed shift to open the view schedule form wizard
5. Click **Cancel Request**
6. Click **Yes** on the confirmation alert window

Create Availability Template

Users can create an availability template in DCI so the supervisor is aware of when they can work. Availability templates can be created for up to thirteen weeks and must be renewed when they have reached their end date. Availability templates are created for a set of days for which the user has the same availability. For example, if the employee is only available from 6 AM to 6 PM on weekdays, but all day on weekends, two different availability templates must be created. Employees can have multiple availability templates.

*Please note: Availability templates are not used by all organizations. Contact a supervisor or employer to learn more about availability templates.

1. Log in to personal profile
2. Click **Home** on the main menu
3. Click **Availability** on the submenu
4. Click **Actions**
5. Select **Create Template** from the drop-down menu
6. Complete the Create Template form wizard
    a. Template Name - Create a name for this template
    b. Time - Select the available **Start** and **End Times** of the day
    c. Date - Select the **Dates** for this availability template (up to 13 weeks)
    d. Days - Check the available **Days** of the week
7. Click **Save** and **Yes** to confirm
8. Click **Publish**
9. A Review pop-up opens. Click the **Template Name** checkbox to send it to the supervisor for review.
10. Click **Publish**
11. Click **Save**
12. The schedule status has changed to Published
    a. After a supervisor or employer reviews it
        i. The availability template will turn green if it is approved and will update to Approved
        ii. The availability template will turn red if it is rejected and will update to Rejected

Edit Availability Template

Users can edit the availability template by changing individual entries or editing the entire template. Changes can be made to pending, published, and approved templates. If an approved template is edited, it must be re-published for supervisor approval.

1. Log in to personal profile
2. Click **Home** on the main menu
3. Click **Availability** on the submenu
4. **To Edit** an availability entry:
    a. **Right-click** on the date to edit
    b. Click **Edit**
    c. Edit the start and/or end time
    d. Click **Save**
    e. Click **Yes** on the confirmation alert window to apply to this individual entry only or click **Yes to all** to apply to all entries on the same day of the week
5. **To Delete** an availability entry:
    a. Right-click on the date to delete
    b. Click **Delete**
    c. Click **Yes** on the confirmation alert window to delete this individual entry only or click **Yes to all** to apply to all entries on the same day of the week
6. **Add Availability Entry** - Add a day of the week not specified in the availability template
    a. Click in the **blank day** to launch the Add Availability Entry form wizard
    b. Time - Add the available **Start** and **End** times for the day
    c. Click **Save** and **Yes** to confirm
7. **Make changes to the entire template**
    a. *Please note: This function is only available when the template is in Pending status
    b. Click the **Pencil icon** in the Template column
    c. Make changes to the availability template in the Edit Template form wizard
    d. Click **Save** and **Yes** to confirm
    e. Click **Publish**
8. A Review window opens. Click the **Template Name** checkbox to send it to the supervisor for review.
9. Click **Yes** on the confirmation alert window
10. The schedule status has changed to Published
    a. After a supervisor or employer reviews it
        i. The availability template will turn green if it is approved and will update to Approved
        ii. The availability template will turn red if it is rejected and will update to Rejected

Authorization Check

Hourly employees can check if there are enough authorization units and an existing authorization for future service dates. When running an authorization check, the system will alert the employee if the shift:

- Results in overtime
- Overlaps with a published schedule entry
- Exceeds the authorization balance
- Is outside of the authorization dates

Run an Authorization Check

1. Log in to personal profile
2. Click **Home** on the main menu
3. Click **Entries** on the submenu
4. Click **Actions**
5. Select **Authorization Check** from the drop-down menu
6. Complete the form wizard for the proposed shift
7. Click **Verify**
8. If the shift passes all the above-listed rules, a **Green Check Mark** will appear in the alert box and it will state "Active Authorization and unites available for this entry.". If the shift violates any of the above-listed rules, a **Red X** will appear in the alert box.

Related articles

- Group Service - Supervisor Guide
- Schedule Comparison and Setting Schedule Deviation
- Approve Client Requests - Video
- Approve Availability Template - Video
- Scheduling Module - Residential or Parenting Program Supervisor