

# Scheduling Module - Client

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**Description:** In this topic, the user will learn how to use the scheduling module as a client.

This useful tool allows clients to:

- View all shifts, for multiple employees and programs.
- Request services
- Receive notifications when changes are made to the schedule

\*Please note: The DCI Scheduling Module is used by some organizations. Please reach out to a coordinator with questions.

**Role Required:** Client

**Permission Required:** N/A

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## **View Schedule - Web Portal**

The schedule can be viewed when published.

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

## **Schedule Details**

- The scheduling module displays the current week's schedule listed by employee and/or program for 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 the Today button.
- Each shift will display the start and end time, total hours, and service provided.
- Scheduled Shifts (published) will appear in light blue
- Offered Shifts will appear in yellow
- Requested Shifts will appear in orange
- Click the **Printer** icon to print the schedule in a calendar or list format

## **View Schedule - Mobile App**

The schedule can be viewed when published.

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 by day or by week

## **Request Services**

Clients can request services on a particular day.

1. Log in to personal profile
2. Click **Home** on the main menu
3. Click **Schedules** on the submenu
4. Click **Actions**
5. Select **Add New Client Request** from the drop-down menu
6. Complete the form wizard
  - a. Day - Select the date when service is requested
  - b. Time - Add the start and end times for the shift
  - c. Service Code - Select the service code from the drop-down menu
  - d. Employee - Type and select the name of the requested employee
    - i. Only eligible employees will populate
    - ii. If the employee is unavailable, the coordinator may schedule a different employee.
7. Click **Save** and **Yes** to confirm
8. The request will appear on the schedule in pending status and has been sent to the coordinator for review
  - a. If approved, the shift will appear blue on the schedule.

- b. If rejected, it will no longer appear, and the coordinator may provide details regarding the rejection.
- c. If messaging is enabled for the instance, the client may receive a notification when the request has been approved or rejected.
- d. **To cancel the request**, please contact the coordinator by **right-clicking on the schedule request** to send a message.

## 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](#)