Scheduling Module - Guardian

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

This useful tool allows guardians to:

- View all shifts for all clients, for multiple employees and programs.
- Request services for a client
- 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: Guardian

Permission Required: N/A

Contents:

Related articles

View Client Schedule - Web Portal

Client schedules can be viewed when your coordinator has published them.

1. Log in to the guardian profile
2. Click **Home** on the main menu
3. Click **Clients** on the submenu
4. Search for the client by typing the name in the search filter
5. Click **Search**
6. Click **anywhere on the row of the client** to open the Client Details page
7. Scroll down and click the **Schedule** tab
8. View the client's schedule

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 the guardian profile
2. Click the **Menu icon** (hamburger menu) in the upper left corner
3. Click **Clients** on the menu
4. Select the client by clicking anywhere on the row
5. Click **Schedules**
6. View the client's schedule by day or week

Request Services

Guardians can request services on a particular day.

1. Log in to the guardian profile
2. Click **Home** on the main menu
3. Click **Clients** on the submenu
4. Search for the client by typing the name in the search filter
5. Click **Search**
6. Click **anywhere on the row of the client** to open the Client Details page
7. Scroll down and click the **Schedule** tab
8. Click **Actions**

9. Select **Add New Client Request** from the drop-down menu
10. 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.
11. Click **Save** and **Yes** to confirm
12. 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