Scheduling Module - Supervisor

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

This useful tool allows supervisors to:

- Build a schedule for each client
- View employee shifts
- Prevent scheduling of overtime and over authorization
- Prevent double scheduling of employees and clients
- Manage shift swapping
- Manage client requests for services
- Manage employee availability templates

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

Role Required: Super User, Supervisor

Permission Required: N/A

Contents:

Related articles

Client Schedules

Create a New Hourly Service Schedule for a Client

Hourly service 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 personal profile
2. Click **Scheduling** 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 client row** to open the Client Details page
7. To create a new schedule, use the calendar or arrow icons to navigate to the desired week, OR click the **Actions** button and select **New Schedule** from the drop-down menu to display the next blank week's schedule
8. To create a new schedule shift, click the **Blank Cell** on the selected day to open the Schedule form wizard
   a. Complete the Schedule form wizard
      i. Client Name - Prefilled with client name
      ii. Service Code - Prefilled based on the service code row in which the blank cell was selected
      iii. EVV Location - Select from the drop-down
      iv. Day - Select the date the client will receive the service
      v. Start time - Enter the start time the client will receive the service
      vi. End time - Enter the end time the client will receive the service
      vii. Employee - Type the employee's name and select it from the drop-down. Only employees with an active service account with this client and service code will populate.

viii. Note - Optional
ix. Critical - Check the box if this is a critical shift
x. Reminder - Enter the numeric value (minutes, hours, days, or weeks) in the first field
xi. Reminder Type - Select Minutes, Hours, Days, or Weeks from the drop-down in the second field

9. 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 submenu. Search for and select the employee.
10. Click **Save** on the confirmation alert window
11. Repeat until the schedule is complete
    a. Copy entries by dragging and dropping them into a new cell
    b. To use the same schedule as the previous week:
        i. Click the **Copy icon** (two pieces of paper)
        ii. Select the **week** to copy from the drop-down and click **Ok**
        iii. Click **Yes** on the confirmation alert window
12. Click **Publish**
13. Review exceptions and make changes as needed
14. Click **Publish** on the review exceptions window
    a. The schedule will be visible when published
15. Click **Save**
16. Changes can be made to the schedule by right-clicking on individual entries
17. Re-publish the schedule for the employee to see the changes

View Hourly Services Schedule for Clients

1. Log in to personal profile
2. Click **Scheduling** 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 client row** to open the Client Details page and view the schedule
    a. The default view is a weekly view. To view an hourly view of one day, click the Day button or click the Today button to navigate to today's schedule. To return to the week view, click the Week button.
        i. Navigate to other weeks by using the arrows or the calendar icon
    b. Service Codes for the client are listed in the column on the left side
        i. There are several numbers listed on each service code. Hover over each to learn more.
            1. The first number is consumed weekly hours, which is the total of all pending and approved punches for the service code for the week.
            2. The second number is scheduled weekly hours, which are the total hours of the saved shifts for the week.
            3. The third and fourth numbers are the daily maximum and maximum available weekly hours, which are both set on the authorization. A warning will populate if a user attempts to schedule over the maximum available daily or weekly hours.
        ii. Hover over the "i" icon to see more authorization details, including the authorization end date and the remaining balance. Schedule entries will be prohibited beyond the end date or that exceed the remaining balance.
7. There are several tools available to quickly make changes to the schedule
    a. Click the **Trash icon** to clear the current schedule
    b. Click the **Copy icon** to copy the schedule from a previous week
    c. Click the **Printer icon** to print the schedule
8. Right-click on any schedule entry and select:
    a. **View**
    b. **Edit**
    c. **Delete**

Employee Schedules

The employee schedule allows the supervisor to create schedules for miscellaneous account types including Administration, Training, and Drive. It is available to all supervisors who are linked to the employee via a default cost center or an active service account. One to one care is scheduled on the client. Supervisors can view the employee schedule to see all scheduled shifts for the employee's active service accounts.

Create New Employee Schedule

1. Log in to personal profile
2. Click **Scheduling** on the main menu
3. Click **Employees** on the submenu
4. Search for the employee by typing the name in the search filter
5. Click **Search**
6. Click **anywhere on the employee row** to open the Employee Details page and view the schedule
7. To create a new schedule, use the calendar or arrow icons to navigate to the desired week, OR click the **Actions** button and select **New Schedule** from the drop-down menu to display the next blank week's schedule.
8. To use the same schedule as the previous week, click the **Copy icon.**
    a. Select **the week** to copy from the drop-down and click **Ok**
    b. Click **Yes** on the confirmation alert window
9. To create a new schedule shift, click the **Blank Cell** on the selected day to open the Schedule form wizard.
10. Complete the form wizard
    a. Employee Name - The field will prefill based on the employee selected
    b. Account Type - The field will prefill based on the account selected
    c. EVV Location - Select from the drop-down

    d. Day - Field will prefill based on the date selected
    e. Start Time - Enter the start time for the shift
    f. End Time - Enter the end time for the shift
    g. Cost Center - The field will prefill
    h. Reminder - Enter the numeric value (minutes, hours, days, or weeks) in the first field
    i. Reminder Type - Select Minutes, Hours, Days, or Weeks from the drop-down in the second field
11. 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
12. Click **Save** on the confirmation alert window
13. Repeat until the schedule is complete
    a. Copy entries by dragging and dropping to a new cell and update the schedule form wizard as necessary
    b. Schedule non-client shifts (i.e., PTO, sick, administration)
14. Click **Publish**
15. Review exceptions and make changes as needed
16. Click **Publish** on the review exceptions window
    a. The schedule will be visible to the employee when published
17. Click **Save**
18. Changes can be made to the schedule by right-clicking on individual entries
    a. Re-publish the schedule for the employee to see the changes by clicking **Publish** and **Save** on the confirmation alert window

View Employee Schedule

1. Log in to personal profile
2. Click **Scheduling** on the main menu
3. Click **Employees** on the submenu
4. Search for the employee by typing the name in the search filter
5. Click **Search**
6. Click **anywhere on the employee row** to open the Employee Details page and view the schedule
7. The default view is a weekly view. To view an hourly view of one day, click the Day button or click the Today button to navigate to today's schedule. To return to the week view, click the Week button.
8. Navigate to other weeks by using the arrows or the calendar icon
9. Each active service account is listed in the profiles/accounts column
10. Each shift will display start and end time, total hours, and service code, if applicable.
    a. Scheduled Shifts (published) will appear in light blue
    b. On Call Shifts (residential and day programs only) will appear in dark blue
    c. Offered Shifts will appear in yellow
    d. Unpublished Change will appear in green
    e. Deleted Unpublished Change will appear in bright red
11. There are several tools available to quickly make changes to your schedule.
    a. Click the **Trash icon** to clear the current schedule
    b. Click the **Copy icon** to copy the schedule from the previous week
    c. Click the **Printer icon** to print the schedule
12. Right-click on any schedule entry and select:
    a. **View**
    b. **Edit**
    c. **Delete**

Additional Scheduling Functions

View existing entries

1. **Right-click** on the entry
2. Click **View**
3. View the details of the entry
4. Click **Cancel** to exit the Schedule form wizard

Edit existing entries

1. **Right-click** on the entry
2. Click **Edit**
3. **Update/make changes** to the form wizard
4. Click **Update**
5. Click **Save** on the confirmation alert window
6. Select **Publish changes** to republish
7. Click **Save** on the confirmation alert window

Delete existing entries

1. **Right-click** on the entry
2. Click **Delete**
3. Click **Ok** on the confirmation alert window
4. Select **Publish changes** to republish
5. Click **Save** on the confirmation alert window

Shift Swapping

Employees can offer published shifts if they are unable to work the scheduled shift. Another employee with an active service account for the same program /client can claim the shift. Shift swaps must be approved by the supervisor before they are complete.

View, Approve, and Reject Shift Swap Requests

1. Log in to 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 in which the user has the supervisor role
5. Review the details of the shift swap in the table including:
    a. Client/Program Name
    b. Service Code
    c. Initial Employee - Employee offering the shift
    d. Claimed By - Employee claiming the shift
    e. Shift Date
    f. Shift Timings - Start and end time of the shift
    g. Status - i.e., Claimed
    h. Action - Click the A to approve, or the red R to reject the shift swap request.
6. In the Action Column, click **A** to approve the shift swap or **R** to reject the shift swap

    i. Both employees will be notified of the review if the message template is enabled
    a. Action cannot be taken until an offered shift has been claimed by another employee
    b. The entry will change from a yellow offered entry to a light blue published entry

Additional Notes:

- If no one claims an offered shift, it will revert to the original employee's schedule.
- The schedule is automatically updated and re-published when a shift swap occurs. Supervisors do not need to revise the schedule based on the shift swap.

Client Requests

Clients can request services on a particular day.

View, Approve, or Reject Client Requests

1. Log in to personal profile
2. Click **Scheduling** on the main menu
3. Click **Client Requests** on the submenu
4. The table will list all client requests for the cost centers in which the user has the supervisor role
5. Review the details of the request in the table including:
    a. Client/Program
    b. Service Code
    c. Employee Name - Requested employee
    d. Shift date
    e. Shift Timings - Requested start and end time of the service
    f. Status
    g. Action
6. In the Action Column:
    a. Click **A** to approve the request. The entry will move from pending status to published.
    b. Click **E** to edit the shift time or the employee
    c. Click **R** to reject the request
7. The client/guardian will be notified when the review is complete if the message template is enabled

Review Availability Templates

Employees can create availability templates in DCI so that supervisors know when they are available to work. Availability templates must be approved by a supervisor when created and when edited. If the availability template is approved, supervisors are unable to schedule an employee outside of their approved availability templates.

*Please note: An alternate option is to view the employee's availability template but not approve it. The result is that the supervisor will not be restricted when scheduling the employee.

Review an Employee's Availability Template

1. Log in to personal profile
2. Click **Scheduling** on the main menu
3. Click **Availability Templates** on the submenu
4. Use the filters to locate the desired employee's availability template(s), or simply scroll through the table.
5. Click anywhere in the results row to open the **Availability Template Details** page
6. After reviewing the template, go back to the Availability Templates page.
    a. Click the **A** to approve the template
    b. Click the red **R** to reject the template

    c. OR view the employee's availability template but do not take action. The result is that the supervisor will not be restricted when scheduling the employee.
7. Return to the Availability Templates page at any time to view an employee's availability

Reports

There are several Scheduling Reports available for the supervisor.

1. Click **Reports** on the main menu
2. Hover over **Schedule Reports** on the submenu
3. Select one of the following scheduling reports from the flyout menu:

- Employee Schedule Report
- Client Schedule Report
- Day Program Schedule Report
- Residential Program Schedule Report
- Group Service Schedule Report
- Missed Shift Report

Message Templates

Message Templates are automated messages and notifications that are sent to DCI users based on specific events or triggers in DCI. Message Templates can only be edited by a super user. Message Templates are split into two categories - messages and notifications. For more information on message templates, view additional resources in the help center. The following message templates are available for the Scheduling Module:

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

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