Scheduling Module - Residential or Parenting Program Supervisor

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

- The Program Schedule Builder allows the supervisor to create a schedule specifically for a chosen Residential or Parenting Program
    - All employees with an active service account for that program will be listed on the schedule builder
    - The module takes the weekly allocated hours into consideration as the schedule is created
- Prevents scheduling overtime and over authorization
- Prevents double-scheduling of employees
- Allows for efficient management of shift swapping
- Enables easy-to-use client requests for services
- Manage employee availability templates

*Please note: The DCI Scheduling Module is used by some organizations. For questions, contact your DCI representative.

Role Required: Super User, Supervisor

Permission Required: N/A

Residential/Parenting Program Schedule

Create New Program Schedule

1. Log in to personal profile
2. Click **Scheduling** on the main menu
3. Click **Residential Programs** or **Parenting Programs** on the submenu
4. Search for the program using the filters and click **Search**
5. Select the program by clicking anywhere in the row to open the details page
6. If the Required # of Hours data is incorrect:
    a. Click **Actions**
    b. Select **Set Required # of Hours** from the drop-down menu
    c. Enter the number of hours to be scheduled, then click **Save**.
7. To create a new schedule, use the calendar or arrow icons to go to the desired week, or click **Actions** and select **New Schedule** to display the next blank week's schedule.

    i. Select the **week** to copy from the drop-down and click **Ok**
    ii. Click **Yes** to confirm
    i. Employee Name: The field will prefill based on the employee selected
    ii. EVV Location: Select from the drop-down
    iii. Day: Field will prefill based on the date selected
    iv. Start Time: Enter the start time for the shift
    v. End Time: Enter the end time for the shift
    vi. Note: Optionally add a note for the employee
    vii. OnCall: Check if this is an on-call shift (only for residential programs)
    viii. Critical: Check to mark the shift as critical
    ix. Reminder: Enter the numeric value (minutes, hours, days, or weeks) in the first field
    x. Reminder Type: Select Minutes, Hours, Days, or Weeks from the drop-down in the second field
    a. To use the same schedule as the previous week, click the **Copy** icon.
    b. To create a new schedule shift, click the **Blank Cell** on the day to create a shift for to open the Schedule form wizard.
    c. Complete the Schedule form wizard:
8. Click **Schedule**
    a. An employee cannot be double-booked. To view an employee's full schedule, click **Scheduling** on the main menu and **Employees** on the submenu. Search for and select the employee.
9. Click **Save** on the confirmation alert window
10. Repeat until the schedule is complete

    a. Copy entries by dragging and dropping them into a new cell
11. Click **Publish**
12. Review exceptions and make changes as needed
13. Click **Publish** on the exceptions window
    a. Employees can view published schedules
    b. Make changes by right-clicking on individual entries. Re-publish the schedule for the employee to view the changes.

View Program Schedule

1. Log in to personal profile
2. Click **Scheduling** on the main menu
3. Click **Residential Programs** or **Parenting Programs** on the submenu
4. Search for the program using the filters and click **Search**
5. Select the program by clicking anywhere in the row to open the details page
6. All employees with an active service account for the specified program will be listed in the left header column of the schedule table
    a. The number of consumed weekly hours, scheduled weekly hours, and max available weekly hours will appear under each employee's na me.
    b. If you do not see the employee you wish to schedule, verify that they have an active service account.
7. The default view is a weekly view. To view an hourly view of one day, click the Day button or click the Today to navigate to today's schedule. To return to the week view, click the Week button.
    a. Navigate to other weeks by using the arrows or the calendar icon
8. Each shift displays start and end times and total hours
    a. Scheduled Shifts (published) appear in light blue
    b. On Call Shifts (residential and day program only) appear in dark blue
    c. Offered Shifts appear in yellow
    d. My Offered Shifts (shifts you have offered for others pick up) appear in light red
    e. Unpublished Change appear in green
    f. Deleted Unpublished Change appear is bright red
9. 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 the previous week
    c. Click the **Printer** icon to print the schedule
10. Right-click on any schedule entry and select:
    a. **View**
    b. **Edit**
    c. **Delete**

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 lists all shift swap requests for the cost centers for which the user has the supervisor role
5. Review the details of the shift swap in the table including:
    a. Client/Program
    b. Service
    c. Initial Employee: Employee offering the shift
    d. Claimed By: Employee claiming the shift
    e. Shift Date
    f. Shift Timings
    g. Status
    h. Action
6. In the Action Column, click **A** to approve the shift swap or **R** to reject the shift swap.
    a. Action cannot be taken until an offered shift has been claimed by another employee
7. In the schedule, the entry will change from a yellow offered entry to a light blue published entry.
    a. Both employees will be notified of the review if the message template is enabled

Additional Notes:

- If no one claims an offered shift, it will revert back to the original employee's schedule.
- The schedule is automatically updated and re-published when a shift swap occurs. There is no need to revise the schedule based on the shift swap.

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 before they are taken into consideration and whenever a change is made to them. An employee cannot be scheduled outside of their approved availability templates if the template has been approved. As a workaround, some organizations view the templates but do not approve them.

Review Employee Availability Templates

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 templates
5. **Click anywhere in the row** to open the Availability Template Details page
6. After reviewing the template:
    a. Click **A** to approve the template
    b. Click the red **R** to reject the template
7. Return to the Availability Templates page at any time to view an employee's availability

Scheduling Reports

1. Click **Reports** on the main menu
2. Click/hover over **Scheduling Reports** on the submenu
3. Select a report 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. They 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 initial reminder deadline
- Availability Template reached reminder deadline frequency
- Unscheduled Punch
- Scheduling Notify Upcoming Shift Reminder
- Change in Published Schedule
- Offered Shift

Residential & Parenting Programs - Absence & Attendance Entries

If an individual is absent or only attends a partial day at a residential or parenting program, an absence entry can be created. Absence entries are approved when the attendance is approved. DCI will allow a user to create an attendance entry for a date for which an absence entry already exists. DCI will not allow a user to create an attendance entry for a date for which an attendance entry already exists. Super users or supervisors can create an absence entry.

Create an Absence Entry

1. Log in to personal profile
2. Select **Home** on the main menu
3. Click **Residential Programs** or **Parenting Programs** on the submenu
4. Use the filters to search for the program and click **Search**
5. Select the program from the table by clicking anywhere in the row
6. Click **Actions**
7. Select **New Entry** from the drop-down menu
8. Complete the form wizard
    a. Entry Type - Select **Absent**
    b. Program Name – Auto populates
    c. Account Type – Select **Residential Program** or **Parenting Program**
    d. Client – Enter the client name and select it from the drop-down menu
    e. Check Out – Select a date and time for the check out
    f. Check In - Select a date and time for the check in
    g. Reason – May be required. Select from the available drop-down options.
    h. Note – Optionally add a note regarding the absence
    i. Attachment – Optionally add an attachment regarding the absence
9. Click **Save** to continue and **Yes** to confirm

Create Absence Entries from the Residential or Parenting Program Profile

1. Sign in to the Residential or Parenting Program profile
2. Select **Home** on the main menu
3. Click **Clients** on the submenu
4. Click **Actions**
5. Select **New Absent** from the drop-down menu
6. Complete the New Absent form wizard

    a. Client – Enter the client name and select it from the drop-down menu
    b. Check Out – Select a date and time for the check out
    c. Check In - Select a date and time for the check in
    d. Reason – May be required. Select from the available drop-down options.
    e. Note – Optionally add a note regarding the absence
    f. Attachment – Optionally add an attachment regarding the absence
7. Click **Save** to continue and **Yes** to confirm

Approve Attendance

1. Log in to DCI with personal profile
2. Select **Home** from the main menu
3. Select **Residential Program** from the submenu
4. Search for the program by typing the name in the field Type Residential Program Name and selecting it when it populates
5. Click **Search**
6. Click the green **Approve Attendance** button
    a. Select the date range and EVV Location if applicable
    b. Click **Submit**
    c. Click **Verify All** and **Yes** to confirm

FAQ - Why are there attendance entries missing when I generate attendance?

1. No active authorization
2. Outside the start and end date of the funding account
3. The date range overlaps with the end of one authorization and the start of another. Change the start date on the date range to the start date on the second authorization and try again.

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