

Group Service Profile - Create, View, Edit, or Deactivate

Description: In this topic, the user will learn how to create, view, edit, and deactivate group service profiles.

*Please note: When the cost center on a group service profile is edited/changed, all associated client service accounts and employee service accounts (active or inactive) will automatically be updated to match the cost center on the group service profile. All edits will be listed on the profile (employee, client, and group service) under the history or events tab.

Role Required: Super User, Supervisor (*Supervisor role cannot create a new group service profile)

Permission Required: Group Service Admin

Create a Group Service Profile

1. Log in to DCI
2. Click **Home** on the main menu
3. Click **Group Services** on the submenu
4. Click **Actions**
5. Select **Add New Group Service** from the drop-down menu
6. Complete the **form wizard**
 - a. Basic Demographics tab:
 - i. Name **(required)**: Must be at least six characters
 - ii. Address **(required)**: After entering, click the blue **search location** hyperlink to populate GNIS Code.
 - iii. Time Zone (optional): Select from drop-down
 - iv. Phone **(required)**
 - v. Alternative Phone (optional)
 - vi. Email **(required)**
 - vii. Cost Center **(required)**
 - viii. Profile Reference (optional)
 - ix. Status **(required)**: Defaults to active. Change to inactive when service is no longer valid.
 - x. EVV Required **(required)**: Yes or no options, default is yes. Select no if not required.
 - xi. Enable Geofencing **(required)**: Yes or no options, default is no. Select yes to enable geofencing for this program.
 - xii. Requires Multiple Clients Per Punch **(required)**: Yes or no options, default is no. Select yes to require employees to select more than one client upon punch creation.
 - xiii. Minimum # of Attendees **(required if selected yes on Requires Multiple Client Per Punch field)**: Minimum number of clients that must be in attendance for the employee to be allowed to create a punch for this group service.
 - xiv. Click **Next**
 - b. EVV Location tab (optional): Can be added later
 - i. Copy from Profile Address (optional): Copies address from the Basic Demographics tab
 - ii. EVV Location Name **(required)**: Name of the location
 - iii. EVV Location Type **(required)**: Select from drop-down
 - iv. Address **(required)**: Location address
 - v. Begin Date **(required)**: First date the location is approved for use
 - vi. End Date (optional): If applicable, the last date the location is approved for use.
 - vii. Status **(required)**: Defaults to active. Change to inactive when the program is no longer valid.
 - viii. Primary (optional): Select if this is the primary location to provide services
 - ix. Click **Next**
7. Click **Save** to continue and **Yes** to confirm

View, Edit, or Deactivate a Group Service Profile

1. Log in to DCI
2. Click **Home** on the main menu
3. Click **Group Services** on the submenu
4. Use filters to find the group service and click **Search**
5. **Click anywhere in the row** to open the group services details page
6. Click **Actions**
7. Select **Edit Group Service** from the drop-down menu
 - a. To deactivate, update the status to **Inactive**.
8. Edit as needed
9. Click **Save** and **Yes** to confirm

Related articles

- [Group Service - Supervisor Guide](#)
- [System Set-Up - Admin Guide](#)
- [Employee - Group Service Enter a Punch - Mobile App](#)
- [Time Entry - Account Type Group Service](#)
- [Group Service Profile - Create, View, Edit, or Deactivate](#)