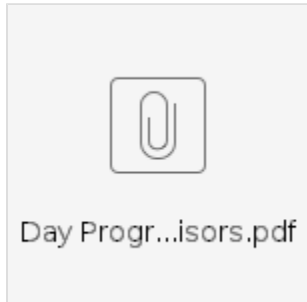


Day Program - Supervisors

Description: In this guide, the user will learn how to use DCI to supervise a day program.

Roles Required: Super User, Supervisor

Permissions Required: Day Program Admin



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Day Program Profile

Description: In this topic, the user will learn an overview of the day program profile. The day program profile is designed to keep time and attendance for clients who attend and employees who work at a day program for individuals with disabilities. Typically, the person who works at the front desk will log in to the day program profile at check-in and check-out, so that employees and clients can easily log their attendance in the system.

Profile Overview

Dashboard

The day program dashboard displays news posts, which are important messages from the day program. Click on other submenu options to check in or out or view the schedule.


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Dashboard

News Posts

Showing 6 out of 6 records

Subject: 514 day

Message: BZ Day
Created Date: May 14, 2020 08:05:20 AM
Created By: huijing zhai

Subject: NewsTest7

Message: NewsTest7
Created Date: May 05, 2020 02:02:53 PM
Created By: mason menges

Subject: Day Program BZ


Message: Day Program BZ
Created Date: Apr 09, 2020 12:40:20 PM
Created By: huijing zhai

Subject: MC_News_Day

Message: It is time for some news, Dont you agree? DayP
Created Date: Apr 09, 2020 12:36:23 PM
Created By: Maribel Cervantes

Clients

From this submenu tab, a client can be checked in, checked out, or have attendance verified. Check-in single or multiple clients at a time. Click a client's name to open the details page.


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Home / Clients

Clients

[Actions](#)

- Check - In
- Check - Out
- Attendance Verification
- Kiosk Mode

[Export](#)

Showing 2 out of 2 records

Name	Client Id	Service Code	Cost Center	Balance	Unit Type	Staff Ratio
Andy Dwyer	AZ6543210	Day Program	AZ 090 MCC	0.00	Hourly	2.00
Charles Townsend	A23456789	Day Program	Administration - OAW	0.00	Hourly	2.00

Access Kiosk Mode, which enables clients to check in or out on a kiosk (shared device at the day program site).

OAW Day

Day Program Check-In / Check-Out

Sign In

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Employees

Here, an employee can clock in and out.

Home / Employees

Employees

Type Employee Name Type Cost Center Type Employee Number Select Employee Type Select Status

Reset Search

Actions

- Clock - In
- Clock - Out

Export

Showing 1 out of 1 record

Name	Cost Center	Employee #	Phone #	Type	Balance	Unit Type	Account Status
Kelly Garrett	Administration - OAW	AZ445566	(480) 867-5309	Hourly Non Exempt	0.00	Hourly	Active

Entries

View program entries and details. Employees and clients can also be clocked or checked in and out from this page.

Schedule

View the program schedule. All edits are made from the super user or supervisor profile.

Clients	Sunday 20	Monday 21	Tuesday 22	Wednesday 23	Thursday 24	Friday 25
Charles Townsend (Day Program) 0 / 0 / 8.00 / 100						
Andy Dywer (Day Program) 0 / 0 / 8.00 / 100						

Edit Profile

A day program profile may be edited or updated by the supervisor (i.e., the profile is no longer in use and needs to be inactivated).

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Day Programs** on the submenu
4. Search for the program by typing the name in the field Type Day Program Name and selecting it when it populates
5. Click **Search**
6. Select the program from the table by clicking anywhere in the row
7. Click **Actions**
8. Select **Edit Day Program** from the drop-down menu
9. Make the necessary changes on the Edit Day Program page
10. Click **Save** to continue and **Yes** to confirm

Service Accounts

Description: A client or employee service account must be established for each service code that may be used for the day program.

Create Client Service Account

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Day Programs** on the submenu
4. Search for the program by typing the name in the field Type Day Program Name and selecting it when it populates
5. Click **Search**
6. Select the program from the table by clicking anywhere in the row
7. Click **Actions**

8. Select **New Client Service Account** from the drop-down menu
9. Complete the form wizard
 - a. Day Program Name – Auto populates
 - b. Account Type – Select **Day Program**. If applicable, will need to repeat this process to add account type Transportation.
 - c. Client - Enter the client name and select it from the drop-down menu
 - d. Service Code - Select **Day Program**
 - e. Funding Source - Select the appropriate funding source from the drop-down menu
 - f. Cost Center – Auto populates
 - g. Billing Unit – Auto populates
 - h. Rate (optional) – Defaults to 0. This number can be changed if this service account has a unique pay rate.
 - i. Account Reference (optional) – Optional reference field
 - j. Status – Defaults to active. Switch to inactive when this is no longer a valid service account.
 - k. True Clock In-Out box – Select to allow real-time entries only. If not selected, historical entries can be entered.
10. Click **Save** to continue and **Yes** to confirm

Create Employee Service Account

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Day Programs** on the submenu
4. Search for the program by typing the name in the field Type Day Program Name and selecting it when it populates
5. Click **Search**
6. Select the program from the table by clicking anywhere in the row
7. Click **Actions**
8. Select **New Employee Service Account** from the drop-down menu
9. Complete the form wizard
 - a. Day Program Name – Auto populates
 - b. Employee – Enter the employee name and select it from the drop-down menu
 - c. Cost Center – Auto populates
 - d. Employee Number (optional)
 - e. Pay Rate Name (**required**) – Select from the drop-down menu
 - f. Pay Rate (**required**) – Employee pay rate
 - g. Effective Date - Click in the field to open the calendar and select a date
 - h. Min Units Per Punch (optional) – Enter if a minimum number of billing units must be used when the employee clocks in under this service account
 - i. Max Units Per Punch (optional) – Enter if the employee may not exceed a maximum number of billing units in one shift
 - j. Start Date (optional) – If a date is entered, the employee will not be able to make a punch before this date.
 - k. End Date (optional) – If a date is entered, the employee will not be able to make a punch after this date.
 - l. Account Reference (optional) – Optional reference field
 - m. Grace Period – Defaults to disabled. By clicking enabled, the grace period for a certification template that is linked to this service account will be permitted.
 - i. Grace Period Expiration – The date the grace period will expire based on the time frame associated with the linked certification template
 - n. Allows OverLapping Pay Rates box – Check to allow
 - o. Status – Defaults to active. Switch to inactive when this is no longer a valid service account.
 - p. True Clock In-Out box – Select to allow real-time entries only. If not selected, historical entries can be entered.
10. Click **Save** to continue and **Yes** to confirm

Manage Client Attendance Entries

Pending Entries

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Day Programs** on the submenu
4. Search for the program by typing the name in the field Type Day Program Name and selecting it when it populates
5. Click **Search**
6. Select the program from the table by clicking anywhere in the row
7. Click the **Entries** tab
8. In the Select Type filter, select **Attendance** from the drop-down menu.
9. In the Select Status filter, select **Pending** from the drop-down menu.
10. Click **Search**
11. Click anywhere in the entry row to view the attendance details
12. Click **Actions**
13. Select **Approve** or **Reject** from the drop-down menu
14. To export attendance entries, return to the Day Program details page.
15. Use filters to define and search for entries to be exported
16. Export selected entries by clicking the **Export** button above the entries table on the right-hand side of the page
 - a. Open the .CSV file from the device downloads
 - b. Excel will open
 - c. Sort and format downloaded data as needed

All Entries by Object

1. Log in to DCI with personal profile

2. Click **Home** on the main menu
3. Click one of the following tabs on the submenu to open the object page
 - a. Clients - Shows all attendance entries by client
 - b. Day Programs – Shows all attendance entries for the day program (excludes punches not made within the program such as Training, Admin, Hourly, etc.)
 - c. Cost Centers - Shows all attendance entries by cost center
4. Use the filters to search by object name
5. Click **Search**
6. Select the object by clicking anywhere in the row
7. Select the **Entries** tab on the object details page
 - a. Choose **Attendance** from the Select Type filter
 - b. For Clients, also select **Day Program** from the Select Account Type filter.
8. Click **Search**
 - a. For Day Programs, click the Service Code header to sort day program entries.
 - b. For Cost Centers, click the Employee/Program header to sort day program entries.
9. Export entries by clicking the **Export** button above the entries table on the right-hand side of the page
 - a. Open the .CSV file from the device downloads
 - b. Excel will open
 - c. Sort and format downloaded data as needed
10. Click anywhere in the entry row on the entries table to view the attendance details
11. Click **Actions**
12. For pending entries, select **Approve** or **Reject** from the drop-down menu.
13. For approved entries, select **Edit Entry** or **Cancel Entry** from the drop-down menu if required.

Add a Historical Attendance Entry

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Day Programs** on the submenu
4. Search for the program by typing the name in the field Type Day Program Name and selecting it when it populates
5. Click **Search**
6. Select the program from the table by clicking anywhere in the row
7. Click **Actions**
8. Select **New Entry** from the drop-down menu
9. Complete the form wizard
 - a. Entry Type - Select **Attendance** from the drop-down menu
 - b. Day Program Name – Auto populates
 - c. Account Type – Select **Day Program**
 - d. Client – Enter the client name and select it from the drop-down menu
 - e. EVV Location – Select the day program location
 - f. Service Code – Select **Day Program**
 - g. Funding Source – Select the appropriate funding source from the drop-down menu
 - h. Service Date – Click in the field to open the calendar and select a date
 - i. Service Time – Click in the Check In and Check Out fields to select service times
 - j. Reason – May be required. Select from the available drop-down options.
 - k. Used provider transportation box – Select if applicable
 - i. Select if provider transportation was used for Check In, Check Out, or both.
 1. Select the funding source and service code for the transportation
10. Click **Save** to continue and **Yes** to confirm

Employee Punch Entries – Search, View, Approve, Reject, or Export

Description: Day program entries are approved like other entries (i.e., hourly time entries).

Pending Entries

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Pending Entries** on the submenu
4. Select Day Program from the Select Account Type filter
5. Click **Search**
6. Click the **A** in the entry row to approve the punch or the red **R** to reject it
7. Click **Yes** to confirm
8. Click anywhere in the entry row to view the punch details
9. Export entries by clicking the **Export** button above the entries table on the right-hand side of the page
 - a. Open the .CSV file from the device downloads
 - b. Excel will open
 - c. Sort and format downloaded data as needed

All Entries by Object

1. Log in to DCI with personal profile
2. Click **Home** on the main menu

3. Click one of the following tabs on the submenu to open the object page
 - a. Employees – Shows all entries by employee
 - b. Clients - Shows all entries by client
 - c. Day Programs – Shows all entries for the program (excludes punches not made within the program such as Training, Admin, Hourly, etc.)
 - d. Cost Centers - Shows all entries by cost center
4. Use the filters to search by specific criteria
5. Click **Search**
6. Select the object by clicking anywhere in the row
7. Select the **Entries** tab on the object details page
8. Select **Day Program** from the Select Account Type filter
9. Click **Search**
10. Export entries by clicking the **Export** button above the entries table on the right-hand side of the page
 - a. Open the .CSV file from the device downloads
 - b. Excel will open
 - c. Sort and format downloaded data as needed
11. Click anywhere in the entry row on the entries table to view details
12. Click **Actions**
13. Select **Approve** or **Reject** from the drop-down menu

Manage Punch Entry for Employee

Description: In this topic, the supervisor will learn how to add or edit employee punches for those they supervise. The best practice is for employees to enter and edit their punches, however, some situations require supervisor assistance (i.e., missed punches for the day program, approved punches that require editing, etc.).

Add a New Punch for an Employee

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Day Programs** on the submenu
4. Search for the program by typing the name in the field Type Day Program Name and selecting it when it populates
5. Click **Search**
6. Select the program from the table by clicking anywhere in the row
7. Click **Actions**
8. Select **New Entry** from the drop-down menu
9. Complete the form wizard
 - a. Entry Type - Select **Punch**
 - b. Day Program Name – Auto populates
 - c. Account Type – Select **Day Program**
 - d. Employee – Enter the employee name and select it from the drop-down menu
 - e. EVV Location – Select the day program location
 - f. Service Date – Click in the field to open the calendar and select a date
 - g. Service Time – Click in the Check In and Check Out fields to select service times
 - h. Reason – May be required. Select from the available drop-down options.
 - i. Notes – Add additional information regarding the punch as needed
 - j. Attachment – Add an attachment as needed
10. Click **Save** to continue and **Yes** to confirm

The punch appears in the employee's entries list with a status of Unverified. The employee must verify the punch, which updates the status to Pending. The supervisor may then review and approve the pending entry.

Edit a Punch for an Employee

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Enter the employee name in the Employee Name field then click **Search**
5. Click anywhere on the row to open the employee details page
6. Select the **Entries** tab located below the demographics box
7. Select **Day Program** from the Select Account Type filter
8. Click **Search**
9. Click anywhere in the row to open the punch details page
10. Click **Actions**
11. Select **Edit Entry** from the drop-down menu
12. Make the necessary changes on the Entry Form wizard
13. If the organization requires a reason code when editing a punch, click the blue **Plus (+) Sign** next to the reason field
14. Select a reason from the **Add Reason Codes** drop-down that best describes why the edit is being made
15. Reason codes may require a text explanation. If this requirement is selected, a text box will appear where text must be entered.
16. Click the blue **Plus (+) Sign** next to the Add Reason Codes drop-down to add the selection to the Added Reason Codes box
17. Click **Save** to continue and **Yes** to confirm

An edited *pending* punch will change to rejected status and a new punch with unverified status is generated with the corrections. The Ref field is assigned a number that references the original punch, indicating the punch has been modified. The employee must log in to DCI and verify (acknowledge and concur with) the change(s), which updates the status to Pending. The supervisor must now review and approve the punch. Once approved, the approved or rejected entry will disappear from the Pending Entries screen and be visible under Entries for the program, or individually under Entries for the employee or client.

An edited *approved* punch will maintain the status of approved but will reflect a Compensated flag. Two new punches are created and need to be approved; one that zeroes out the original entry, and one for the correct entry. These entries can be found on Pending Entries on the submenu or in the reference entries table on the original entry's punch entry details page. The Ref field is assigned a number that references the original punch, indicating the punch has been modified.

Cancel Approved Punch for an Employee

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Enter the employee name in the Employee Name field then click **Search**
5. Click anywhere on the row to open the employee details page
6. Select the **Entries** tab located below the demographics box
7. Select **Day Program** from the Select Account Type filter
8. Click **Search**
9. Click anywhere in the row to open the punch details page
10. Click **Actions**
11. Select **Cancel Entry** from the drop-down menu to open the Cancel Entry form
12. If the organization requires a reason code when canceling a punch, click the blue **Plus (+) Sign** next to the reason field
13. Select a reason from the **Add Reason Codes** drop-down that best describes why the edit is being made
14. Reason codes may require a text explanation. If this requirement is selected, a text box will appear where text must be entered.
15. Click the blue **Plus (+) Sign** next to the Add Reason Codes drop-down to add the selection to the Added Reason Codes box
16. Click **Save** to continue and **Yes** to confirm

The updated employee punch remains in Approved/Processed/Paid status but will reflect a Compensated flag. A new entry zeroing out the original has been created. The Ref field is assigned a number that references the original punch indicating the punch has been modified.

Verify an Unverified Punch for an Employee

Description: As an alternate option to the employee verifying an unverified punch, some organizations may allow a supervisor to verify (or reject) the punch from the punch details screen on behalf of the employee.

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Enter the employee name in the Employee Name field then click **Search**
5. Click anywhere on the row to open the employee details page
6. Select the **Entries** tab located below the demographics box
7. Select **Day Program** from the Select Account Type filter and select **Unverified** from the Select Status filter
8. Click **Search**
9. Click anywhere in the row to open the punch details page
10. In the Punch Details widget box, select either the **Verify** or **Reject** button by the Status field
11. Click **Yes** to confirm

Scheduling (Instance-Level Setting)

Description: In this topic supervisors will learn how to use the scheduling system. This module is an instance-level setting and is not utilized by every organization.

- Create a schedule specifically for the day program
- View all employee shifts using the Employees Schedules tab
- View all clients scheduled on the Clients Schedules tab
- Prevent scheduling overtime and over authorization
- Prevent double-scheduling of employees and clients
- Allow efficient management of shift swapping
- Allow client requests for services
- Manage employee availability templates

Create New Day Program Schedule

1. Log in to DCI with personal profile
2. Click **Scheduling** on the main menu
3. Click **Day Programs** on the submenu
4. Search for the program by typing the name in the field Type Day Program Name and selecting it when it populates
5. Click **Search**
6. Select the program from the table by clicking anywhere in the row
7. **Clients Schedule** tab:
 - a. All clients with an active service account for the specified program will be listed in the left header column of the schedule table
 - b. If a particular client is not listed, verify that they have an active service account.
 - c. The number of consumed weekly hours, scheduled weekly hours, maximum available daily hours, and maximum available weekly hours will appear under each client name
 - d. The information icon (i) to the right of the client name displays the authorization end date, remaining balance, and staff ratio.
8. To create a new schedule, use the calendar or arrow icons to go to the desired week. Alternatively, click **Actions**, then select **New Schedule** from the drop-down menu to display the next blank schedule by week.

- a. To copy the same schedule as the previous week, click the **Copy** icon (two pieces of paper).
 - i. Select the week to copy from the drop-down and click **Ok**
 - ii. Click **Yes** to confirm
 - b. To create a new schedule shift, click the **blank cell** to open and complete the schedule form wizard:
 - i. Name – Auto populates with the client name of the selected cell
 - ii. Service Code – Auto populates to Day Program
 - iii. EVV Location – Select from the drop-down menu
 - iv. Day – Auto populates the date of the selected cell but can click in the field to open the calendar and select a different date
 - v. Start Time – Click in the field to select a shift start time
 - vi. End Time – Click in the field to select a shift end time
 - vii. Note – Optionally add a note for the client
9. Click **Schedule** and **Save** to confirm
 - a. Please note: A client cannot be scheduled if they are already scheduled somewhere else. To view a client's full schedule, click **Scheduling** on the main menu and **Clients** on the submenu.
10. Repeat until the schedule is complete
 - a. Copy entries by dragging and dropping them into a new cell
11. Click **Publish** to make the schedule visible to clients
12. Review exceptions and make changes as needed
13. Click **Publish** on the exceptions window
 - a. Changes can be made to the schedule by right-clicking on individual entries
 - b. Re-publish the schedule for the client to view the changes
14. **Employees Schedule** tab:
 - a. All employees with an active service account for the specified program will be listed in the left header column of the schedule table
 - b. If a particular employee is not listed, verify that they have an active service account.
 - c. The number of consumed weekly hours, scheduled weekly hours, max available daily hours, and max available weekly hours will appear under each employee's name.
15. In the Select Day drop-down, **select the day of the week to schedule**. This will update the Required Employees column on the hourly tables.
16. To create a new schedule, use the calendar or arrow icons to go to the desired week.
 - a. To copy the same schedule as the previous week, click the **Copy** icon (two pieces of paper).
 - i. Select the **week** to copy from the drop-down and click **Ok**
 - ii. Click **Yes** to confirm
 - b. To create a new schedule shift, click the **blank cell** to open and complete the schedule form wizard:
 - i. Employee Name – Auto populates with the employee name of the selected cell
 - ii. EVV Location – Select from the drop-down menu
 - iii. Day – Auto populates the date of the selected cell but can click in the field to open the calendar and select a different date
 - iv. Start Time – Click in the field to select a shift start time
 - v. End Time – Click in the field to select a shift end time
 - vi. Note – Optionally add a note for the employee
 - vii. OnCall checkbox – Check if this is an on-call shift
 - a. If selected, proceed to step 16.
 - viii. Critical checkbox – Check to mark a shift as critical
 - ix. Reminder - Enter a numeric value in minutes, hours, days, or weeks
 - x. Reminder Type - Select Minutes, Hours, Days, or Weeks from the drop-down
17. Click **Schedule** and **Save** to confirm
 - a. Please note: A client must be scheduled for the same hours to save the employee shift
18. Repeat until the schedule is complete
 - a. Copy entries by dragging and dropping them into a new cell
19. Click **Publish** to make the schedule visible to employees
20. Review exceptions and make changes as needed
21. Click **Publish** on the exceptions window
 - a. Changes can be made to the schedule by right-clicking on individual entries
 - b. Re-publish the schedule for the employee to view the changes

View Day Program Schedule

1. Log in to DCI with personal profile
2. Click **Scheduling** on the main menu
3. Click **Day Programs** on the submenu
4. Search for the program by typing the name in the field Type Day Program Name and selecting it when it populates
5. Click **Search**
6. Select the program from the table by clicking anywhere in the row
7. The Day Program schedule has two tabs:
 - a. Clients Schedule tab
 - i. Lists all clients who have an active service account for the day program
 1. Clients will be listed once per service code
 - ii. There are several numbers listed by each client. Hover over each number to view what it represents.
 1. The first number is consumed weekly hours. This is the total of all pending and approved punches for the service code for the week.
 2. The second number is scheduled weekly hours. This is the total hours of saved shifts for the week.
 3. The third and fourth numbers are the daily maximum and maximum available weekly hours. These are both set on the authorization. A warning will display if an attempt to schedule over the maximum available daily hours is made.
 - iii. Hover over the information (i) icon to see more authorization details, including the authorization end date, remaining balance, and staff ratio. Shifts cannot be scheduled beyond the end date or exceeding the remaining balance.
 - b. Employees Schedule tab
 - i. At the top of the Employees Schedule tab is an hourly view of the required employees compared to scheduled employees. Click the Select Day drop-down to change the day.
 1. Required Employees number will update when the Client Schedule is published
 2. Scheduled Employees number updates as new shift entries are added to the schedule

- ii. All employees with an active service account for the specified program will be listed in the left header row of the schedule table
- iii. There are several numbers listed by each employee. Hover over each number to view what it represents.
 - 1. The first number is consumed weekly hours. This is the total of all pending and approved punches for the employee for the week.
 - 2. The second number is scheduled weekly hours. This is the total hours of saved shifts for the week.
 - 3. The third number is max available weekly hours, which is set on the authorization. A warning will display if an attempt to schedule over the max available weekly hours.
- 8. The default view is a weekly view. To view an hourly view of one day, click **Day** or click **Today** to view today's schedule. To return to the Week view, click **Week**.
- 9. Navigate to other weeks by using the arrows or the calendar icon
- 10. Each shift will display the start time, end time, and total hours.
 - a. On-Call Shifts - Appear in dark blue
 - b. Scheduled Shifts (published) - Appear in light blue
 - c. Offered Shifts - Appear in yellow
 - d. Unpublished Changes - Appear in green
 - e. Deleted Unpublished Changes - Appear in bright red
- 11. There are several tools available to quickly make changes to the schedule
 - a. Trash icon - Clear the current schedule
 - b. Copy icon - Copy the schedule from a previous week
 - c. Printer icon - Print the schedule
- 12. Right-click on any schedule entry and select
 - a. View - View details
 - b. Edit - Edit the entry
 - c. Delete - Delete the entry

Shift Swapping – View, Approve, and Reject Requests

Description: Employees can offer published shifts if they are unable to work the scheduled shift. Another employee with an active service account for the same day program can claim the shift. If no one claims an offered shift, it will revert to the original employee's schedule.

Shift swaps must be approved by the supervisor before they are complete. The schedule is automatically updated and re-published when a shift swap occurs. No further supervisor action is required.

1. Log in to DCI with 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 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 Code
 - c. Initial Employee - Employee offering shift
 - d. Claimed By - Employee claiming shift
 - e. Shift Date
 - f. Shift Timings
 - g. Status
 - h. Action
6. In the Action Column, click **A** to approve the shift swap or the red **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 that the supervisor has reviewed the shift swap if the message template is enabled

Review Employee Availability Template

Description: Employees can create availability templates so that supervisors know when they are available to work. Availability templates must be approved by a supervisor upon creation and when a template is updated. If the template is approved, supervisors cannot schedule an employee outside the hours of their approved availability template.

1. Log in to DCI with personal profile
2. Click **Scheduling** on the main menu
3. Click **Availability Templates** on the submenu
4. Use the filters to find the desired employee's availability templates, or simply scroll through the table.
5. Click anywhere in the row to open the Availability Template Details page
6. After reviewing the template, return to the Availability Templates page.
 - a. Click the **A** to approve the template or the red **R** to reject the template
 - b. Please note: If the template is approved, supervisors cannot schedule an employee outside the hours of their approved availability template.
7. Return to the Availability Templates page at any time to view an employee's availability

Reports

Description: There are several scheduling reports regarding the day program available to supervisors:

- Employee Schedule Report
- Client Schedule Report
- Day Program Schedule Report
- Missed Shift Report

1. Click **Reports** on the main menu
2. Hover over **Scheduling Reports** on the submenu
3. Select a report from the flyout menu
4. Use filters or click **Search** to populate all data
5. Drag and drop column headers into the order of choice
6. Click **Download** to open the download report wizard
 - a. Columns tab:
 - i. Use the arrows to move items from the available columns to the selected columns
 - ii. Reorder columns as needed by dragging and dropping the item into place
 - iii. Click **Next**
 - b. Options tab:
 - i. Format – Select the download file format. Choices include Excel, PDF, CSV, and Tab Delimited.
 1. If PDF is selected, the Orientation field will become available. Select Portrait or Landscape.
 - ii. Save as Report Download Preference box – If checked, DCI will save the format and orientation preferences for subsequent downloads.
 - iii. Click **Download** and **Yes** to confirm
7. Click the downloaded file to open
8. Enable editing and use data as needed

Message Templates

Description: Message templates are automated messages and notifications that, if enabled, are sent to users based on specific events or triggers within the system. 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, visit the help center. The following message templates are available for the scheduling module:

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

Related articles

- [Authorizations - Overview](#)
- [Case Workers Guide](#)
- [System Set-Up - Admin Guide](#)
- [Mobile App - Supervisor - Dashboard & Menu Navigation](#)
- [Mobile App - Employer - Dashboard & Menu Navigation - FI Mode Only](#)