Scheduling Module - Group Service Supervisor

Description: In this topic, the user will learn how to use the scheduling module as a supervisor who works with a group service program.

This useful tool allows supervisors of a group service program to:

- Create a schedule specifically for a Group services program using the group services schedule builder
- View employee shifts via the Employees Schedules tab
- View clients' schedules via the Clients Schedules tab
- View all employees and clients with an active service account for the program
- 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: Group Service Admin

Contents:

Group Services Program Schedule

Create New Group Services Program Schedule

1. Log in to personal profile
2. Click **Scheduling** on the main menu
3. Click **Group Services** on the submenu
4. Search for the group service by typing the name in the search filter
5. Click **Search**
6. Click **anywhere on the row of the group service** to open the Group Service 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. First, create the employee schedule by clicking the **Employee Schedule** tab
    a. Creating entries on this tab will automatically create the client schedule
    b. All employees with an active service account for the specified program will be listed in the Employees column
    c. To create a new schedule shift, click the **Blank Cell** on the selected day to open the Schedule form wizard
    d. Complete the form wizard
        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. Clients - Select the clients for the group service
        vii. Note - Optional field to enter additional notes for the employee
        viii. Reminder - Enter the numeric value (minutes, hours, days, or weeks) in the first field
        ix. Reminder Type - Select Minutes, Hours, Days, or Weeks from the drop-down in the second field
    e. Click **Schedule**
        i. An employee that is already scheduled somewhere else cannot be scheduled. To see an employee’s full schedule, navigate to the Scheduling Module home page and click Employees on the submenu. Search for and select the employee.
        ii. Shifts cannot be scheduled if the authorization has expired
    f. Click **Save** on the confirmation alert window
    g. Repeat until the schedule is complete
        i. Copy entries by dragging and dropping them into a new cell
        ii. To use the same schedule as the previous week:
            1. Click the **Copy icon** (two pieces of paper)
            2. Select the **week** to copy from the drop-down and click **Ok**
            3. Click **Yes** on the confirmation alert window
    h. Click **Publish**
    i. Review exceptions and make changes as needed
    j. Click **Publish** on the review exceptions window

    k. Click **Save**
9. Next, click the **Client Schedule** tab to see the Client Schedule.
    a. Entries cannot be created on the Client Schedule tab
    b. The Client Schedule is automatically created as entries are scheduled on the Employee Schedule tab

View Group Services Schedule

1. Log in to personal profile
2. Click **Scheduling** on the main menu
3. Click **Group Services** on the submenu
4. Search for the group service by typing the name in the search filter
5. Click **Search**
6. Click **anywhere on the row of the group service** to open the Group Service Details page
7. The Group Services Schedule builder has two scheduling tabs:
    a. Employee Schedule
        i. All employees with an active service account for the group services program will be listed in the Employees column
        ii. The number of consumed weekly hours, scheduled weekly hours, and max available weekly hours will appear under each employee's name.
        iii. If a particular employee is not visible, verify they have an active service account.
    b. Client Schedule
        i. All clients who have an active service account for the group services program will be listed in the Clients column
        ii. Clients will be listed once per service code
8. 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.
9. Navigate to other weeks by using the arrows or the calendar icon
10. On the Employee Schedule tab, each shift will display the start and end time, total hours, and client initials for the group service.
    a. Scheduled Shifts (published) will appear in light blue
    b. On Call Shifts (residential and day program only) will appear in dark blue
    c. Offered Shifts will appear in yellow
    d. Unpublished Changes will appear in green
    e. Deleted Unpublished Changes will appear in bright red
11. 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
12. 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 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
    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
        i. 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 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.

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
- 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