Approve Client Requests - Video

Description: In this topic, the user will learn how to approve client requests for service. Clients are able to request service for a specific date and time, as well as the preferred employee. Supervisors of the client's cost center will receive a notification when a new request is submitted if messaging templates are enabled.

Role Required: Super User, Supervisor

Permission Required: N/A

View Client Requests

- 1. Log in to DCI
- 2. Click **Scheduling** on the main menu
- 3. Click Client Requests on the submenu
- 4. The results table will display all client requests for the cost centers for which the user has the supervisor role
- 5. Review the details of the request and take appropriate action:
 - a. Click A to approve the request. The entry will move from pending to published status.
 - b. Click the blue ${\ensuremath{\mathsf{E}}}$ to edit the shift time or the requested employee
 - c. Click the red R to reject the request
- 6. If messaging templates are enabled, the client/guardian will be notified when the review is complete.

Click the video below to launch the video player in a new tab.



Approve Client Request



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Related articles

- Group Service Supervisor Guide
- Schedule Comparison and Setting Schedule Deviation
- Client Request for Services Video
- Approve Client Requests Video
- Approve Availability Template Video