Create Availability Template - Video

Description: In this topic, the user will learn how to create availability templates for supervisor review.

*Please note: Templates can be created for up to 13 weeks in length and are for a set of days that have the same availability. For example, if the user is only available from 6 AM to 6 PM on weekdays, but is available all day on weekends, two different availability templates must be created. Templates must be renewed when they have reached their end date. Changes can be made to pending, published, and approved templates. If an approved template is edited, it must be re-published for supervisor review.

Role Required: Employee (base user)

Permission Required: N/A

Create an Availability Template

1. Log in to DCI
2. Click **Availability** on the submenu
3. Click **Actions**
4. Select **Create Template** from the drop-down menu
5. Complete the Create Template form wizard
    a. Template Name: Create a name for the template (e.g., Jennifer Smith Q3)
    b. Time: Select the start time
    c. To: Select the end time
        i. If different days have different start and/or end times, a separate template must be created.
    d. Date: Select the date the template begins
    e. To: Select the date the template ends
    f. Days: Check the days of the week for the template
6. Click **Save** and **Yes** to confirm
7. Click **Publish**
8. Click the **checkbox** of the template to send to the supervisor for approval
9. Click **Publish** and **Save** to confirm

The schedule status has changed to Published. After supervisor review, it will turn green if approved and red if rejected. Repeat to create templates for other time frames on other days of the week as needed

Edit an Availability Template

Make changes to the template by changing individual entries, or editing the entire template.

1. To change an individual day, **right-click** on the entry.
    a. Click **Edit** to edit the start and end times
        i. Click **Save** and **Yes** to apply to just this individual entry. Click **Yes to All** to apply to all entries on the same day of the week.
    b. Click **Delete** to delete the entry from the template.
        i. Click **Yes** to apply to delete the individual entry or click **Yes to All** to delete all entries on the same day of the week.
2. To change the entire template, click the **pencil** icon next to Pending.
3. When edits are complete, click **Publish.**
4. Click the **checkbox** of the template to send to the supervisor for approval
5. Click **Publish** and **Save** to confirm

The schedule status has changed to Published. After supervisor review, it will turn green if approved and red if rejected.

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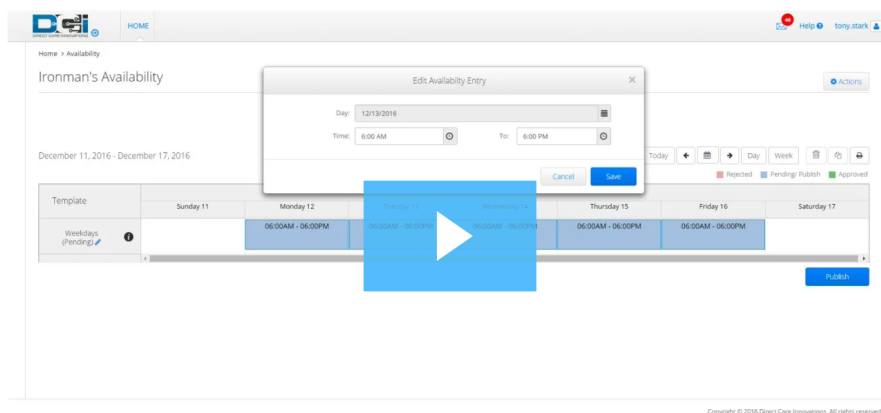
Related articles

- Group Service - Supervisor Guide
- Schedule Comparison and Setting Schedule Deviation
- Client Request for Services - Video
- Change Login Information - Video
- Authorization Check - Video