

Create Day Program Schedule - Video

Description: The Day Program Schedule Builder allows the supervisor to create a schedule specifically for a chosen day program. The Day Program Schedule Builder has two tabs: Clients Schedules and Employees Schedules. All clients and employees with an active service account for that program will be listed on the corresponding tab. The Clients Schedule must be created before creating the Employees Schedule, as the builder takes staffing ratios into account.

Role Required: Super User, Supervisor

Permission Required: N/A

Create New Day Program Schedule

1. Log in to personal profile
2. Click **Scheduling** on the main menu
3. Click **Day Program** on the submenu
4. Search for the day program by using the filters and click **Search**
5. **Click anywhere in the program row** to open the Day Program Details page
6. Create the **Client Schedule** from the **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 you do not see the client you wish to schedule, 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 employee's name.
7. To create a new schedule, use the calendar or arrow icons to go to the desired week or click the **Actions** button, then click **New Schedule** to display the next blank week's schedule.
 - a. To use the same schedule as the previous week click the **Copy** icon
 - 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** on the day to create a shift to open the Schedule form wizard.
 - c. Complete the entry form
 - d. Name: Prefilled with the client's name
 - e. Service Code: Day Program (prefilled)
 - f. EVV Location
 - g. Day
 - h. Start Time
 - i. End Time
 - j. Note
8. Click **Schedule**
 - a. A client cannot be double-booked. To see a client's full schedule, go back to the Scheduling Module home page and click **Clients** on the submenu.
9. Click **Save** to confirm
10. Repeat until the schedule is complete
 - a. Copy entries by dragging and dropping them into a new cell
11. Click **Publish**
12. Review exceptions and make changes as needed
13. Click **Publish** on the exceptions window
 - a. The schedule will be visible to clients after it is published
 - b. Changes can be made to the schedule by right-clicking on individual entries. Re-publish the schedule for the employee to see the changes.
14. After the Clients Schedule has been published, click the **Employees Schedule** Tab.
 - a. Select the day of the week to schedule. This will update the Required Employees Number on the hourly tables.
 - b. All employees with an active service account for the specified program will be listed in the left header column of the schedule table
15. To create a new schedule, use the calendar or arrow icons to go to the desired week.
 - a. To use the same schedule as the previous week click the **Copy** icon
 - 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** on the day to create a shift for to open the Schedule form wizard.
 - i. Complete the Schedule form wizard
 - ii. Employee Name
 - iii. EVV Location
 - iv. Day
 - v. Start Time
 - vi. End Time
 - vii. Select the clients for the group service
 - viii. Note
 - ix. OnCall: Checkbox if this is an on call shift
 - x. Critical: Checkbox if you want the shift to be marked as critical
 - xi. Reminder: Enter the numeric value (minutes, hours, days or weeks)
 - xii. Reminder Type: Select Minutes, Hours, Days or Weeks from the drop down
16. Click **Schedule**
17. Click **Save** to confirm
18. Repeat until the schedule is complete
 - a. Copy entries by dragging and dropping them into a new cell
19. Click **Publish**
20. Review exceptions and make changes as needed
21. Click **Publish** on the exceptions window

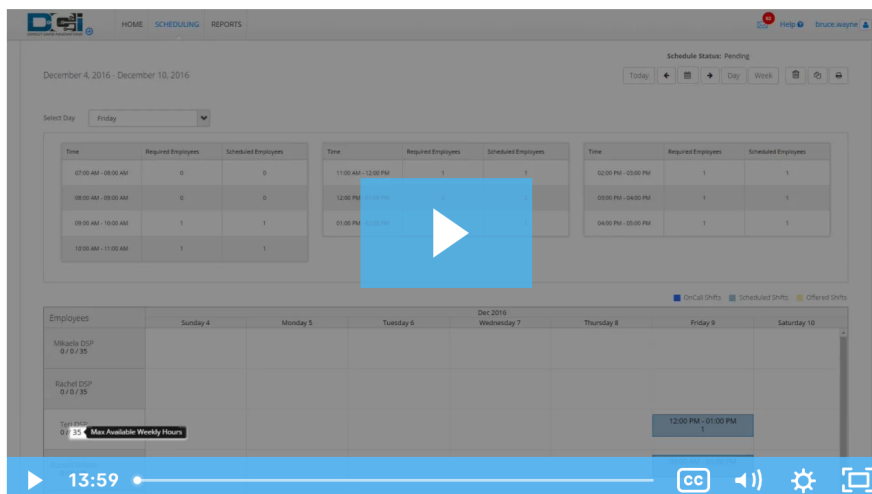
- a. The schedule will be visible to employees after it is published
- b. Changes can be made to the schedule by right-clicking on individual entries. Re-publish the schedule for the employee to see the changes.

View Day Program Schedule

1. Log in to personal profile
2. Click **Scheduling** on the main menu
3. Click **Day Programs** on the submenu
4. Search for the day program by using the filters and click **Search**
5. **Click anywhere in the program row** to open the Day Program Details page
6. The Day Program Schedule builder has two tabs:
 - a. Clients Schedule
 - i. Lists all clients who have an active service account for the Day Program
 - ii. Clients will be listed once per service code
 - iii. There are several numbers listed on each service code. Hover over each number to find out what it represents.
 - iv. The first number is consumed weekly hours. This is the total of all pending and approved punches for the service code for the week.
 - v. The second number is scheduled weekly hours. This is the total hours of saved shifts for the week.
 - vi. The third and fourth numbers are the daily maximum and maximum available weekly hours. These are both set on the authorization. A warning will populate if attempting to schedule over the maximum available daily hours.
 - vii. Hover over the **i** icon to see more authorization details, including the authorization end date and the remaining balance. Schedule entries cannot be created beyond the end date or if they exceed the remaining balance.
 - b. Employees Schedule
 - i. At the top of the Employee's schedule is an hourly view of the required employees compared to scheduled employees. Click the drop-down next to Select Day to change the day.
 1. Required Employees number will be updated when the Client Schedule is published
 2. Scheduled Employees 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
 1. The number of consumed weekly hours, scheduled weekly hours, and maximum weekly hours will appear under each employee name.
 2. If you do not see the employee you wish to schedule, verify that they have an active service account.
7. The default view is a weekly view. To view an hourly view of one day, click Day or Today to go to today's schedule. To return to the Week view, click Week.
8. Easily navigate to other weeks by using the arrows or the calendar icon
9. Each shift will display start and end time and total hours
 - 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. My Offered Shifts (shifts you have offered for others pick up) will appear in light red
 - e. Unpublished Change will appear in green
 - f. Deleted Unpublished Change will appear is bright red
10. 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 the previous week
 - c. Click the **Printer** icon to print the schedule
11. Right-click on any schedule entry and select:
 - a. **View**: To view details
 - b. **Edit**: To edit the entry
 - c. **Delete**: To delete the entry

Video

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](#)