View and Create Employee Schedules - Video

Description: In this topic, the user will learn how to create and view employee schedules. The supervisor creates schedules for all account types including Administration, Training, and Drive. It is available to all supervisors who are linked to the employee via a default cost center or an active service account. Supervisors can view the employee schedule to see all scheduled shifts for the employee's active service accounts, which is helpful when creating programs or client schedules.

Role Required: Super User, Supervisor

Permission Required: N/A

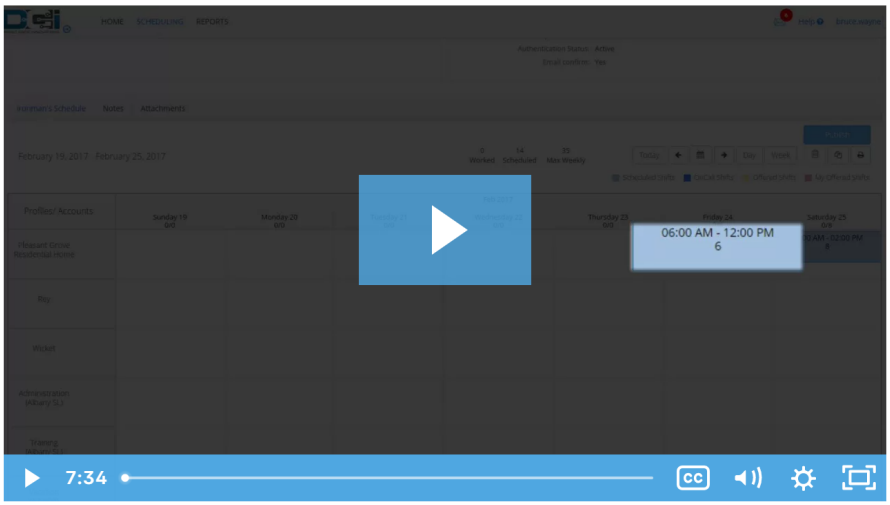
Create New Employee Schedule

1. Log in to personal profile
2. Click **Scheduling** on the main menu
3. Click **Employees** on the submenu
4. Search for the employee by using the filters and click **Search**
5. **Click anywhere in the employee row** to open the Employee Details page
6. To create a new schedule, use the calendar or arrow icons to navigate 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 to open the Schedule form wizard
        i. Complete the Schedule form wizard
        ii. Employee Name: Prefilled with the employee name
        iii. Service Code: Prefilled based on the service code of the selected cell
        iv. EVV Location
        v. Day
        vi. Start time
        vii. End time
        viii. Cost Center: Prefilled with the employee's cost center
        ix. Reminder: Enter the numeric value (minutes, hours, days, or weeks)
        x. Reminder Type: Select Minutes, Hours, Days, or Weeks from the drop-down
7. Click **Schedule**
    a. Shifts cannot be saved if the employee is already scheduled for a shift
    b. Shifts cannot be scheduled if the authorization has expired
8. Click **Save** to confirm
9. Repeat until the schedule is complete for all services
    a. Copy entries by dragging and dropping them into a new cell. Update the schedule form wizard as needed.
    b. Schedule non-client shifts (e.g., PTO, sick, administration)
10. Click **Publish**
11. Review exceptions and make changes as needed
12. Click **Publish** on the review exceptions window
    a. The schedule will be visible to the employee after it is published
    b. Changes can be made to the schedule by right-clicking on individual entries
        i. Publish the schedule for the employee to see the changes by clicking **Publish** and **Save**

View Employee Schedule

1. Log in to personal profile
2. Click **Scheduling** on the main menu
3. Click **Employees** on the submenu
4. Search for the employee by using the filters and click **Search**
5. **Click anywhere in the employee row** to open the Employee Details page
6. The employee's current weekly schedule shows
    a. The dates are listed at the top of the schedule
    b. Each active service account is listed in the far left column. Use the scroll bar to see all accounts.
7. The default view is a weekly view. To view an hourly view of one day, click Day or click 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 times, total hours, and service codes, if applicable.
    a. Scheduled Shifts (published) will appear in light blue
    b. On Call Shifts (residential and day programs only) will appear in dark blue
    c. Offered Shifts will appear in yellow
    d. My Offered Shifts (shifts you have offered for others to pick up) will appear in light red
    e. Unpublished Change will appear in green
        i. Deleted Unpublished Change will appear in 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

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



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