

Guardian Request for Client Services - Video

Description: In this topic, the user will learn how to request services on behalf of their client.

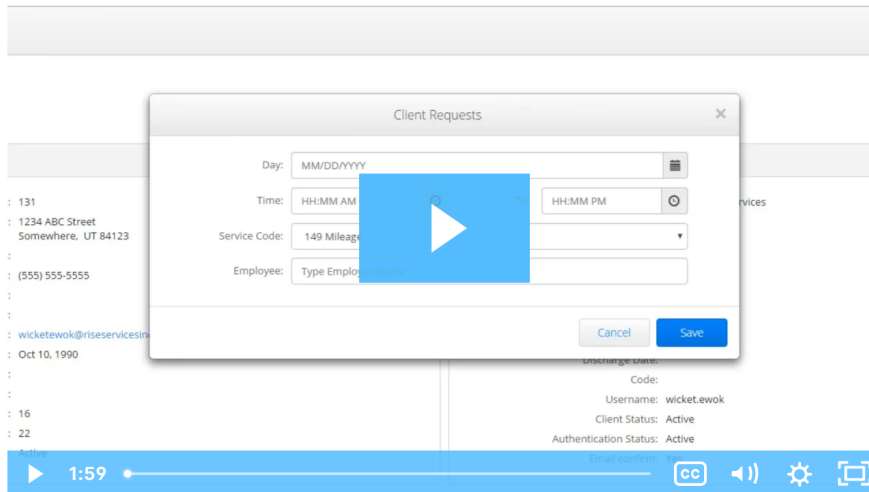
Role Required: Guardian

Permission Required: N/A

Request Service

1. Click **Clients** on the submenu
2. **Select the client** from the table
3. Click the **Schedule** tab
4. Click **Actions**
5. Select **Add New Request** from the drop-down menu
6. Complete the form wizard. Select the date, start time, end time, service, and preferred employee. Click **Save**.
 - a. If the employee is unavailable, the supervisor may schedule a different employee.
 - b. Add notes for the request, if needed.
7. The request will appear on the schedule as pending and has been sent to the supervisor for review. If messaging is enabled, a notification will be sent when this review is complete.
 - a. If the request is approved, the shift will appear in blue on the schedule.
 - b. If it is rejected, it will no longer appear and the supervisor will provide details as to why it was rejected.
 - c. To cancel the request, please contact the supervisor.

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



Related articles

- [Authorizations Widget](#)
- [Authorizations - Overview](#)
- [Attestation \(*EVV\) Workflow for Clients and Guardians](#)
- [Client - FOB Attestation \(*EVV\)](#)
- [October 2023 Release Notes](#)