Scheduling Module - Day Program Supervisor

Description: In this topic, the user will learn how to use the scheduling module as a supervisor who works with a day program.

This useful tool allows supervisors of a day program to:

- Create a schedule specifically for a day program using the day program schedule builder
- View employee shifts via the Employees Schedules tab
- View clients' schedules via the Clients Schedules tab
- View all employees and clients with an active service account for the program
- Prevent scheduling of overtime and over authorization
- Prevent double scheduling of employees and clients
- Manage shift swapping
- Manage client requests for services
- Manage employee availability templates

*Please note: The DCI Scheduling Module is used by some organizations. Please reach out with questions.

Role Required: Super User, Supervisor

Permission Required: Day Program Admin

Contents:

Day Program Schedule

Create New 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 typing the name in the search filter
5. Click **Search**
6. Click **anywhere on the row of the day program** to open the Day Program Details page
7. To create a new schedule, use the calendar or arrow icons to navigate to the desired week, OR click the **Actions** button and select **New Schedule** from the drop-down menu to display the next blank week's schedule.
8. First, create the client schedule by clicking the **Clients Schedule** Tab
    a. All clients with an active service account for the specified program will be listed in the Clients column
    b. If a particular client is not visible, verify 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 client's name
    d. To create a new schedule shift, click the **Blank Cell** on the selected day to open the Schedule form wizard
    e. Complete the form wizard
        i. Name - Field will prefill based on the client selected
        ii. Service Code - The field will prefill with the day program name
        iii. EVV Location - Select from the drop-down
        iv. Day - Select the date the client will attend the program
        v. Start Time - Enter the start time the client will attend the program
        vi. End Time - Enter the end time the client will leave the program
        vii. Note - Optional field
    f. Click **Schedule**
        i. A client that is already scheduled somewhere else cannot be scheduled. To see a client’s full schedule, navigate to the Scheduling Module home page and click Clients on the submenu. Search for and select the client.
    g. Click **Save** on the confirmation alert window
    h. Repeat until the schedule is complete
        i. Copy entries by dragging and dropping them into a new cell
        ii. To use the same schedule as the previous week:
            1. Click the **Copy icon** (two pieces of paper)
            2. Select the **week** to copy from the drop-down and click **Ok**
            3. Click **Yes** on the confirmation alert window
    i. Click **Publish**
    j. Review exceptions and make changes as needed
    k. Click **Publish** on the exceptions window
        i. The schedule will be visible to clients when published

l. Click **Save**
m. Changes can be made to the schedule by right-clicking on individual entries
n. Re-publish the schedule for the client to see the changes

9. Next, click the **Employees Schedule** tab
    a. In the Select Day drop-down, select the day of the week to view the schedule. This will update the Required Employees number on the hourly tables.
    b. All employees with an active service account for the day program will be listed in the Employees column
    c. To create a new schedule shift, click the **Blank Cell** on the selected day to open the Schedule form wizard.
    d. Complete the form wizard
        i. Employee Name - The field will prefill based on the employee selected
        ii. EVV Location - Select from the drop-down
        iii. Day - Select the date for the employee to work
        iv. Start Time - Enter the start time for the shift
        v. End Time - Enter the end time for the shift
        vi. Note - Optional field to enter additional notes for the employee
        vii. OnCall - Check the box if this is an on call shift
        viii. Critical - Check the box if this is a critical shift
        ix. Reminder - Enter the numeric value (minutes, hours, days, or weeks) in the first field
        x. Reminder Type - Select Minutes, Hours, Days, or Weeks from the drop-down in the second field
    e. Click **Schedule**
        i. An employee that is already scheduled somewhere else cannot be scheduled. To see an employee's full schedule, navigate to the Scheduling Module home page and click Employees on the submenu. Search for and select the employee.
    f. Click **Save** on the confirmation alert window
    g. Repeat until the schedule is complete
        i. Copy entries by dragging and dropping them into a new cell
        ii. To use the same schedule as the previous week:
            1. Click the **Copy icon** (two pieces of paper)
            2. Select the **week** to copy from the drop-down and click **Ok**
            3. Click **Yes** on the confirmation alert window
    h. Click **Publish**
    i. Review exceptions and make changes as needed
    j. Click **Publish** on the review exceptions window
        i. The schedule will be visible to employees when published
    k. Click **Save**
    l. Changes can be made to the schedule by right-clicking on individual entries
    m. 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 typing the name in the search filter
5. Click **Search**
6. Click **anywhere on the row of the day program** to open the Day Program Details page
7. The Day Program Schedule builder has two scheduling tabs:
    a. Clients Schedule
        i. All clients with an active service account for the day program will be listed in the Clients column
        ii. Clients will be listed once per service code
        iii. There are several numbers listed on each service code. Hover over each to learn more.
            1. The first number is consumed weekly hours, which is the total of all pending and approved punches for the service code for the week.
            2. The second number is scheduled weekly hours, which is the total hours of the saved shifts for the week.
            3. The third and fourth numbers are the daily maximum and maximum available weekly hours, which are both set on the authorization. A warning will populate if a user attempts to schedule over the maximum available daily or weekly hours.
        iv. Hover over the "i" icon to see more authorization details, including the authorization end date and the remaining balance. Schedule entries will be prohibited beyond the end date or that exceed the remaining balance.
    b. Employees Schedule
        i. This tab includes an hourly view of the number of required employees compared to the number of scheduled employees. Click the Select Day drop-down to change the day of the week to view the information for a different 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 day program will be listed in the Employees column
        iii. The number of consumed weekly hours, scheduled weekly hours, and maximum weekly hours will appear under each employee's name.
        iv. If a particular employee is not visible, verify they have an active service account
8. The default view is a weekly view. To view an hourly view of one day, click the Day button or click the Today button to navigate to today's schedule. To return to the week view, click the Week button.
9. Navigate to other weeks by using the arrows or the calendar icon
10. On the Employee Schedule tab, each shift will display the start and end time, total hours, and client initials for the group service.
    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. Unpublished Changes will appear in green
    e. Deleted Unpublished Changes will appear in bright red
11. 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 a previous week
    c. Click the **Printer icon** to print the schedule

12. Right-click on any schedule entry and select:
    a. **View**
    b. **Edit**
    c. **Delete**

Shift Swapping

Employees can offer published shifts if they are unable to work the scheduled shift. Another employee with an active service account for the same program /client can claim the shift. Shift swaps must be approved by the supervisor before they are complete.

View, Approve, and Reject Shift Swap Requests

1. Log in to personal profile
2. Click **Scheduling** on the main menu
3. Click **Pending Approvals** on the submenu
4. The table will list all shift swap requests for the cost centers in which the user has the supervisor role
5. Review the details of the shift swap in the table including:
    a. Client/Program Name
    b. Service Code
    c. Initial Employee - Employee offering the shift
    d. Claimed By - Employee claiming the shift
    e. Shift Date
    f. Shift Timings - Start and end time of the shift
    g. Status - i.e., Claimed
    h. Action - Click the A to approve, or the red R to reject the shift swap request.
6. In the Action Column, click **A** to approve the shift swap or **R** to reject the shift swap
    a. Action cannot be taken until an offered shift has been claimed by another employee
    b. The entry will change from a yellow offered entry to a light blue published entry
        i. Both employees will be notified of the review if the message template is enabled

Additional Notes:

- If no one claims an offered shift, it will revert to the original employee's schedule.

- The schedule is automatically updated and re-published when a shift swap occurs. Supervisors do not need to revise the schedule based on the shift swap.

Review Availability Templates

Employees can create availability templates in DCI so that supervisors know when they are available to work. Availability templates must be approved by a supervisor when created and when edited. If the availability template is approved, supervisors are unable to schedule an employee outside of their approved availability templates.

*Please note: An alternate option is to view the employee's availability template but not approve it. The result is that the supervisor will not be restricted when scheduling the employee.

Review an Employee's Availability Template

1. Log in to personal profile
2. Click **Scheduling** on the main menu
3. Click **Availability Templates** on the submenu
4. Use the filters to locate the desired employee's availability template(s), or simply scroll through the table.
5. Click anywhere in the results row to open the **Availability Template Details** page
6. After reviewing the template, go back to the Availability Templates page.
    a. Click the **A** to approve the template
    b. Click the red **R** to reject the template
    c. OR view the employee's availability template but do not take action. The result is that the supervisor will not be restricted when scheduling the employee.
7. Return to the Availability Templates page at any time to view an employee's availability

Reports

There are several Scheduling Reports available for the supervisor.

1. Click **Reports** on the main menu
2. Hover over **Schedule Reports** on the submenu
3. Select one of the following scheduling reports from the flyout menu:

- Employee Schedule Report
- Client Schedule Report
- Day Program Schedule Report
- Missed Shift Report

Message Templates

Message Templates are automated messages and notifications that are sent to DCI users based on specific events or triggers in DCI. Message Templates can only be edited by a super user. Message Templates are split into two categories - messages and notifications. For more information on message templates, view additional resources in the help center. The following message templates are available for the Scheduling Module:

- Schedule Published
- Shift Claimed Employee
- Scheduling Notify Failure to Punch
- Schedule Entry Rejected
- Availability Template reached the initial reminder deadline
- Availability Template reached reminder deadline frequency
- Unscheduled Punch
- Scheduling Notify Upcoming Shift Reminder
- Change in Published Schedule
- Offered Shift

Related articles

- Group Service - Supervisor Guide
- Schedule Comparison and Setting Schedule Deviation
- Approve Client Requests - Video
- Approve Availability Template - Video
- Scheduling Module - Residential or Parenting Program Supervisor