

Create Residential Schedule - Video

Description: The Residential Schedule Builder allows the supervisor to create a schedule specifically for a chosen Residential Program. All employees with an active service account for that program will be listed on the schedule builder. The module considers the weekly allocated hours as the schedule is created.

Role Required: Super User, Supervisor

Permission Required: N/A

Create New Residential Program Schedule

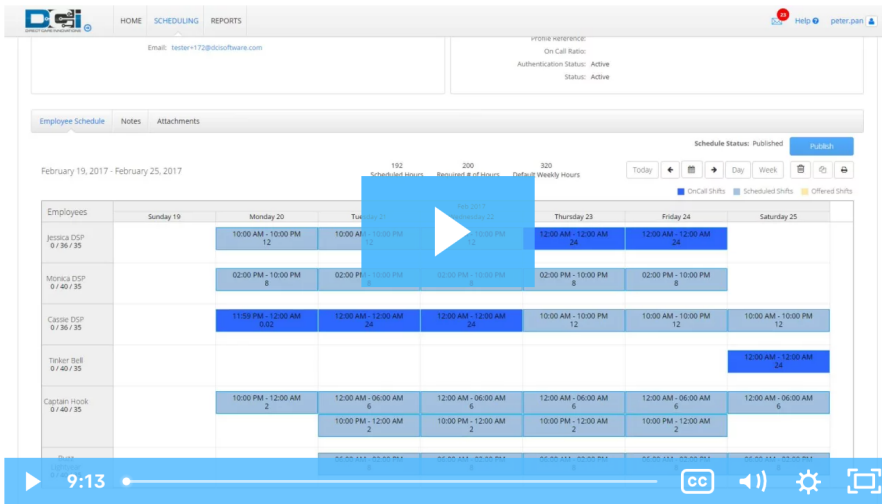
1. Log in to personal profile
2. Click **Scheduling** on the main menu
3. Click **Residential Programs** on the submenu
4. Search for the program by using the filters and click **Search**
5. **Click anywhere in the program row** to open the Residential Program Details page
6. If the number of hours to be scheduled is different than the default hours:
 - a. Click **Actions**
 - b. Select **Set Required # of Hours** from the drop-down menu
 - c. Enter the number of hours to be scheduled for the week, then click **Save**.
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.
 - i. Complete the Schedule form wizard
 - ii. Employee Name
 - iii. EVV Location
 - iv. Day
 - v. Start Time
 - vi. End Time
 - vii. Note
 - viii. OnCall: Checkbox if this is an on call shift (only for residential programs)
 - ix. Critical: Checkbox if you want the shift to be marked as critical
 - x. Reminder: Enter the numeric value (minutes, hours, days, or weeks)
 - xi. Reminder Type: Select Minutes, Hours, Days, or Weeks from the drop-down
8. Click **Schedule**
 - a. Please Note: An employee cannot be double-booked. To see an employee's full schedule, return to the Scheduling Module home page and click **Employees** 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 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 Residential Program Schedule

1. Log in to personal profile
2. Click **Scheduling** on the main menu
3. Click **Residential Programs** on the submenu
4. Search for the program by using the filters and click **Search**
5. **Click anywhere in the program row** to open the Residential Program Details page
6. All employees with an active service account for the specified program will be listed in the left header column of the schedule table
 - a. The number of consumed weekly hours, scheduled weekly hours, and max available weekly hours will appear under each employee's name.
 - b. 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 times 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 to pick up) will appear in light red
 - e. Unpublished Change will appear in green
 - f. 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



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