

# Supervisor Profile - Create, View, Edit, or Deactivate

**Description:** In this topic, the user will learn how to create, view, edit, or deactivate a supervisor profile. A supervisor profile is an employee profile that has been assigned the supervisor role for a cost center. This role can manage employees, clients, service accounts, profile certifications, punch entries, attendance and absence entries, schedules, notes, and attachments.

**Roles Required:** Super User

**Permissions Required:** Employee Admin, Role Admin

**Required Entities Before Creation:**

- Cost Center
- Employee Profile

## Create Supervisor Profile

1. Log in to DCI
2. First, create an employee (base user) profile.
3. Click **Home** on the main menu
4. Click **Employees** on the submenu
5. Click **Actions**
6. Select **Add New Employee**. Complete the form wizard.
  - a. Basic Demographics tab:
    - i. First Name **(required)**
    - ii. Last Name **(required)**
    - iii. Full Name **(required)**
    - iv. Address **(required)** – After entering, the click blue **search location** hyperlink to populate GNIS Code.
    - v. Time Zone: Select from drop-down
    - vi. Phone **(required)**
    - vii. \*Alternate Phone (optional)
    - viii. Mobile Number (optional)
    - ix. Email **(required)**
    - x. DOB (optional)
    - xi. \*\*Profile Reference (optional)
    - xii. \*\*Training System Reference (optional)
    - xiii. Employee Type **(required)**: Dictates how the employee's hours are processed for payroll, including whether they are eligible for overtime.
    - xiv. \*SSN **(required)**
    - xv. \*Verify SSN **(required)**
    - xvi. Allow SSN Retrieval: Yes or no options, default is no. If yes is selected, the SSN will be stored in a retrievable format for EVV aggregation. Only select yes if the funding source requires SSN to be aggregated.
    - xvii. Gender (optional): Select from drop-down
    - xviii. Employee Mailing Address (optional): If using, exclude commas and special characters.
    - xix. Attach Photo (optional): Required if facial recognition will be used for EVV.
7. Click **Next**
  - a. Employee Information tab:
    - i. Domestic Worker (optional): Only select yes if an employee is classified as a domestic worker (not applicable to all states)
    - ii. Domestic Worker 7 Day Exception: This field unlocks if domestic worker is set to yes. Only select yes if the domestic worker agrees to a 7-day work week.
    - iii. Domestic Worker Preferred Day of Rest: Unlocks if yes is selected for domestic worker 7 Day exemption is selected. Certain states pay overtime if the domestic worker works on their day of rest.
    - iv. Employee Number **(required)**: Number provided by the organization at the time of hire
    - v. Weekly Hours Available **(required)**: Maximum number of hours the employee is available to work each week. Links to the scheduling module.
    - vi. \*\*Professional Id1 (optional)
    - vii. \*\*Professional Id2 (optional)
    - viii. \*\*Payroll Id (optional)
    - ix. Certification Template (optional): Select if there are a set of certification requirements specific to this employee
    - x. Holiday Schedule **(required)**: Dictates which days this employee is eligible for holiday pay
    - xi. Cost Center **(required)**: The employee's home cost center
    - xii. \*Hire Date (optional): The date the employee was hired
    - xiii. Preferred Language: Default is English
8. Click **Next**
  - a. EVV Location tab (not used for employees – specific to the client, where they are receiving service):
    - i. Copy from Profile Address (optional): Copies the address from the basic demographics tab
    - ii. EVV Location Name **(required if completing)**: The name of the location, i.e., home.
    - iii. EVV Location Type **(required if completing)**: Select from drop-down
    - iv. Address **(required if completing)**: The location address. Auto-populates if Copy from Profile Address box was checked.
    - v. Country **(required if completing)**
    - vi. Phone Number (optional): Required for Phone EVV
    - vii. Phone Verified **(required)**: Select yes or no, has the phone number been verified for Phone EVV?
    - viii. Phone Type (optional)
    - ix. Phone Carrier (optional)
    - x. Begin Date **(required if completing)**: The first date the location is approved for use
    - xi. End Date (optional): The last date the location is approved, if applicable.

- xii. Status **(required if completing)**: Select from drop-down
  - xiii. Primary (optional): Select if this is the primary EVV location
9. Click **Next**
    - a. Authentication Information tab:
      - i. Username (optional to change): Will be used for all future logins by this employee
      - ii. Password **(required)**: Will be used for all future logins by this employee. Hover over the white "i" (information) for password requirements.
      - iii. Confirm Password **(required)**: Enter the same password as above to confirm
      - iv. Pin **(required)**: Can be used instead of a password when logging in via a mobile device
      - v. Employment Status **(required)**: The employee's status with the organization
      - vi. Authentication Status **(required)**: The status of the employee profile. Defaults to active. Select disabled if the employee is no longer with the organization. Select locked to temporarily prevent the employee from logging in.
      - vii. Permissions (optional): Select all tasks the employee can perform for the entire system
        1. See the Permissions Guide to learn more
  10. Click **Next**
  11. Review Employee Information, click **Save** to continue, and **Yes** to confirm.
  12. Next, add the supervisor role to the newly created employee (base user) profile.
  13. Click **Settings** on the main menu
  14. Click **Roles** on the submenu
  15. Click **Actions**
  16. Select **Manage Role** from the drop-down menu
  17. Search by name for the newly created employee
  18. Select **Supervisor** in the Role field
  19. Search and select a **cost center**
  20. Click the **+** icon to add the supervisor role to this employee
  21. Click **Save** to continue and **Yes** to confirm

### **View, Edit, or Deactivate Supervisor Profile**

1. Log in to DCI
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Enter the employee's (supervisor's) name in the filter and click **Search**
5. **Click anywhere in the employee row** to open the Employee Details page
6. Click **Actions**
7. Select **Edit Employee** from the drop-down menu
8. View, make edits, and review employee (supervisor) details on the following tabs:
9. Basic Demographics
  - a. To deactivate the employee (supervisor) profile, change the status to **Inactive**.
  - b. Employee Information
  - c. Authentication Information
10. Click **Save** and **Yes** to confirm

### **Related articles**

- [Service Codes - Create, View, Edit, or Deactivate](#)
- [System Set-Up - Admin Guide](#)
- [Service Accounts - Employee - Create, View, Edit, or Deactivate](#)
- [Supervisor Profile - Create, View, Edit, or Deactivate](#)
- [Employer Profile - Create, View, Edit, or Deactivate - FI Mode Only](#)