

# Group Service - Supervisor Guide

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**Description:** In this guide, the user will learn how to use DCI to supervise group service.

**Roles Required:** Super User, Supervisor

**Permissions Required:** Group Service Admin



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## **Group Service Profile - Create**

1. Log in to DCI
2. Click **Home** on the main menu
3. Click **Group Services** on the submenu
4. Click **Actions**
5. Select **Add New Group Service** from the drop-down menu
6. Complete the **form wizard**
  - a. Basic Demographics tab:
    - i. Name **(required)**: Must be at least six characters
    - ii. Address **(required)**: After entering, click the blue **search location** hyperlink to populate GNIS Code.
    - iii. Time Zone (optional): Select from drop-down
    - iv. Phone **(required)**
    - v. Alternative Phone (optional)
    - vi. Email **(required)**
    - vii. Cost Center **(required)**
    - viii. Profile Reference (optional)
    - ix. Status **(required)**: Defaults to active. Change to inactive when service is no longer valid.
    - x. EVV Required **(required)**: Yes or no options, default is yes. Select no if not required.
    - xi. Enable Geofencing **(required)**: Yes or no options, default is no. Select yes to enable geofencing for this program.
    - xii. Requires Multiple Clients Per Punch **(required)**: Yes or no options, default is no. Select yes to require employees to select more than one client upon punch creation.
    - xiii. Minimum # of Attendees **(required if selected yes on Requires Multiple Client Per Punch field)**: Minimum number of clients that must be in attendance for the employee to be allowed to create a punch for this group service.
    - xiv. Click **Next**
  - b. EVV Location tab (optional): Can be added later

- i. Copy from Profile Address (optional): Copies address from the Basic Demographics tab
  - ii. EVV Location Name **(required)**: Name of the location
  - iii. EVV Location Type **(required)**: Select from drop-down
  - iv. Address **(required)**: Location address
  - v. Begin Date **(required)**: First date the location is approved for use
  - vi. End Date (optional): If applicable, the last date the location is approved for use.
  - vii. Status **(required)**: Defaults to active. Change to inactive when the program is no longer valid.
  - viii. Primary (optional): Select if this is the primary location to provide services
  - ix. Click **Next**
7. Click **Save** to continue and **Yes** to confirm

### **Group Service Profile - View, Edit, or Deactivate**

1. Log in to DCI
2. Click **Home** on the main menu
3. Click **Group Services** on the submenu
4. Use filters to find the group service and click **Search**
5. **Click anywhere in the row** to open the group services details page
6. Click **Actions**
7. Select **Edit Group Service** from the drop-down menu
  - a. To deactivate, update the status to
8. Edit as needed
9. Click **Save** and **Yes** to confirm

### **Service Accounts**

**Description:** A client or employee service account connects the client or employee to the group service allowing them to receive service and service to be provided.

#### **Create Client Service Account**

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Group Services** on the submenu
4. Search for the service by typing the name in the filter Type Group Service Name and selecting it when it appears
5. Click the blue **Search** button
6. Select the service from the table by clicking anywhere in the row
7. Click **Actions**
8. Select **New Client Service Account** from the drop-down
9. Complete the **form wizard**
  - a. Group Service Name – Auto populates
  - b. Client - Enter the client's name and select it from the drop-down menu
  - c. Service Code - Select **Group Service**
  - d. Funding Source - Select the appropriate funding source from the drop-down menu
  - e. Cost Center – Auto populates based on the service code selected
  - f. Billing Unit – Auto populates
  - g. Rate (optional) – Defaults to 0. This number can be changed if this service account has a unique pay rate.
  - h. Account Reference (optional) – Optional reference field
  - i. Status – Defaults to active. Switch to inactive when this is no longer a valid service account.
10. Click **Save** to continue and **Yes** to confirm

#### **Create Employee Service Account**

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Group Services** on the submenu
4. Search for the service by typing the name in the filter Type Group Service Name and selecting it when it appears
5. Click the blue **Search** button
6. Select the service from the table by clicking anywhere in the row
7. Click **Actions**
8. Select **New Employee Service Account** from the drop-down
9. Complete the form wizard
  - a. Group Service Name – Auto populates
  - b. Employee – Enter the employee's name and select it from the drop-down menu
  - c. Cost Center – Auto populates based on the group service selected
  - d. Employee Number (optional)
  - e. Pay Rate Name **(required)** – Select from the drop-down menu
  - f. Pay Rate – Defaults to 0. Enter a pay rate for the employee. If no pay rate is entered, the employee will not be paid.
  - g. Effective Date - Click in the field to open the calendar and select a date
  - h. Min Units Per Punch (optional) – Enter if a minimum number of billing units must be used when the employee clocks in under this service account
  - i. Max Units Per Punch (optional) – Enter if the employee may not exceed a maximum number of billing units in one shift
  - j. Start Date (optional) – If a date is entered, the employee will not be able to make a punch before this date.
  - k. End Date (optional) – If a date is entered, the employee will not be able to make a punch after this date.
  - l. Account Reference (optional) – Optional reference field
  - m. Grace Period – Defaults to disabled. By clicking enabled, the grace period for a certification template that is linked to this service account will be permitted.

- i. Grace Period Expiration – Locked field on this form. The date the grace period will expire is based on the time frame associated with the linked certification template.
  - n. Allows OverLapping Pay Rates box – Check to allow
  - o. Status – Defaults to active. Switch to inactive when this is no longer a valid service account.
10. Click **Save** to continue and **Yes** to confirm

## **Employee Punch Entries – Search, View, Approve, Reject, or Export**

**Description:** Group service entries are approved like other entries (e.g., hourly time entries).

### **Pending Entries**

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Pending Entries** on the submenu
4. Select **Group Service** from the Select Account Type filter
5. Click **Search**
6. Click the **A** in the entry row to approve the punch or the red **R** to reject it
7. Click **Yes** to confirm
8. Click anywhere in the entry row to view the punch details
9. Export entries by clicking the **Export** button above the entries table on the right-hand side of the page
  - a. Open the .CSV file from the device downloads
  - b. Excel will open
  - c. Sort and format downloaded data as needed

### **All Entries by Object**

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click one of the following tabs on the submenu to open the object page
  - a. **Employees – Shows all entries by employee**
  - b. **Clients** - Shows all entries by client
  - c. **Group Services** – Shows all entries for the service (excludes punches not made within the service such as Training, Admin, Hourly, etc.)
  - d. **Cost Centers** - Shows all entries by cost center
4. Use the filters to search by specific criteria
5. Click **Search**
6. Select the **object** by clicking anywhere in the row
7. Select the **Entries** tab on the object details page
8. If searching by object Employees or Clients, select **Group Service** from the Select Account Type filter.
9. If searching by object Group Services or Cost Center, there is no need to further filter, but can optionally select Client Service or Employee Service to narrow the entry search.
  - a. For Cost Center, click Client/Program header to sort by Group Service.
10. Click **Search**
11. Export entries by clicking the **Export** button above the entries table on the right-hand side of the page
  - a. Open the .csv file from the device downloads
  - b. Excel will open
  - c. Sort and format downloaded data as needed
12. Click anywhere in the **entry row** on the entries table to view details
13. Click **Actions**
14. Select **Approve** or **Reject** from the drop-down menu

## **Manage Punch Entry for Employee**

**Description:** In this topic, the supervisor will learn how to add or edit employee punches for those they supervise. The best practice is for employees to enter and edit their punches, however, some situations require supervisor assistance (e.g., missed punches for the group service, approved punches that require editing, etc.).

### **Add a New Punch for an Employee**

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Group Services** on the submenu
4. Search for the program by typing the name in the field Type Group Service Name and selecting it when it populates
5. Click **Search**
6. Select the program from the table by clicking anywhere in the row
7. Click **Actions**
8. Select **New Entry** from the drop-down menu
9. Complete the form wizard
  - a. Entry Type - Select **Punch**
  - b. Group Service Name – Auto populates
  - c. Account Type – Select **Group Service**
  - d. Employee Name – Enter the employee's name and select it from the drop-down menu
  - e. Service Date – Click in the field to open the calendar and select a date
  - f. Check In/Check Out – Click in the fields to select service times
  - g. EVV Location – Select the group service location

- h. Reason – May be required. Select from the available drop-down options.
  - i. Notes – Add additional information regarding the punch as needed
  - j. Attachment – Add an attachment as needed
10. Click **Save** to continue and **Yes** to confirm

The punch appears in the employee's entries list with a status of Unverified. The employee must verify the punch, which updates the status to Pending. The supervisor may then review and approve the pending entry.

### Edit a Punch for an Employee

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Enter the employee's name in the Employee Name field then click **Search**
5. Click anywhere on the row to open the employee details page
6. Select the **Entries** tab located below the demographics box
7. Select **Group Service** from the Select Account Type filter
8. Click **Search**
9. Click anywhere in the row to open the punch details page
10. Click **Actions**
11. Select **Edit Entry** from the drop-down menu
12. Make the necessary changes to the Entry Form wizard
13. If the organization requires a reason code when editing a punch, click the blue **plus sign (+)** next to the reason field
14. Select a reason from the **Add Reason Codes** drop-down that best describes why the edit is being made
15. Reason codes may require a text explanation. If this requirement is selected, a text box will appear where text must be entered.
16. Click the blue **plus sign (+)** next to the Add Reason Codes drop-down to add the selection to the Added Reason Codes box
17. Click **Save** to continue and **Yes** to confirm

An edited *pending* punch will change to rejected status and a new punch with unverified status is generated with the corrections. The Ref field is assigned a number that references the original punch, indicating the punch has been modified. The employee must log in to DCI and verify (acknowledge and concur with) the change(s), which updates the status to Pending. The supervisor must now review and approve the punch. Once approved, the approved or rejected entry will disappear from the Pending Entries screen and be visible under Entries for the program, or individually under Entries for the employee or client.

An edited *approved* punch will maintain the status of approved but will reflect a Compensated flag. Two new punches are created and need to be approved; one that zeroes out the original entry, and one for the correct entry. These entries can be found on Pending Entries on the submenu or in the reference entries table on the original entry's punch entry details page. The Ref field is assigned a number that references the original punch, indicating the punch has been modified.

### Cancel Approved Punch for an Employee

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Enter the employee's name in the Employee Name field then click **Search**
5. Click anywhere on the row to open the employee details page
6. Select the **Entries** tab located below the demographics box
7. Select **Group Service** from the Select Account Type filter
8. Click **Search**
9. Click anywhere in the row to open the punch details page
10. Click **Actions**
11. Select **Cancel Entry** from the drop-down menu to open the Cancel Entry form
12. If the organization requires a reason code when canceling a punch, click the blue **plus sign (+)** next to the reason field
13. Select a reason from the **Add Reason Codes** drop-down that best describes why the edit is being made
14. Reason codes may require a text explanation. If this requirement is selected, a text box will appear where text must be entered.
15. Click the blue **plus sign (+)** next to the Add Reason Codes drop-down to add the selection to the Added Reason Codes box
16. Click **Save** to continue and **Yes** to confirm

The updated employee punch remains in Approved/Processed/Paid status but will reflect a Compensated flag. A new entry zeroing out the original has been created. The Ref field is assigned a number that references the original punch indicating the punch has been modified.

### Verify an Unverified Punch for an Employee

**Description:** As an alternate option to the employee verifying an unverified punch, some organizations may allow a supervisor to verify (or reject) the punch from the punch details screen on behalf of the employee.

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Enter the employee's name in the Employee Name field then click **Search**
5. Click anywhere on the row to open the employee details page
6. Select the **Entries** tab located below the demographics box
7. Select **Group Service** from the Select Account Type filter and select **Unverified** from the Select Status filter
8. Click **Search**
9. Click anywhere in the row to open the punch details page
10. In the Punch Details widget box, select either the **Verify** or **Reject** button by the Status field
11. Click **Yes** to confirm

## **Client Attendance Entries – Search, View, or Export**

Client attendance entries cannot be managed independently of employee punch entries. Whatever action is taken to the employee punch entry is automatically applied to the client attendance entry.

### **View on Employee Punch Entry Details page**

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Search for the employee by typing the name in the field Type Employee Name and selecting it when it populates
5. Click **Search**
6. Select the employee from the table by clicking anywhere in the row
7. Click the **Entries** tab
8. Click anywhere on the group service punch entry row to open the details page
9. Select the **Attendance Entries** tab
10. Filter results by client name, service code, or entry ID.
11. Click **Search**
12. Click the entry ID to view the attendance entry details

### **View on Group Service Details page**

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Group Services** on the submenu
4. Search for the program by typing the name in the field Type Group Service Name and selecting it when it populates
5. Click **Search**
6. Select the program from the table by clicking anywhere in the row
7. Click the **Entries** tab
8. In the Select Type filter, select **Attendance** from the drop-down menu.
9. Click **Search**
10. Click anywhere in the entry row to view the attendance details
11. To export attendance entries, return to the Group Services details page.
12. Use filters to define and search for entries to be exported
13. Export selected entries by clicking the **Export** button above the entries table on the right-hand side of the page
  - a. Open the .csv file from the device downloads
  - b. Excel will open
  - c. Sort and format downloaded data as needed

### **View on Client Details page**

1. Log in to DCI with personal profile
2. Click **Home** on the main menu
3. Click **Clients** on the submenu
4. Search for the client by typing the name in the field Type Client Name and selecting it when it populates
5. Click **Search**
6. Select the client from the table by clicking anywhere in the row
7. Click the **Entries** tab
8. In the Select Type filter, select **Attendance** from the drop-down menu.
9. Click **Search**
10. Click anywhere in the entry row to view the attendance details

## **Scheduling (Instance-Level Setting)**

**Description:** In this topic, supervisors will learn how to use the scheduling system. This module is an instance-level setting and is not utilized by every organization.

- Create a schedule specifically for the group service
- View all employee shifts using the Employee Schedule tab
- View all clients scheduled on the Client Schedule tab
- Prevent scheduling overtime and over authorization
- Prevent double scheduling of employees and clients
- Allow efficient management of shift swapping
- Allow client requests for services
- Manage employee availability templates

### **Create New Group Service Schedule**

1. Log in to DCI with personal profile
2. Click **Scheduling** on the main menu
3. Click **Group Services** on the submenu
4. Search for the program by typing the name in the field Type Group Service Name and selecting it when it populates
5. Click **Search**

6. Select the program from the table by clicking anywhere in the row
7. Click the **Employees Schedule** tab:
  - a. All employees with an active service account for the specified group service will be listed in the left header column of the schedule table
  - b. If a particular employee is not listed, verify that they have an active service account.
  - c. The number of consumed weekly hours, scheduled weekly hours, and max available weekly hours will appear under each employee's name.
  - d. Creating entries on this tab will automatically create the client schedule
8. To create a new schedule, use the calendar or arrow icons to go to the desired week. Alternatively, click **Actions**, then select **New Schedule** from the drop-down menu to display the next blank schedule by week.
  - a. Select the **week** to copy from the drop-down and click **Ok**
  - b. Click **Yes** to confirm
  - a. Employee Name – Auto populates with the employee's name of the selected cell
  - b. EVV Location – Select from the drop-down menu
  - c. Day – Auto populates the date of the selected cell but can click in the field to open the calendar and select a different date
  - d. Start Time – Click in the field to select a shift start time
  - e. End Time - Click in the field to select a shift end time
  - f. Select the clients for the group service
  - g. Note – Optionally add a note for the employee
  - h. Reminder - Enter the numeric value (minutes, hours, days, or weeks)
  - i. Reminder Type - Select Minutes, Hours, Days, or Weeks from the drop-down
  - a. To copy the same schedule as the previous week, click the **Copy** icon (two pieces of paper).
  - b. To create a new schedule shift, click the **blank cell** to open and complete the schedule form wizard:
9. Click **Schedule** and **Save** to confirm
  - a. An employee cannot be scheduled if they are already scheduled somewhere else. To view an employee's full schedule, click **Scheduling** on the main menu and **Employees** on the submenu.
  - b. Shifts cannot be scheduled if the authorization has expired
10. Repeat until the schedule is complete
  - a. Copy entries by dragging and dropping to a new cell and update the schedule form wizard as necessary
11. Click **Publish**
12. Review exceptions and make changes as needed
13. Click **Publish** on the review exceptions window
14. Click the **Client Schedule** tab:
  - a. All clients with an active service account for the specified program will be listed in the left header column of the schedule table
  - b. If a particular client is not listed, verify that they have an active service account.
  - c. The client schedule is automatically created as entries are added to the employee schedule tab
  - d. Entries cannot be created on the client schedule tab

### View Group Service Schedule

1. Log in to DCI with personal profile
2. Click **Scheduling** on the main menu
3. Click **Group Services** on the submenu
4. Search for the group service by typing the name in the field Type Group Service Name and selecting it when it populates
5. Click **Search**
6. Select the group service from the table by clicking anywhere in the row
7. The Group Services Schedule builder has two scheduling tabs:
  - a. Lists all employees who have an active service account for the group service
  - a. Employee Schedule
    - i. There are several numbers listed by each client. Hover over each number to view what it represents.
      1. The first number is consumed weekly hours. This is the total of all pending and approved punches for the service code for the week.
      2. The second number is scheduled weekly hours. This is the total hours of saved shifts for the week.
      3. The third number is max available weekly hours, which is set on the authorization. A warning will be displayed if an attempt to schedule over the max available weekly hours is made.
  - a. Client Schedule
    - i. Lists all clients who have an active service account for the group service
    - ii. Clients are listed once per service code
8. The default view is a weekly view. To view an hourly view of one day, click **Day** or click **Today** to view today's schedule. To return to the Week view, click **Week**.
9. Navigate to other weeks by using the arrows or the calendar icon
10. Each shift will display the start time, end time, and total hours.
  - a. On-Call Shifts - Appear in dark blue
  - b. Scheduled Shifts (published) - Appear in light blue
  - c. Offered Shifts - Appear in yellow
  - d. Unpublished Changes - Appear in green
  - e. Deleted Unpublished Changes - Appear in bright red
11. There are several tools available to quickly make changes to the schedule
  - i. **Trash** icon - Clear the current schedule
  - ii. **Copy** icon - Copy the schedule from a previous week
  - iii. **Printer** icon – Print the schedule

12. Right-click on any schedule entry and select

- a. **View** - View details
- b. **Edit** - Edit the entry
- c. **Delete** - Delete the entry

### Shift Swapping – View, Approve, and Reject Requests

**Description:** Employees can offer published shifts if they are unable to work the scheduled shift. Another employee with an active service account for the same group service can claim the shift. If no one claims an offered shift, it will revert to the original employee's schedule.

Shift swaps must be approved by the supervisor before they are complete. The schedule is automatically updated and re-published when a shift swap occurs. No further supervisory action is required.

1. Log in to DCI with 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 for which the user has the supervisor role
5. Review the details of the shift swap in the table including:
  - a. Client/Program
  - b. Service Code
  - c. Initial Employee - Employee offering shift
  - d. Claimed By - Employee claiming shift
  - e. Shift Date
  - f. Shift Timings
  - g. Status
  - h. Action
6. In the Action Column, click **A** to approve the shift swap or the red **R** to reject the shift swap
  - a. Action cannot be taken until an offered shift has been claimed by another employee
7. In the schedule, the entry will change from a yellow offered entry to a light blue published entry.
  - a. Both employees will be notified that the supervisor has reviewed the shift swap if the message template is enabled

### Review Employee Availability Template

**Description:** Employees can create availability templates so that supervisors know when they are available to work. Availability templates must be approved by a supervisor upon creation and when a template is updated. If the template is approved, supervisors cannot schedule an employee outside the hours of their approved availability template.

1. Log in to DCI with personal profile
2. Click **Scheduling** on the main menu
3. Click **Availability Templates** on the submenu
4. Use the filters to find the desired employee's availability templates, or simply scroll through the table.
5. Click anywhere in the row to open the **Availability Template Details** page
6. After reviewing the template, return to the Availability Templates page.
  - a. Click the **A** to approve the template or the red **R** to reject the template
  - b. Please note: If the template is approved, supervisors cannot schedule an employee outside the hours of their approved availability template.
7. Return to the Availability Templates page at any time to view an employee's availability

### Reports

**Description:** There are several scheduling reports regarding group services available to supervisors:

- Employee Schedule Report
  - Client Schedule Report
  - Group Service Schedule Report
  - Missed Shift Report
1. Click **Reports** on the main menu
  2. Hover over **Scheduling Reports** on the submenu
  3. Select a report from the flyout menu
  4. Use filters or click **Search** to populate all data
  5. Drag and drop column headers into the order of choice
  6. Click **Download** to open the download report wizard
    - a. Use the arrows to move items from the available columns to the selected columns
    - b. Reorder columns as needed by dragging and dropping the item into place
    - c. Click **Next**
    - a. Format – Select the download file format. Choices include Excel, PDF, CSV, and Tab Delimited.
      - i. If PDF is selected, the Orientation field will become available. Select Portrait or Landscape.
    - b. Save as Report Download Preference box – If checked, DCI will save the format and orientation preferences for subsequent downloads.
    - c. Click **Download** and **Yes** to confirm
      - a. Columns tab:
      - b. Options tab:
  7. Click the downloaded file to open

8. Enable editing and use data as needed

## **Message Templates**

**Description:** Message templates are automated messages and notifications that, if enabled, are sent to users based on specific events or triggers within the system. Message templates can only be edited by a super user. They are split into two categories, messages and notifications. For more information on message templates, visit the help center. The following message templates are available for the scheduling module:

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

## **Related articles**

- [May 2024 Release Notes](#)
- [Group Service - Supervisor Guide](#)
- [April 2024 Release Notes](#)
- [System Set-Up - Admin Guide](#)
- [Managing Entries - Guide](#)