User Guide: Schedule Module

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I. Overview

The scheduling module is a comprehensive system that captures all shifts for an employee or client. Using the scheduling module in DCI will reduce errors such as scheduling overtime, over authorizations, or double booking a client or employee.

There are schedule builders for each program type that interact to provide one concise schedule view for the employee and/or client. Supervisors can easily manage schedules for their programs, employees, and clients.

Key Features:

- Program-specific schedule builders
- Comprehensive scheduling to prevent double booking an employee or scheduling overtime
- Alerts for overtime, over authorization, or over daily/weekly max
- Prevention of scheduling outside of authorization dates or balance
- Shift swapping with supervisor approval
- Client request for services

II. Employee Portal

The employee view of the schedule allows the employee to:

- View all shifts, even if he or she works in multiple cost centers
- Find coverage directly in the system
- Pick up additional shifts
- Receive notifications when changes are made to the schedule

A. View Schedule

The employee schedule can be seen once the schedule has been published.

1. Log in to your personal profile.
2. Click “Schedules” on the sidebar.
    - The schedule module displays the current week’s schedule listed by service account. All of your active service accounts will appear in the first column.
    - Each published shift will appear in blue on your schedule including start and end time, total hours, and the client or program name, if applicable.
    - There are two numbers under each date. The first number is the total number of hours worked based on your pending and approved punches. The second number is how many total hours are scheduled for the day.
3. To see a detailed view of the current day’s scheduled shifts click “Today.”
4. To view a different week, use the arrows or the calendar icon.

Tips:

- You will receive notifications when:
  - The schedule has been published
  - If changes are made to the schedule and it is re-published
- Your schedule can also be accessed from your mobile device.
- Click the printer icon to print your schedule. Keep in mind that you will need to refer to the schedule in DCI if any changes are made.

B. Offer Shift

If you are unable to work a scheduled shift, you can offer the shift for another employee to cover. To do so, go to the Schedules tab in your profile.

1. Click the shift you wish to offer up.
2. On the shift details page, click Offer Shift.
3. Click Yes on the confirmation window.
4. The offered shift will turn red on your calendar.

Once another employee has claimed your offered shift, your supervisor will review the schedule swap. You will receive a notification when this review is complete. If the swap is approved, the offered shift will no longer appear on your schedule. If no one claims your offered shift or your supervisor rejects the swap, it will be added back to your schedule and you will be responsible for working the shift.

If you are able to work the shift, you can rescind the offer.

1. Click the shift to open the details.
2. Click Reclaim Shift.
3. Click Yes on the confirmation window.
4. The shift will appear blue again on your schedule.

C. Claim Offered Shift

To see shifts that other employees have offered, select the checkbox next to “View Offered Shifts” above the calendar. Only shifts that you have an active service account for will appear on the offered shifts schedule. Offered shifts will appear in yellow.

To select an offered shift:

1. Click the shift you want to claim.
2. Click “Claim Shift”.
3. Click “Yes” on the confirmation window.

The shift will remain yellow until it is reviewed by your supervisor. You will receive a notification when the shift swap has been reviewed. If the swap is approved, the shift will appear blue on your schedule. If it is rejected, it will be given back to the original employee.

To cancel your claim request:

1. Click the shift.
2. Click “Cancel Request”
3. Click “Yes” on the confirmation window.

D. Availability Template

You are able to create availability templates in DCI so that your supervisor knows when you are available to work. To create a new availability template:

1. Login to your personal profile
2. Click “Availability” on the sidebar
3. Click Actions, then “Create Template”
4. Give your template a name.
    a. Availability templates are created for a set of days that you have the same availability for. For example, if you are only available from 6 AM to 6 PM on weekdays, but all day on weekends, you will have two different availability templates. Name your template accordingly.
5. Select the start and end times that you are available. Please see note above regarding different start and end times for different days.
6. Select the dates this availability template is good for. You can select a range of up to 13 weeks.
7. Check the days that this availability template applies to.
8. Click Save. You will have the opportunity to make changes to your template after clicking save.
9. Click Yes on the confirmation window
10. You can make changes to your template by changing individual entries, or editing the entire template.
    a. To change an individual day, right-click on the entry.
        i. Click “edit” to edit the start and end time.
            1. Make the desired changes, then click Save
            2. On the confirmation window, click Yes to apply to just this individual entry. Click “Yes to All” to apply to all entries on the same day of the week.
        ii. Click “delete” to delete the entry from the template.
            1. On the confirmation window, click “Yes” to apply to delete just this individual entry. Click “Yes to All” to delete all entries on the same day of the week.
    b. To change the entire template, click the pencil next to Pending.
11. Repeat steps 3-10 to create templates for other time frames on other days of the week.
12. When you have finished editing your templates, click Publish.
13. Select the template you wish to send to your supervisor for approval. If you are not finished with your templates, you can continue working on them at a later time and send to your supervisor when it is complete.
14. Click Yes on the confirmation window.

15. The schedule status has changed to Published. Once your supervisor reviews it, it will turn green if it is approved and red if it is rejected.

Availability templates can be created for up to 13 weeks, and must be renewed when they have reached their end date. Changes can be made to pending, published, and approved templates. If you edit an approved template, it will need to be re-published for supervisor approval.

E. Authorization Check

Hourly employees can check if there is enough authorization units and an existing authorization for future service dates. When running an authorization check, the system will alert the employee if the shift:

- Results in overtime
- Overlaps with a published schedule entry
- Exceeds the authorization balance
- Is outside of the authorization dates

To run an authorization check:

1. Login to your personal profile
2. Click Entries on the sidebar
3. Click Actions
4. Click Authorization Check
5. Complete the form for the proposed shift
6. Click Verify
7. If the shift passes all above listed rules, you will receive a green check mark. If the shift violates any of the above listed rules, you will receive a red x.

Client Portal

The client view of the schedule allows the client to:

- View all shifts, even if he or she has multiple employees
- Request services directly in the system
- Receive notifications when changes are made to the schedule

A. View Personal Schedule

1. Your schedule can be seen once your coordinator has published it.
2. To view your schedule, first log in to your personal profile.
3. Click “Schedules” on the sidebar.
4. The schedule module displays the current week’s schedule listed by employee. Any employee with an active service account linked to you will appear in the list. If you attend a Day or Group Services Program, these programs will also be listed.
5. Each published shift will appear in blue on your schedule including start and end time, total hours, and the employee or program name.
6. To see a detailed view of the current day’s scheduled shifts click “Today.”

7. To view a different week, use the arrows or the calendar icon.
8. Click the printer icon to print your schedule.

B. Request Services

If you would like to receive services on a particular day, you can submit a request for services using DCI. To do so, go to the Scheduling Module, then click Actions.

1. Click "New Request"
2. Complete the request form. Select the date, start time, end time, service and employee you would prefer to work. Please note that if the employee is unavailable, your coordinator might schedule a different employee.
3. The request will appear on your schedule as pending and has been sent to your coordinator for review. You will receive a notification when this review is complete. If the request is approved, the shift will appear blue on your schedule. If it is rejected, it will no longer appear and your coordinator will provide you details as to why it was rejected. If you would like to cancel your request, please contact your coordinator.

Guardian Portal

The client view of the schedule allows the guardian to:

- View all shifts for each client they are a guardian for, even if he or she has multiple employees
- Request services for a client directly in the system
- Receive notifications when changes are made to the schedule

A. Viewing Client Schedules

Client schedules can be seen once your coordinator has published it. To view client schedules:

1. Log in to your guardian profile.
2. Click "Clients" on the sidebar.
3. Select the client from the table.
4. Click the Schedule tab.
    a. The schedule module displays the current week's schedule listed by employee. Any employee with an active service account linked to the client will appear in the list. If the client attends a Day or Group Services Program, these programs will also be listed.
    b. Each published shift will appear in blue on the schedule including start and end time, total hours, and the service provided. Click an individual entry to see more details.
5. To see a detailed view of the current day's scheduled shifts click "Today."
6. To view a different week, use the arrows or the calendar icon.
7. Click the printer icon to print the schedule.

B. Request Services

If you would like to receive services on a particular day, you can submit a request for services using DCI. To do so:

1. Click “Clients” on the sidebar.
2. Select the client from the table.
3. Click the Schedule tab.
4. On the Scheduling Module, click actions.
5. Click “New Request”
6. Complete the request form. Select the date, start time, end time, service, and employee you would prefer to work.
   a. If the employee is unavailable, your coordinator might schedule a different employee.
   b. Add any particular notes for the request, if needed.
7. The request will appear on the schedule as pending and has been sent to your coordinator for review. You will receive a notification when this review is complete.
   a. If the request is approved, the shift will appear blue on the schedule.
   b. If it is rejected, it will no longer appear and your coordinator will provide you details as to why it was rejected.
   c. If you would like to cancel your request, please contact your coordinator.

Supervisor Portal

The supervisor portal:

- Enables schedule building for each program type
- Provides a comprehensive view of all employee shifts through Employee Schedule
- Prevents scheduling overtime and over authorization
- Prevents double-scheduling employees and clients
- Allows for efficient management of shift swapping
- Enables easy-to-use client requests for services
- Compares actual time worked against scheduled shifts

A. 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.

To view shift swapping requests:

1. Log in to your personal profile
2. Click Scheduling on the top bar
3. Click Pending Approvals on the side bar
4. The table will list all shift swap requests for the cost centers you have Supervisor Role for. Action cannot be taken until an offered shift has been claimed by another employee.
5. Review the details of the shift swap including:
    a. Client/Program
    b. Service
    c. Employee offering shift
    d. Employee claiming shift
        i. The number of hours already worked, the scheduled hours, and total available weekly hours will be listed under the employee.
    e. Shift Date
    f. Shift Time
6. Click "A" to approve the shift swap or "R" to reject the shift swap.
7. The entry will change from a yellow offered entry to a blue published entry on the schedule. Both employees will be notified of the review.

Additional Notes:

- If no one claims an offered shift, it will revert back to the original employee's schedule.
- The schedule is automatically updated and re-published when a shift swap occurs. You do not need to revise the schedule based on the shift swap.

B. Client Requests

Clients can request services through the scheduling module. The request can be made for a specific date and time, as well as the preferred employee. Supervisors of the client's cost center will receive a notification when a new request is submitted.

To view client requests:

1. Log in to your personal profile
2. Click Scheduling on the top bar
3. Click Client Requests on the side bar
4. The table will list all client requests for the cost centers you have Supervisor Role for.
5. Review the details of the request including:
    a. Client/Program
    b. Service
    c. Preferred employee
    d. Employee claiming shift
    e. Shift date
    f. Shift Time
6. Click "A" to approve the request. The entry will move from pending status to published.
7. If the preferred employee is unavailable, click "E" to edit the shift time or the employee.
8. If the request cannot be granted, click "R" to reject the request.

9. The client/guardian will be notified when your review is complete.

C. Review Availability Templates

Employees are able to create availability templates in DCI so that supervisors know when they are available to work. Availability templates must be approved by a supervisor before they are taken into consideration and whenever a change is made to them. You are unable to schedule an employee outside of their approved availability templates.

To review an employee's availability template:

1. Login to your personal profile
2. Click Scheduling on the top bar
3. Click Availability Templates on the side bar
4. Use the filters to find the desired employee's availability templates, 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 R to reject the template
7. You can return to the Availability Templates page at any time to view an employee's availability.

D. Create Schedules

There are several schedule types, each with a few nuances specific to the service model. The types of schedules include:

- Clients
- Employees
- Residential Programs
- Day Programs
- Group Service Programs
- Parenting Programs

For all schedule types, the general process of creating a schedule is the same:

1. To create a new schedule for the next blank week, click Actions, then click New Schedule. Or, use the calendar or arrow icons to go to the desired week.
2. If you want to use the same schedule as a previous week, click the Copy icon.
    a. Select the week you wish to copy in the pop-up window
    b. Changes can be made to the schedule by right-clicking on individual entries or creating new entries by following the steps below.
3. Click the blank cell on the day you wish to create a shift for.
4. Complete the schedule entry form. All entry forms will include start and end time, but will vary in other fields depending on the schedule type.
    a. Common Fields:

i. EVV Location: When adding an entry to a schedule for a Day Program, Residential Program, or Hourly Service, you have the option to select an EVV location for that shift. When selected, and the Schedule Comparison function is enabled, the system will check that the punch location matches the selected location on the schedule entry.

ii. Critical Shift: When adding an entry to a schedule for a Day Program, Residential Program, or Hourly Service, you have the option to select "critical" for that shift. When selected, the system will send alerts if the employee is not clocked in within the time frame established for your DCI instance. Alerts will be sent based on the settings for the Critical Gap Event Message Template.

iii. Reminders: When adding an entry to a schedule for a Day Program, Residential Program, Hourly Service, or Parenting Program you have the option to include a shift reminder that will remind the employee of his or her upcoming shift. In the free text box, enter a number that represents how long before a shift you want the employee to receive the reminder; in the drop down box, select the unit of time (minutes, hours, days, or weeks).

5. Click Schedule
6. Click Yes on the confirmation window
7. To edit existing entries, right-click on the entry then click Edit.
8. To delete existing entries, right-click on the entry then click Delete.
9. Repeat until schedule is complete for all services. Copy entries by dragging and dropping to a new cell.
10. Click Publish
11. Review exceptions and make changes as needed.
12. Click Publish on the exceptions window
13. To make changes to a published schedule, simply make the desired changes then click "Publish Changes."

To View/Edit a Schedule:

1. Login to your personal profile
2. Click Scheduling on the top bar.
3. Click the desired schedule type on the sidebar.
4. Use the search filters to find the desired schedule.
5. Select the desired entity by clicking anywhere in the client row. The schedule details will appear on the next screen with the current week's schedule displayed.
6. When you open a schedule, you will see the current week's schedule. The dates are listed across the top of the schedule. Each active account is listed in the far left column. You might need to use the scroll bar to see all accounts.

7. The default view is a weekly view. To view an hourly view of one day, click “Day” or click “Today” to go to today’s schedule. To return to the Week view, click Week.
8. You can easily navigate to other weeks by using the arrows or the calendar icon.
9. There are several tools available to quickly make changes to your 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.
10. Right-click on any schedule entry to:
    a. View Details
    b. Edit the entry
    c. Delete the entry
11. After making changes to a published schedule, click “Publish Changes.” This updates the published schedules that are visible to users. Users will be notified that there was a schedule change.

E. Hourly Services Schedule

Hourly Services Schedules are made per client. The Client Schedule Builder is designed to prevent scheduling over authorization, outside of authorization dates, and over the daily or weekly max.

Create New Hourly Services Schedule

1. Click Clients in the Scheduling Module
2. Follow the steps listed in **Section D (Create Schedules)** to create a new schedule.
3. On the entry form:
    a. Client Name and Service Code will be prepopulated based on the cell you click
    b. Select an EVV Location if needed. Setting an EVV Location will require the employee to complete the shift at the specified location.
    c. Set the day, start time, and end time
    d. Select the employee. Only employees with an active service account with this client and service code will appear. If you do not see an employee, verify that they have an active service account.
    e. Add any notes if needed
    f. Critical: select the checkbox if this shift is considered critical. A critical shift gap notification will be sent if the employee does not clock in for the scheduled shift.
    g. Reminder: if you wish to remind the employee of the shift via notifications, enter the number of minutes/hours/days/weeks and select type. For example, if you wish to notify them 24 hours prior to shift start, set reminder as 1 day.
    h. Complete the remaining steps as listed on page 10.

View Hourly Services Schedule

1. Follow the steps in Section D to view Client Schedules.
2. There are several numbers listed on each service code in the accounts list on a Client Schedule. Hover over each number to find out what it represents.

a. The first number is consumed weekly hours. This is the total of all pending and approved punches for the service code for the week.
b. The second number is scheduled hours. This is the total hours of saved shifts for the week.
c. The third and fourth numbers are the maximum available daily hours and weekly hours. These are both set on the authorization. You will receive a warning if you attempt to schedule over the maximum available daily hours.
d. Hover over the "*I*" icon to see more authorization details, including the authorization end date and the remaining balance. You will not be able to create schedule entries beyond the end date or that exceed the remaining balance.

F. Employee Miscellaneous Schedule

The Employee Schedule allows the supervisor to create schedules for miscellaneous account types including Administration, Training, and Drive. It is available to all supervisors who are linked to the employee via default cost center or an active service account. Supervisors can view the Employee Schedule to see all scheduled shifts for the employee's active service accounts. This is helpful when creating Program or Client Schedules to prevent double-scheduling an employee.

Create New Employee Schedule

1. Select Employees from the side bar of the Scheduling Module
2. Follow the steps listed in **Section D (Create Schedules)** to create a new schedule.
3. Complete the entry form
    a. Employee Name and Account Type will be prepopulated based on the cell you click
    b. Select an EVV Location if needed. Setting an EVV Location will require the employee to complete the shift at the specified location.
    c. Set the day, start time, and end time
    d. Add any notes if needed
    e. Reminder: if you wish to remind the employee of the shift via notifications, enter the number of minutes/hours/days/weeks and select type. For example, if you wish to notify them 24 hours prior to shift start, set reminder as 1 day.
4. Complete the remaining steps as listed on page 10.

View Employee Schedule

1. Follow the steps listed in Section D to view employee schedules.

G. Residential and Parenting Schedules

The Residential Schedule and Parenting Schedule Builders allow the supervisor to create a schedule specifically for a chosen program. All employees with an active service account for that program will be listed on the schedule builder. The module takes the weekly allocated hours into consideration as the schedule is created.

Create New Residential/Parenting Program Schedule

1. Click Actions, then New Schedule, or use the calendar/arrows to navigate to the desired week.
2. If the number of hours to be scheduled is different than the default hours, click Actions, then click "Set Required # of Hours."
    a. The default hours are Weekly Hours set on the Program Profile. To update the default hours, go to the Program Profile Details Page and click Actions, then click Edit.
3. Enter the number of hours to be scheduled, then click Save.
4. If the number of hours to be scheduled is the same as the default hours, skip steps 2 and 3.
5. Follow the steps listed in **Section D (Create Schedules)** to create a new schedule.
6. Complete the entry form
    a. Select the employee
    b. Set an EVV location if needed
    c. Set the day, start and end time
    d. Add any notes as needed
    e. On-Call: the shift will not count toward the program weekly hours.
    f. Critical: select the checkbox if this shift is considered critical. A critical shift gap notification will be sent if the employee does not clock in for the scheduled shift.
    g. Reminder: if you wish to remind the employee of the shift via notifications, enter the number of minutes/hours/days/weeks and select type. For example, if you wish to notify them 24 hours prior to shift start, set reminder as 1 day.
7. Follow the remaining steps in Section D to complete the schedule.

View Residential/Parenting Program Schedule

1. Follow the steps in Section D to view Residential/Parenting Program schedules.
2. All employees with an active service account for the specified program will be listed in the leftmost column of the schedule table
    a. The number of weekly hours, hours scheduled, and hours available will appear under each employee name
    b. If you do not see the employee you wish to schedule, verify that they have an active service account

H. Day Program

The Day Program Schedule Builder allows the supervisor to create a schedule specifically for a chosen Day Program. The Day Program Schedule Builder has two tabs: Clients Schedules and Employees Schedules. All clients and employees with an active service account for that program will be listed on the corresponding tab. The Clients Schedule must be created before creating the Employees Schedule, as the builder takes staffing ratios into account.

Create New Day Program Schedule

1. First create the Client Schedule from the Clients Schedule Tab
    a. All clients with an active service account for the specified program will be listed in the leftmost column of the schedule table
        i. The number of weekly hours, hours scheduled, and hours available will appear under each employee name
        ii. If you do not see the client you wish to schedule, verify that they have an active service account
    b. Complete the steps listed in Section D to build the schedule.
2. Once the Clients Schedule has been published, click the Employees Schedule Tab
    a. Select the day of the week that you will be scheduling for. This will update the Required Employees Number on the hourly tables.
    b. Complete the steps listed in Section D to build the Employees Schedule.

View Day Program Schedule

1. Follow the steps listed in Section D to view the Day Program Schedule.
2. The Day Program Schedule builder has two tabs:
    a. Clients Schedule
        i. Lists all clients who have an active service account for the Day Program.
        ii. Clients will be listed once per service code
        iii. There are several numbers listed on each service code. Hover over each number to find out what it represents.
        iv. The first number is consumed weekly hours. This is the total of all pending and approved punches for the service code for the week.
        v. The second number is scheduled hours. This is the total hours of saved shifts for the week.
        vi. The third and fourth numbers are the maximum available daily hours and weekly hours. These are both set on the authorization. You will receive a warning if you attempt to schedule over the maximum available daily hours.
        vii. Hover over the "*I"* icon to see more authorization details, including the authorization end date and the remaining balance. You will not be able to create schedule entries beyond the end date or that exceed the remaining balance.
    b. Employees Schedule
        i. At the top of the Employee's schedule is an hourly view of the required employees compared to scheduled employees. Click the dropdown next to Select Day to change the day.

1. Required Employees number will be updated when the Client Schedule is published.
2. Scheduled Employees updates as new entries are added to the schedule.

ii. All employees with an active service account for the specified program will be listed in the leftmost column of the schedule table

1. The number of weekly hours, hours scheduled, and hours available will appear under each employee name
2. If you do not see the employee you wish to schedule, verify that they have an active service account

I. Group Services

The Group Services Schedule Builder allows the supervisor to create a schedule specifically for a chosen Group Services Program. The Group Services Program Schedule Builder has two tabs: Employees Schedules and Clients Schedules. All employees and clients with an active service account for that program will be listed on the corresponding tab. As the Employees Schedule is created, the Clients Schedule will automatically build based on employee shifts.

Create New Group Services Program Schedule

1. First create the Employee Schedule from the Employee Schedule tab. Creating entries on this tab will automatically create the client schedule.
    a. Complete the entry form
        i. Verify the date
        ii. Set the start and end time
        iii. Select the clients the employee is assigned to
        iv. Add any desired notes

View Group Services Schedule

1. Follow the steps listed in Section D to view Group Services Schedules.
2. The Group Services Schedule builder has two tabs:
    a. Employee Schedule
        i. All employees with an active service account for the specified program will be listed in the leftmost column of the schedule table
            1. The number of weekly hours, hours scheduled, and hours available will appear under each employee name
            2. If you do not see the employee you wish to schedule, verify that they have an active service account
    b. Client Schedule
        i. Lists all clients who have an active service account for the Group Services Program.
        ii. Clients will be listed once per service code