Ability to Schedule without an Authorization

A new security group has been added to allow the ability to schedule without an authorization. The first step will be to add the individuals that would be allowed to do this task.

After adding the individual to the new security group. That individual would go in and schedule the visits filling out the below areas:
Frequency – Dates – Services – bill type – Pay Type – Times – client and Staff

After filling out all the fields - Select Add in the upper right hand corner
After selecting the ‘Add’ button you will see the schedule populate on the bottom of the screen. You will see that there are color coded ‘boxes’ to the left of the schedule. These are warnings but you are able to schedule thru them due to this new functionality.

Select commit from the upper right hand area of the screen

You will receive a warning message due to the color-coded warnings you saw after the schedules were displayed. Read the message. You know you are scheduling without an authorization or outside of the limits. Select ‘OK’

After you select OK, the schedules are no longer displayed at the bottom of the screen which means that the schedules were actually created. To validate this, Select Scheduling
Search for the date range that you created the schedules for

Select Refresh and you see the schedules

Schedules display