PTC Sandata Tutorial

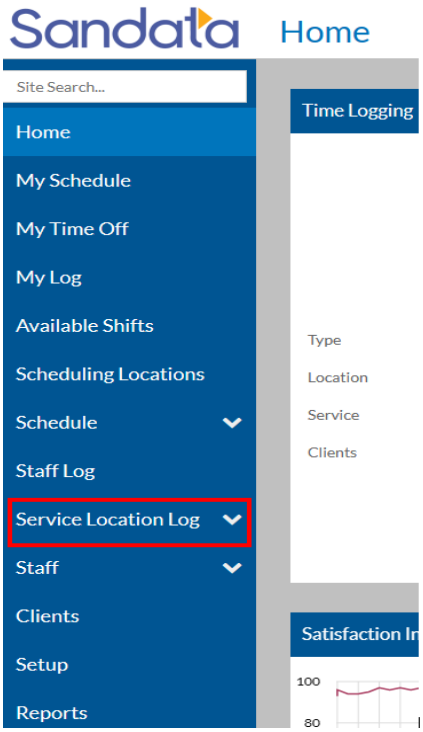
FS Managers

Approving and Checking Timecard Process

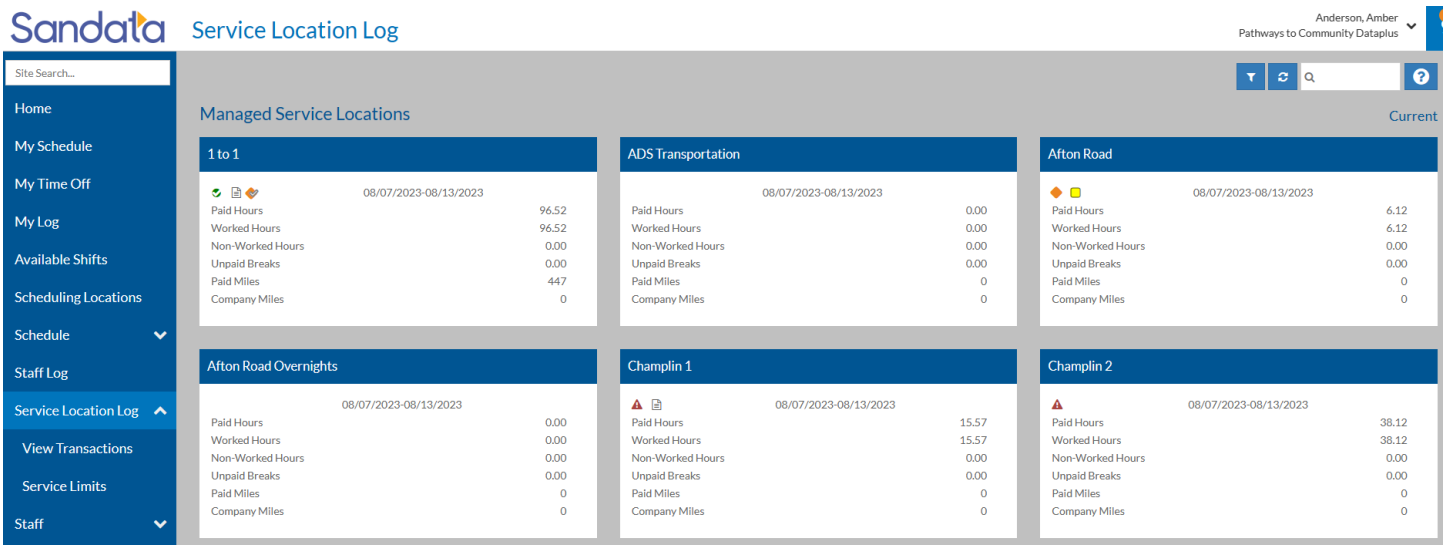
1. **FS Manager**: Timecards must be reviewed for your designated sites on a daily basis Monday to Friday.
    a. Monday's timecards are checked for the prior weekend.
    b. Mondays, all approvals must be completed by 11am.
    c. If you are unable to complete any timecard tasks by the deadlines given, you must get permission from the FS Senior Manager. This includes making a plan if you are using PTO, taking a vacation, are out sick, etc. It is your responsibility to reach out and coordinate with the Senior Manager.
2. **FS Senior Manager**: Timecards must be reviewed for your designated sites on a daily basis Monday to Friday.
    a. Monday's timecards are checked for the prior weekend.
    b. Mondays, all approvals must be completed by 2pm.
    c. If you are unable to complete any timecard tasks by the deadlines given, you must get permission from the Director. This includes making a plan if you are using PTO, taking a vacation, are out sick, etc. It is your responsibility to reach out and coordinate with Director.

Approving Timecards—Direct Care Shifts

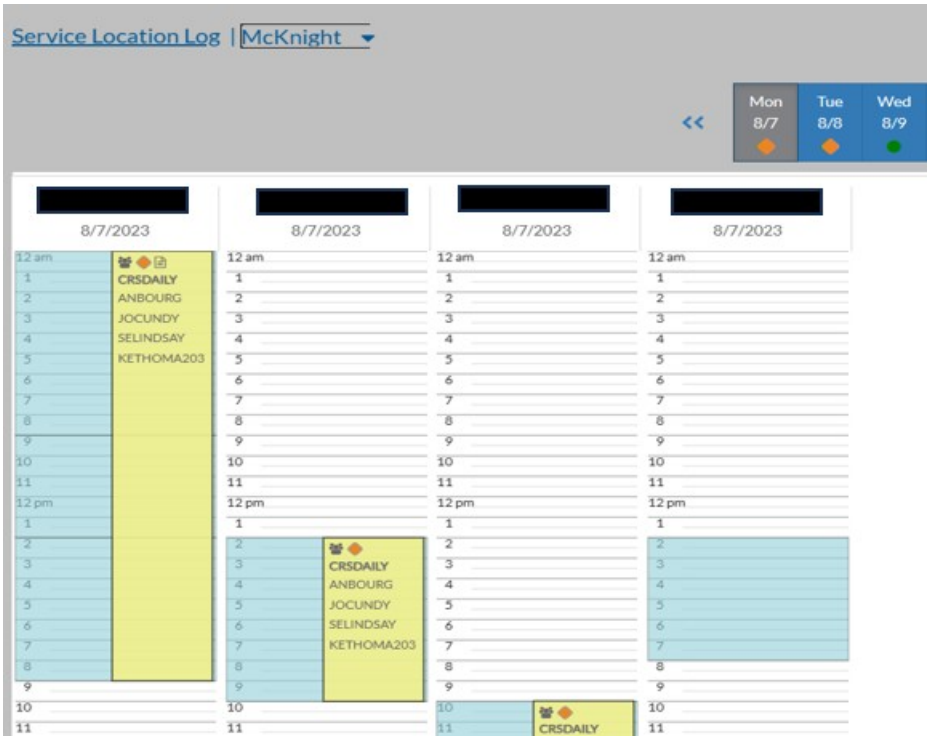
1. Start by clicking on "**Service Location Log**."



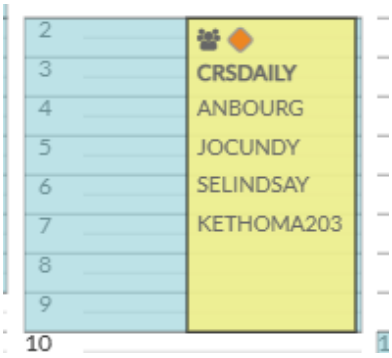
2. Your screen should look similar to the below.



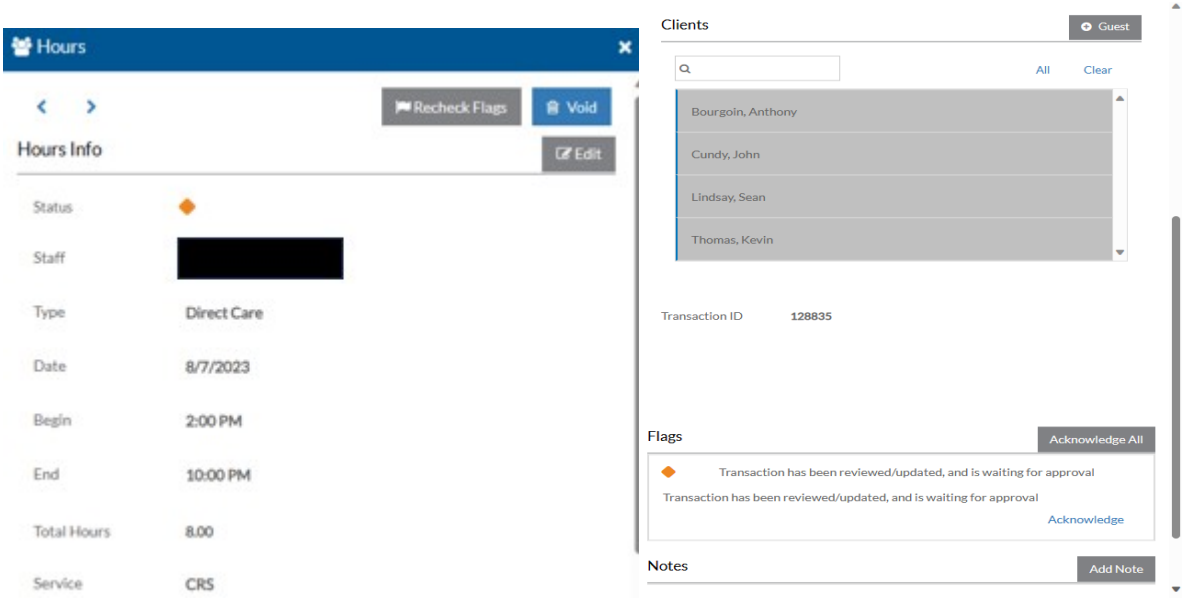
3. Under Managed Services Locations, find and click on the Site(s) you which to review/approve timecards. This would be 1 to 1 or Wknd.



4. If it looks like the below, this shows a completed timecard. Before approving, you will need to double check the following:
    a. Are all individuals accounted for?
    b. If some of the individuals were not clocked in, do you know the reason?
    c. Are there any error messages? This could indicate an overlap.
    d. Does their time appear accurate?
    e. Was this their scheduled shift? If not, do you know why they worked this shift?

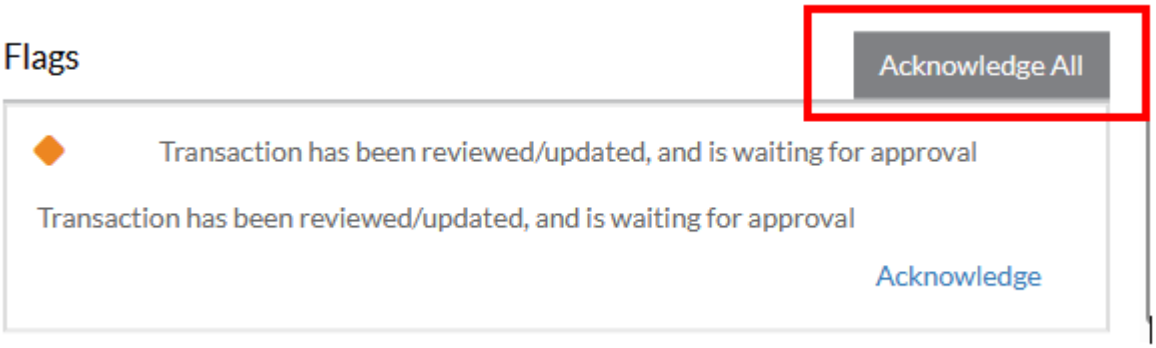


5. Click on the **yellow box** to view more details. You will need to scroll to see the full timecard.



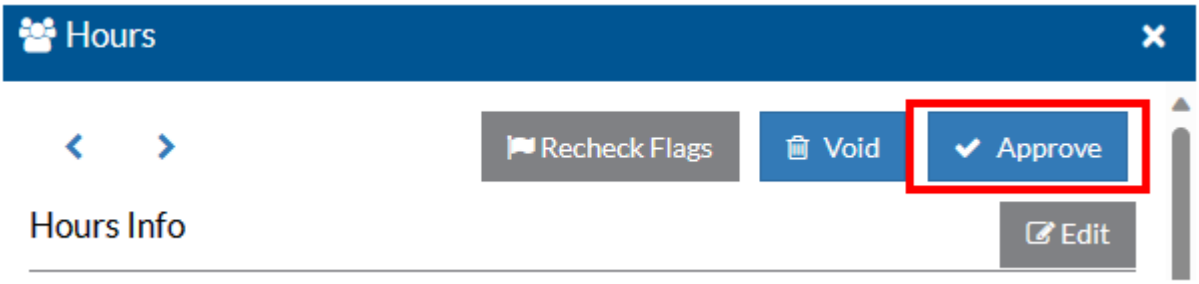
6. **Status** indicates whether or not a timecard has been acknowledged yet.

7. While in your staff's timecard, look at the Flags. Flags will indicate any error messages. Some flags will always be present, see below. If everything appears accurate, click on "**Acknowledge All**."

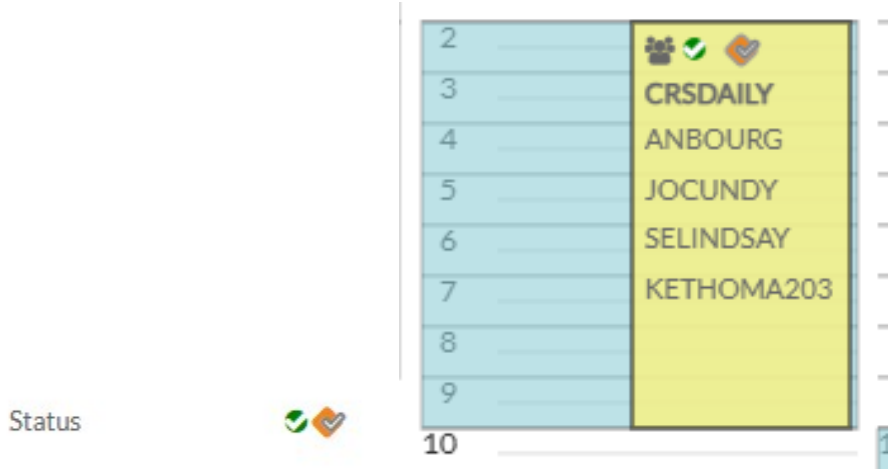


8. Now that you have acknowledged, the Status should now look like the below:

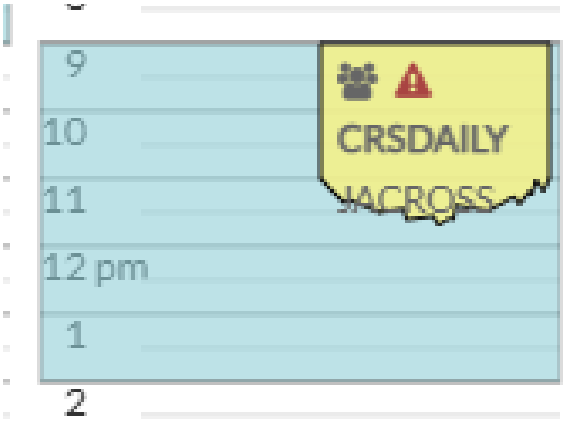
9. The Green Circle indicates that the timecard is now waiting for final approval. Click on "**Approve**."



10. Now that you have approved, you will see the below Status, which will look like the below.

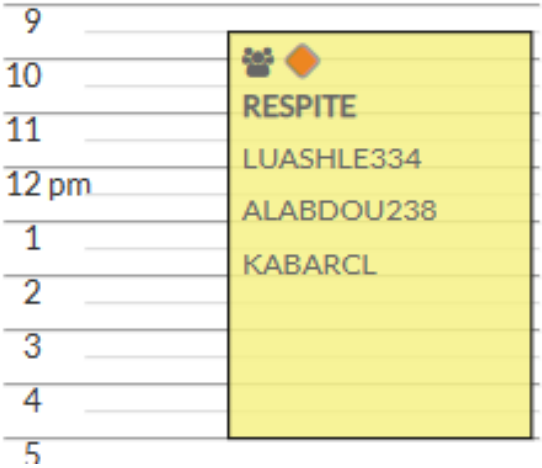


11. If you see the below, it indicates an incomplete timecard (looks similar to a torn piece of paper). The Red Triangle with the exclamation point, also indicates an error (which in this case, is due to the timecard missing an end time). You will need to follow up with your staff and have them enter in their end time.



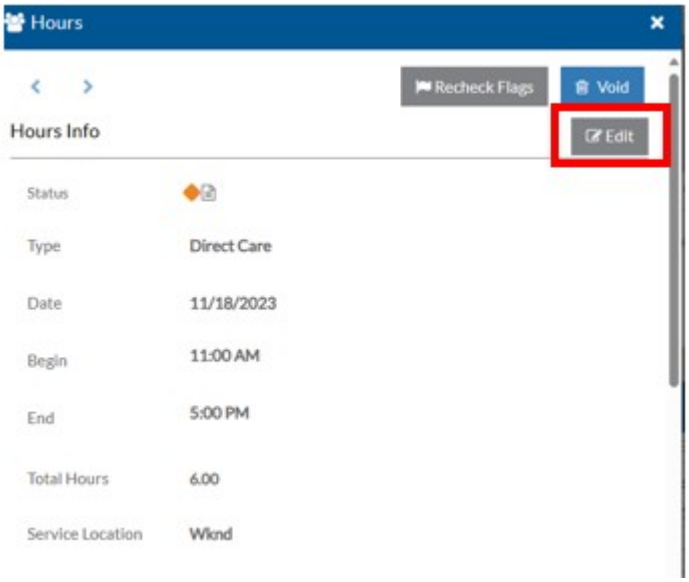
12. If you see the below, this indicates that there is an error.

13. You are checking a Wknd Timecard and notice below that a staff forgot to clock in with one of the individuals. They had four people scheduled in their care.

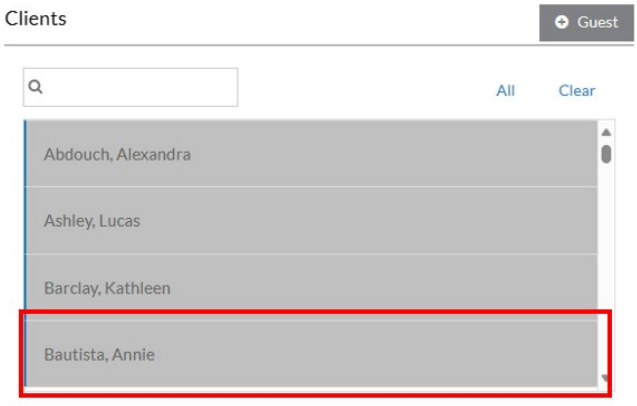


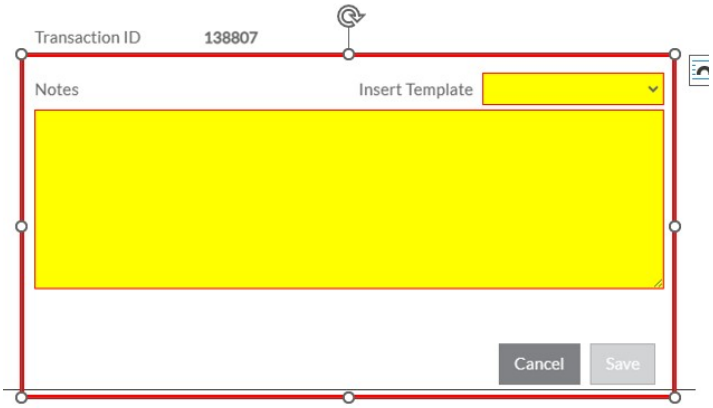
a. Please reach out to the staff to fix it first. If for some reason you are unable to get hold of the staff, you may fix to meet a payroll deadline.

14. Now it is time to fix the error. Click on the Yellow Box for the staff that missed clocking in with one of the individuals. Click on "**Edit**."

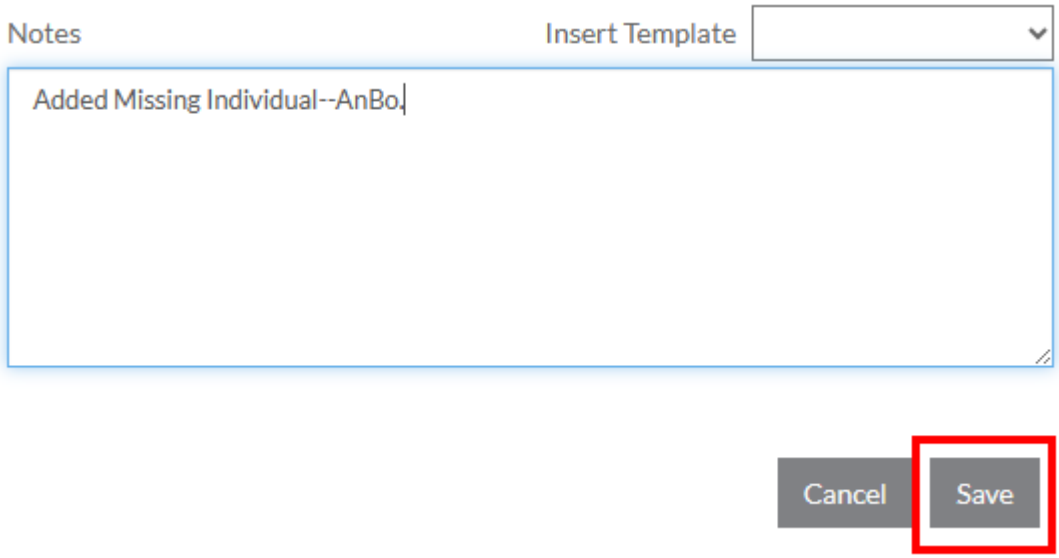


15. Fix the timecard by selecting the name of the other Client in your care. Once you fixed the timecard, it will highlight the Notes section. You will need to enter in what change/edit you made.





16. Once you have entered in your Note, click "**Save**." You can now finish approving this timecard.



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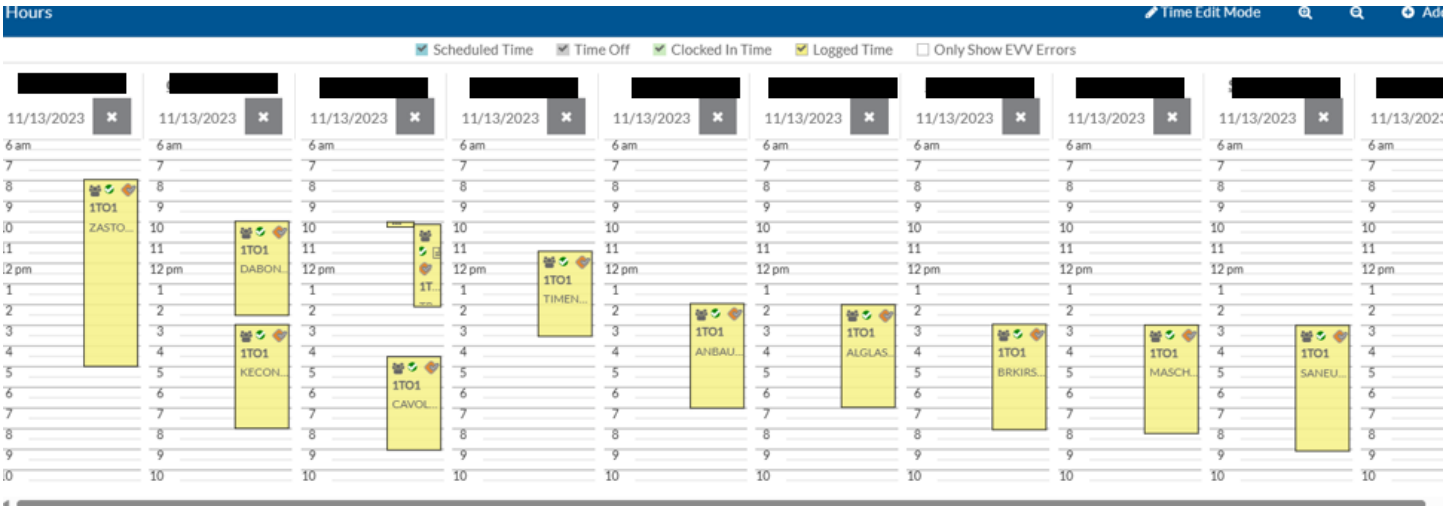
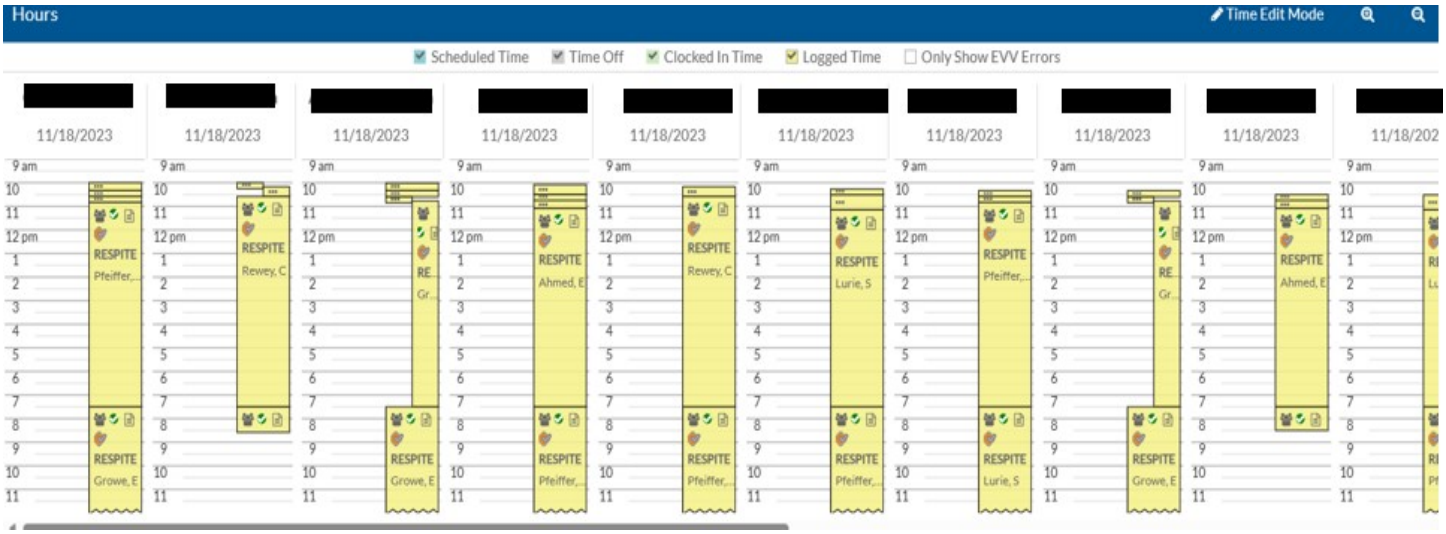
Tips for Viewing the Service Location Log

1. There are two ways to filter in the Service Location Log—**By Staff** or **By Client**.

2. If you view **By Staff**, you will see all the timecards laid out according to each Staff's time log, shown below. This is a great way to make sure all staff time logs are accounted for.

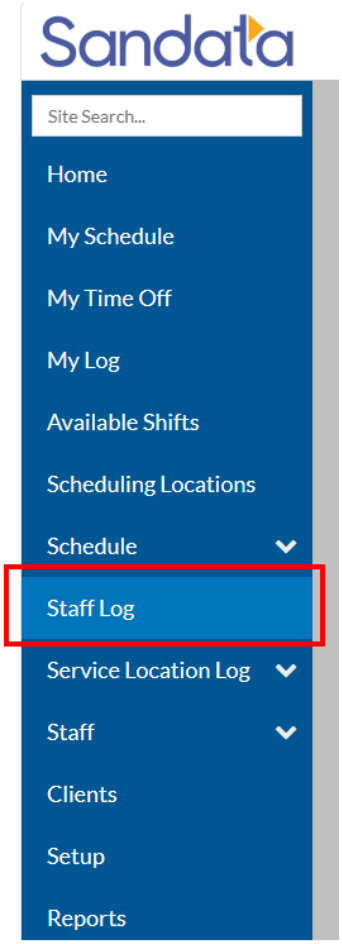


3. If you view **By Client**, you will see all the timecards laid out according to each Individual's time that the staff logged in with them. This is very helpful when looking at Wknd timecards, as you can see if any individuals have any gaps in their timecards or are missing.

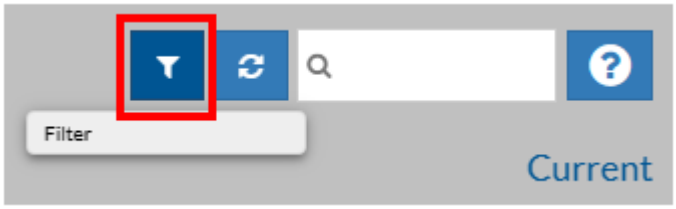


Approving Timecards—Non-Direct Care or Training Shifts

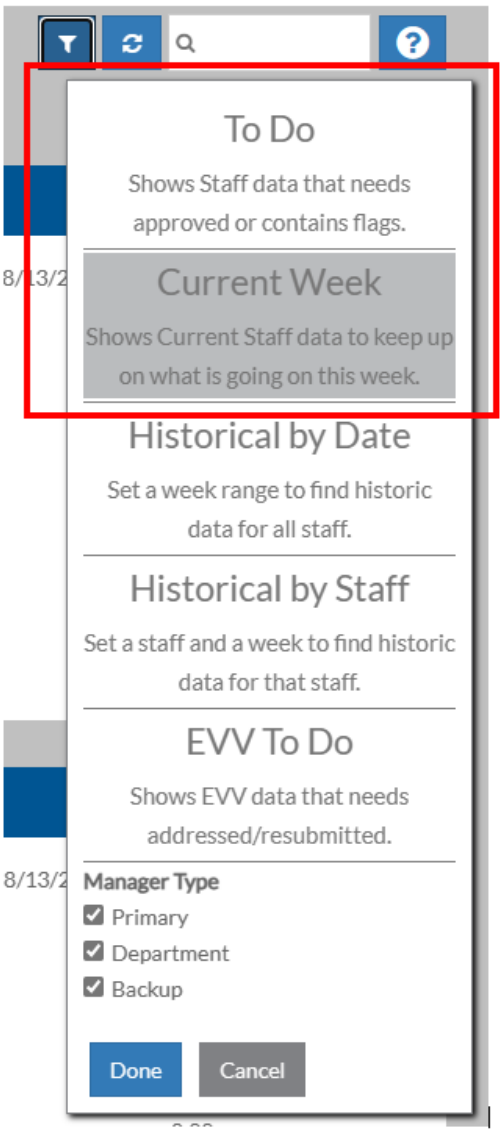
1. After you finish viewing/approving Time Logs under the Service Location Log, you will now want to start viewing **Staff Logs.** This will allow you to see any Admin/Training/Non-Direct Care shifts that will NOT show up on Service Location Logs. Click on "**Staff Log.**"



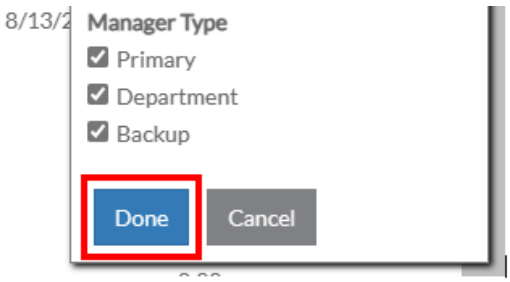
2. There are two ways to filter the views of your Staff Log. Click on the **Filter Icon** in the upper right corner of your screen (It looks similar to a funnel).



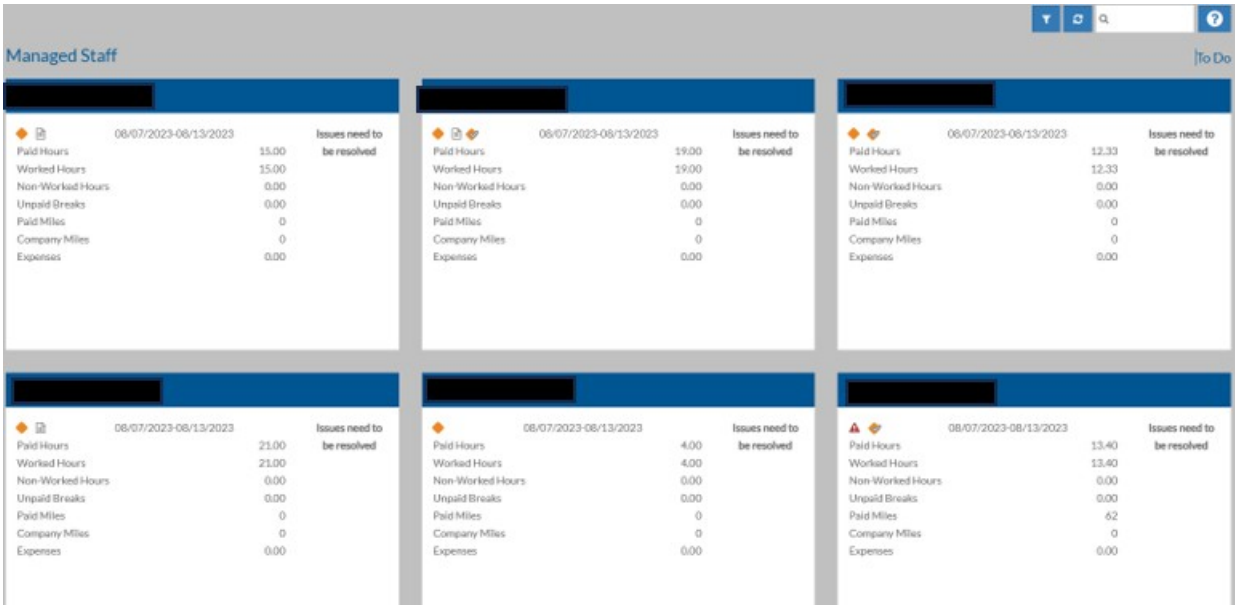
3. Now you can select between two categories: **To Do** or **Current Week**
    a. **To Do:** This will show any staff that have any unapproved timecards/mileage.
    b. **Current Week:** This will show ALL staff that work for PTC. Some permissions may only allow you to see your Managed Staff only.



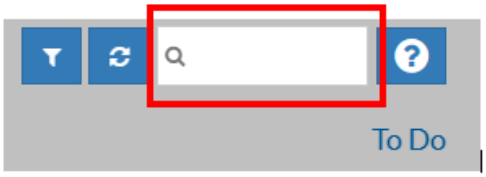
4. Click "**Done**" after selecting **To Do**.



5. You will need to know the Staff Names of those you Manage. Your screen will look similar to the below:



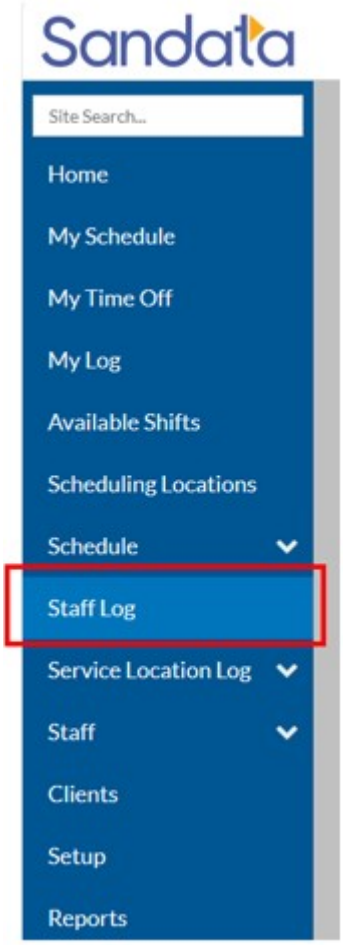
6. You can scroll down to view all the Staff or you can enter a staff name in the upper right corner Search Box to locate them.



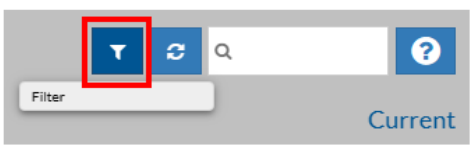
7. Start going through all of your Managed Staff and reviewing/approving timecards. These are typically not Scheduled Shifts, so you will need to ask yourself the following questions before you approve:
    a. Does the time appear accurate?
    b. Why did the staff clock in under Admin/Non-Direct Care?
    c. Did they have any Annual Trainings (such as CPR)?
    d. Are they still shadowing at the sites? If so, do the shadow times appear accurate?
    e. Are they a Supervisor/Lead, and clocked in for Admin time?
    f. If you are unsure of any timecards, you can directly contact your staff or reach out to the FS Senior Manager/Director.

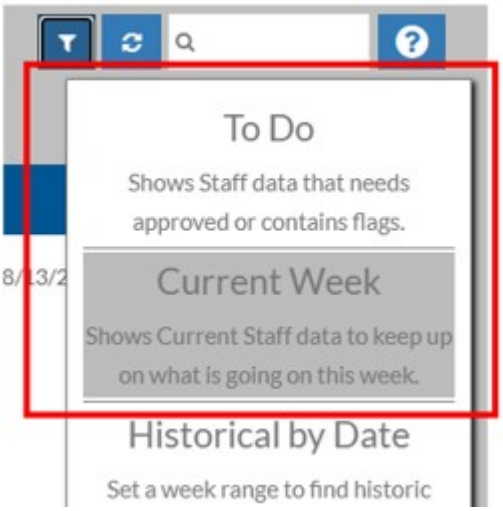
Approving Mileage Logs

1. In order to approve Staff Mileage Logs, you need to view the **Staff Log.**

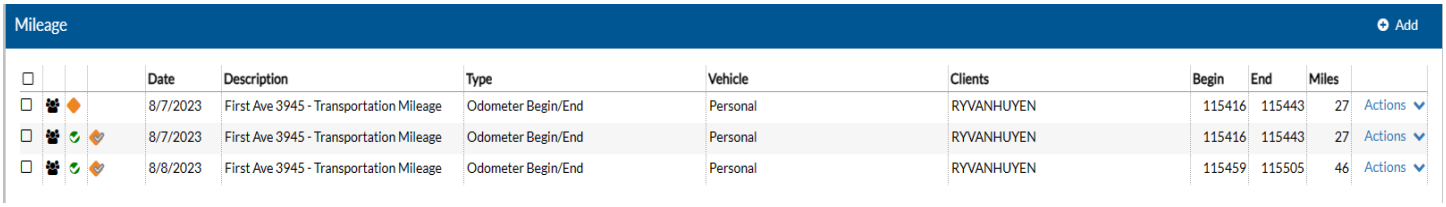


2. You will then use the **Filter Icon** and select **To Do**.





3. For each of your Managed Staff, you will click on their names, then scroll down to view their Mileage Logs.



4. Just like approving timecards, you will need to click on each mileage entry and approve one at a time. Make sure to ask the following questions:
    a. Does the mileage appear accurate? If not, are there any notes on where the staff went?
    b. Does this staff drive a company vehicle? If so, it may appear a bit different.
    c. Do the dates match the dates they worked, and the correct sites.
    d. If they have staff mileage, were they approved to track mileage to drive between sites? (This is common for Float Staff, of staff that work different shifts in the same day).
    e. If the mileage is over 50 miles for 1:1's or 150 miles for Wknd, reach out to staff to confirm it is accurate.
    f. If you are not sure of any of the above, please contact the staff directly before approving.

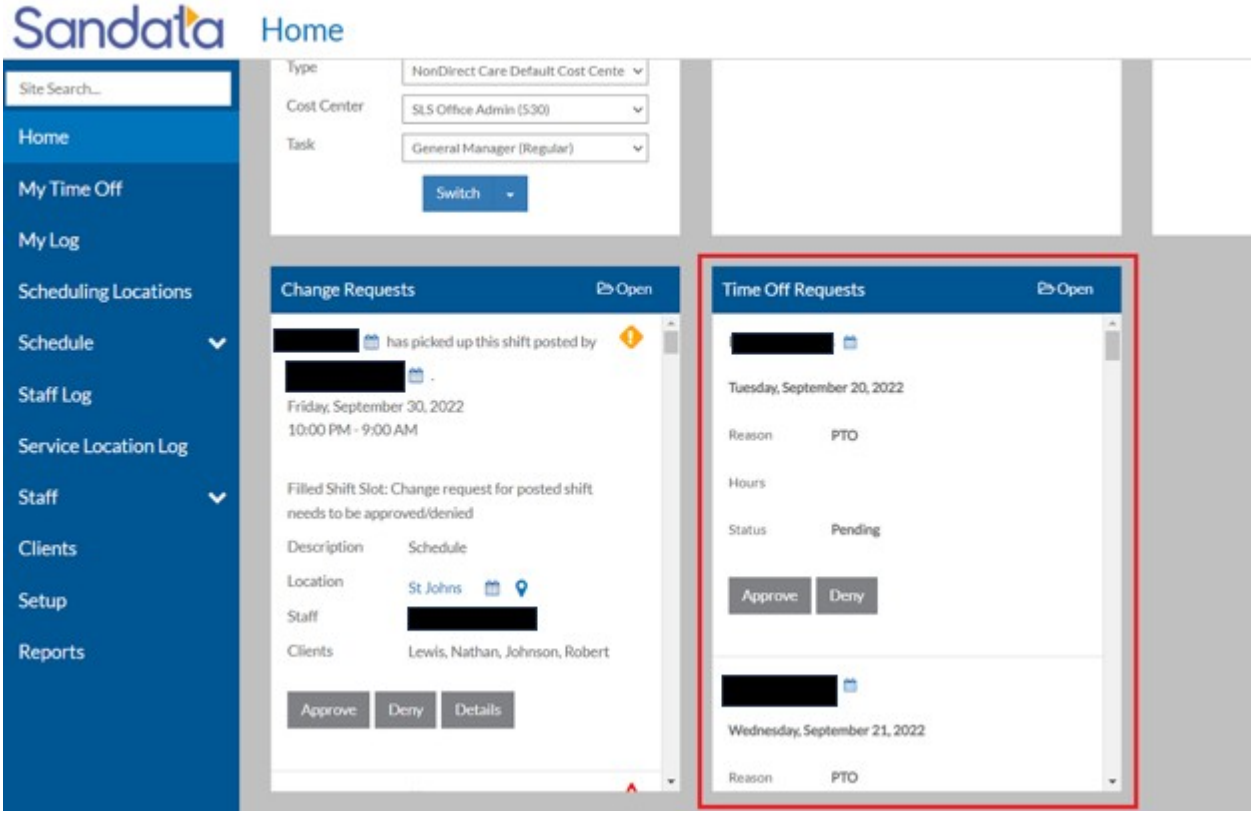
Approving PTO Process for FS Managers

Important Information

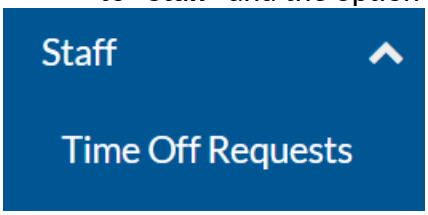
1. PTO is approved on a weekly basis by the FS Senior Manager all FS Staff by end of day each Monday.
    a. Approvals are for the previous week—Monday to Sunday.
    b. If you are unable to meet this deadline, you must get approval and coordinate with the Director.
    c. PTO approvals go hand in hand with Occurrence Tracking, so it is very important that you are cross checking PTO approvals with any missed shifts.
2. Sandata does not update a staff's PTO balance as you approve them. PTO balances are updated after payroll is processed. **Do not approve PTO for more hours than the staff have available to them.**
    a. The first week of the pay period = the most accurate PTO balance
    b. The second week of the pay period = the least accurate PTO balance. You must do the math by subtracting the first week of the pay period's approved PTO requests to get an accurate balance.
3. A staff is not eligible for PTO until after they've been with PTC for 90 days. If you're unsure if your staff of this date, you can find this in GoCo or Adaptive Care.
4. A staff cannot request more PTO than their scheduled shift. If someone has a permanent schedule of 4pm-10pm (6 hours), they cannot request 8 hours of PTO.
5. PTO is approved for all scheduled shifts—Permanent or Pick-up shifts.
6. PTO cannot be approved for a shift that a staff is scheduled to work. A staff cannot request PTO and also be clocked in for work.
7. Supervisors/Leads who have admin hours they can use PTO if they are not planning on being available for their scheduled duties.
8. If a staff wasn't able to work their scheduled shift, and did not enter in any PTO, the FS Senior Manager must enter in the PTO for them. If they do not have enough PTO to cover the missed shift, please reference the Work Attendance Policy.
9. Double check each of your Daily Schedules to make sure all staff accounted for, and PTO was entered accordingly.
10. PTO cannot be used during the last 14 days of a staff's employment.
11. Please review PTC's PTO Policy or Work Attendance Policy if you have more questions.
12. **Bereavement:** If you are entering in Bereavement for an employee, please immediately contact your Director. Once approved, send an email to Abigail Peterson (abigailp@pathwaystocommunity.com) and Ceallaigh Estepp (ceallaigh.estepp@pathwaystocommunity.com), and cc Monica Mooney (monica.mooney@pathwaystocommunity.com). **Only Directors can approve Bereavement.** If your director states it is not approved, you may change/deny.
13. **FMLA:** Deny any FMLA that has been entered in by a staff. Sarah Farinella, Talent Acquisition Specialist, will enter an approve all FMLA for employees.

Approving PTO

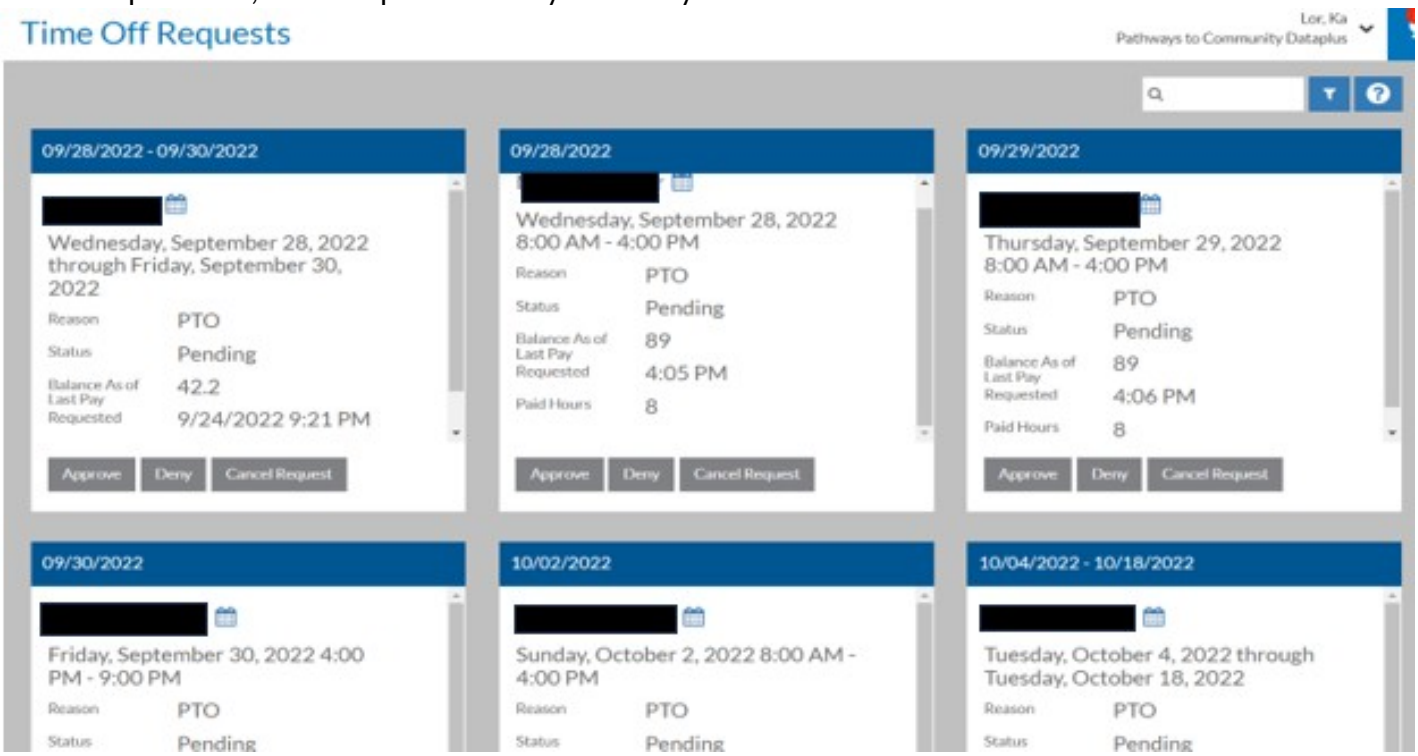
1. Once you log into Sandata, you should see a box that says "**Time Off Requests**"



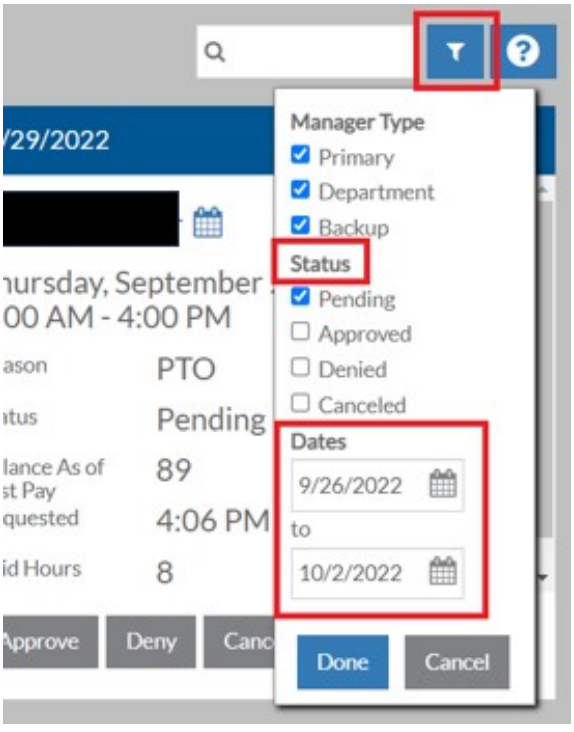
2. If you do not see this box, on the left-hand side (where the blue panel is), click on the down arrow next to "**Staff**" and the option for "**Time Off Requests**" will appear.



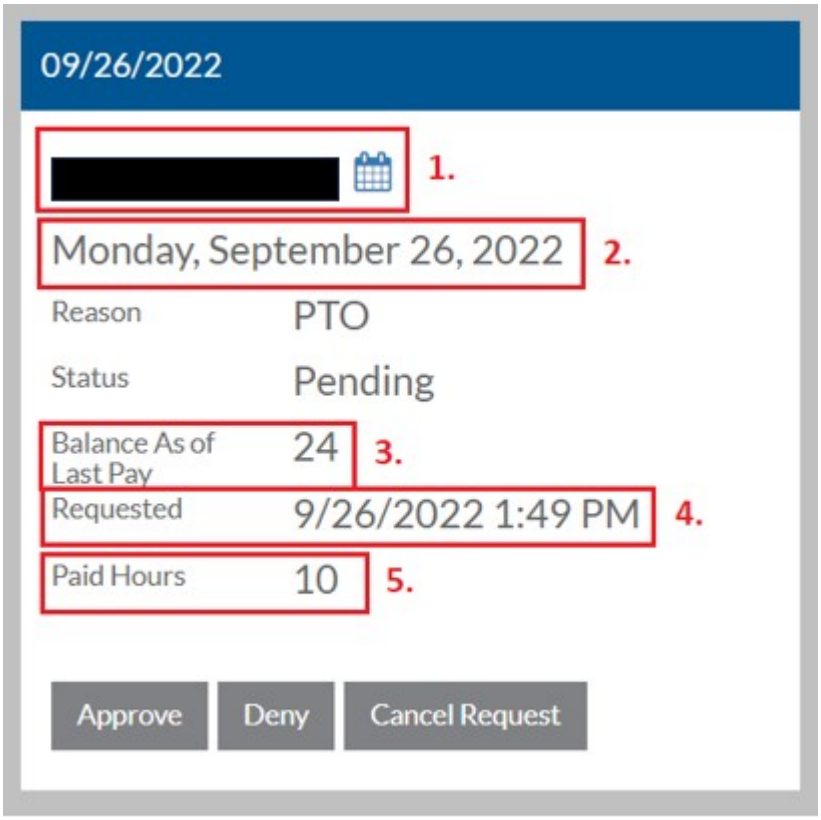
3. You should see all the time off requests by every employee at PTC. There is no way to sort this list by department, so it's important that you know your staff's names.



4. It is easiest to filter the requests by the pay week. To filter your list, click on the **funnel icon** on the right-hand side, change your status to "**pending**" and put in your pay period start and end date. Click "**Done**."



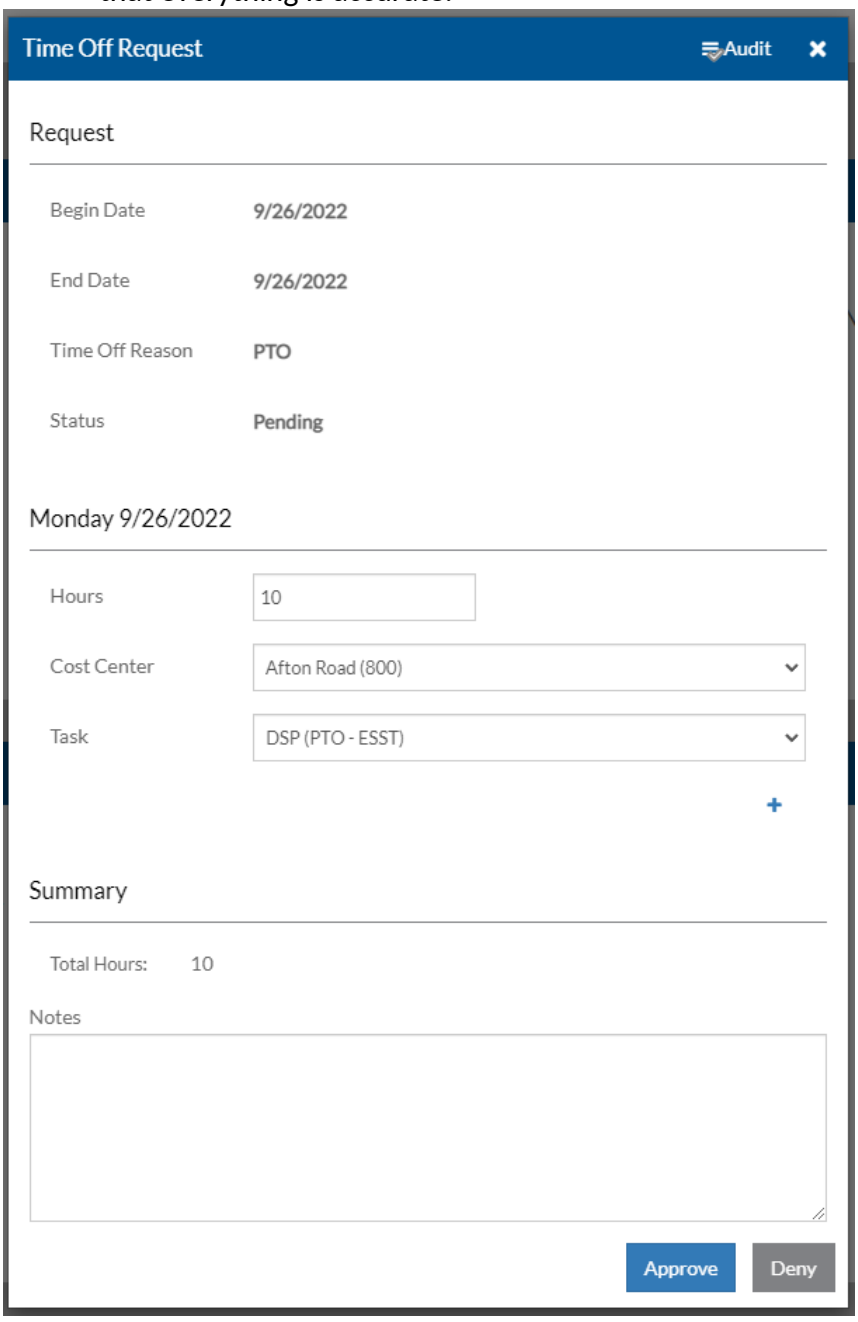
5. From this new filtered list, find your staff from the list. **Make sure you keep in mind all the important information highlighted at the beginning of this tutorial.**



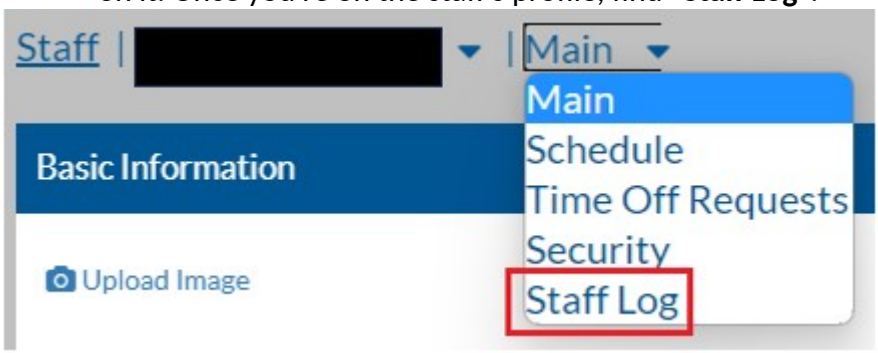
a. (1.) This is the name of the staff who is requesting time off.
b. (2.) This is the date of the time off the staff is requesting.
c. (3.) This is the current PTO balance the staff has available to them.
d. (4.) This is the date/time the staff put in the request.
e. (5.) This is the number of PTO hours the staff is requesting.

6. Once you've made sure the pending time off request meets all the requirements, you can go ahead and approve it. If the time off request does not meet all the requirements, you would deny the request. If you Deny a time off request, you must reach out to the staff and explain why it was denied. Please also make sure you put a reason why you're denying it in the notes section.

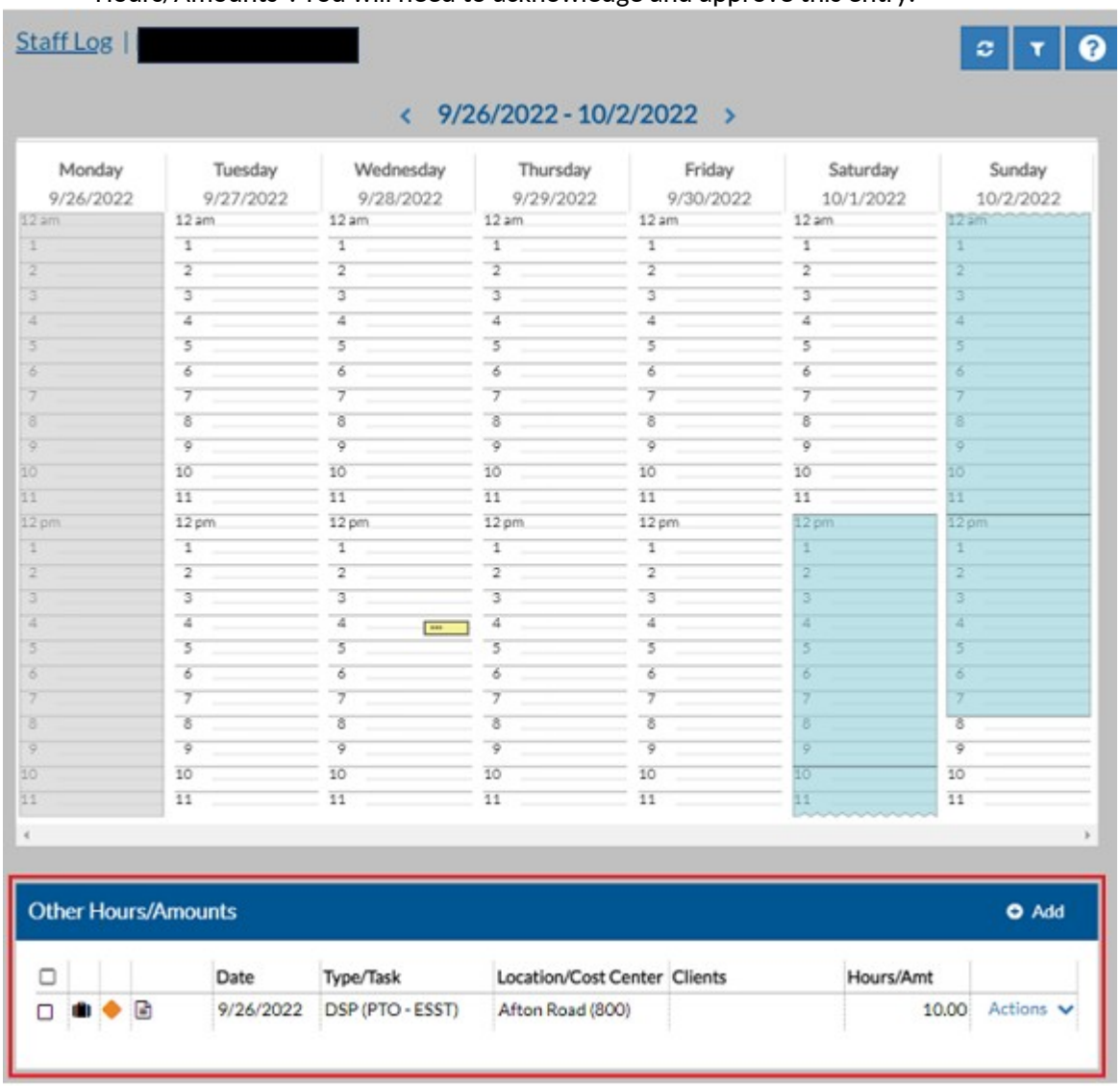
7. A pop-up like this will appear after you click "**Approve.**" Make sure the **Cost Center** reflects the name of the site. Under **Task** it should say DSP (PTO-ESST). Click "**Approve**" again once you have confirmed that everything is accurate.



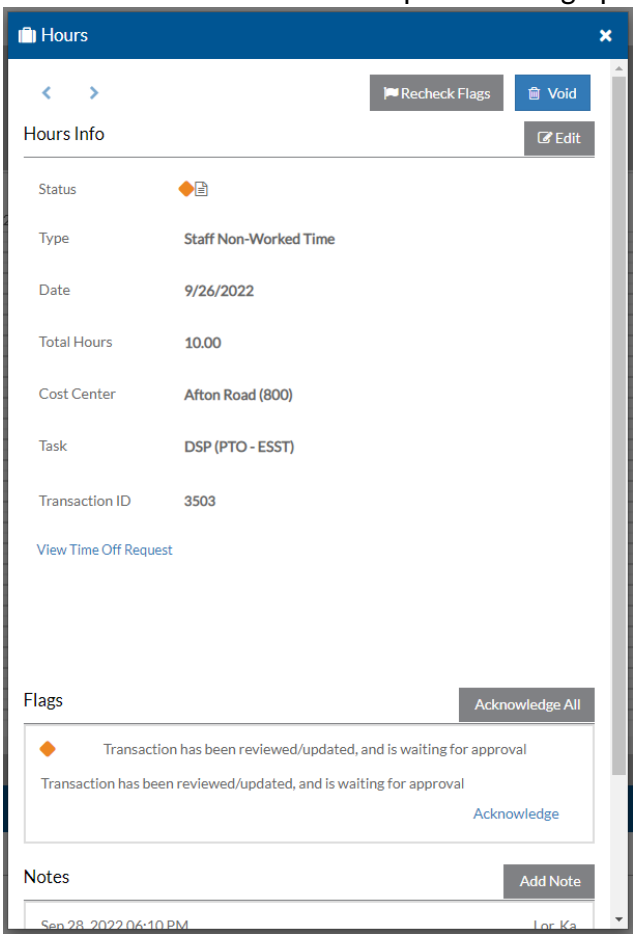
8. After you approve a time off request, you have to go into the staff's timecard to do a second approval. From the blue panel on the left side, click on "**Staff**". Find the name of your staff from the list and click on it. Once you're on the staff's profile, find "**Staff Log**".



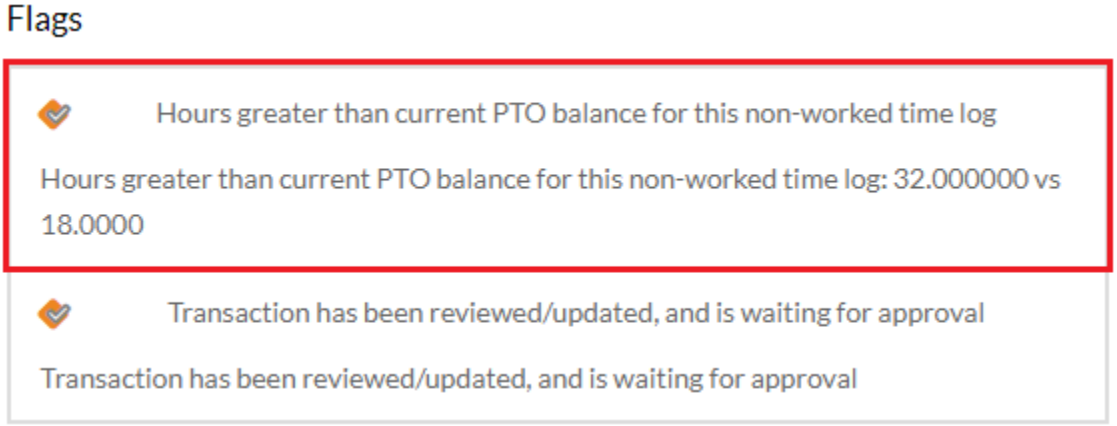
9. The time off request that you just finished approving will appear in the staff's timecard under "Other Hours/Amounts". You will need to acknowledge and approve this entry.



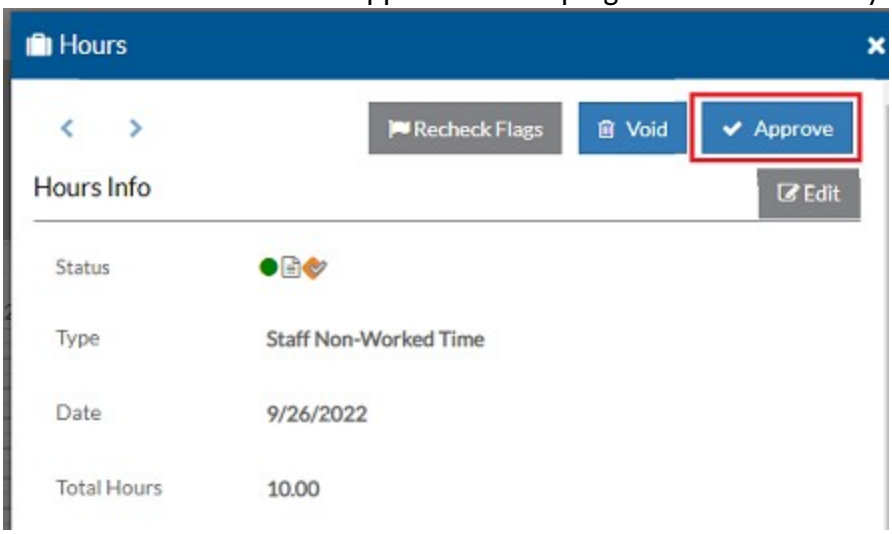
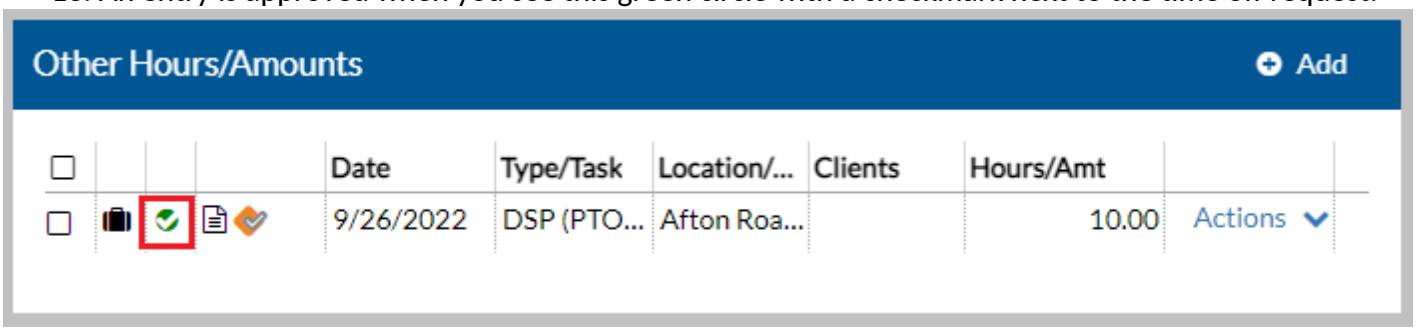
10. Click on the time off request to bring up a popup that looks like this:



11. Under where it says, "Flags", read to see if Sandata noticed anything wrong with this time off request. If you accidentally approve a staff for more PTO than they have available to them, you will see a flag that looks like the following (in this photo, it says that that you approved 32 hours, but the staff only has 18 hours of PTO). When this happens, you must edit all their time request entries, so they all total up to only 18 hours. Notify the staff of this when you're done.



12. If there's nothing wrong with the time off request, click on "**Acknowledge All**". After you click on this, a new button should appear at the top right-hand corner for you to approve the entry.



13. An entry is approved when you see this green circle with a checkmark next to the time off request.