



PTC Sandata Tutorial

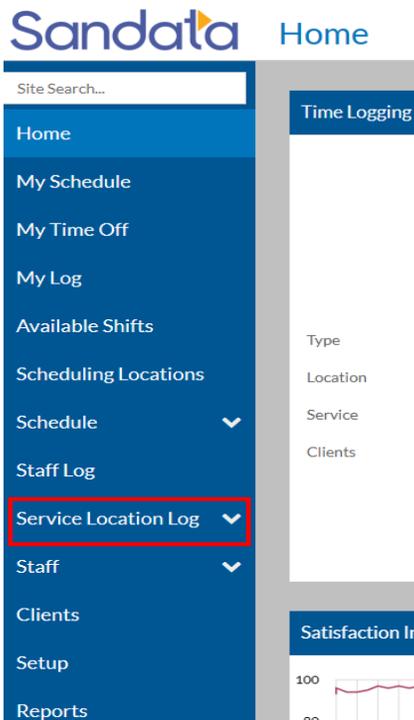
FS Managers

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.

Sandata Service Location Log Anderson, Amber Pathways to Community Dataplus

Site Search... [Filter] [Refresh] [Search] [Help]

Home
My Schedule
My Time Off
My Log
Available Shifts
Scheduling Locations
Schedule
Staff Log
Service Location Log
View Transactions
Service Limits
Staff

Managed Service Locations Current

1 to 1	ADS Transportation	Afton Road
<p>08/07/2023-08/13/2023</p> <p>Paid Hours: 96.52 Worked Hours: 96.52 Non-Worked Hours: 0.00 Unpaid Breaks: 0.00 Paid Miles: 447 Company Miles: 0</p>	<p>08/07/2023-08/13/2023</p> <p>Paid Hours: 0.00 Worked Hours: 0.00 Non-Worked Hours: 0.00 Unpaid Breaks: 0.00 Paid Miles: 0 Company Miles: 0</p>	<p>08/07/2023-08/13/2023</p> <p>Paid Hours: 6.12 Worked Hours: 6.12 Non-Worked Hours: 0.00 Unpaid Breaks: 0.00 Paid Miles: 0 Company Miles: 0</p>
Afton Road Overnights	Champlin 1	Champlin 2
<p>08/07/2023-08/13/2023</p> <p>Paid Hours: 0.00 Worked Hours: 0.00 Non-Worked Hours: 0.00 Unpaid Breaks: 0.00 Paid Miles: 0 Company Miles: 0</p>	<p>08/07/2023-08/13/2023</p> <p>Paid Hours: 15.57 Worked Hours: 15.57 Non-Worked Hours: 0.00 Unpaid Breaks: 0.00 Paid Miles: 0 Company Miles: 0</p>	<p>08/07/2023-08/13/2023</p> <p>Paid Hours: 38.12 Worked Hours: 38.12 Non-Worked Hours: 0.00 Unpaid Breaks: 0.00 Paid Miles: 0 Company Miles: 0</p>

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.

Service Location Log | McKnight

Mon 8/7 Tue 8/8 Wed 8/9

8/7/2023	8/7/2023	8/7/2023	8/7/2023
12 am	12 am	12 am	12 am
1	1	1	1
2	2	2	2
3	3	3	3
4	4	4	4
5	5	5	5
6	6	6	6
7	7	7	7
8	8	8	8
9	9	9	9
10	10	10	10
11	11	11	11
12 pm	12 pm	12 pm	12 pm
1	1	1	1
2	2	2	2
3	3	3	3
4	4	4	4
5	5	5	5
6	6	6	6
7	7	7	7
8	8	8	8
9	9	9	9
10	10	10	10
11	11	11	11



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?

2	 CRSDAILY ANBOURG JOCUNDY SELINDSAY KETHOMA203
3	
4	
5	
6	
7	
8	
9	
10	

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

Hours

Hours Info

Status 

Staff [REDACTED]

Type Direct Care

Date 8/7/2023

Begin 2:00 PM

End 10:00 PM

Total Hours 8.00

Service CRS

Buttons: Recheck Flags, Void, Edit

Clients Guest

Search:

All Clear

- Bourgoin, Anthony
- Cundy, John
- Lindsay, Sean
- Thomas, Kevin

Transaction ID 128835

Flags Acknowledge All

-  Transaction has been reviewed/updated, and is waiting for approval
- Transaction has been reviewed/updated, and is waiting for approval Acknowledge

Notes Add Note

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

Status 



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."

Flags

Acknowledge All

Transaction has been reviewed/updated, and is waiting for approval

Transaction has been reviewed/updated, and is waiting for approval

Acknowledge

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

Status



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

Hours

Recheck Flags Void **Approve**

Hours Info Edit

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

Status

2	 CRSDAILY ANBOURG JOCUNDY SELINDSAY KETHOMA203
3	
4	
5	
6	
7	
8	
9	
10	



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.

Status



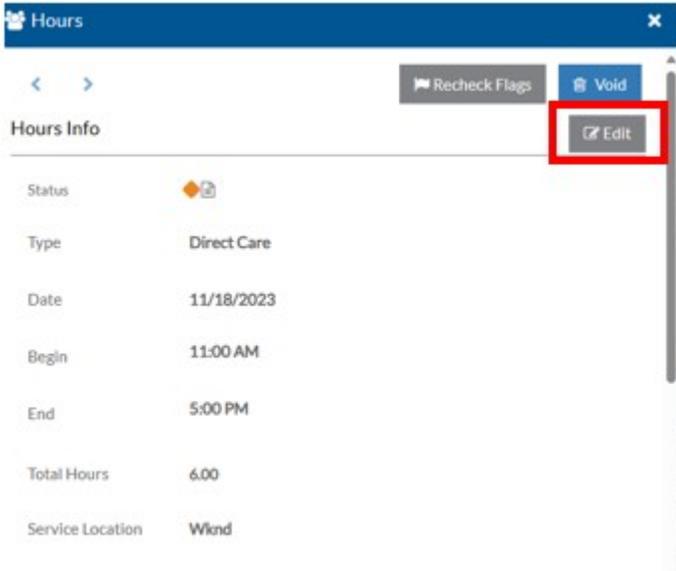
13. You are checking a Wknd Timecard and notice below that a staff forgot to clock in with one of the individuals. They had four people scheduled in their care.



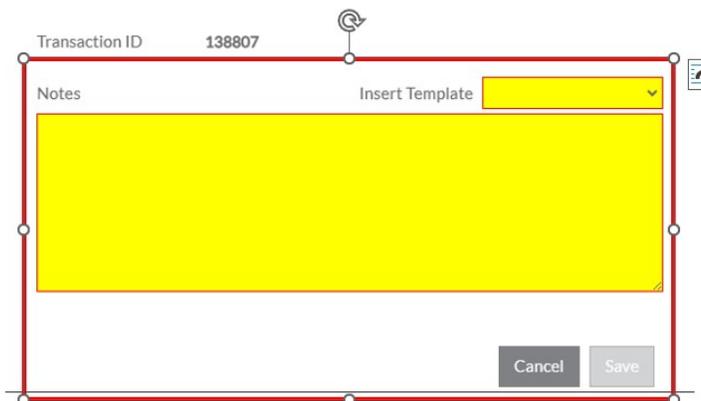
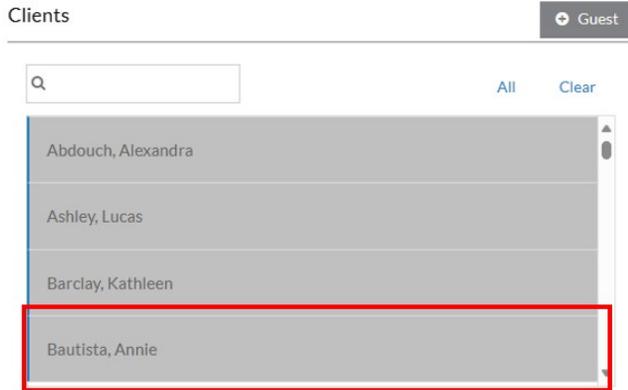
- a. Please reach out to the staff to fix it first. If for some reason you are unable to get hold of the staff, you may fix to meet a payroll deadline.



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.

Notes Insert Template

Added Missing Individual--AnBo|

|

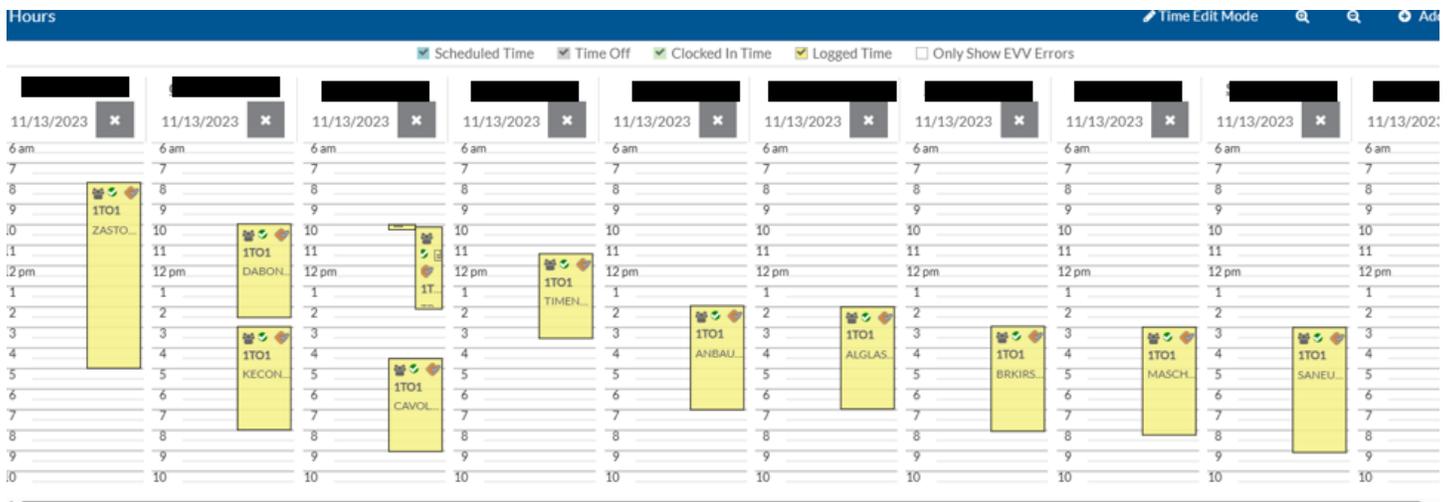


Tips for Viewing the Service Location Log

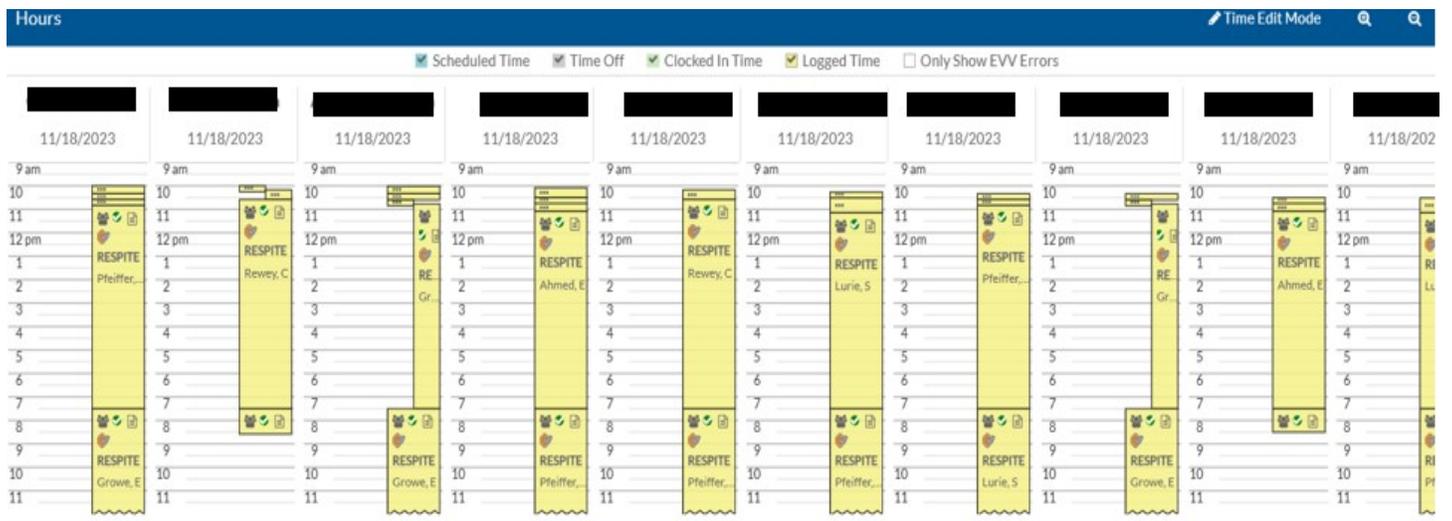
1. There are two ways to filter in the Service Location Log—**By Staff** or **By Client**.



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.



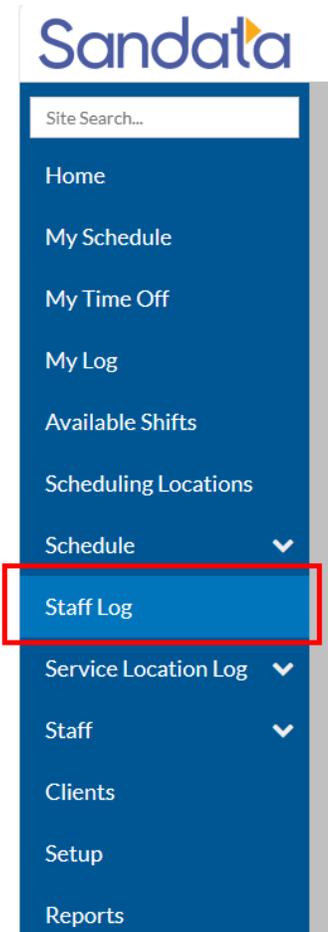
3. If you view **By Client**, you will see all the timecards laid out according to each Individual's time that the staff logged in with them. This is very helpful when looking at Wknd timecards, as you can see if any individuals have any gaps in their timecards or are missing.



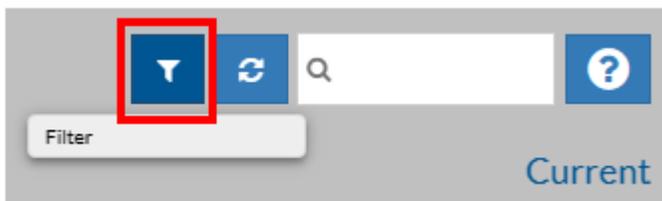


Approving Timecards—Non-Direct Care or Training Shifts

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.**”

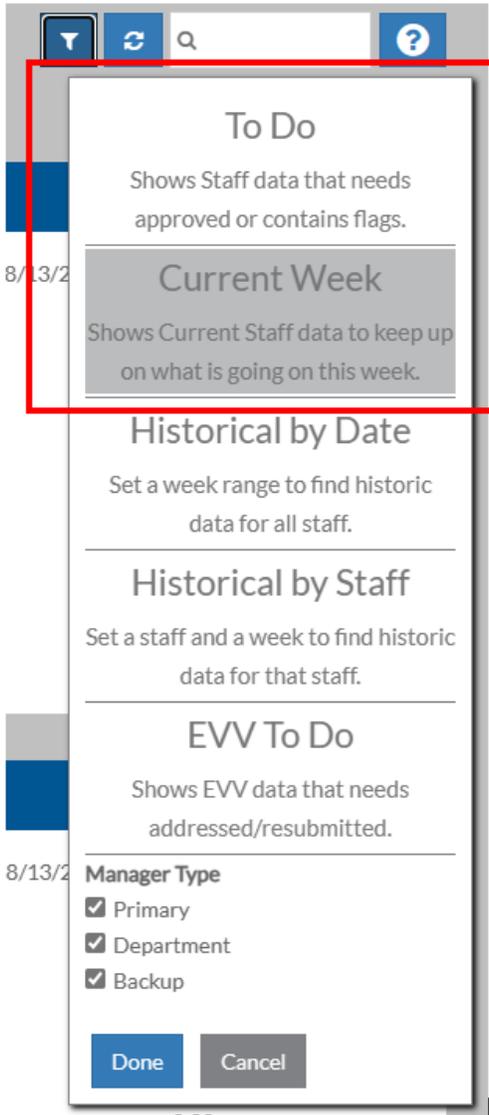


2. There are two ways to filter the views of your Staff Log. Click on the **Filter Icon** in the upper right corner of your screen (It looks similar to a funnel).

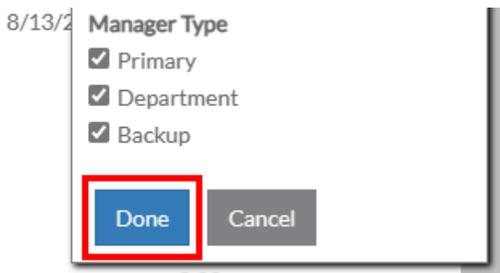




3. Now you can select between two categories: **To Do** or **Current Week**
 - a. **To Do:** This will show any staff that have any unapproved timecards/mileage.
 - b. **Current Week:** This will show ALL staff that work for PTC. Some permissions may only allow you to see your Managed Staff only.



4. Click **“Done”** after selecting **To Do**.

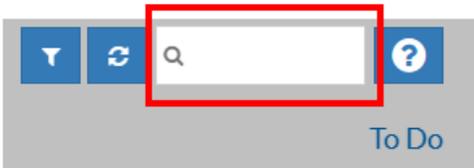




5. You will need to know the Staff Names of those you Manage. Your screen will look similar to the below:

Managed Staff				Managed Staff				Managed Staff			
Staff	Period	Issues	Status	Staff	Period	Issues	Status	Staff	Period	Issues	Status
[Redacted]	08/07/2023-08/13/2023	Issues need to be resolved		[Redacted]	08/07/2023-08/13/2023	Issues need to be resolved		[Redacted]	08/07/2023-08/13/2023	Issues need to be resolved	
Paid Hours	15.00			Paid Hours	19.00			Paid Hours	12.33		
Worked Hours	15.00			Worked Hours	19.00			Worked Hours	12.33		
Non-Worked Hours	0.00			Non-Worked Hours	0.00			Non-Worked Hours	0.00		
Unpaid Breaks	0.00			Unpaid Breaks	0.00			Unpaid Breaks	0.00		
Paid Miles	0			Paid Miles	0			Paid Miles	0		
Company Miles	0			Company Miles	0			Company Miles	0		
Expenses	0.00			Expenses	0.00			Expenses	0.00		

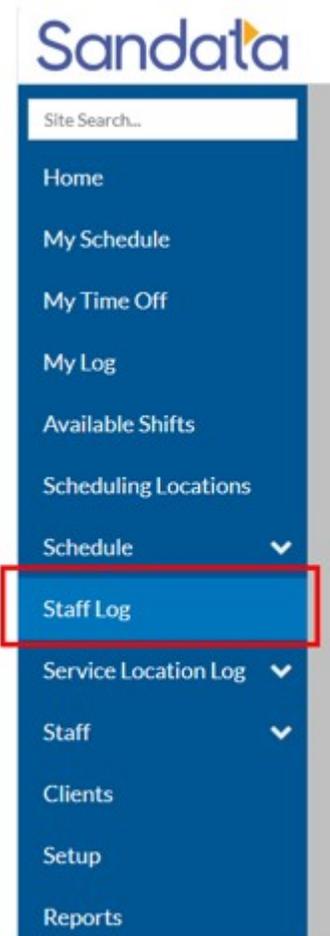
6. You can scroll down to view all the Staff or you can enter a staff name in the upper right corner Search Box to locate them.



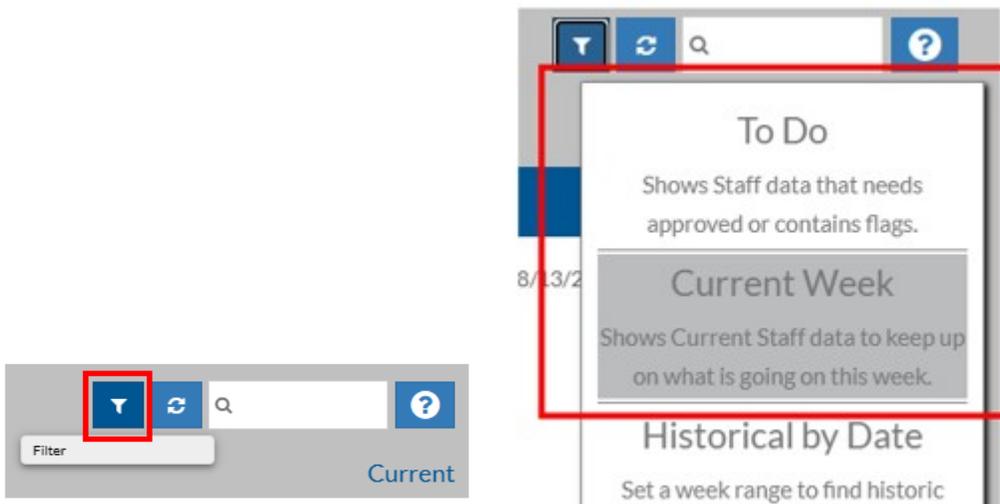
7. Start going through all of your Managed Staff and reviewing/approving timecards. These are typically not Scheduled Shifts, so you will need to ask yourself the following questions before you approve:
- a. Does the time appear accurate?
 - b. Why did the staff clock in under Admin/Non-Direct Care?
 - 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.



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.

Mileage											Add
			Date	Description	Type	Vehicle	Clients	Begin	End	Miles	
<input type="checkbox"/>			8/7/2023	First Ave 3945 - Transportation Mileage	Odometer Begin/End	Personal	RYVANHUYEN	115416	115443	27	Actions
<input type="checkbox"/>			8/7/2023	First Ave 3945 - Transportation Mileage	Odometer Begin/End	Personal	RYVANHUYEN	115416	115443	27	Actions
<input type="checkbox"/>			8/8/2023	First Ave 3945 - Transportation Mileage	Odometer Begin/End	Personal	RYVANHUYEN	115459	115505	46	Actions

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 Estep (ceallaigh.estep@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**"

The screenshot shows the Sandata Home interface. On the left is a blue navigation sidebar with options: Home, My Time Off, My Log, Scheduling Locations, Schedule, Staff Log, Service Location Log, Staff, Clients, Setup, and Reports. The main content area has a top section with filters for Type (NonDirect Care Default Cost Cente), Cost Center (SLS Office Admin (530)), and Task (General Manager (Regular)), with a Switch button. Below this are two panels: 'Change Requests' and 'Time Off Requests'. The 'Time Off Requests' panel is highlighted with a red border and shows a request for Tuesday, September 20, 2022, with Reason: PTO, Hours, and Status: Pending. There are 'Approve' and 'Deny' buttons for this request.

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.

This image shows a close-up of the 'Staff' menu item in the navigation sidebar. The 'Staff' item has a downward arrow, and the 'Time Off Requests' option is visible below it.



- 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.

Time Off Requests

Lor. Ka
Pathways to Community Dataplus

Search [] [] []

09/28/2022 - 09/30/2022	09/28/2022	09/29/2022
<p>Wednesday, September 28, 2022 through Friday, September 30, 2022</p> <p>Reason: PTO Status: Pending Balance As of Last Pay: 42.2 Requested: 9/24/2022 9:21 PM</p> <p>Approve Deny Cancel Request</p>	<p>Wednesday, September 28, 2022 8:00 AM - 4:00 PM</p> <p>Reason: PTO Status: Pending Balance As of Last Pay: 89 Requested: 4:05 PM Paid Hours: 8</p> <p>Approve Deny Cancel Request</p>	<p>Thursday, September 29, 2022 8:00 AM - 4:00 PM</p> <p>Reason: PTO Status: Pending Balance As of Last Pay: 89 Requested: 4:06 PM Paid Hours: 8</p> <p>Approve Deny Cancel Request</p>
09/30/2022	10/02/2022	10/04/2022 - 10/18/2022
<p>Friday, September 30, 2022 4:00 PM - 9:00 PM</p> <p>Reason: PTO Status: Pending</p>	<p>Sunday, October 2, 2022 8:00 AM - 4:00 PM</p> <p>Reason: PTO Status: Pending</p>	<p>Tuesday, October 4, 2022 through Tuesday, October 18, 2022</p> <p>Reason: PTO Status: Pending</p>

- 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.**"

Search [] [] []

Filter Menu:

- Manager Type
 - Primary
 - Department
 - Backup
- Status
 - Pending
 - Approved
 - Denied
 - Canceled
- Dates
 - 9/26/2022 []
 - to
 - 10/2/2022 []

Approve Deny Cancel Request

Done Cancel



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.

09/26/2022

[Redacted Name] 1.

Monday, September 26, 2022 2.

Reason PTO

Status Pending

Balance As of Last Pay 24 3.

Requested 9/26/2022 1:49 PM 4.

Paid Hours 10 5.

Approve Deny Cancel Request

- 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.

Time Off Request Audit X

Request

Begin Date	9/26/2022
End Date	9/26/2022
Time Off Reason	PTO
Status	Pending

Monday 9/26/2022

Hours	<input type="text" value="10"/>
Cost Center	<input type="text" value="Afton Road (800)"/>
Task	<input type="text" value="DSP (PTO - ESST)"/>

+

Summary

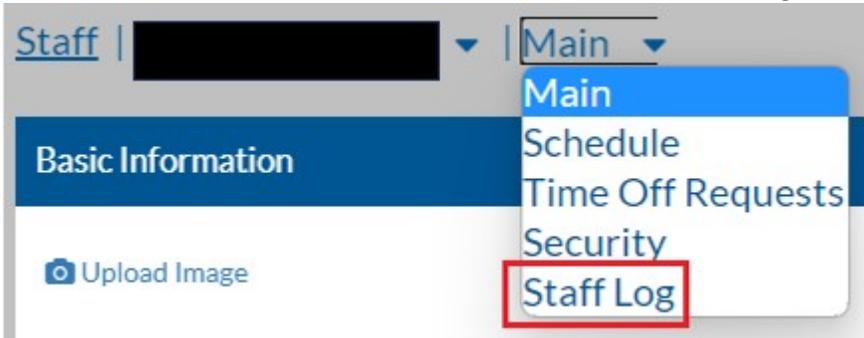
Total Hours: 10

Notes

Approve Deny



- 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".



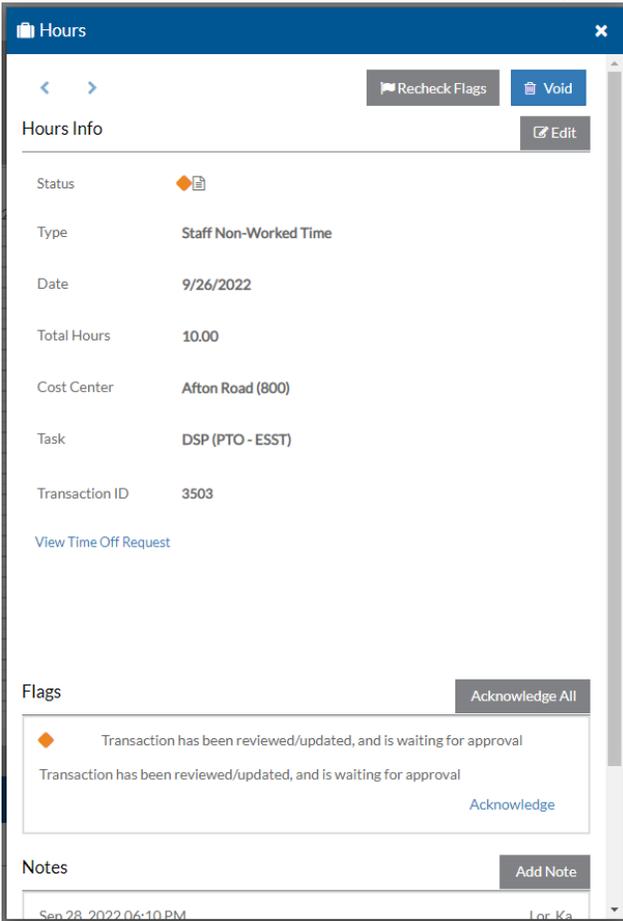
- 9. The time off request that you just finished approving will appear in the staff's timecard under "Other Hours/Amounts". You will need to acknowledge and approve this entry.

Monday 9/26/2022	Tuesday 9/27/2022	Wednesday 9/28/2022	Thursday 9/29/2022	Friday 9/30/2022	Saturday 10/1/2022	Sunday 10/2/2022
12 am	12 am	12 am	12 am	12 am	12 am	12 am
1	1	1	1	1	1	1
2	2	2	2	2	2	2
3	3	3	3	3	3	3
4	4	4	4	4	4	4
5	5	5	5	5	5	5
6	6	6	6	6	6	6
7	7	7	7	7	7	7
8	8	8	8	8	8	8
9	9	9	9	9	9	9
10	10	10	10	10	10	10
11	11	11	11	11	11	11
12 pm	12 pm	12 pm	12 pm	12 pm	12 pm	12 pm
1	1	1	1	1	1	1
2	2	2	2	2	2	2
3	3	3	3	3	3	3
4	4	4	4	4	4	4
5	5	5	5	5	5	5
6	6	6	6	6	6	6
7	7	7	7	7	7	7
8	8	8	8	8	8	8
9	9	9	9	9	9	9
10	10	10	10	10	10	10
11	11	11	11	11	11	11

Other Hours/Amounts							Add
<input type="checkbox"/>		Date	Type/Task	Location/Cost Center	Clients	Hours/Amt	Actions
<input type="checkbox"/>		9/26/2022	DSP (PTO - ESST)	Afton Road (800)		10.00	Actions

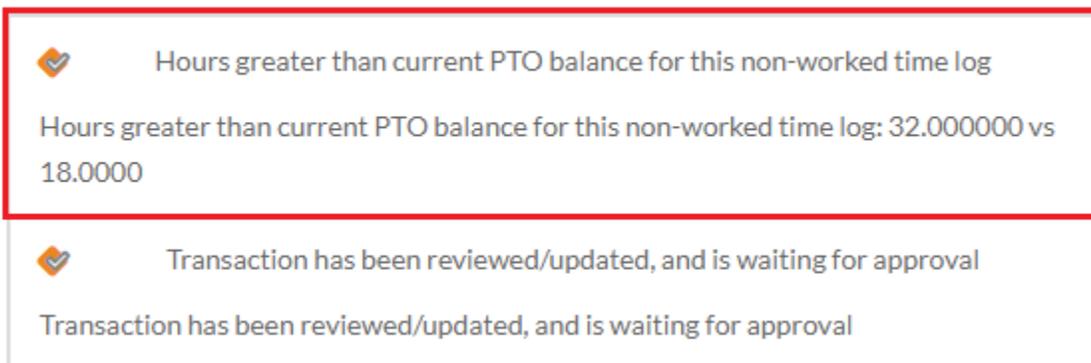


10. Click on the time off request to bring up a popup that looks like this:



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.

Flags





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.

Hours

Recheck Flags Void **Approve** Edit

Hours Info

Status

Type Staff Non-Worked Time

Date 9/26/2022

Total Hours 10.00

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

Other Hours/Amounts + Add

<input type="checkbox"/>		Date	Type/Task	Location/...	Clients	Hours/Amt	
<input type="checkbox"/>		9/26/2022	DSP (PTO...	Afton Roa...		10.00	Actions