



# PTC Sandata Tutorial

## *Family Services Staff*

### Clocking In/Out of your Shifts

1. Important: Please do not clock in with your individuals or non-direct care until your scheduled shift starts. (If you need information for your shift, you can review the Communication Book or send messages in Sandata).
2. Log in with your user credentials.

Welcome! Please log in.

**Sandata**

User Name  
kabsl@pathwaystocommunity.com

Password  
..... Show

Remember my user name

Log In Help, I forgot my password!

3. Your Home dashboard should look similar to the below:

**Sandata** Home

Site Search...

Home  
My Schedule  
My Time Off  
My Log  
Available Shifts  
Scheduling Locations  
Schedule  
Staff  
Reports

**Time Logging** My Log

11:42:28 AM  
You are not currently logging time.

Wed Aug 2 11 : 42 AM

Type Direct Care  
Location Afton Road  
Service IHS 1:1  
Clients None Selected

Start

**Mileage Logging** My Log

You are not currently logging mileage.

Odometer

Type Direct Care Mileage  
Location Afton Road  
Service Transportation Mileage  
Origin  
Personal Vehicle   
Clients None Selected

Start



4. Choose the **Type** of care this is – Direct Care or Non-Direct Care?

- **Direct Care:** Working directly with individuals.
- **Non-Direct Care:** Trainings, Meetings, Approved Drive Time, Admin, etc.
  - o **Please Note:** If an individual(s) ends their shift early, you cannot stay clocked in to work. Please call the FS Manager to discuss.

The screenshot shows the 'Time Logging' interface. At the top, it says '10:48:44 AM' and 'You are not currently logging time.' Below this is a date and time selector showing 'Thu May 12' and '10 : 48 AM'. The 'Type' dropdown menu is highlighted with a red box and contains the text 'Direct Care'. Other fields include 'Location' (Champlin 1), 'Service' (CRS), and 'Clients' (None Selected). A 'Start' button is at the bottom.

5. Choose your **Location** – What is the name of the site you’re working at? 1:1 or Wknd?

- a. If this is a non-direct care shift, please choose the name of the site you’re training at OR if you’re unsure, please choose FS Training (585).

This screenshot is identical to the one above, but the 'Location' dropdown menu is highlighted with a red box and contains the text 'Champlin 1'. The 'Type' dropdown menu is also visible and set to 'Direct Care'.



6. Select the names of the **Clients** you are working with.

The screenshot shows the 'Time Logging' interface. At the top, it displays the time '10:48:44 AM' and the message 'You are not currently logging time.' Below this, there are date and time selection fields: 'Thu May 12' with up/down arrows, and '10 : 48 AM' with a dark 'AM' button. There are three dropdown menus: 'Type' (Direct Care), 'Location' (Champlin 1), and 'Service' (CRS). The 'Clients' dropdown menu is highlighted with a red box and shows 'None Selected'. A blue 'Start' button is at the bottom.

7. When you click on “None Selected,” you will get a pop-up window that lists the names of all the individuals who live at that location.
- a. If an individual does not show up in the list, please contact the FS Manager.

The screenshot shows the 'Time Logging' interface with a 'Clients' pop-up window. The background interface is dimmed. The pop-up window has a search bar with a magnifying glass icon, 'All', and 'Clear' buttons. Below the search bar is a list of names: 'Crossman, James', 'Nelson, David', and 'Ummel, Ryan'. A blue 'Done' button is at the bottom of the pop-up. The background interface shows the time '10:57:15 AM' and the message 'You are not currently logging time.' Below this, there are date and time selection fields: 'Thu May 12' with up/down arrows, and '10 : 57 AM' with a dark 'AM' button. There are three dropdown menus: 'Type' (Direct Care), 'Location' (Champlin 1), and 'Service' (CRS). The 'Clients' dropdown menu is highlighted with a green box and shows 'None Selected'. A blue 'Start' button is at the bottom.



8. After choosing the names of the individuals, click **“Start.”** This will clock you in to your shift.

**Time Logging** My Log

10:58:03 AM

You are not currently logging time.

Thu  
May 12

10 : 58 AM

Type: Direct Care  
Location: Champlin 1  
Service: CRS  
Clients: 3 Selected

**Start**

9. To clock out of your shift, click on **“End.”**

**Time Logging** My Log

10:59:24 AM

You began logging time at 10:59:00 AM

Thu  
May 12

10 : 59 AM

**End**

To switch, pick a new Type, Cost Center or Task

Type: Direct Care  
Location: Champlin 1  
Service: CRS  
Clients: 3 Selected

**Update**



## In Home Supports with Training (1:1) Services

1. Your shift will start as soon as you can visually see the Client you are clocking in with. If your shift starts at 3:00pm; however, the individual doesn't answer the door until 3:15pm, you will need to clock in as FS Training (485) from 3:00pm to 3:15pm.
2. To start your shift with the individual you are scheduled with, start by making sure both **Location** and **Service** say "1 to 1."

Time Logging My Log

9:23:14 PM

You are not currently logging time.

Sat  
Nov 18 09 : 23 PM

Type Direct Care

Location 1 to 1

Service 1 to 1

Clients None Selected

Start

3. Click on "Start," and now you have started your shift.

Type Direct Care

Location 1 to 1

Service 1 to 1

Clients Ashley, Lucas

Start

4. At the end of your shift, click "End," and now you have ended your shift.

End

To switch, pick a new Type, Cost Center or Task

Type Direct Care

Location 1 to 1

Service 1 to 1

Clients Ashley, Lucas

Update



## Weekend Respite Services

1. FS Weekend (Wknd) Respite Services are different than Crisis Respite Services. FS Wknd Respite Services are provided in a 4:1 ratio—meaning four individuals to one staff (it could be more/less than four at times).
2. You will need to clock in each individual as you pick them up and switch timecards to add more individuals to your timecard.
3. As you previously saw, when you switch timecards with other staff, you will need to make sure to coordinate with the other staff to clock in and out at the EXACT same time.
4. Start your pick-ups by clocking in with the first individual you pick up.
5. For **Location**, make sure you select “**Wknd.**”

Time Logging [My Log](#)

7:52:51 PM

You are not currently logging time.

Sat  
Nov 18 07 : 52 PM

Type Direct Care

Location Wknd

Service Respite

Clients None Selected

Start

6. Service will automatically default to “**Respite.**”
7. Now you will start by selecting **Clients**, and click on where it says “**None Selected.**”

Time Logging [My Log](#)

7:52:51 PM

You are not currently logging time.

Sat  
Nov 18 07 : 52 PM

Type Direct Care

Location Wknd

Service Respite

Clients None Selected

Start



8. Once you select your first **Client**, click **“Done.”**

Clients Guest

Q All Clear

- Abdouch, Alexandra
- Ashley, Lucas
- Barclay, Kathleen
- Bautista, Annie



9. Click **“Start.”**

Type

Location

Service

Clients [Ashley, Lucas](#)



10. Your screen will now similar to the below:

Sat  
Nov  
18

10 : 00 AM



To switch, pick a new Type, Cost Center or Task

Type

Location

Service

Clients [Ashley, Lucas](#)





11. At your next pick-up, you will need to add in the next individual by clicking on the **Client**.

Service

Clients

12. Select another Client and Click **Done**.

Clients

All Clear

- Abdouch, Alexandra
- Ashley, Lucas
- Barclay, Kathleen
- Bautista, Annie

13. It will now show that you clocked in with 2 Clients (says “2 Selected.”)

14. Click **Update**.

Sat  
Nov 10 : 00 AM  
18

To switch, pick a new Type, Cost Center or Task

Type

Location

Service

Clients

15. Repeat these steps until all 4 pickups have been completed.



16. For drop-offs, you will follow the same steps; however, you will be removing a **Client** at each drop-off, and click **Update** each time.

17. For your last drop-off, you can click on **End**.

Sat  
Nov 18 10 : 00 AM

End

To switch, pick a new Type, Cost Center or Task

Type Direct Care

Location Wknd

Service Respite

Clients 2 Selected

Update

18. You have now completed your full shift.



## How to Enter Mileage Logs

1. Add your beginning odometer reading – this is found on your car.

Mileage Logging My Log

You are not currently logging mileage.

Odometer

Type

Location

Service

Origin

Personal Vehicle

Clients

2. What **Type** of mileage is this – Direct Care Mileage or Staff Mileage?
  - a. **Direct Care Mileage:** Driving with an individual.
  - b. **Staff Mileage:** Driving during your shift without an individual in the car (Ex. Driving to/from a different shift). This must be pre-approved by the FS Manager.

Mileage Logging My Log

You are not currently logging mileage.

Odometer

Type

Location

Service

Origin

Personal Vehicle

Clients



3. Select the **Location**, if you are clocking in under Direct Care Mileage. For FS, this is 1:1 or Wknd.

**Mileage Logging** My Log

You are not currently logging mileage.

Odometer

Type

**Location**

Service

Origin

Personal Vehicle

Clients

4. Add an **Origin** (starting location) and **Description** of where you drove.

**Mileage Logging** My Log

You are not currently logging mileage.

Odometer

Type

Location

Service

**Origin**

Personal Vehicle

Clients

**Mileage Logging** My Log

You are not currently logging mileage.

Odometer

Type

Expense Type

**Description**



5. Under **Clients**, select the name of the individual(s) who were in the car with you.

**Mileage Logging** My Log

You are not currently logging mileage.

Odometer

Type

Location

Service

Origin

Personal Vehicle

Clients

6. Click **“Start”** after you’re done.

**Mileage Logging** My Log

You are not currently logging mileage.

Odometer

Type

Location

Service

Origin

Personal Vehicle

Clients



7. After you're done driving, add your ending odometer.

Mileage Logging My Log

You are currently logging mileage for 05/12/2022.

Odometer

Destination

End

Mileage Logging My Log

You are currently logging mileage for 05/12/2022.

Odometer

End

**For a staff mileage, add the ending odometer reading from your car and click "end".**

8. For Direct Care Mileage, enter the description of where you drove to. Click "end" when you're done.

Mileage Logging My Log

You are currently logging mileage for 05/12/2022.

Odometer

Destination

End



## How to Edit Your Timecard

You are responsible for accurately reporting your time worked and managing your timecards. Failure to accurately report your time worked could be considered timecard fraud and may lead to disciplinary action or termination.

### To Add Time Worked

1. Click on “My Log”. This will bring up your timecard for the current week.

The screenshot shows the Sandata Home page. On the left sidebar, the 'My Log' option is highlighted with a red box. The main content area is titled 'Time Logging' and includes a clock showing 12:17:32 PM. Below the clock, it says 'You are not currently logging time.' There are dropdown menus for 'Type' (set to Direct Care), 'Location' (set to Champlin 1), 'Service' (set to CRS), and 'Clients' (set to None Selected). A 'Start' button is visible at the bottom.

2. Locate the box that says “Hours” and click on “+ Add”

The screenshot shows the Sandata My Log page. The 'Hours' section at the bottom is highlighted with a red box. It displays a grid of time slots for the week of 5/9/2022 to 5/15/2022. An 'Add' button is visible in the top right of the Hours section. The grid shows time slots from 7 am to 3 pm for each day. A 'CRSDAL' icon is visible in the 11 am slot on Thursday.

	Mon 5/9/22	Tue 5/10/22	Wed 5/11/22	Thu 5/12/22	Fri 5/13/22	Sat 5/14/22	Sun 5/15/22	Totals 5/9 - 5/15
Paid Hours	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Worked	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Non-Worked	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Unpaid Break	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Company Miles	0	0	0	0	0	0	0	0
Paid Miles	0	0	0	0	0	0	0	0
Paid Miles	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Status								



3. You will get a pop-up screen to enter in all the information of your shift.
  - a. **Type:** Direct Care or Non-Direct Care?
  - b. **Date:** The day you worked.
  - c. **Begin:** The time you started your shift.
  - d. **End:** The time you ended your shift.
  - e. **Service Location:** The site you worked at: 1:1 or Wknd.
  - f. **Service:** This will automatically default depending on which Location you chose.
  - g. **Clients:** Choose the individual(s) you worked with.
  - h. **Notes:** Add in a note that tells why you needed to add this in.

The screenshot shows a 'Hours' pop-up window with the following fields and options:

- Hours Info:**
  - Type: Direct Care
  - Date: 5/12/2022
  - Begin: [Yellow time picker]
  - End: [Time picker]
  - Total Hours: 0.00
  - Service Location: Champlin 1
  - Service: CRS
- Clients:**
  - Search bar with magnifying glass icon
  - Buttons: All, Clear
  - Client list: Crossman, James; Nelson, David; Ummel, Ryan
- Transaction ID:** [Empty field]
- Notes:** [Empty field] with an 'Insert Template' dropdown menu

4. Click **“Save”** after you finish filling all the section.



## To Edit a Time Log That's Already on Your Timecard

1. Click on the yellow box that has the time log you want to edit.

Monday 5/9/2022	Tuesday 5/10/2022	Wednesday 5/11/2022	Thursday 5/12/2022	Friday 5/13/2022	Saturday 5/14/2022	Sunday 5/15/2022
7 am	7 am	7 am	7 am	7 am	7 am	7 am
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

2. You will get a pop-up after clicking on the yellow box. Once you're in the pop-up, click "Edit."

Hours

Recheck Flags Void

**Edit**

Hours Info

Status

Type Direct Care

Date 5/12/2022



3. Make the changes necessary for your time log.
  - a. **Type:** Direct Care or Non-Direct Care?
  - b. **Date:** The day you worked.
  - c. **Begin:** The time you started your shift.
  - d. **End:** The time you ended your shift.
  - e. **Service Location:** The site you worked at: 1:1 or Wknd.
  - f. **Service:** This will automatically default depending upon which location you chose.
  - g. **Clients:** Choose the individuals you worked with.
  - h. **Notes:** Add in a note and explain why you had to fix your timecard.
4. Click "Save" after you finish editing your timecard.

Transaction ID

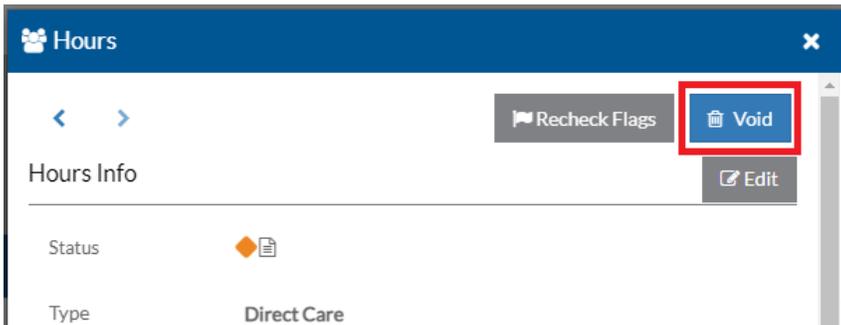
Notes Insert Template

Forgot to clock in.

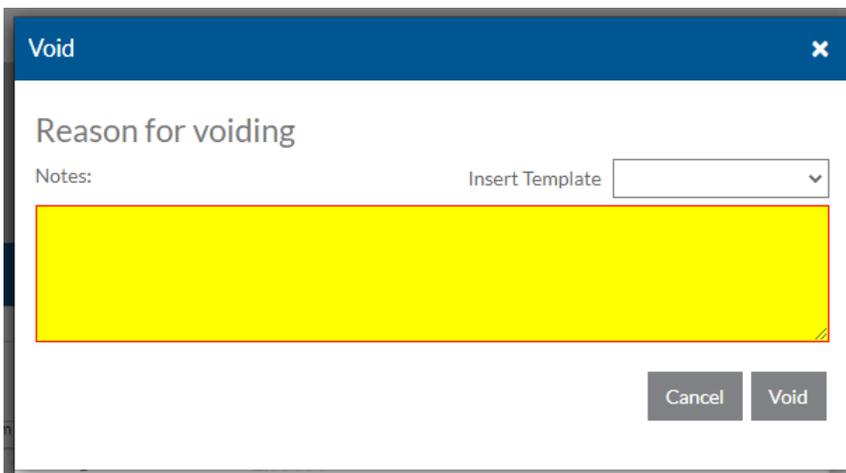


## How to Void a Time Log

1. If you accidentally added a wrong time log, you could void the entry. Click on the yellow box of the time log you want to void.
2. Click “Void” in the upper right corner.



3. Add the reason why you have to void the time log and click “void” when you’re done.



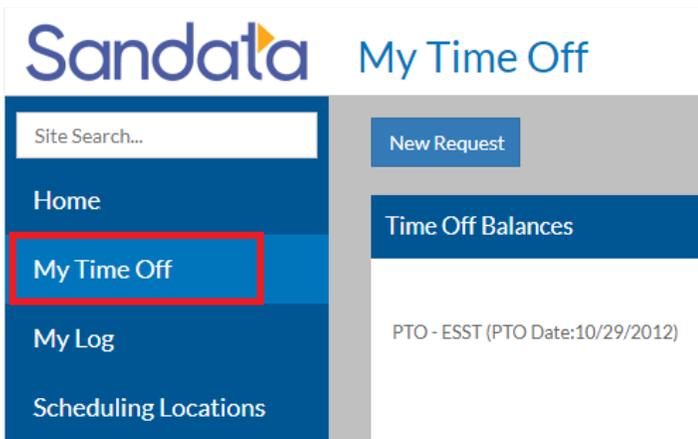
4. If you have an error (for ex. you clocked in twice for the same timecard), the below is an example of what it would look like once voided. The voided timecard is on the right in white.

Monday 8/28/2023		
7 am		
8		
9	1TO1	1TO1
10	LUASHLE3...	LUASHLE3...
11		



## Requesting PTO

1. Before requesting PTO on Sandata, have you done the following?
  - a. **Notify the FS Senior Manager of your time off.**
    - Entering your PTO request does not equal notifying the FS Senior Manager. PTO requests in Sandata are for timecard purposes, not notification.
  - b. **Enter your PTO request(s) before the start of the shift you're requesting PTO for.**
  - c. PTO request(s) must be entered before the start of the shift you're requesting it for. If you are having problems entering your PTO, please reach out to the FS Manager immediately.
  - d. Your PTO must be entered into Sandata by end of day Sunday.
2. When requesting PTO, please remember the following:
  - a. PTO requests are for any permanent or picked-up shifts. You cannot use PTO to add to your paycheck.
  - b. You cannot request more PTO than the total hours of your shift (For example, if your shift is 8 hours long, you cannot request for 10 hours of PTO).
  - c. **PTO cannot total more than 40 hours for a given week.**
  - d. Please refer to the PTO Policy and Work Attendance Policy for more information.
3. Click on "My Time Off"



4. The balance shows how many PTO hours you have. **Note:** The PTO balance is updated every two weeks when payroll is processed. If you requested PTO during the first week of a pay period, those PTO hours will not be reflected until after that pay period is processed.





5. Click on “New Request.”

Time Off Balances	
PTO - ESST (PTO Date:10/29/2012)	Balance as of last pay 109.0000

6. You will get a pop-up to fill out.

- All Day:** Are you requesting for the whole day or just portion of the day?
- Date:** The date you're requesting PTO for.
- Begin Time:** If you are not requesting for the whole day, add in the beginning time of your PTO request.
- End Time:** If you're not requesting for the whole day, add in the ending time of your PTO request.
- Time Off Reason:** This will always be PTO/Anniversary PTO. Do NOT Select FMLA or Bereavement. Only HR/Director can add this.
- Note:** Reason for your PTO request.

**New Request** [Close]

All Day

Date  [Calendar Icon]

Begin Time  [Clock Icon]

End Time  [Clock Icon]

Time Off Reason  [Dropdown Arrow]

Note

7. Click “Next” when you are done.



- 8. Sandata will calculate the hours of your PTO request(s).
  - a. **Cost Center:** The name of the site you would have worked at on that day or your main site location if you're a float staff.
  - b. **Task:** There should not be a need to change this one, but please make sure it says "PTO - ESST"

**New Request** ✕

Complete the non-worked time log information for the number of hours to be paid for this time off request.

Tuesday 8/8/2023

Hours	<input type="text" value="8"/>
Cost Center	<input type="text" value="Champlin 1 (220)"/>
Task	<input type="text" value="DSP (PTO - ESST)"/>

+

**Summary**

Total Hours: 8

[Back](#) [Cancel](#) [Save](#)

- 9. On your anniversary date, you are allotted an additional 8 hours of PTO to use. It will look like the below:

Time Off Balances	
	Balances As of Last Pay
Paid Time Off Gift	0
<b>PTO - Anniversary</b>	8
PTO - ESST	81.8453



- a. When you are adding in your PTO request, when you fill out “Task” you would select “**PTO-Anniversary.**”

Task	CSP (Holiday) ▼
Transaction ID	CSP (Holiday) CSP (PTO - Anniversary) CSP (PTO - ESST)

- 10. Once you verify your information, please click “**Save.**”
- 11. PTO approvals are done once a week, usually on a Monday. If you have questions about your PTO request(s), please make sure you reach out to the FS Senior Manager.