



# PTC Sandata Tutorial

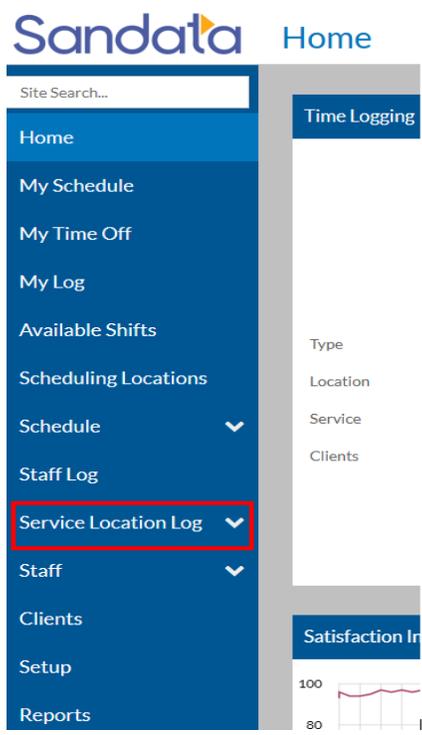
## *Residential Supervisors and Managers*

### Approving and Checking Timecard Process

1. **Supervisors:** Timecards must be approved for your designated sites on a daily basis.
  - a. Monday's timecards are checked for the prior weekend.
  - b. All approvals must be completed by 2pm Monday through Friday.
  - c. If you are unable to complete any timecard tasks by the deadlines given, you must get permission from your direct Manager. This includes if you are using PTO, taking a vacation, are out sick, etc.
2. **Managers:** 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 5pm.
  - c. If your site does not have a designated Supervisor, you must also approve all timecards.
  - d. If you are unable to complete any timecard tasks by the deadlines given, you must get permission from the General Manager (GM) or 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 the GM or 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]

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 wish to review/approve timecards.

Service Location Log | McKnight

Navigation: << 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. The **blue boxes** will show what the staff was scheduled for. If it looks like the below from a previous date, that staff that is normally scheduled did not clock in or did not work. If you do not know why the staff is missing their timecard, you must follow up with them. If they did work, you must ask them to enter in their own timecard.

11	McKnight
12	Aug 7
1	2:00 PM - 8:00 PM
2	
3	
4	
5	
6	
7	
8	

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

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



- Click on the **yellow box** to view more details. You will need to scroll to see the full timecard. You also may need to scroll under Clients if there are more than four individuals being clocked in at the same time (you may see this when reviewing overnights at some sites).

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

Status 

- 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.**"

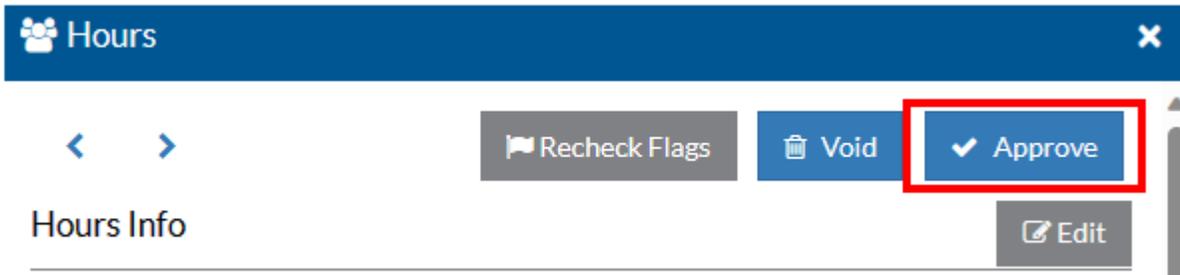
### Flags

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

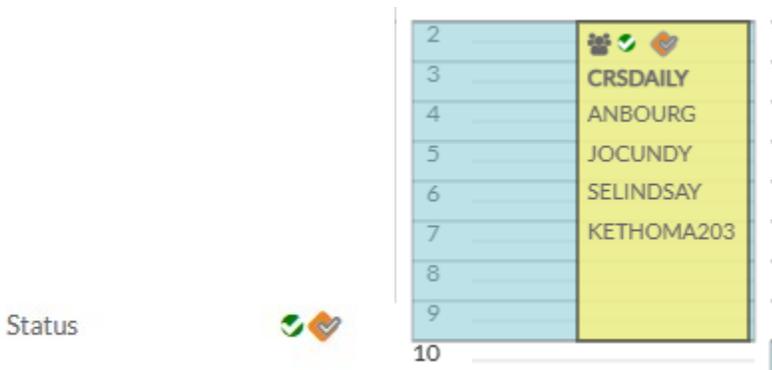
Status 



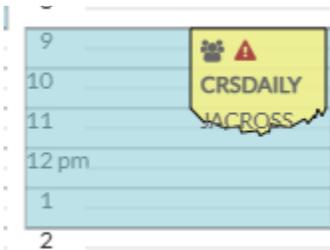
10. The Green Circle indicates that the timecard is now waiting for final approval. Click on **“Approve.”**



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



12. 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.



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

Status





14. Looking further into the above, you see below and notice that both staff did not clock in with all the individuals at the same time.
- 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.

Time	Staff	Time	Staff
2 am		12 am	
1	CRSDAILY	1	
2	ANBOURG	2	
3	JOCUNDY	3	
4	SELINDSAY	4	
5	KETHOMA203	5	
6		6	
7		7	
8		8	
9		9	
0		10	
1		11	
2 pm		12 pm	
1		1	
2		2	CRSDAILY
3		3	JOCUNDY
4		4	SELINDSAY
5		5	KETHOMA203
6		6	
7		7	
8		8	
9		9	
0		10	

15. 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.”**

**Hours**

Recheck Flags Void

**Hours Info** Edit

Status

Staff [REDACTED]

Type Direct Care

Date 8/7/2023

Begin 2:00 PM

End 10:00 PM

Total Hours 8.00

Service CRS

**Clients** Guest

Q All Clear

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



16. Once you fixed the timecard, it will highlight the Notes section. You will need to enter in what change/edit you made.

Clients Guest

Q All Clear

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

Transaction ID 128835

Notes Insert Template ▼

*(The Notes text area is highlighted in yellow in the original image)*

Cancel Save

17. Once you have entered in your Note, click “**Save.**” You can now finish approving this timecard.

Notes Insert Template ▼

Added Missing Individual--AnBo|

Cancel Save

*(The Save button is highlighted with a red box in the original image)*



## Tips for Viewing the Service Location Log

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

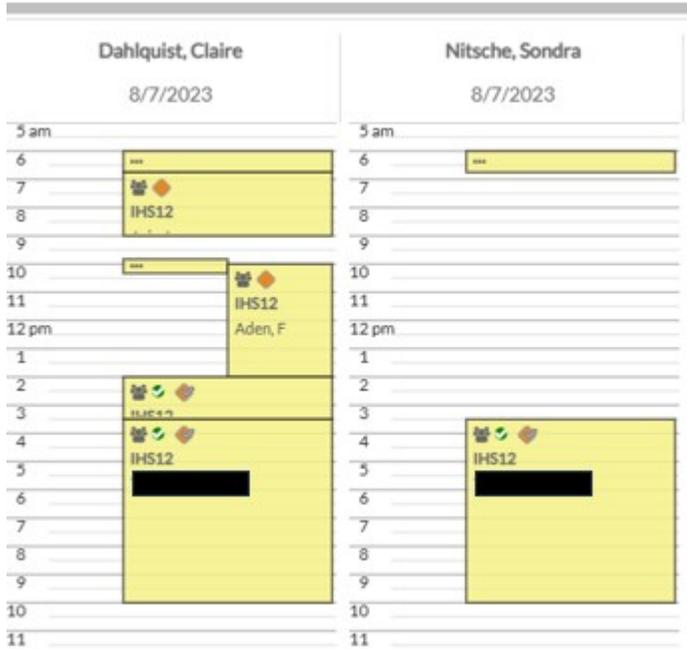


2. If you view **By Staff**, you will see all the timecards laid out according to each Staff's time log and schedule, shown below. This is a great way to make sure all staff time logs are accounted for.

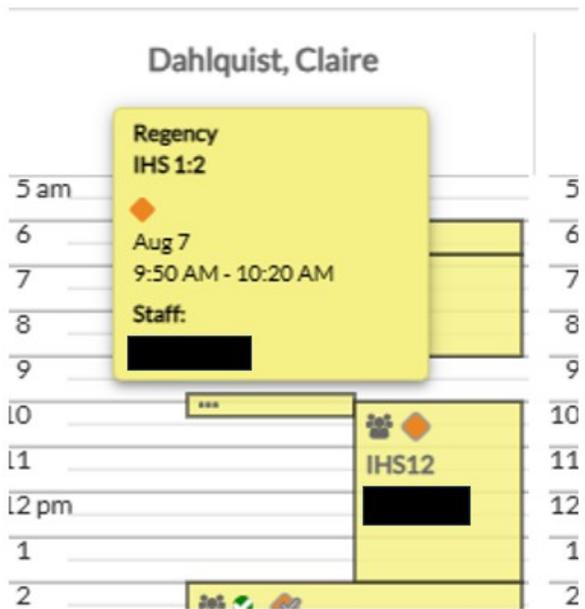
The screenshot displays the 'Service Location Log' interface. At the top, there's a header with 'Service Location Log | Regency' and filter buttons for 'By Staff' and 'By Client'. Below the header is a date selector showing 'Mon 8/7', 'Tue 8/8', 'Wed 8/9', 'Thu 8/10', 'Fri 8/11', 'Sat 8/12', and 'Sun 8/13'. The main area shows three columns representing different staff members, each with a timecard for 8/7/2023. The timecards are organized by hourly slots from 12 am to 11 pm. Various service codes are visible, such as 'PH12' and 'CDDH1Q'.



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 trying to see if individuals were not home/on leave, if individuals were overlapped, if staff didn't work with them, or even if someone forgot to clock in with someone.



4. Looking at the above, I can see that two staff overlapped timecards for an IHS 1:2 site. This will need to be adjusted. For CRS sites, overlaps are allowed due to a different billing code.





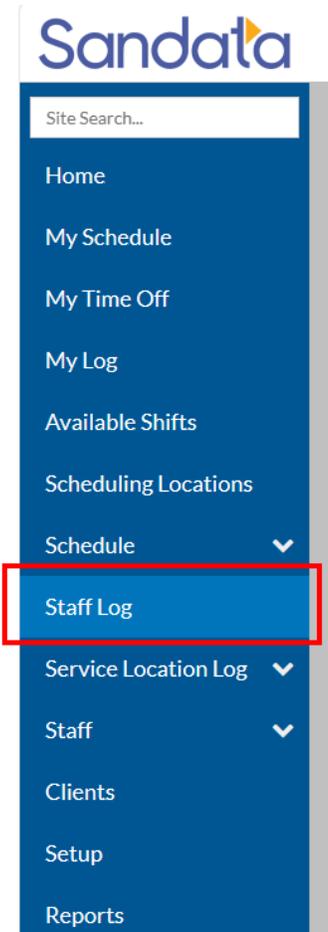
## **How to Edit Timecards for an Individual that is Discharged or Hospitalized**

1. When an individual is discharged; it usually means that they are leaving for another service. Since both services cannot bill the same day (due to double billing), they can NOT be clocked in on their last day.
  - a. Ex. If AaZz was discharged on 10/31 at 10:01PM, we would need to edit their timecard for billing so they are not clocked in on 10/31 AT ALL; meaning, their timecard on 10/30 would end at 12AM. It doesn't matter what time of day they leave; we can NOT bill.
2. When an individual is brought to a hospital, it doesn't always mean that they were admitted. They could just have been in the ER. Just because they may have stayed the night in the ER, also does NOT mean they were admitted. You will need to look at their discharge paperwork and/or speak to someone at the hospital.
  - a. If they were admitted, we cannot clock them in on the day they went to the hospital (no matter what time they were brought to the hospital). For example, if they were brought to the hospital on 10/31 at 11:59PM, and the hospital decides to admit them, we cannot bill for them the entire day, meaning, their timecard on 10/30 would end at 12am. This is due to double billing.
  - b. On the day the individual is discharged from the hospital, we can also NOT bill for them; meaning, even if they were discharged at 1:00AM, their timecard would end at 12am the night before.
3. Failure to adjust individual's timecards to prevent double-billing can become a serious issue. Please notify your Director immediately, and also send an email to the person responsible for overseeing billing.

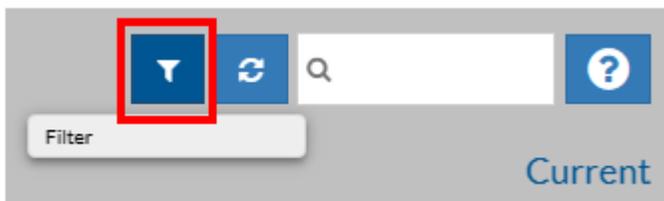


## Approving Timecards—Non-Direct Care and Training Shifts

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.**”

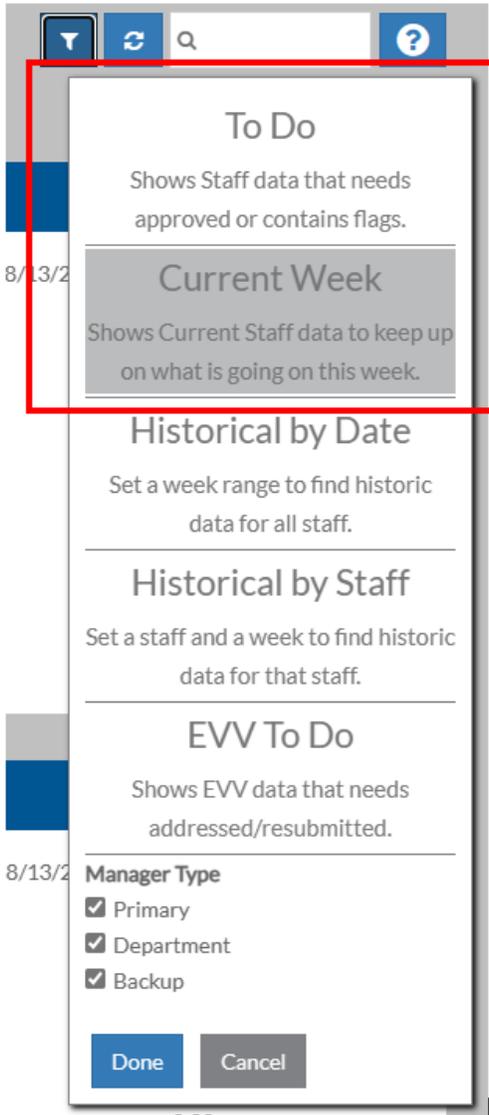


2. There are two ways to filter the views of your Staff Log. Click on the **Filter Icon** in the upper right corner of your screen (It looks similar to a funnel).

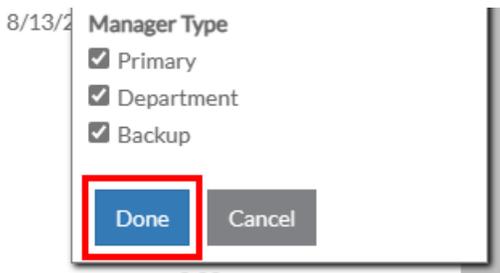




3. Now you can select between two categories: **To Do** or **Current Week**
  - a. **To Do:** This will show any staff that have any unapproved timecards/mileage.
  - b. **Current Week:** This will show ALL staff that work for PTC. Some permissions may only allow you to see your Managed Staff only.



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

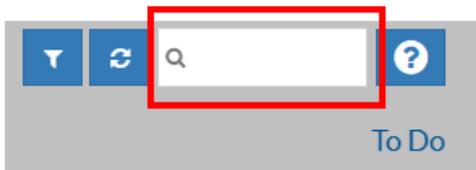




5. You will need to know the Staff Names of those you Manage. Your screen will look similar to the below:

Staff Name	Date Range	Issues need to be resolved
[Redacted]	08/07/2023-08/13/2023	0

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.

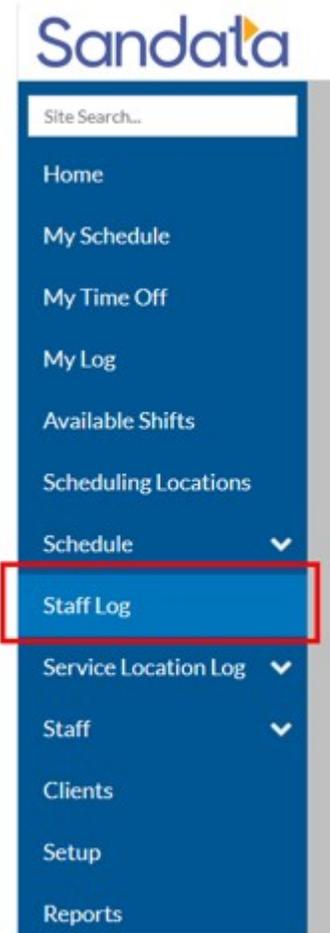


7. Start going through all of your Managed Staff and reviewing/approving timecards. These are typically not Scheduled Shifts, so you will need to ask yourself the following questions before you approve:
- Does the time appear accurate?
  - Why did the staff clock in under Admin/Non-Direct Care?
  - Did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

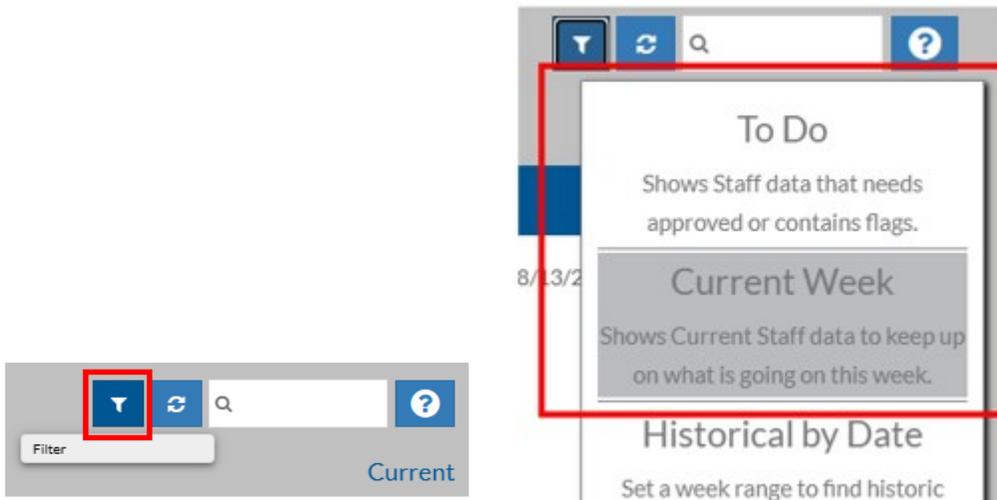


## Approving Mileage Logs

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.

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 at different sites on the same day).
  - e. If the mileage is over 100 miles in Residential, 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.
5. Important Notes:
  - a. If they are a float staff, you are responsible for approving their mileage if they were driving “to” your site. For example, if a staff was leaving Champlin 1 and going to St. John’s, then the Site Manager for St. John’s would be responsible for approving their non-direct care mileage.
  - b. Mileage can not be approved/paid if entered in late. The deadline for mileage is end of day Sunday. Back-pay can not be approved for missing mileage. If a staff tries to enter in their mileage in late, you will need to void their mileage entry and notify the staff.



## Approving PTO Process for Managers

### **Important Information**

1. PTO is approved on a weekly basis by the Managers for their designated sites by 5pm 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 General Manager.
  - 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 Asana or GoCo.
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 already worked. A staff cannot request PTO and also be clocked in for work.
7. Supervisors who have admin hours as part of their schedule must use PTO for it if they are choosing not to do any admin work during their time off.
8. If a staff wasn't able to work their scheduled shift, and did not enter in any PTO, the Site 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 Site 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](mailto:abigailp@pathwaystocommunity.com)) and Ceallaigh Estep ([ceallaigh.estep@pathwaystocommunity.com](mailto:ceallaigh.estep@pathwaystocommunity.com)), and cc Monica Mooney ([monica.mooney@pathwaystocommunity.com](mailto:monica.mooney@pathwaystocommunity.com)). **Only Directors can approve Bereavement.** If your director states it is not approved, you may change/deny.
- **FMLA: Deny any FMLA that has been entered in by a staff. Sarah Farinella, Talent Acquisition Specialist, will enter and approve all FMLA for employees. Please notify Sarah if you had to deny any FMLA requests, and also notify the staff.**



## 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

09/28/2022 - 09/30/2022

09/28/2022

09/29/2022

09/30/2022

10/02/2022

10/04/2022 - 10/18/2022

Each card displays request details: Date, Reason (PTO), Status (Pending), Balance As of Last Pay, Requested, and Paid Hours. Buttons for Approve, Deny, and Cancel Request are visible at the bottom of each card.

- 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.**"

The screenshot shows the filter menu with the following options:

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

Buttons for Done and Cancel are at the bottom of the menu.



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 number of PTO hours the staff is requesting.

6. Before you approve this request, you will want to make sure the staff is not scheduled to work. To check if they are on the schedule, click on the calendar icon next to their name.

09/26/2022

[Redacted Name] 

Monday, September 26, 2022

Reason PTO



7. A popup of their schedule for that pay week will show up. In this case, this staff is not scheduled for the time off they are requesting (there's no green box, which is their scheduled shift, next to the PTO box).

	Mon 9/26	Tue 9/27	Wed 9/28	Thu 9/29	Fri 9/30	Sat 10/1	Sun 10/2
12am	12:00 am						10:00 pm - 1
1am	PTO (Pending)						McKnight Schedule
2am							
3am							
4am							
5am							
6am							
7am							
8am							
9am							
10am							
11am							
12pm						12:00 pm - 1	12:00 pm - 8
1pm						McKnight Schedule	McKnight Schedule
2pm							
3pm							
4pm							
5pm							
6pm							
7pm							
8pm							
9pm							
10pm						10:00 pm - 1	
11pm						McKnight Schedule	

8. 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.



9. 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

Cost Center  ▼

Task  ▼

+

---

Summary

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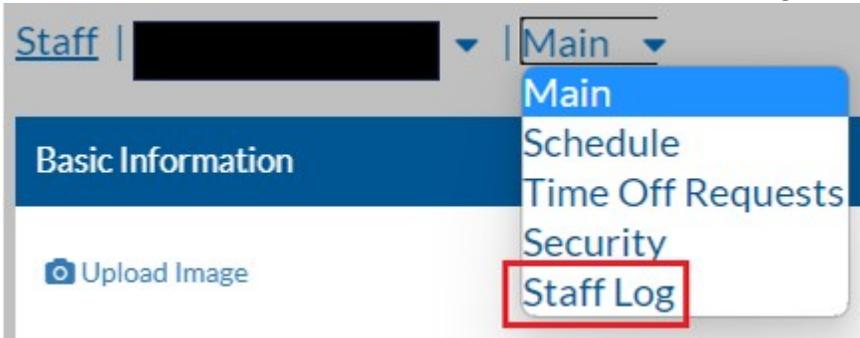
Total Hours: 10

Notes

Approve Deny



10. 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".



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



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

The screenshot shows a 'Hours' popup window with the following details:

- Hours Info:**
  - Status:
  - Type: Staff Non-Worked Time
  - Date: 9/26/2022
  - Total Hours: 10.00
  - Cost Center: Afton Road (800)
  - Task: DSP (PTO - ESST)
  - Transaction ID: 3503
- Flags:**
  - Transaction has been reviewed/updated, and is waiting for approval
  - Transaction has been reviewed/updated, and is waiting for approval
- Notes:**
  - Sep 28, 2022 06:10 PM
  - Lor Ka

13. Under where it says, "Flags", read to see if Sandata noticed anything wrong with this PTO 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

The flags section contains the following messages:

- Hours greater than current PTO balance for this non-worked time log  
Hours greater than current PTO balance for this non-worked time log: 32.000000 vs 18.0000
- Transaction has been reviewed/updated, and is waiting for approval  
Transaction has been reviewed/updated, and is waiting for approval



14. 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

15. 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



## Creating Permanent Schedules

1. To see the permanent of a site, click on "**Scheduling Locations.**"

Sandata Home

Site Search...

Time Logging

Home

My Time Off

My Log

**Scheduling Locations**

Schedule ▾

Staff Log

Service Location Log

Staff ▾

Thu  
Sep  
15

Type

Cost Center

Task

2. Find the site from the list and click on it. Once you click on the site, click on "**Shift Templates.**"

[Scheduling Locations](#) | Champlin 2 ▾

**Shift Templates** Schedule Delete Audit

Basic Information <a href="#">Edit</a>	Other Information <a href="#">Edit</a>	Notes <a href="#">Edit</a>
<p>Description <b>Champlin 2</b></p> <p>Active <input checked="" type="checkbox"/></p> <p>Address 1 <b>8140 115th Lane N.</b></p> <p>Address 2 <b>0</b></p> <p>City <b>Champlin</b></p> <p>State <b>MN</b></p> <p>Zip Code <b>55316</b></p> <p>Phone Number</p> <p>Email Address</p>	<p>Include Clients <input type="checkbox"/></p> <p>Mandatory Staff Count <b>1</b></p> <p>Shift Swaps Require Approval <input checked="" type="checkbox"/></p> <p>Disallow Posting of Shift: Hours Before Shift <b>0</b></p> <p>Auto Unpost Posted Shifts: Hours Before Shift <b>0</b></p> <p>Scheduling Method <b>Schedule From Source</b></p> <p>Weeks In Cycle <b>2</b></p> <p>Week A Start <b>9/9/2019</b></p> <p>Time Zone <b>Central</b></p>	<p>Notes</p> <p>Site Supervisor: 651-641-4009 Ext. 240 Manager: Ext. 507 General Manager: Ext 502</p>



3. This will bring you to the permanent schedule for the site.

Tuesday	Wednesday	Thursday	Friday	Saturday
10:00 pm - 9:00 am Schedule [A, B]	10:00 pm - 10:00 am Schedule [A, B]			
9:00 am - 2:00 pm Schedule [A, B]	10:00 am - 2:00 pm Schedule [A, B]			
2:00 pm - 10:00 am Schedule [A, B]	2:00 pm - 10:00 am Schedule [A, B]			
3:00 pm - 8:00 pm Schedule [A, B]	3:00 pm - 8:00 pm Schedule [A, B]			
10:00 pm - 9:00 am Schedule [A, B]	10:00 pm - 9:00 am Schedule [A, B]	10:00 pm - 9:00 am Schedule [A, B]	10:00 pm - 10:00 am Schedule [A, B]	10:00 pm - 9:00 am Schedule [A, B]

4. To update the permanent schedule, click on the shift you want to update and click on "Add".

Time Slot
Edit
Audit
✕

Shift Template: Schedule

Begin Day: Tuesday

Begin Time: 9:00 AM

End Time: 2:00 PM

Service Type 2 Hours: 0.00

Weeks: A  B

Notes:

Mandatory Employees: 1

Staff: + Add

Delete



- 5. A list of staff trained at this site will appear for you to choose from. If the staff you're adding is not on the list, this means they were never trained at this site, or they have not been added to the schedule (they do not have access to this site's schedule). If they do not have access to this site's location, see the next section on how to give a staff access.
- 6. Some sites will have an A & B Schedule. If a staff works every week, you want to make sure that A & B is selected. If a staff is every other, you want to make sure you select the correct week for them.

**Time Slot** Edit Audit X

Shift Template	Schedule
Begin Day	Tuesday
Begin Time	9:00 AM
End Time	2:00 PM
Service Type 2 Hours	0.00
Weeks	A <input checked="" type="checkbox"/> B <input checked="" type="checkbox"/>
Notes	
Mandatory Employees	1

**Staff** + Add

<div style="background-color: black; width: 100px; height: 20px;"></div>	Weeks: A <input checked="" type="checkbox"/> B <input type="checkbox"/> <span>⊖</span>
--	--

Delete



- When a site has an 'every other' schedule (meaning they have staff(s) who works every other week), we have to give that site an **A & B schedule**.
- If you ever have to give a site an **A & B schedule**, click on "**Scheduling Location**" and find the site from the list. It will bring you to this page:

Scheduling Locations | Champlin 1

Shift Templates Schedule Delete Audit

Basic Information <span>Edit</span>		Other Information <span>Edit</span>		Notes <span>Edit</span>
Description	Champlin 1	Include Clients	<input type="checkbox"/>	Notes
Active	<input checked="" type="checkbox"/>	Mandatory Staff Count	1	Site Supervisor: 651-641-4009 Ext. 220
Address 1	401 Kimball Drive	Shift Swaps Require Approval	<input checked="" type="checkbox"/>	Manager: Ext. 507
Address 2	0	Disallow Posting of Shift: Hours Before Shift	0	General Manager: Ext 502
City	Champlin	Auto Unpost Posted Shifts: Hours Before Shift	0	
State	MN	Scheduling Method	Schedule From Source	
Zip Code	55316	Weeks In Cycle	1	
Phone Number		Week A Start	9/9/2019	
Email Address		Time Zone	Central	

- Under "**Other Information**", click on "**Edit**". Where it says, "**Weeks in Cycle**", change that from **1** to **2** and click "**Save**".

Other Information

Include Clients

Mandatory Staff Count

Shift Swaps Require Approval

Disallow Posting of Shift: Hours Before Shift

Auto Unpost Posted Shifts: Hours Before Shift

Scheduling Method

**Weeks In Cycle**

Week A Start

Time Zone

Cancel Save



10. Adding an A & B schedule means you will need to go back to the permanent schedule and make sure every shift listed has both A & B selected.

**Time Slot** Edit Audit X

Shift Template	Schedule
Begin Day	Tuesday
Begin Time	9:00 AM
End Time	2:00 PM
Service Type 2 Hours	0.00
Weeks	A <input checked="" type="checkbox"/> B <input checked="" type="checkbox"/>
Notes	
Mandatory Employees	1
Staff	<span>+ Add</span>

Delete



## Giving Staff Access to a Site for Scheduling

1. Only Site Managers can give a staff access to a site.
2. Before giving a staff access to a site, please ask yourself the following questions:
  - a. Do they have a completed on-site packet? If not, has one been sent?
  - b. Has the staff worked there before? If so, do they need any retraining?
  - c. Is the staff finished with all of their initial training?
  - d. Is it their first-time back from a leave?
  - e. Has Susan Schommer, the Senior HR Specialist, sent them an onsite packet? (If not, and it is time sensitive, the Site Manager may send this.)
  - f. Has there been any updated paperwork that the staff need to sign an in-service for? (examples include an updated CRP, SP, etc.)
3. Click on "**Scheduling Location**" and find the site you want to give the staff access to.

Sandata Home

Site Search...

Home

My Time Off

My Log

**Scheduling Locations**

Schedule

Staff Log

Service Location Log

Staff

Time Logging

Thu  
Sep  
15

Type

Cost Center

Task



4. Find the box that says, "Approved Staff" and click on "Add".

The screenshot shows the 'Scheduling Locations' page for 'Champlin 2'. The 'Approved Staff' section at the bottom right contains a table with redacted names and a red box around the 'Add' button.

5. Using the search bar, find the staff's name and click on it. Once their name is highlighted, click "Save."

The 'Approved Staff' modal window shows a search bar with a magnifying glass icon, highlighted by a red box. Below the search bar is a list of redacted names. At the bottom of the modal, there are 'Cancel' and 'Save' buttons.

6. This staff now has access to view the schedule at this site.



## Removing a Staff from a Permanent Schedule

1. In the permanent schedule (**Shift Template**), click on the shift you want to remove the staff from and click on the **minus icon** next to their name.

Time Slot Edit Audit X

Shift Template	Schedule
Begin Day	Tuesday
Begin Time	9:00 AM
End Time	2:00 PM
Service Type 2 Hours	0.00
Weeks	A <input checked="" type="checkbox"/> B <input checked="" type="checkbox"/>
Notes	
Mandatory Employees	1

Staff Add

[Redacted Name] Weeks: A  B  [-]

Delete

2. You will get a prompt to confirm that you want to delete this, click on "Yes".

Are you sure you want to delete? X

Are you sure?

No Yes

## Approving Change Requests and Changing Schedules



1. Approving Change Requests should be done daily (Monday-Friday).
2. Staff will pickup Open and Posted Shifts, which will prompt Sandata to show the pending requests.
3. Prior to approving any Shift Change Requests, please ask the following questions:
  - a. Will the staff be in Over-Time? If so, is OT approved for your site(s)? Is this particular staff able to work OT (you may need to speak to the General Manager/Director if you are unsure if you would like to approve them or not).
  - b. Does the request overlap with any other permanent hours they are scheduled?
  - c. Are they trained at this site? If it has been over three months since they have worked at this site, do they need to complete any further training(s) before working this shift? Have any of the individuals had an annual meeting?
4. There are two ways to view Change Requests:
  - a. On the Home Screen, go to **“Change Requests”** and click **“Open.”**
  - b. On the blue menu, go to **“Schedule”** then **“Change Requests.”**

The image displays two screenshots of the Sandata software interface. The left screenshot shows the 'Schedule Status' page. The left-hand navigation menu is visible, with the 'Schedule' option highlighted in red. The main content area shows a 'Time Logging' section with a digital clock at 2:50:09 PM and a message 'You are not currently logging time.' Below this are fields for 'Type' (Direct Care), 'Location' (Afton Road), and 'Service' (IHS 1:1). The 'Change Requests' section at the bottom has an 'Open' button highlighted in red. The right screenshot shows the 'Home' screen of the Sandata application. The 'Change Requests' option in the navigation menu is highlighted in red.

5. Your screen should now look similar to the screen shot below, showing any requests that are still pending:



Sandata Change Requests

Site Search: [Search] [Filter]

Home  
My Time Off  
My Log  
Scheduling Locations  
Schedule  
Flags  
Change Requests  
Copy  
Generate  
Auto Schedule  
Publish  
More  
Staff Log  
Service Location Log  
Staff  
Time Off Requests

Sep 9, 2023 5:00 PM  
[Name] has picked up this open shift. [Warning Icon]  
Saturday, September 9, 2023  
5:00 PM - 10:00 PM  
Unfilled Shift Slot: Change request for open shift needs to be approved/denied Unfilled Shift Slot: There is no staff scheduled  
Description: [Blank] Schedule: [Blank]  
Location: Maple Grove [Map Icon] [Location Pin Icon]  
Staff: [Blank], Open [Open Icon]  
Clients: Soto, Blossom  
Approve Deny Details

Sep 16, 2023 9:00 AM  
[Name] has picked up this open shift. [Warning Icon]  
Saturday, September 16, 2023  
9:00 AM - 2:00 PM  
Unfilled Shift Slot: Change request for open shift needs to be approved/denied Unfilled Shift Slot: There is no staff scheduled  
Description: [Blank] Schedule: [Blank]  
Location: McKnight [Map Icon] [Location Pin Icon]  
Staff: [Blank], Open [Open Icon]  
Clients: Bourgois, Anthony, Cundy, John  
Notes: [Blank]  
SHIFT Notes: 1:1  
Approve Deny Details

Sep 9, 2023 9:00 AM  
[Name] has picked up this open shift. [Warning Icon]  
Saturday, September 9, 2023  
9:00 AM - 2:00 PM  
Unfilled Shift Slot: Change request for open shift needs to be approved/denied Unfilled Shift Slot: There is no staff scheduled  
Description: [Blank] Schedule: [Blank]

Sep 3, 2023 10:00 AM  
[Name] has picked up this open shift. [Warning Icon]  
Sunday, September 3, 2023  
10:00 AM - 10:00 PM  
Unfilled Shift Slot: Change request for open shift needs to be approved/denied Unfilled Shift Slot: There is no staff scheduled  
Description: [Blank] Schedule: [Blank]

6. Click on “Approve” or “Deny.” Note: If you Deny a request, you will need to write a note and also notify the staff.

Sep 9, 2023 5:00 PM [Close Icon]

[Name] has picked up this open shift. [Warning Icon]

Saturday, September 9, 2023  
5:00 PM - 10:00 PM

Unfilled Shift Slot: Change request for open shift needs to be approved/denied Unfilled Shift Slot: There is no staff scheduled

Description: [Blank] Schedule: [Blank]

Location: Maple Grove [Map Icon] [Location Pin Icon]

Staff: [Blank], Open [Open Icon]

Clients: Soto, Blossom

Approve Deny Details

### How to Manually Add a Staff to a Shift

1. Click on “Scheduling Locations.”



# Sandata

Site Search...

Home

My Time Off

My Log

**Scheduling Locations**

Schedule

Staff Log

2. Select your site that you would like to edit a schedule for/add a staff to a shift. (ex. you would do this if a staff verbally let you know they were picking up an open shift).
3. Click on **“Schedule.”**

Scheduling Locations | Regency

Shift Templates Schedule Delete Audit

Basic Information		Other Information		Notes
Description	Regency	Include Clients	<input type="checkbox"/>	Notes
Active	<input checked="" type="checkbox"/>	Mandatory Staff Count	1	Site Supervisor: 651-641-4009 Ext. 280
Address 1	3521 37th Ave NE	Shift Swaps Require Approval	<input checked="" type="checkbox"/>	Manager: Ext. 506
Address 2	0	Disallow Posting of Shift:	0	General Manager: Ext 502

4. Your screen will look similar to the below. The Green boxes already have scheduled staff, the red box with the blue “O” is OPEN, and the Green box with the red “!” is a shift waiting for approval (a staff already requested to work this shift, and the shift is pending approval).



Scheduling Locations | Regency | Schedule

Copy Schedule | Generate Schedule | Auto Schedule | Publish Schedule

Month Week Day List

### September 2023

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
28 6:00 am - 9:00 am Schedule 9:00 am - 2:00 pm Schedule 2:00 pm - 10:00 pm Schedule	29 6:00 am - 9:00 am Schedule 9:00 am - 2:00 pm Schedule 2:00 pm - 10:00 pm Schedule	30 6:00 am - 9:00 am Schedule 9:00 am - 2:00 pm Schedule 2:00 pm - 10:00 pm Schedule	31 6:00 am - 9:00 am Schedule 9:00 am - 2:00 pm Schedule 2:00 pm - 10:00 pm Schedule	1 6:00 am - 9:00 am Schedule 9:00 am - 2:00 pm Schedule 2:00 pm - 10:00 pm Schedule	2 6:00 am - 10:00 am Schedule 10:00 am - 10:00 pm Schedule	3 6:00 am - 10:00 am Schedule 10:00 am - 10:00 pm Schedule
4 6:00 am - 9:00 am Schedule 9:00 am - 2:00 pm Schedule 2:00 pm - 10:00 pm Schedule	5 6:00 am - 9:00 am Schedule 9:00 am - 2:00 pm Schedule 2:00 pm - 10:00 pm Schedule	6 6:00 am - 9:00 am Schedule 9:00 am - 2:00 pm Schedule 2:00 pm - 10:00 pm Schedule	7 6:00 am - 9:00 am Schedule 9:00 am - 2:00 pm Schedule 2:00 pm - 10:00 pm Schedule	8 6:00 am - 9:00 am Schedule 9:00 am - 2:00 pm Schedule 2:00 pm - 10:00 pm Schedule	9 6:00 am - 10:00 am Schedule 10:00 am - 10:00 pm Schedule	10 6:00 am - 10:00 am Schedule 10:00 am - 10:00 pm Schedule

5. Click on the red shift you would like to schedule a staff in. Click on "Assign."

Slot + Add

Open

**Assign**

6. Now you can select that staff name.



## Fill Slot

Select staff you would like to fill and click save.  
Hours totals indicate total hours if this shift is assigned to staff.

 ▼

12 of 12 shown

		Week:	Day:	24 Hr:	Score:	
[Redacted]		64	8	12	100	▼
[Redacted]		8	8	8	100	▼
[Redacted]		41	8	8	100	▼
[Redacted]		8	8	8	100	▼
[Redacted]		8	8	8	100	▼
[Redacted]		16	8	12	100	▼
[Redacted]		8	8	8	100	▼
[Redacted]		8	8	8	100	▼
[Redacted]		30	16	8	100	▼
[Redacted]		8	8	8	100	▼
[Redacted]		104	16	24	100	▼
[Redacted]		20	20	8	100	▼

- Once you selected a staff to fill the shift, click **“Save.”**
- If a staff only wants to pick up half a shift, you can edit the schedule with the hours they would like to work, and post the other hours as open. Go to **“Basic Information”** and click on **“Edit.”**

### Basic Information

Edit

Description	Schedule
Begin Date	9/1/2023
Begin Time	2:00 PM
End Time	10:00 PM
Duration	8
Mandatory Staff	1
Service Type	None
Service Type 2	None
Service Type 2 Hours	0.00
Scheduling Method	Schedule From Source
Status	Active



9. Edit the **Begin** and **End Time** for what hours the staff is picking up, and for the **Description**, you can write a brief summary of the change. For example, if a staff wanted to only work 4pm to 10pm, instead of 2pm, it would look like the below:

**Basic Information**

Description	<input type="text" value="Picked Up a Partial Shift"/>
Begin Date	<input type="text" value="9/1/2023"/>
Begin Time	<input type="text" value="04:00 PM"/>
End Time	<input type="text" value="10:00 PM"/>
Duration	<input type="text" value="6"/>
Mandatory Staff	<input type="text" value="1"/>
Service Type	<input type="text"/>
Service Type 2	<input type="text"/>
Service Type 2 Hours	<input type="text" value="0"/>
Scheduling Method	<input type="text" value="Schedule From Source"/>
Status	Active

10. Once the new shift time is saved, then you can **Assign** a staff noted previously.

11. To post the open hours of 2pm to 4pm, go to the main schedule and click on the open time slot that doesn't have a shift listed. This will pull of the below screen, and you would fill it out for the open time and click "**Save.**"



Save Cancel

### Basic Information

Description: Open Shift

Begin Date: 9/2/2023

Begin Time: 02:00 AM

End Time: 04:00 PM

Mandatory Staff: 1

Service Type: [Dropdown]

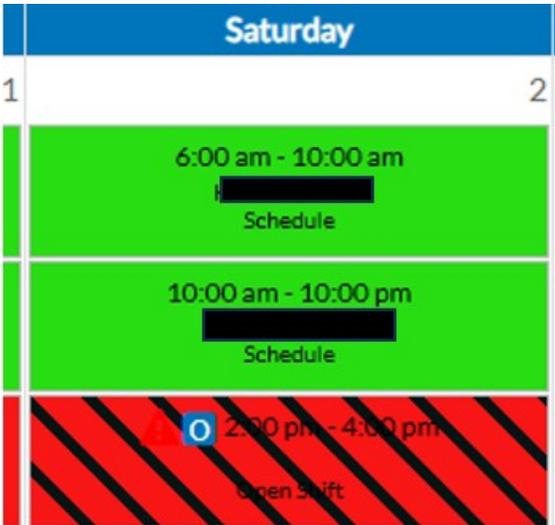
Service Type 2: [Dropdown]

Service Type 2 Hours: [Text Box]

Scheduling Method: Schedule From Source

On Call:

12. It will not automatically show for staff to pick up. Once the above information is entered, it will look like the below:



13. Now you will need to publish the schedule in order for staff to see the open partial shift. Click on "Schedule," then "Publish Schedule:"



14. A pop-up will now ask you to select the week you want to publish, so select the correct “**Week**”, then click “**Publish.**” You would not need to select “Number of Weeks” unless you are wanting to Publish changes you made for more than one week at a time.



Select the week you would like to publish the schedule for.

Week	9/4/2023 to 9/10/2023
Number Of Weeks	1 - (9/4/2023 - 9/10/2023)



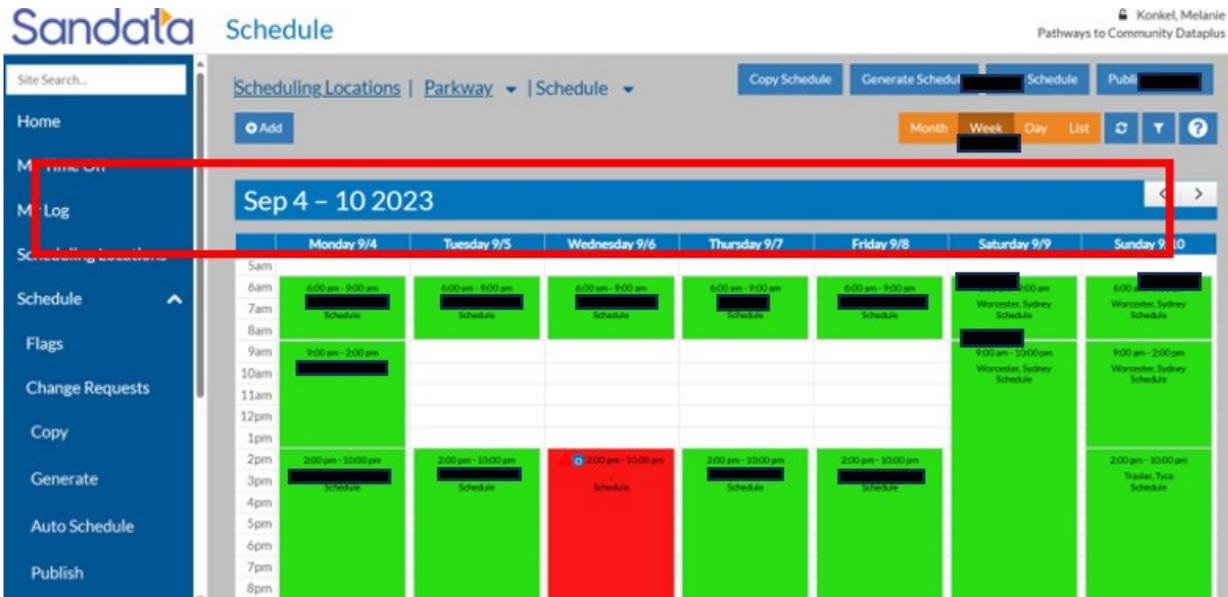
15. You have now posted an Open partial shift.

### **How to Inactivate a Shift**

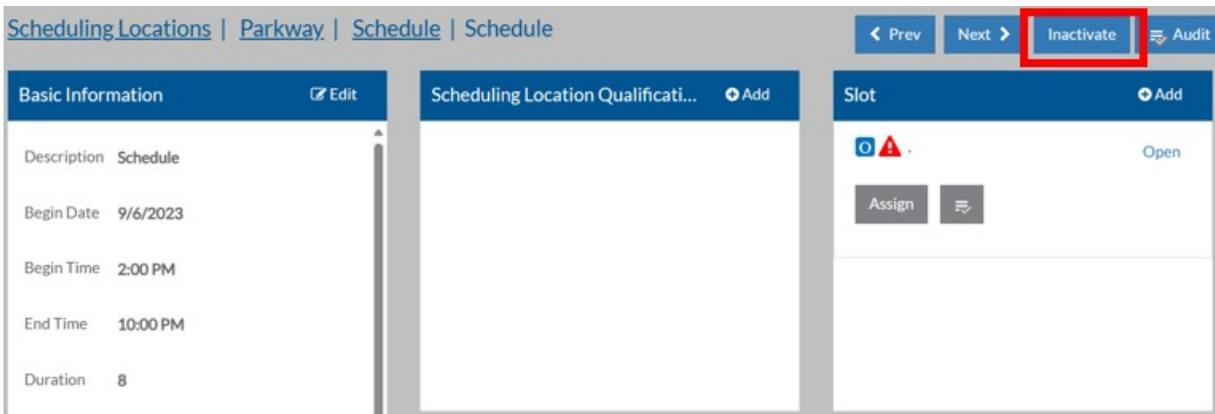
1. If you need to inactivate a shift, for example, you made a mistake when creating a schedule or an individual will not be home and you don't need any staffing for a shift, follow these next few steps.



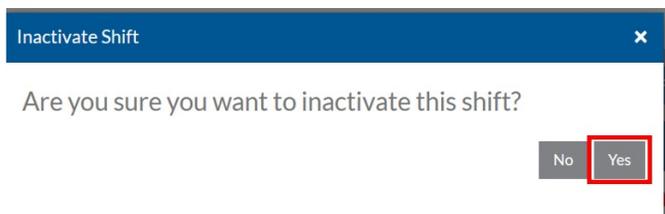
- Go to “**Scheduling Locations,**” and select your **site** you would like to make the change, and then click on “**Schedule**” (as described in previous steps). It will bring you back to the screen below:



- Click on the shift you would like to remove. Now click on “**Inactivate**” in the top right corner of your screen. Your screen should look like the below:



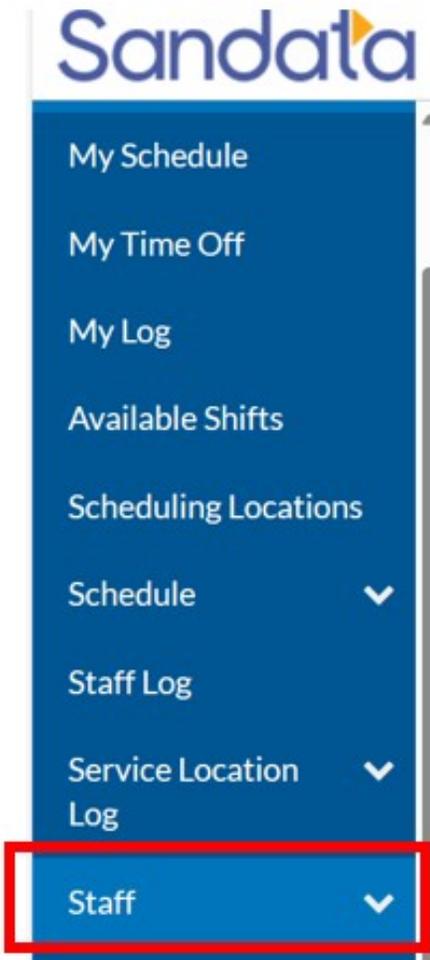
- Click Yes, and that shift will no longer show on the schedule for that week.



## How to Remove Staff from Schedules for a Period of Time or Permanently

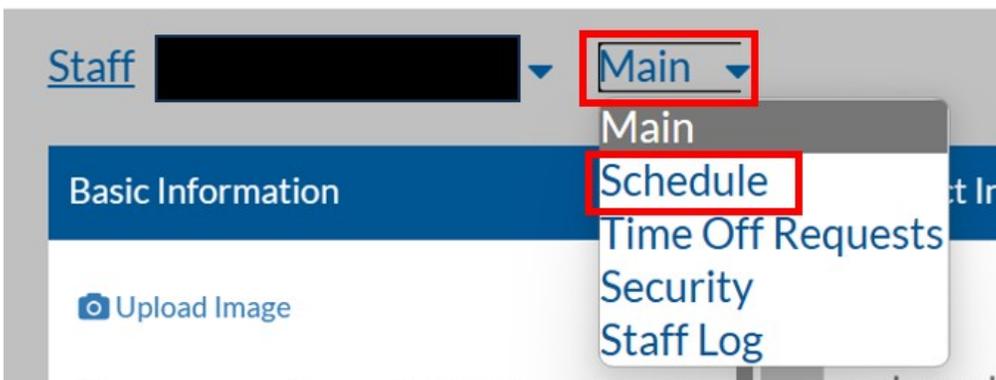


1. If a staff is taking a Leave of Absence, and you would like to remove them from their permanent schedules for a few weeks at a time, here is an easy way to do so. Click on “**Staff.**”



2. Click on “**Main**” then “**Schedule.**”

## Staff



3. Click on “**Remove Staff**” in the righthand corner.



Remove Staff

Month Week Day List

Refresh Filter Help

- Select the **Start** date and **End** date for the schedules you would like them removed from. Once you enter in the dates, click “**Remove.**”

Remove Staff ×

Remove this Staff from all Scheduled Shift Time Slots within this date range and optionally remove the Staff from any Shift Template Time Slots.

Start

End

Remove From Templates

Cancel

- If you would like to permanently remove them from any Templates on the schedule, check the “**Remove From Templates**” box.

Start

End

Remove From Templates