



PTC Sandata Tutorial

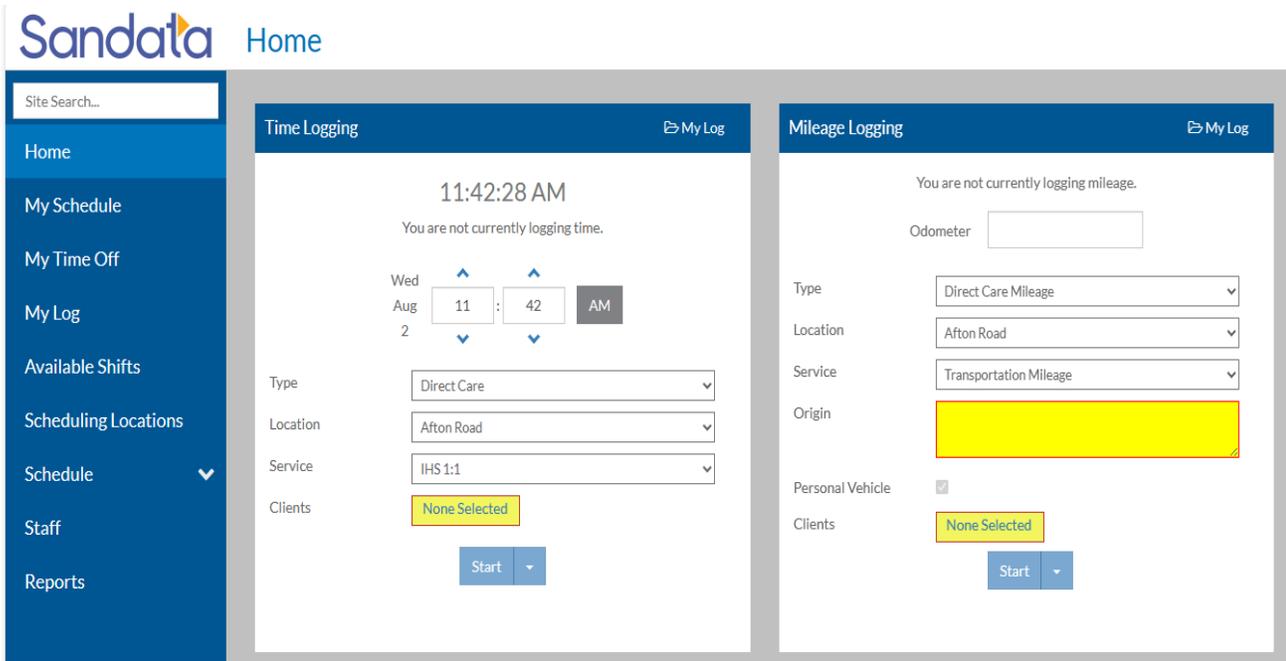
Residential Services Staff

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.



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





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) leaves for your site, you cannot stay clocked in to work in the home. Please call your Supervisor 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 is set to '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?

- 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 SLS Training (585).

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



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

Time Logging My Log

10:48:44 AM

You are not currently logging time.

Thu
May 12

10 : 48 AM

Type: Direct Care

Location: Champlin 1

Service: CRS

Clients: None Selected

Start

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 your Supervisor.

Home

Time Logging

10:57:15 AM

You are not currently logging time.

Thu
May 12

10 : 57 AM

Type: Direct Care

Location: Champlin 1

Service: CRS

Clients: None Selected

Start

Clients Guest x

Q All Clear

Crossman, James

Nelson, David

Ummel, Ryan

Done



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



What to do when an individual Leaves/Returns to your site:

1. Individuals may go on leave/overnight/vacation visits with family/caregivers/friends, etc. When an individual leaves, all staff must uncheck the individual from their time logs. If there is more than one staff working at the site, all staff must match when they log the individual out. If one staff logs the individual out at 2pm and another staff logs them out at 2:01pm, that's considered an overlap and there will be an error on both staffs' time logs.
2. To log someone out during your shift, click on the list that has all the clients you've already selected.

Time Logging My Log

11:18:09 AM

You began logging time at 10:59:00 AM

Thu
May
12

11 : 18 AM End

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

Type Direct Care

Location Champlin 1

Service CRS

Clients 3 Selected

Switch



3. Unselect the individual who is leaving for the overnight/vacation and click "Done."

BEFORE

AFTER



4. Click **“Switch”** after you remove the individual.

Time Logging My Log

11:21:55 AM

You began logging time at 10:59:00 AM

Thu
May 11 : 21 AM End

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

Type Direct Care

Location Champlin 1

Service CRS

Clients 2 Selected

Switch

5. If an individual returns from a leave/overnight while you're working, you will do the exact same thing— instead of removing an individual from the client list, you are adding the individual. Again, keep in mind that if there is more than one staff working at the site, all staff must match when they log the individual in. If one staff logs the individual in at 2pm and another staff logs them in at 2:01pm, that's considered an overlap and there will be an error on both staffs' time logs.



Community Residential Setting (CRS) Services and Overnights

1. If you are not sure if you are working at a CRS site, you can easily find out by looking at the **Service** when clocking in/out.

Type	Direct Care
Location	Champlin 1
Service	CRS
Clients	None Selected
<input type="button" value="Start"/>	

2. All staff at a CRS Site must be clocked in with ALL individuals at the site when working. You will get an error message if you and another staff clock in with different individuals during the same time periods.
3. Individuals need to be clocked out when leaving for overnights and remain clocked out until they return. It is VERY important that staff DO NOT CLOCK in with individuals that are not present for the overnights.
4. When individuals are returning from a leave/overnight, it is important that all staff coordinate the exact time to clock back in with the individual. Again, keep in mind that if there is more than one staff working at the site, all staff must match when they log the individual out/in. If one staff logs the individual in at 2pm and another staff logs them in at 2:01pm, that's considered an overlap and there will be an error on both staffs' time logs.



In Home Support (IHS) Services and Overnights

1. If you are not sure if you are working at an IHS site, you can easily find out by looking at the **Service** when clocking in/out.

Type	Direct Care
Location	Langford
Service	IHS 1:1
Clients	None Selected
<input type="button" value="Start"/>	

2. Individuals **MUST** be clocked in at exact times when leaving/returning from any outings/time away from staff. For example, if an individual goes to church with their family and staff do not go with them, staff **MUST** clock out with them while they are gone and can only clock back in with them when they return. The exception to this rule is Overnights. This also applies when individuals are leaving/returning from their day program. It is considered timecard fraud if you round the time up or down.
3. If you work at an **IHS 1:1** site, this means the staff can only clock in with one individual at a time.
4. If you work at an **IHS 1:2** site, this means the staff can clock in with one or more individuals at a time.
5. For overnights, staff must log out with IHS 1:1 or 1:2, switch locations to the Site Overnight, then clock in as **Overnights-15 min.**
 - a. Ex. If you clocked in as Parkway for 1:2, and then your overnight starts at 10pm, you would clock out, then clock back in as Parkway Overnights (see below):

Type	Direct Care
Location	Parkway Overnights
Service	Overnights-15 min
Clients	None Selected
<input type="button" value="Start"/>	



- b. Overnights start at 10pm and end at 6am.
 - c. If you are continuing your shift after 6am, you must clock out at 6am, and then switch your Location (ex. Clock out with Parkway Overnights, then back in with Parkway 1:2).
6. For IHS sites, when individuals are NOT home for the overnights staff must still clock in with them (for the overnights only!) There are a few exceptions to this rule, so please check in with your Supervisor/Direct Manager if you are not sure. This would include being admitted to a hospital, under the care of another service, or out of the state.
 7. When individuals are returning from a leave/overnight, it is important that all staff coordinate the exact time to clock back in with the individual. Again, keep in mind that if there is more than one staff working at the site, all staff must match when they log the individual in. If one staff logs the individual in at 2pm and another staff logs them in at 2:01pm, that's considered an overlap and there will be an error on both staffs' time logs.



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 site). This must be pre-approved by your 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.

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 shows a clock at 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 is visible, showing a table with columns for days of the week (Monday 5/9/2022 to Sunday 5/15/2022) and rows for time slots (7 am, 8, 9, 10, 11, 12 pm, 1, 2, 3). A red box highlights the '+ Add' button in the top right corner of the Hours section. The table shows zero hours worked for all days and time slots.

	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.
 - f. **Service:** You will only have options to select from in this section if you work at an IHS home. Refer to your supervisor if you're unsure what you should be selecting; otherwise, the CRS sites will default to the correct Service.
 - g. **Clients:** Choose the individuals you worked with.
 - h. **Notes:** Add in a note that tells why you needed to add this in.

Hours

Hours Info

Type: Direct Care

Date: 5/12/2022

Begin: [Yellow highlight]

End: [Clock icon]

Total Hours: 0.00

Service Location: Champlin 1

Service: CRS

Clients: + Guest

Search: [Q] All Clear

Crossman, James

Nelson, David

Ummel, Ryan

Transaction ID

Notes: Insert Template [Dropdown]

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.
 - f. **Service:** You will only have options to select from in this section if you work at an IHS home. Refer to your supervisor if you're unsure what you should be selecting; otherwise, the CRS sites will default to the correct Service.
 - 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.

The screenshot shows the 'Hours' application window with the following fields and values:

- Status:
- Type: Direct Care
- Date: 5/12/2022
- Begin: 2:00 PM
- End: 3:00 PM
- Total Hours: 1.00
- Service Location: Champlin 1
- Service: CRS
- Clients: A list containing Crossman, James; Nelson, David; and Ummel, Ryan.

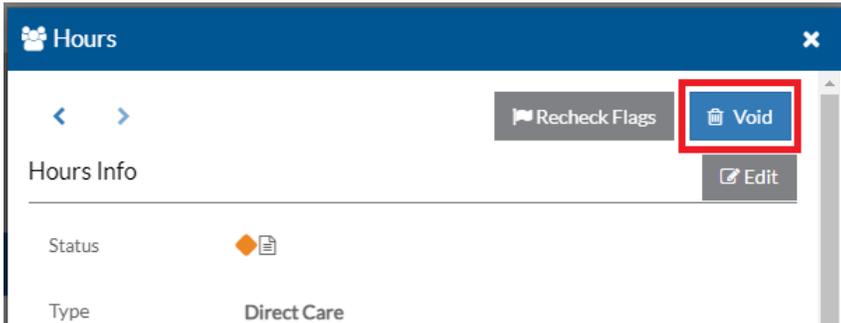
The screenshot shows the 'Notes' section with the following elements:

- Transaction ID: [Empty field]
- Notes: Insert Template [Dropdown menu]
- Text area containing: "Forgot to clock in."
- Buttons: "Save and Add", "Cancel", and "Save".

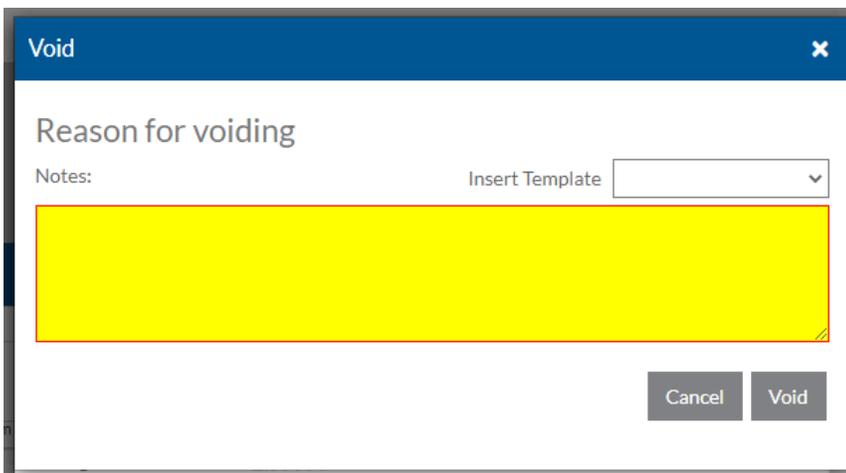


How to Void a Time Log

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.



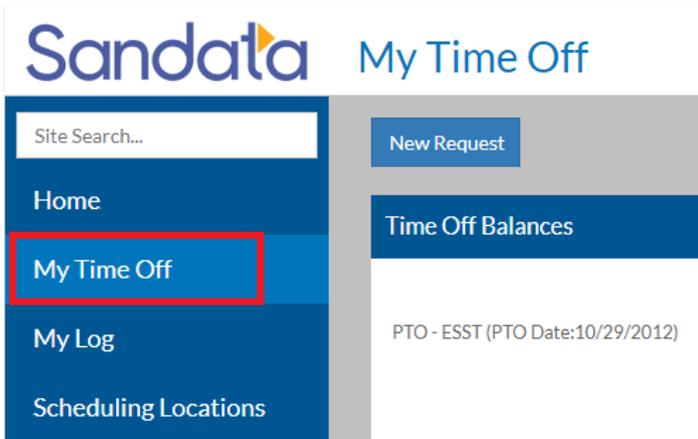
4. If you have an error (for ex. you clocked in twice for the same timecard), the below is an example of what it would look like once voided. The voided timecard is on the right in white.

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 your Site Manager of your time off.**
 - Entering your PTO request does not equal notifying your Site 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 your supervisor 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.”

The screenshot shows the Sandata My Time Off interface. On the left is a navigation menu with options: Home, My Time Off, My Log, and Scheduling Locations. The main content area has a 'New Request' button highlighted with a red box. Below it is a 'Time Off Balances' section showing a balance of 109.0000 for PTO - ESST (PTO Date: 10/29/2012).

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

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

The 'New Request' pop-up form contains the following fields: 'All Day' with an unchecked checkbox; 'Date' with a calendar icon and a highlighted 'm/dd/yyyy' placeholder; 'Begin Time' with a time picker set to 01:00 PM; 'End Time' with a time picker set to 02:00 PM; 'Time Off Reason' with a dropdown menu showing 'PTO'; and a 'Note' text area. At the bottom right, there are 'Cancel' and 'Next' buttons, with 'Next' being highlighted.

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

- 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
PTO - Anniversary	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 your Site Manager.



How to Post or Pick Up Shifts

1. If you are looking to pick up additional shifts each week, in addition to your permanent scheduled hours, you may put in a request on Sandata to do so. Please consider the following before picking up shifts:
 - a. Are you trained in and approved to work at the site(s) you are looking to pick up hours? If you are not, please contact your Site Supervisor/Manager.
 - b. Would you be in Over-Time? If so, is OT currently approved? If you are not sure, please contact your Site Manager.
 - c. Do the hours conflict with your permanent scheduled hours? Please consider the time it would take to drive between sites.
2. Your Site Supervisor/Manager will either approve or deny your request to pick a shift.
3. If you are requesting time off, and need to find staff to cover your hours, you can post shifts for other staff to pick up. It is your responsibility to notify that site's Manager that you are looking for coverage. Please reach out to that site's Manager if you have questions about this.

How to Pick Up Open Shifts

1. There are two ways to view Open Hours:
 - a. On the Home Screen, next to the Available shifts box, click on **“Open.”**
 - b. On the blue menu bar, click on **“Available Shifts.”**

The screenshot shows the Sandata Home interface. On the left is a blue navigation menu with the following items: Home, My Schedule, My Time Off, My Log, Available Shifts (highlighted with a red box), Scheduling Locations, and Reports. The main content area is titled 'Time Logging' and shows the current time as 12:47:03 PM. Below the time, it says 'You are not currently logging time.' There are input fields for the date (Mon Aug 28) and time (12:47 PM). Below these are dropdown menus for 'Type' (set to Direct Care) and 'Location' (set to 1 to 1). A 'Service' field shows 'Loading...'. At the bottom of the main content area is a 'Start' button. At the bottom of the page, there is a blue bar with the text 'Available Shifts' and an 'Open' button (highlighted with a red box). Below this bar, there is a message: 'Select the Open link to see if there are available shifts for you to pick up.'



- For any sites that you are trained on, it will show a list of available shifts you can pick up for that week. See below for an example.

- Find a shift that you would like to pick up, then click on **“Pick Up Shift.”** Once you have picked up a shift, you cannot cancel or undo this. If you made an error, you need to reach out to your Site Manager to let them know ASAP.

- Your Site Manager will approve or deny your request as soon as they are able. Once approved, you will also see this updated in **“My Schedule”** on Sandata.

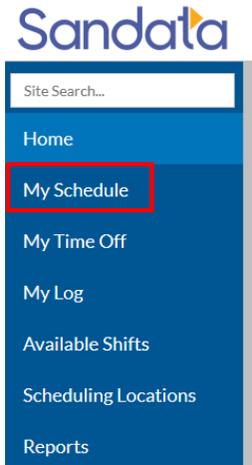
	Monday 8/28	Tuesday 8/29	Wednesday 8/30	Thursday 8/31	Friday 9/1	Saturday 9/2	Sunday 9/3
5am							
6am							
7am							
8am							
9am							
10am							

Scheduled: 8.00 Posted: 0.00 Picked Up (Pending): 0.00 PTO (Approved): 0.00 PTO (Pending): 0.00 Projected Total: 8.00



How to Post a Shift

1. If you are requesting PTO and need a staff to cover your permanent scheduled shift, you can post a shift.
2. Click on “**My Schedule**” from the Home Screen.

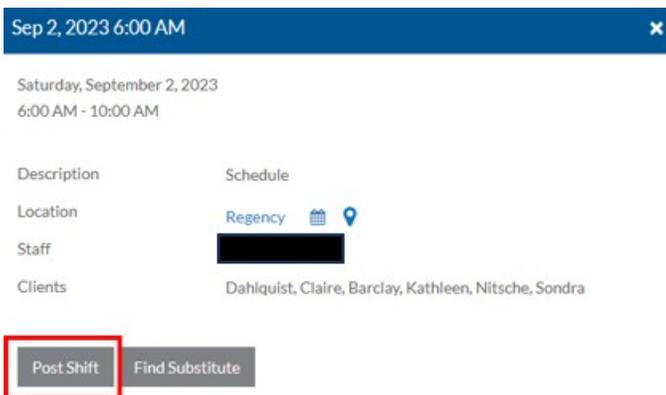


3. Click on the shift you would like to find coverage for. Click on the “**green**” box.

	Monday 8/28	Tuesday 8/29	Wednesday 8/30	Thursday 8/31	Friday 9/1	Saturday 9/2	Sunday 9/3
6am						6:00am - 10:00am Shifts	6:00am - 10:00am Shifts
7am							
8am							
9am							
10am							

Scheduled: 8.00 Posted: 0.00 Picked Up (Pending): 0.00 PTO (Approved): 0.00 PTO (Pending): 0.00 Projected Total: 8.00

4. Once you click on the shift you would like covered, you will get a pop-up that looks like the below. Click on “**Post Shift.**”



5. You will be updated once a staff picks up the open shift, and your Site Manager approves it.