



# PTC Sandata Tutorial

## *Crisis 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) leaves for your site, you can not 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'. All other elements, including the time, date, and service type, remain the same.



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  
12

11 : 21 AM End

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

Type

Location

Service

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.



## Respite Services and Overnights

1. Under Service, your Locations will typically default to **Respite, Crisis Respite, or CRS.**
  - a. Parkfield Ave (**CRS**)
  - b. Louisiana Ave (**Crisis Respite**)
  - c. First Ave (**Crisis Respite**)
  - d. First Ave Apt (**Crisis Respite**)
  - e. Plymouth (**Crisis Respite**)
  - f. Welch (**Crisis Respite**)

**Time Logging** My Log

9:05:54 AM

You are not currently logging time.

Wed  
Aug 9

09 : 05 AM

Type

Location

**Service**

Clients

Start

2. All staff 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 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.

**Tip:** If you're taking an individual into the community, take a photo of your odometer before you and the individual leave the site.

The screenshot shows the 'Mileage Logging' interface. At the top, it says 'You are not currently logging mileage.' Below this, the 'Odometer' input field is highlighted with a red border. The form includes several dropdown menus: 'Type' (set to 'Direct Care Mileage'), 'Location' (set to 'Champlin 1'), and 'Service' (set to 'Transportation Mileage'). The 'Origin' field is a yellow placeholder. There is a 'Personal Vehicle' checkbox which is checked, and a 'Clients' dropdown set to 'None Selected'. A 'Start' button is at the bottom.

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 screenshot shows the 'Mileage Logging' form with the 'Type' dropdown menu open. The 'Odometer' field is visible at the top. The 'Type' dropdown is highlighted with a red box and shows two options: 'Direct Care Mileage' (which is selected and highlighted in blue) and 'Staff Mileage'. Other fields like 'Location', 'Service', 'Origin', 'Personal Vehicle', and 'Clients' are visible below.



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.

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

Summary								
	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								

Hours							
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	7 am
8	8	8	8	8	8	8	8
9	9	9	9	9	9	9	9
10	10	10	10	10	10	10	10
11	11	11	11	11	11	11	11
12 pm	12 pm	12 pm	12 pm	12 pm	12 pm	12 pm	12 pm
1	1	1	1	1	1	1	1
2	2	2	2	2	2	2	2
3	3	3	3	3	3	3	3



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 Louisiana. Please select **Respite**. For other sites, this will default to **Crisis Respite**.
  - 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 box with clock icon]

End: [White box with clock icon]

Total Hours: 0.00

Service Location: Champlin 1

Service: CRS

Clients: + Guest

Search: [Search bar] All Clear

Client List: Crossman, James; Nelson, David; Ummel, Ryan

Transaction ID: [Field]

Notes: [Field] 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, click "Edit."

Hours

Recheck Flags Void

**Edit**

Hours Info

Status

Type Direct Care

Date 5/12/2022

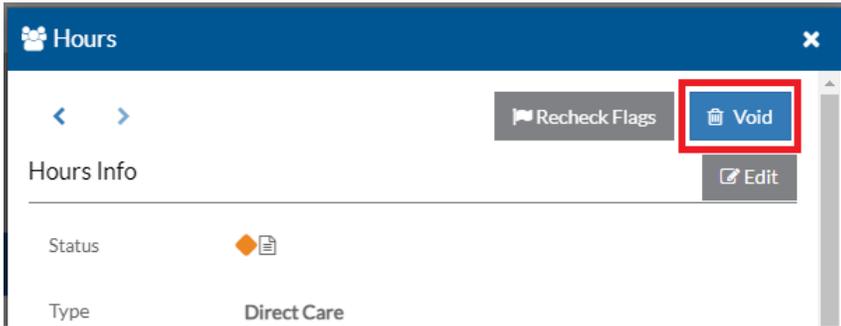


3. Make the changes necessary for your time log.
  - a. **Type:** Direct Care or Non-Direct Care?
  - b. **Date:** The day you worked.
  - c. **Begin:** The time you started your shift.
  - d. **End:** The time you ended your shift.
  - e. **Service Location:** The site you worked at.
  - f. **Service:** You will only have options to select from in this section if you work at Louisiana. Please select **Respite**. For other sites, this will default to **Crisis Respite**
  - 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.

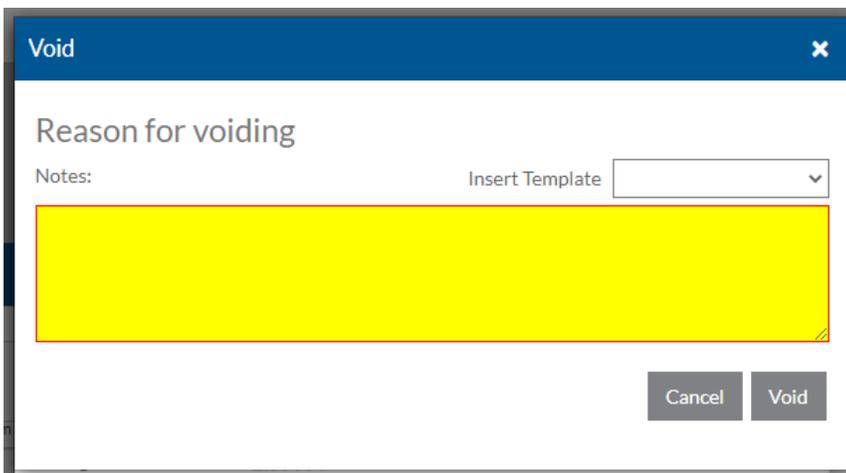


## How to Void a Time Log

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 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 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. PTO request(s) will be automatically denied if not entered in before the start of the shift. 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. Please refer to the PTO Policy and Work Attendance Policy for more information.
3. Click on **"My Time Off"**

The screenshot shows the Sandata My Time Off interface. On the left is a navigation menu with options: Home, My Time Off (highlighted with a red box), My Log, and Scheduling Locations. On the right, there are buttons for 'New Request' and 'Time Off Balances'. Below these buttons, the text 'PTO - ESST (PTO Date:10/29/2012)' is visible.

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.

The screenshot shows the 'Time Off Balances' section. It displays the text 'PTO - ESST (PTO Date:10/29/2012)' and the balance '109.0000'. The balance is labeled as 'Balance as of last pay'.

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



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.

- a. **All Day:** Are you requesting for the whole day or just a 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 PTO. If you are choosing FMLA or Unprotected Leave, please refer to your supervisor for further actions.
- f. **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
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, on top of 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 your Site Supervisor/Manager that you are looking for coverage. Please reach out to your Site Supervisor/Manager if you have questions about this.
  - a. \*Note: If you pick up a shift at a different site, you need to contact the Site Supervisor/Manager for that site. Ex. If you are regularly scheduled at McKnight, but then pick up hours at St. John's, you would contact the St. John's supervisor with any questions or concerns in regard to that site.

### How to Pick Up Open Shifts

1. There are two ways to view Open Hours:
  - b. On Home Screen, next to the Available shifts box, click on “**Open.**”
  - c. 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 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 date and time pickers for Monday, August 28, 12:47 PM. Below that are dropdown menus for 'Type' (Direct Care) and 'Location' (1 to 1). A 'Service' dropdown is currently loading. A 'Start' button is visible. At the bottom of the Time Logging section, there is an 'Available Shifts' link and an 'Open' button (highlighted with a red box). Below this, a message reads: '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.

Three side-by-side screenshots of a shift selection interface. Each screenshot shows a shift for Friday, September 8, 2023, from 2:00 PM to 10:00 PM. The shift details include: Description: Schedule; Location: Regency; Staff: , Open; Clients: Barclay, Kathleen, Dahlquist, Claire, Nitsche, Sondra. A "Pick Up Shift" button is visible at the bottom of each panel.

- 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.

A single screenshot of the shift selection interface, identical to the previous one, but with a red rectangular box highlighting the "Pick Up Shift" button at the bottom left.

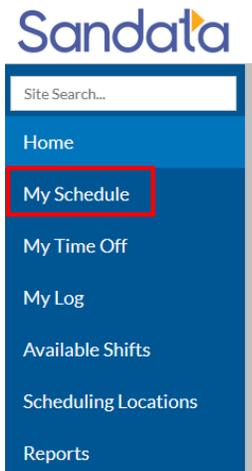
- Your Site Manager will approve or deny your request as soon as they are able. Once approved, you will also see this updated in **"My Schedule"** on Sandata.

A screenshot of a weekly schedule grid for the period Aug 28 - Sep 3, 2023. The grid shows time slots from 5am to 10am. On Saturday 9/2 and Sunday 9/3, there are green blocks representing shifts from 2:00 pm to 10:00 am. At the bottom, a summary row shows: 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

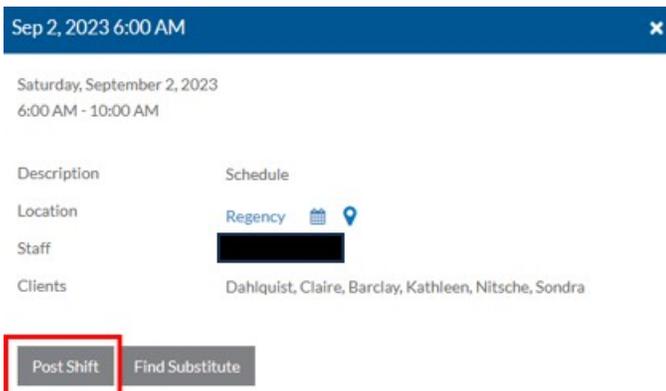
1. If you are requesting PTO and need a staff to cover your permanent scheduled shift, you can post a shift.
2. Click on “My Schedule” from the Home Screen.



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



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.