



# Pathways to Community Sandata Tutorial

ALL SERVICES

# How to Clock In/Out

**RESIDENTIAL, CRISIS, AND  
FAMILY SERVICES**



## Clocking In/Out of Your Shifts

Welcome! Please log in.

**Sandata**

User Name

kabsl@pathwaystocommunity.com

Password

..... Show

Remember my user name

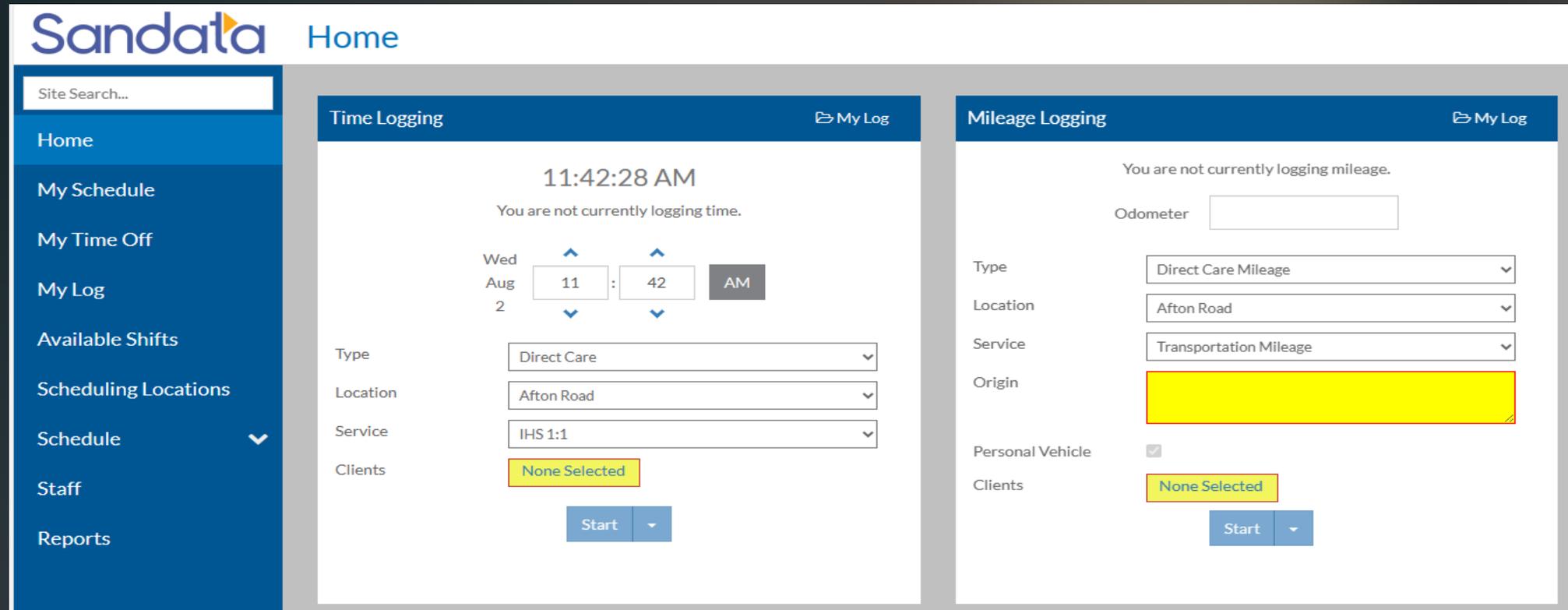
[Log In](#) [Help, I forgot my password!](#)



- 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, if applicable).
- Log in with your user credentials.

# Clocking In/Out of Your Shifts

- Your Home dashboard should look similar to this.



The screenshot displays the Sandata Home dashboard. On the left is a blue navigation sidebar with a search bar and menu items: Home, My Schedule, My Time Off, My Log, Available Shifts, Scheduling Locations, Schedule, Staff, and Reports. The main content area is divided into two panels. The 'Time Logging' panel shows the current time as 11:42:28 AM and a message 'You are not currently logging time.' Below this is a date and time selector for Wednesday, August 2nd, with fields for 11:42 AM. It includes dropdown menus for Type (Direct Care), Location (Afton Road), and Service (IHS 1:1), and a 'Clients' field with 'None Selected'. A 'Start' button is at the bottom. The 'Mileage Logging' panel shows a message 'You are not currently logging mileage.' It features an 'Odometer' input field, dropdown menus for Type (Direct Care Mileage), Location (Afton Road), and Service (Transportation Mileage), a highlighted yellow 'Origin' field, a checked 'Personal Vehicle' checkbox, and a 'Clients' field with 'None Selected'. A 'Start' button is also present.

# Clocking In/Out of Your Shifts



- 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.
  - **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 a 'Time Logging' interface with a blue header and a 'My Log' link. The current time is 10:48:44 AM, and a message states 'You are not currently logging time.' Below this is a date and time selector showing 'Thu May 12' and '10:48 AM'. A red box highlights the 'Type' dropdown menu, which is currently set to 'Direct Care'. Other dropdown menus include 'Location' (Champlin 1), 'Service' (CRS), and 'Clients' (None Selected). A 'Start' button is located at the bottom.

# Clocking In/Out of Your Shifts

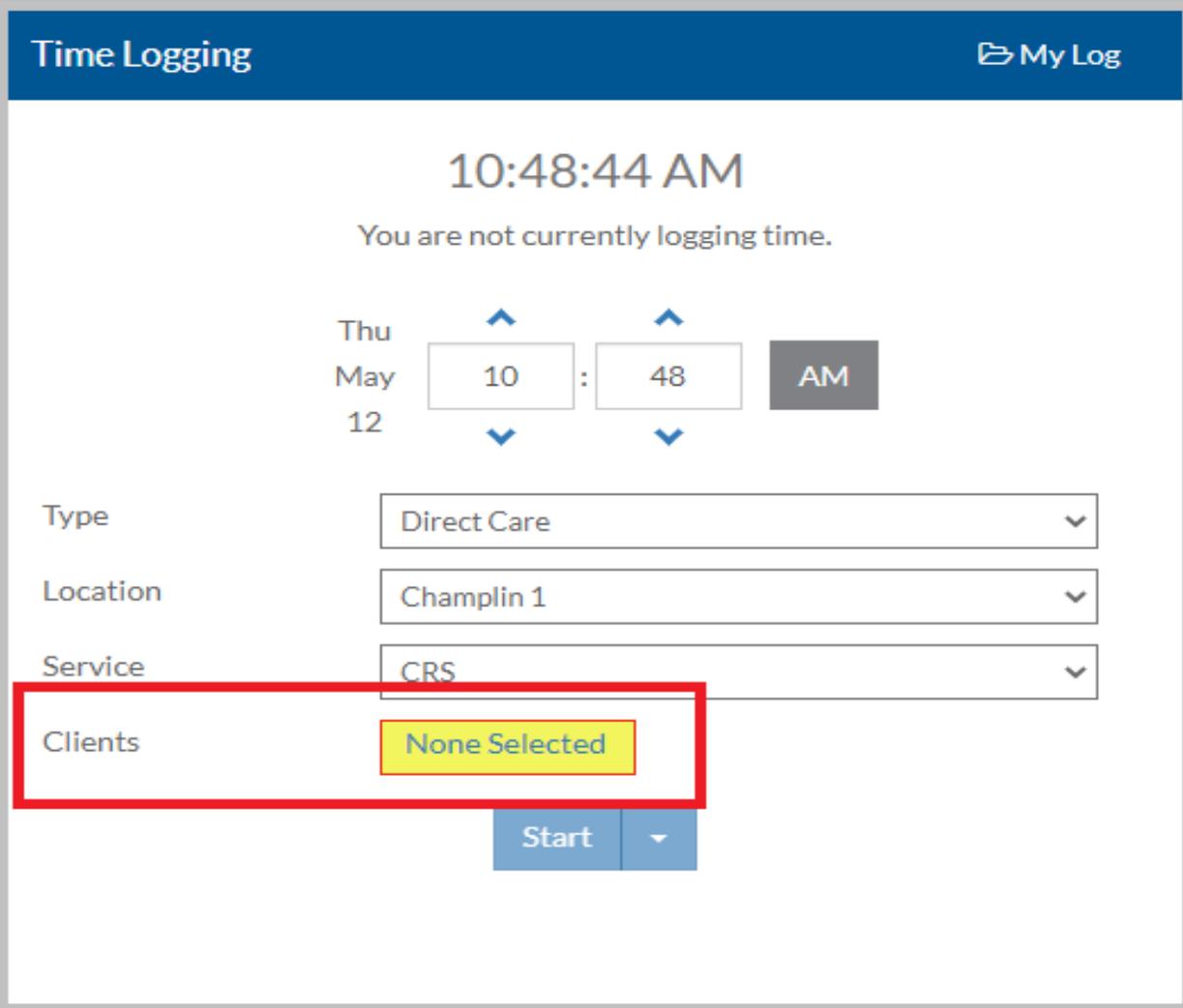


- Choose your **Location** – What is the name of the site you're working at? If you are in Family Services (FS), you will be selecting 1:1 or Wknd.
- If this is a non-direct care shift, please choose the name of the site you're training at OR if you're unsure, please choose SLS Training (585)/FS Training (485).

The screenshot shows a 'Time Logging' interface. At the top, there is a blue header with 'Time Logging' on the left and 'My Log' on the right. Below the header, the current time is displayed as '10:48:44 AM'. A message states 'You are not currently logging time.' Below this, there is a date and time selector showing 'Thu May 12' and '10:48 AM'. The 'Location' dropdown menu is highlighted with a red box and contains the text 'Champlin 1'. Other dropdown menus include 'Type' (Direct Care), 'Service' (CRS), and 'Clients' (None Selected). A 'Start' button is located at the bottom of the form.

# Clocking In/Out of Your Shifts

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



The screenshot shows a 'Time Logging' interface. At the top, there is a blue header with 'Time Logging' on the left and 'My Log' on the right. Below the header, the current time is displayed as '10:48:44 AM'. A message states 'You are not currently logging time.' Below this, there is a date and time selector showing 'Thu May 12' and '10:48 AM'. The time is displayed in a digital format with up and down arrows for adjustment. Below the time selector, there are three dropdown menus: 'Type' (set to 'Direct Care'), 'Location' (set to 'Champlin 1'), and 'Service' (set to 'CRS'). The 'Clients' dropdown menu is highlighted with a red border and shows 'None Selected' in a yellow box. At the bottom right, there is a blue 'Start' button with a dropdown arrow.

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

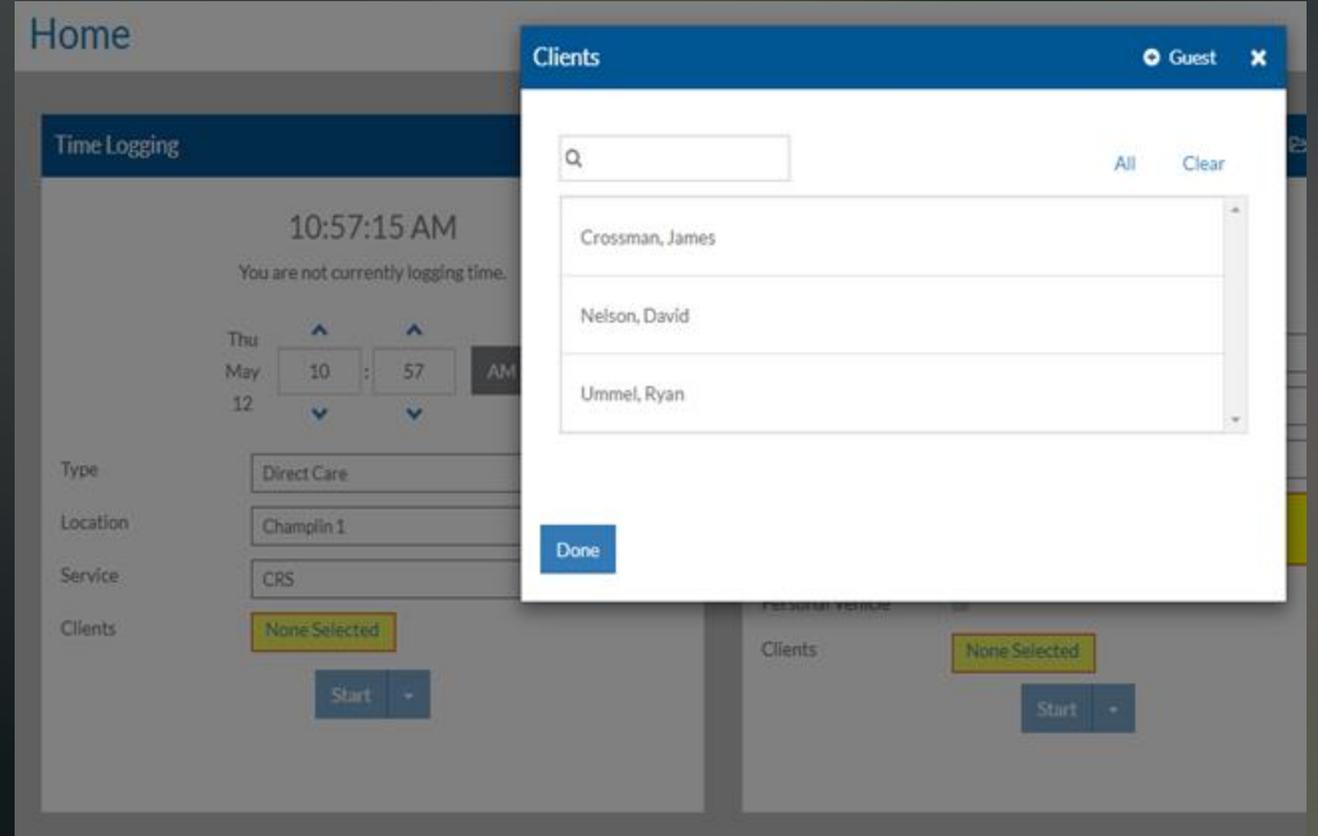
Service CRS

Clients None Selected

Start

# Clocking In/Out of Your Shifts

- 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.
- If an individual does not show up in the list, please contact your Supervisor.



The screenshot displays a software interface for time logging. The main window is titled "Home" and has a "Time Logging" header. It shows the current time as 10:57:15 AM and a message: "You are not currently logging time." Below this, there are date and time selection controls for Thursday, May 12, 2011, at 10:57 AM. The form includes fields for "Type" (Direct Care), "Location" (Champlin 1), and "Service" (CRS). The "Clients" field is currently set to "None Selected" and is highlighted with a yellow box. A "Start" button is visible below the form. A "Clients" pop-up window is overlaid on the right side of the screen. It has a blue header with "Clients" and "Guest" with a close button. The pop-up contains a search bar with a magnifying glass icon and "All" and "Clear" buttons. Below the search bar is a list of names: "Crossman, James", "Nelson, David", and "Ummel, Ryan". A "Done" button is located at the bottom left of the pop-up window.

# Clocking In/Out of Your Shifts



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

The screenshot shows a web interface for 'Time Logging'. At the top, there is a blue header with 'Time Logging' on the left and 'My Log' on the right. Below the header, the current time is displayed as '10:58:03 AM' with the message 'You are not currently logging time.' Below this is a date and time selector showing 'Thu May 12' and '10:58 AM'. The time is set using a digital clock interface with up and down arrows for the hour and minute fields. Below the date and time, there are three dropdown menus: 'Type' set to 'Direct Care', 'Location' set to 'Champlin 1', and 'Service' set to 'CRS'. Below these is a 'Clients' section with the text '3 Selected'. At the bottom, there is a blue button labeled 'Start' with a dropdown arrow, which is highlighted with a red rectangular box.

# Clocking In/Out of Your Shifts



- 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

Location

Service

Clients 3 Selected

**Update**

# What to do when an Individual Leaves/Returns to your Site

**RESIDENTIAL AND CRISIS  
SERVICES ONLY**

# When an Individual Leaves/Returns

- Individuals may go on leave/overnight/vacation visit 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.

# When an Individual Leaves/Returns

- 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

# When an Individual Leaves/Returns



- Unselect the individual who is leaving for the overnight/vacation and click “Done.”

Home

Time Logging

11:19:11 AM

You began logging time at 10:59:00 AM

Thu May 12 11:19 AM

To switch, pick a new Type, Cost Center or

Type: Direct Care

Location: Champlin 1

Service: CRS

Clients: 3 Selected

Switch

Clients

Guest

None Selected

Start

**BEFORE**

Home

Time Logging

11:20:52 AM

You began logging time at 10:59:00 AM

Thu May 12 11:20 AM

To switch, pick a new Type, Cost Center or

Type: Direct Care

Location: Champlin 1

Service: CRS

Clients: 3 Selected

Switch

Clients

Guest

None Selected

Start

**AFTER**

# When an Individual Leaves/Returns



- 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 11 : 21 AM End

May 12

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

Type Direct Care

Location Champlin 1

Service CRS

Clients 2 Selected

Switch

## When an Individual Leaves/Returns

- 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), Crisis Respite, and Overnights

**RESIDENTIAL AND CRISIS  
SERVICES ONLY**



# CRS/CS Respite and Overnights



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

The screenshot shows a web form with the following fields:

- Type: Direct Care
- Location: Champlin 1
- Service: CRS (highlighted with a red box)
- Clients: None Selected

At the bottom of the form is a blue button labeled "Start" with a dropdown arrow.

## CRS/CS Respite and Overnights

- All staff at a CRS Site/CS Respite 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.
- 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.
- 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.

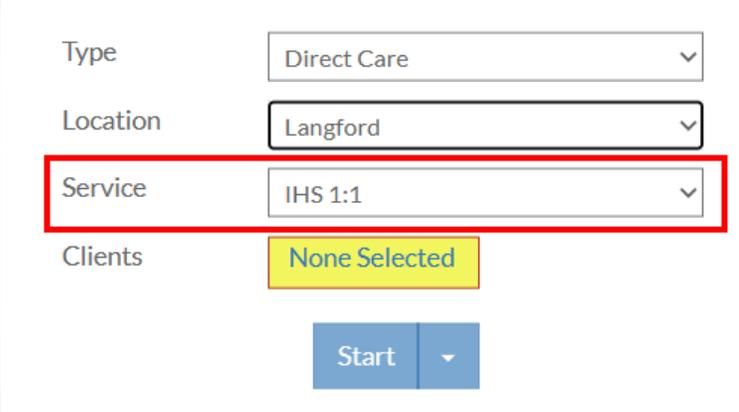
# **In Home Support (IHS) Services and Overnights**

**RESIDENTIAL AND CRISIS  
SERVICES**



# IHS Services and Overnights

- 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.



The screenshot shows a web-based interface for clocking in/out. It features several dropdown menus and a button. The 'Service' dropdown is highlighted with a red border, indicating it is the key to identifying the work site. The 'Type' dropdown is set to 'Direct Care', 'Location' is 'Langford', and 'Clients' is 'None Selected'. A blue 'Start' button is at the bottom.

Type	Direct Care
Location	Langford
Service	IHS 1:1
Clients	None Selected

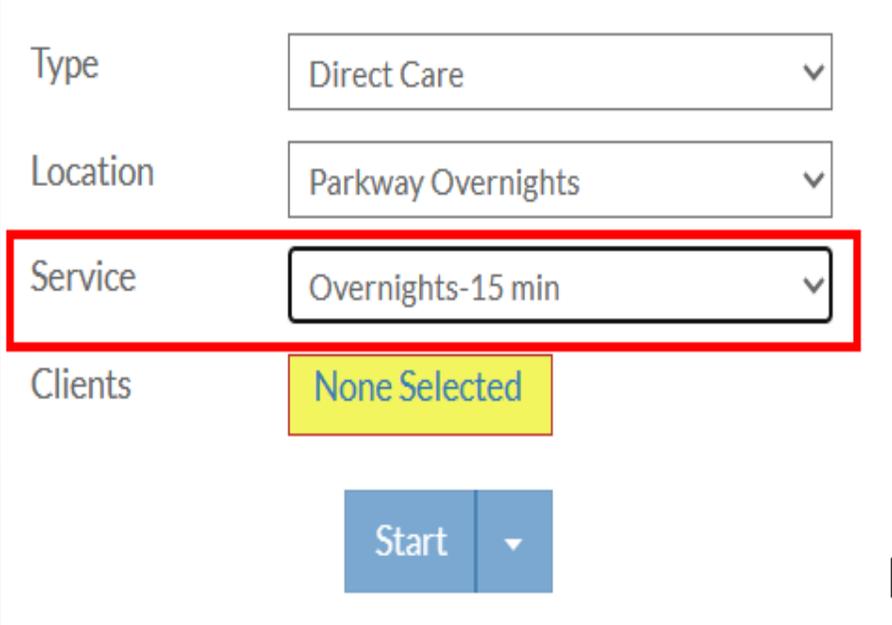
Start

# IHS Services and Overnights

- 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.
- If you work at an **IHS 1:1** site, this means the staff can only clock in with one individual at a time.
- If you work at an **IHS 1:2** site, this means the staff can clock in with one or more individuals at a time (max 3 individuals).

# IHS Services and Overnights

- 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.**
  - 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, as shown here.
- Overnights start at 10pm and end at 6am.
- 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).



The screenshot shows a time clock interface with the following fields:

- Type: Direct Care
- Location: Parkway Overnights
- Service: Overnights-15 min (highlighted with a red box)
- Clients: None Selected

At the bottom, there is a blue button labeled "Start" with a dropdown arrow.

# IHS Services and Overnights

- 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.
- 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.

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

**FAMILY SERVICES ONLY**



# 1:1 Services

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

## Time Logging My Log

9:23:14 PM

You are not currently logging time.

Sat  
Nov  
18

09 : 23 PM

Type: Direct Care

Location: 1 to 1

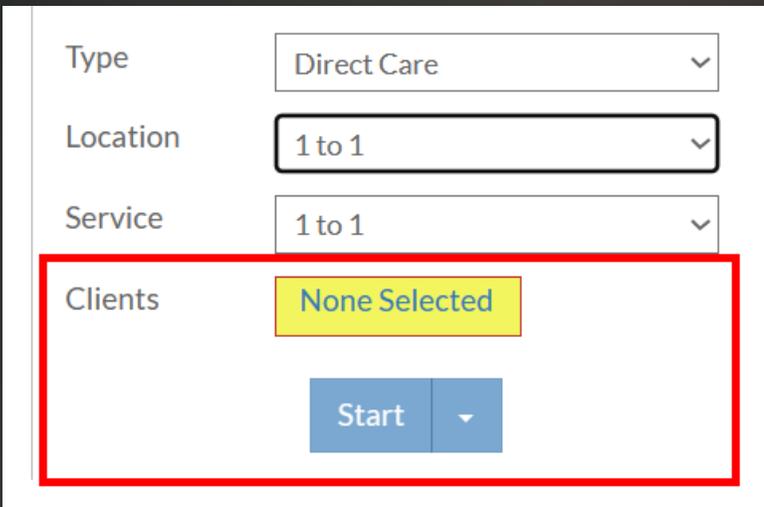
Service: 1 to 1

Clients: None Selected

Start

# 1:1 Services

- Next to **Clients**, click on “**None Selected**,” to chose from a list of Individuals, and select the individual you are working with.
- Click “**Done**” once you select the Client.



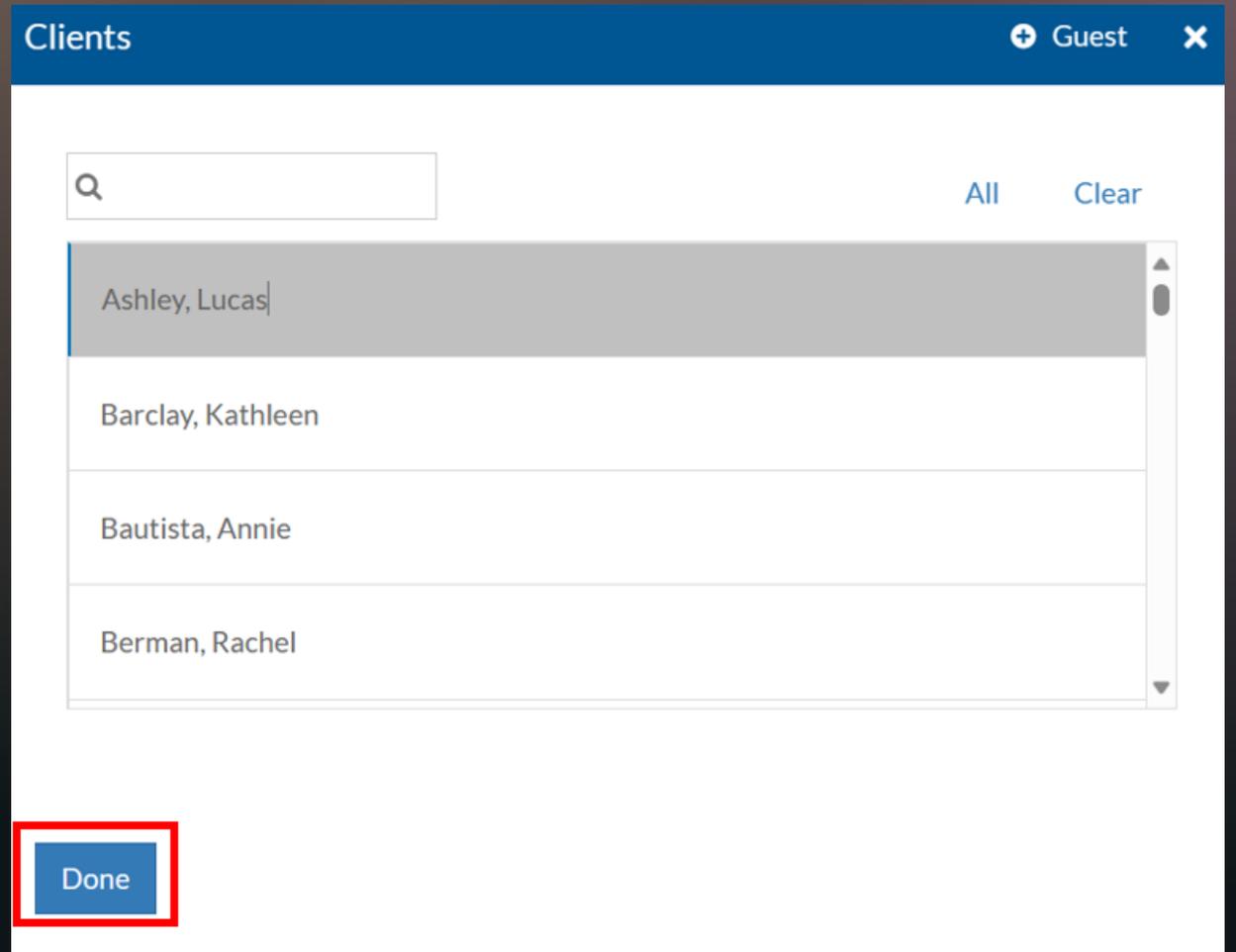
Type Direct Care

Location 1 to 1

Service 1 to 1

Clients **None Selected**

Start



Clients Guest

Search

All Clear

Ashley, Lucas

Barclay, Kathleen

Bautista, Annie

Berman, Rachel

Done

# 1:1 Services

- Click on "**Start**," and now you have started your shift.
- At the end of your shift, click "**End**," and now you have ended your shift.

Type	Direct Care	▼
Location	1 to 1	▼
Service	1 to 1	▼
Clients	Ashley, Lucas	
<div style="border: 2px solid red; padding: 5px; display: inline-block;">Start ▼</div>		

<div style="border: 2px solid red; padding: 5px; display: inline-block;">End ▼</div>		
To switch, pick a new Type, Cost Center or Task		
Type	Direct Care	▼
Location	1 to 1	▼
Service	1 to 1	▼
Clients	Ashley, Lucas	
<div style="border: 2px solid red; padding: 5px; display: inline-block;">Update ▼</div>		

# Weekend Respite Services

**FAMILY SERVICES ONLY** 

## Wknd Respite Services

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

# Wknd Respite Services

- Start your pick-ups by clocking in with the first individual you pick up.
- For **Location**, make sure you select "**Wknd**."
- Service will automatically default to "**Respite**."

Time Logging My Log

7:52:51 PM

You are not currently logging time.

Sat  
Nov  
18

07 : 52 PM

Type: Direct Care

**Location: Wknd**

Service: Respite

Clients: None Selected

Start

# Wknd Respite Services

- Now you will start by selecting **Clients**, and click on where it says "**None Selected.**"

Time Logging My Log

7:52:51 PM

You are not currently logging time.

Sat  
Nov  
18

07 : 52 PM

Type: Direct Care

Location: Wknd

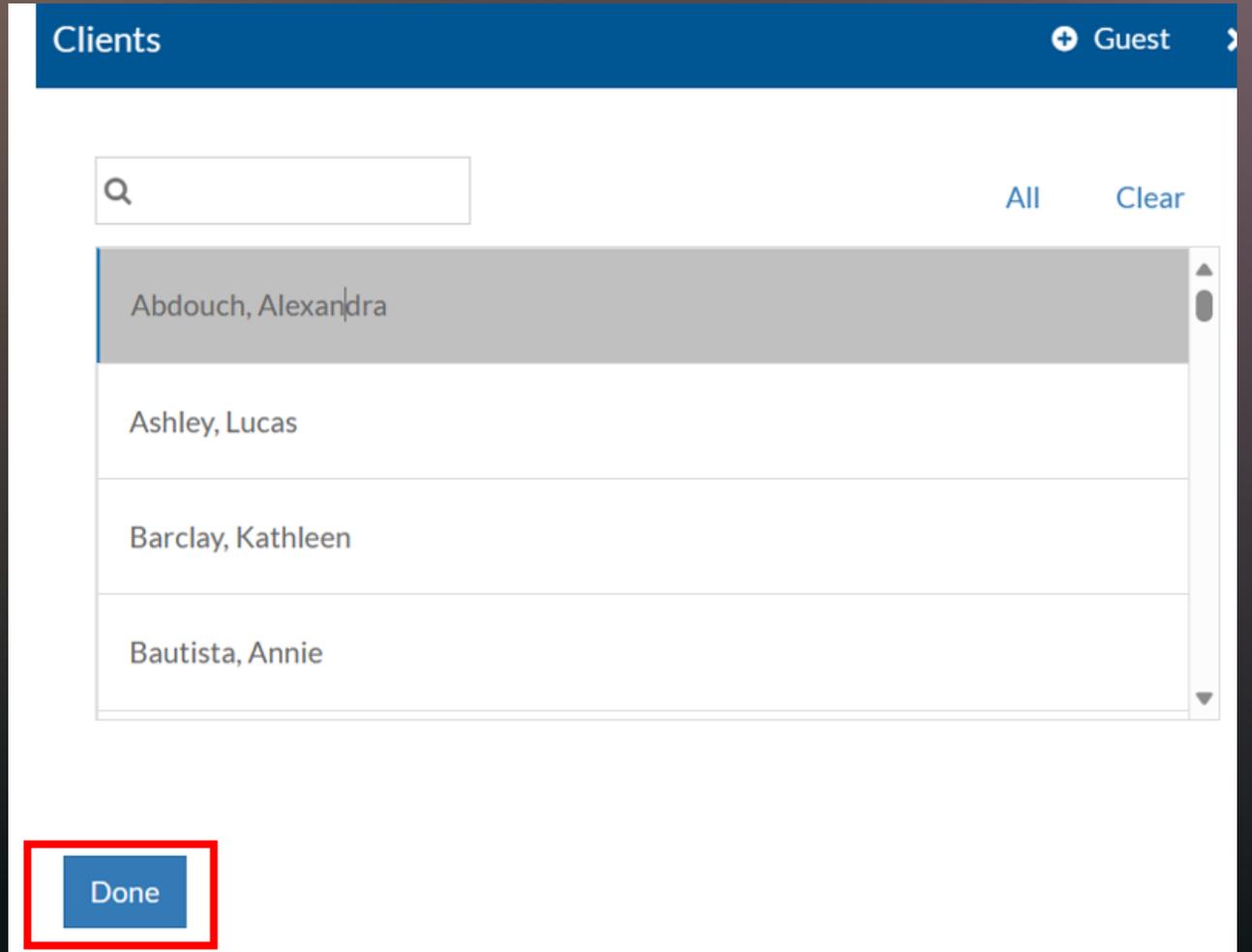
Service: Respite

Clients: None Selected

Start

# Wknd Respite Services

- Once you select your first **Client**, click "**Done**."



Clients + Guest

Q All Clear

Abdouch, Alexandra

Ashley, Lucas

Barclay, Kathleen

Bautista, Annie

Done

# Wknd Respite Services

- Click **"Start."**
- Your screen will now look like the picture to the right.

Type  ▾

Location  ▾

Service  ▾

Clients [Ashley, Lucas](#)

**Start** ▾

Sat  
Nov  
18

:

**End** ▾

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

Type  ▾

Location  ▾

Service  ▾

Clients [Ashley, Lucas](#)

**Update** ▾

# Wknd Respite Services

- At your next pick-up, you will need to add in the next individual by clicking on the **Client**.
- Select another Client and Click **Done**.

Service

Clients

Clients + Guest

All Clear

Abdouch, Alexandra

Ashley, Lucas

Barclay, Kathleen

Bautista, Annie

# Wknd Respite Services

- It will now show that you clocked in with 2 Clients (says "**2 Selected.**")
- Click **Update.**
- Repeat these steps until all 4 pickups have been completed.

Sat  
Nov  
18

10 : 00 AM

End

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

Type Direct Care

Location Wknd

Service Respite

Clients **2 Selected**

Update

# Wknd Respite Services

- For drop-offs, you will follow the same steps; however, you will be removing a **Client** at each drop-off, and click **Update** each time.
- For your last drop-off, you can click on **End**.
- You have now completed your full shift.

Sat  
Nov  
18

10 : 00 AM

**End** ▼

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

Type Direct Care ▼

Location Wknd ▼

Service Respite ▼

Clients 2 Selected

**Update** ▼

# How to Enter Mileage Logs

**RESIDENTIAL, CRISIS, AND  
FAMILY SERVICES**



# Mileage Logs

- 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

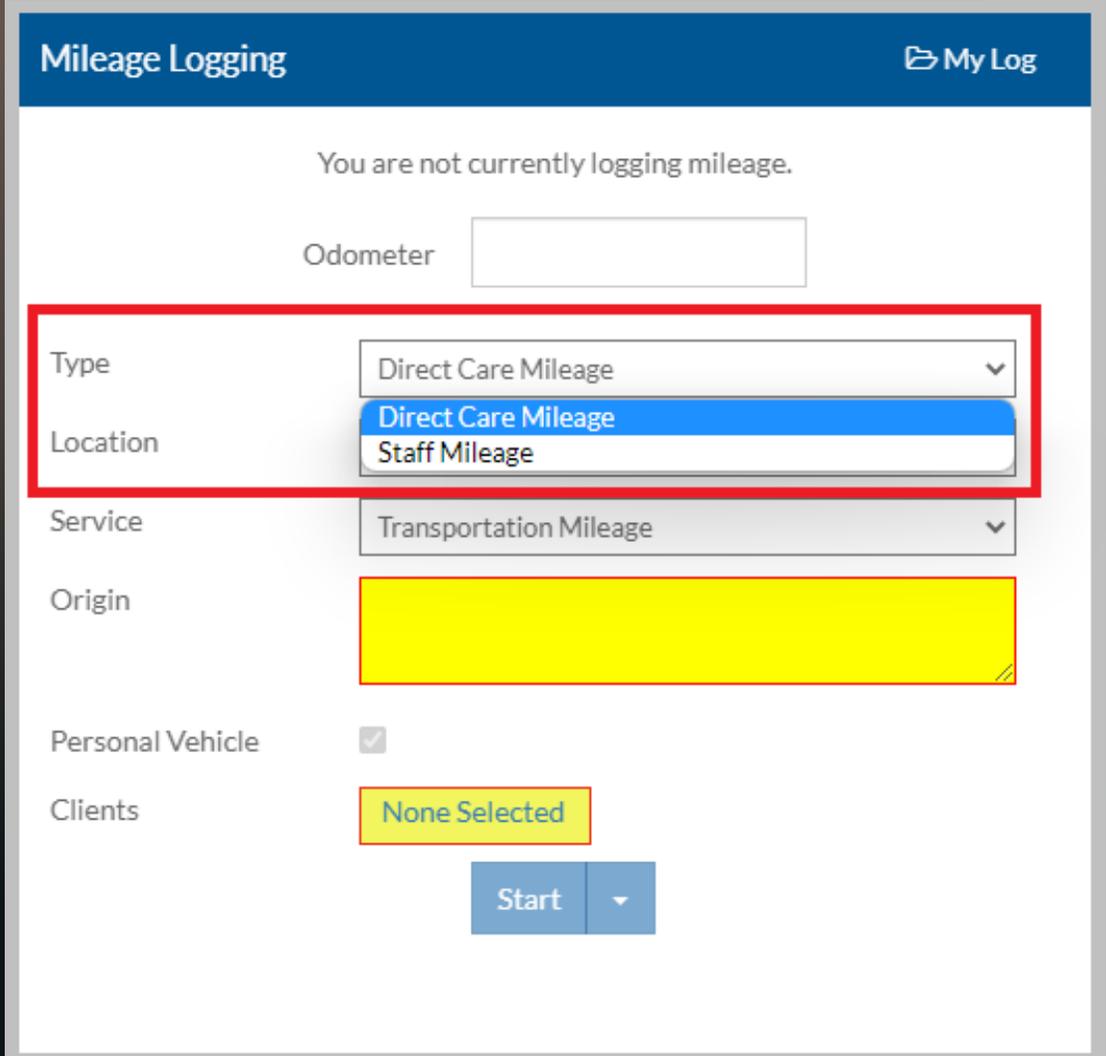
Origin

Personal Vehicle

Clients

# Mileage Logs

- What **Type** of mileage is this – Direct Care Mileage or Staff Mileage?
  - **Direct Care Mileage:** Driving with an individual.
  - **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.



The screenshot shows a web interface for logging mileage. At the top, there is a blue header with the text "Mileage Logging" and a "My Log" link. Below the header, a message states "You are not currently logging mileage." An "Odometer" field is present but empty. The main form contains several fields: "Type" is a dropdown menu currently set to "Direct Care Mileage", with a red box highlighting the dropdown and its open menu showing "Direct Care Mileage" (highlighted in blue) and "Staff Mileage". "Location" is a dropdown menu currently set to "Transportation Mileage". "Service" is a dropdown menu currently set to "Transportation Mileage". "Origin" is a yellow rectangular field. "Personal Vehicle" has a checked checkbox. "Clients" is a dropdown menu currently set to "None Selected". At the bottom, there is a blue "Start" button with a dropdown arrow.

# Mileage Logs

- 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

# Mileage Logs

- 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

# Mileage Logs

- 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

# Mileage Logs



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

### Mileage Logging

My Log

You are not currently logging mileage.

Odometer

Type

Location

Service

Origin

Personal Vehicle

Clients [Crossman, James](#)

# Mileage Logs

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

Mileage Logging ➔ My Log

You are currently logging mileage for [05/12/2022](#).

Odometer

▾

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

Mileage Logging ➔ My Log

You are currently logging mileage for [05/12/2022](#).

Odometer

Destination

▾

# Mileage Logs

- 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: Add Time Worked

**RESIDENTIAL, CRISIS AND  
FAMILY SERVICES**

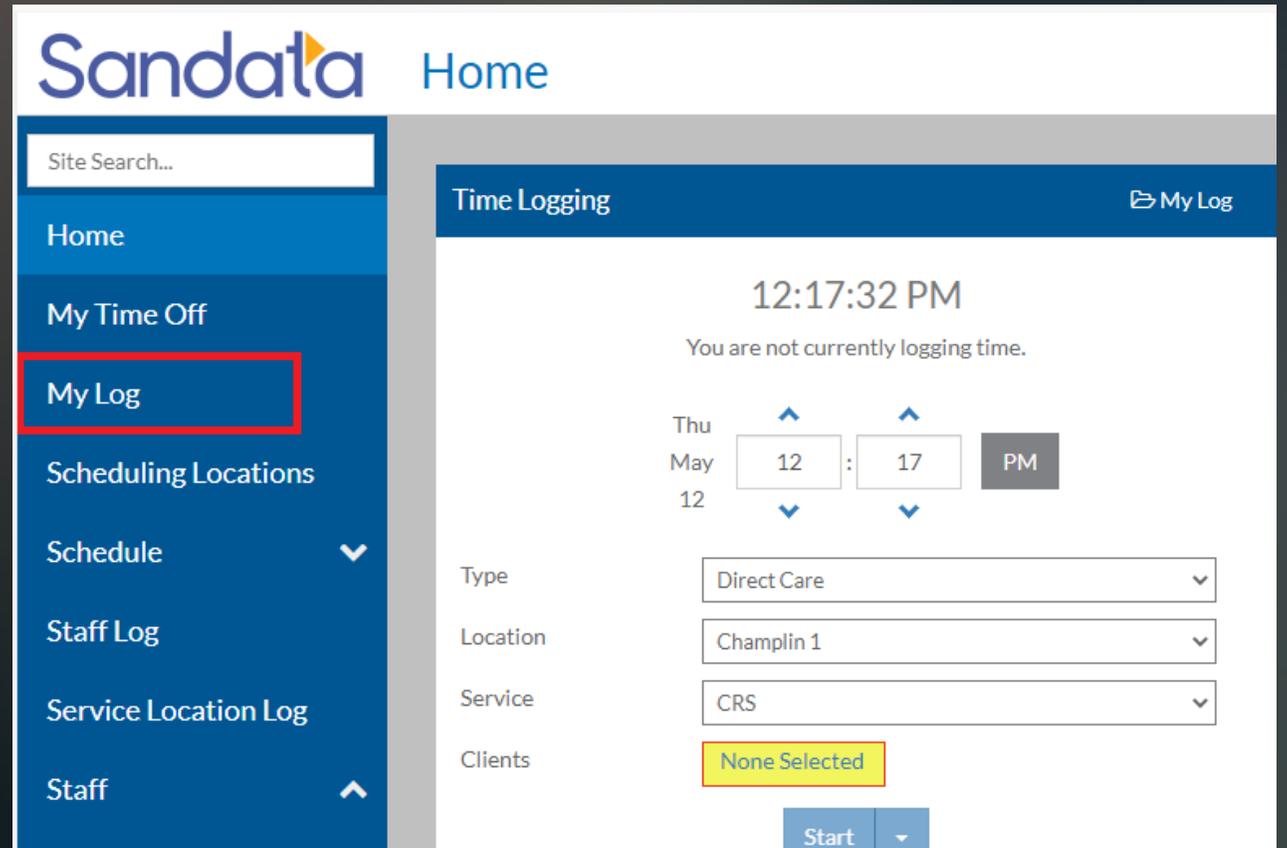


## How to Edit Your Timecard

- **IMPORTANT:** 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.

# Add Time Worked

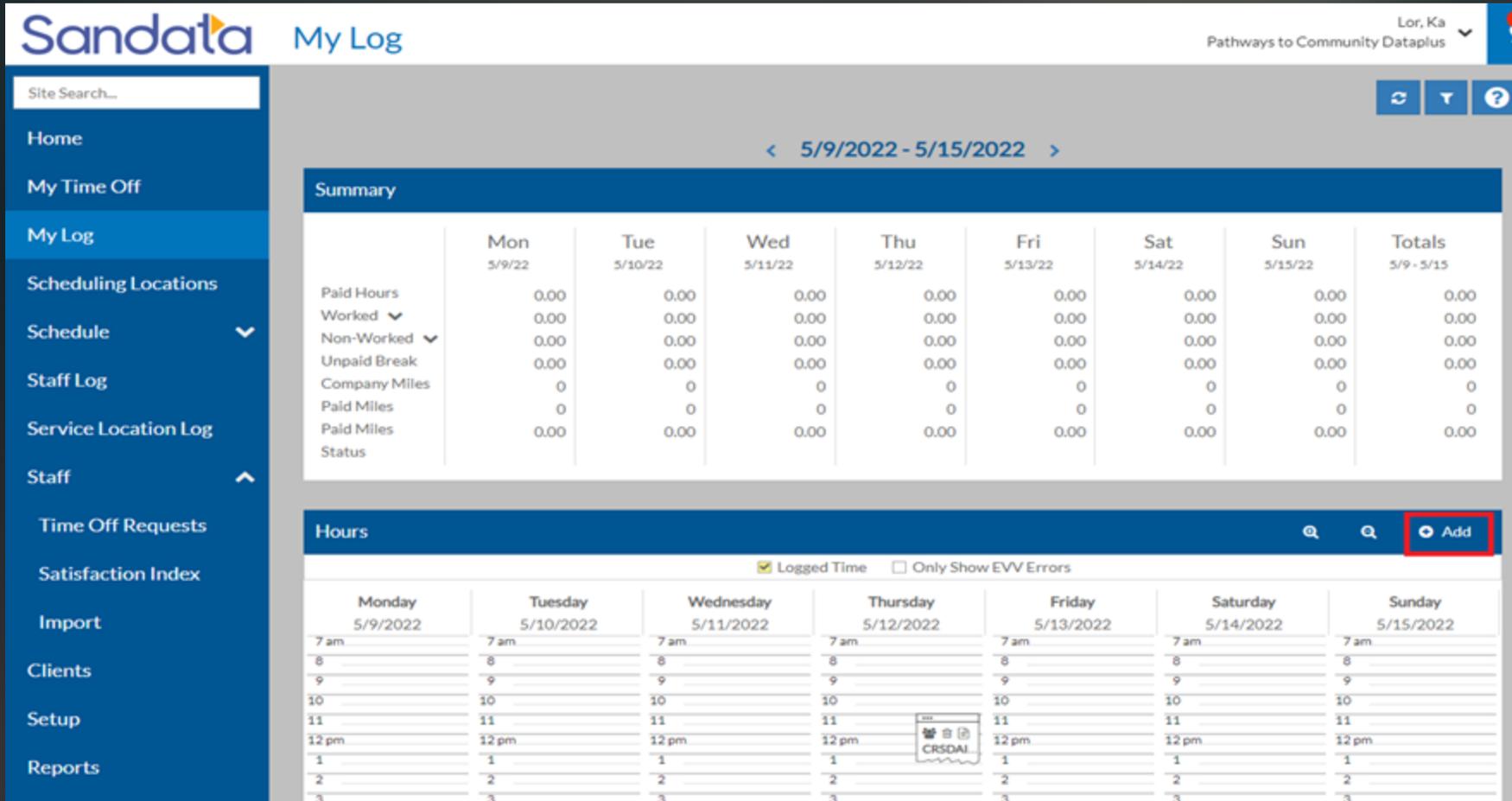
- Click on “My Log”. This will bring up your timecard for the current week.



The screenshot displays the Sandata Home interface. On the left, a blue sidebar contains a search bar and navigation links: Home, My Time Off, My Log (highlighted with a red box), Scheduling Locations, Schedule, Staff Log, Service Location Log, and Staff. The main content area is titled 'Time Logging' and shows the current time as 12:17:32 PM. A message states, 'You are not currently logging time.' Below this, a date and time selector shows 'Thu May 12' and '12 : 17 PM'. Further down, there are dropdown menus for 'Type' (Direct Care), 'Location' (Champlin 1), 'Service' (CRS), and 'Clients' (None Selected). A 'Start' button is visible at the bottom right.

# Add Time Worked

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



The screenshot displays the Sandata My Log interface. The top navigation bar includes the Sandata logo, 'My Log', and user information 'Lor, Ka' with a dropdown arrow and 'Pathways to Community Dataplus'. A search bar is on the left, and navigation icons are on the right. The main content area shows a date range '5/9/2022 - 5/15/2022' and a 'Summary' table. Below the summary is an 'Hours' grid with a red box around the '+ Add' button.

	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								

	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							
8							
9							
10							
11							
12 pm							
1							
2							
3							



## Hours Info

Type Date Begin End 

Total Hours 0.00

Service Location Service Clients  All Clear

Crossman, James



# Add Time Worked

- You will get a pop-up screen to enter in all the information of your shift.
  - **Type:** Direct Care or Non-Direct Care?
  - **Date:** The day you worked.
  - **Begin:** The time you started your shift.
  - **End:** The time you ended your shift.
  - **Service Location:** The site you worked at.
  - **Service:** This will automatically default in most cases. If you are not sure, please contact your Supervisor.
  - **Clients:** Choose the individuals you worked with.
  - **Notes:** Add in a note that tells why you needed to add this in.
- Click **“Save”** once you finish filling this section.

# **Edit a Time Log That's Already On Your Timecard**

**RESIDENTIAL, CRISIS, AND  
FAMILY SERVICES**



# Edit a Time Log



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

Hours 🔍 🔍 ➕ Add

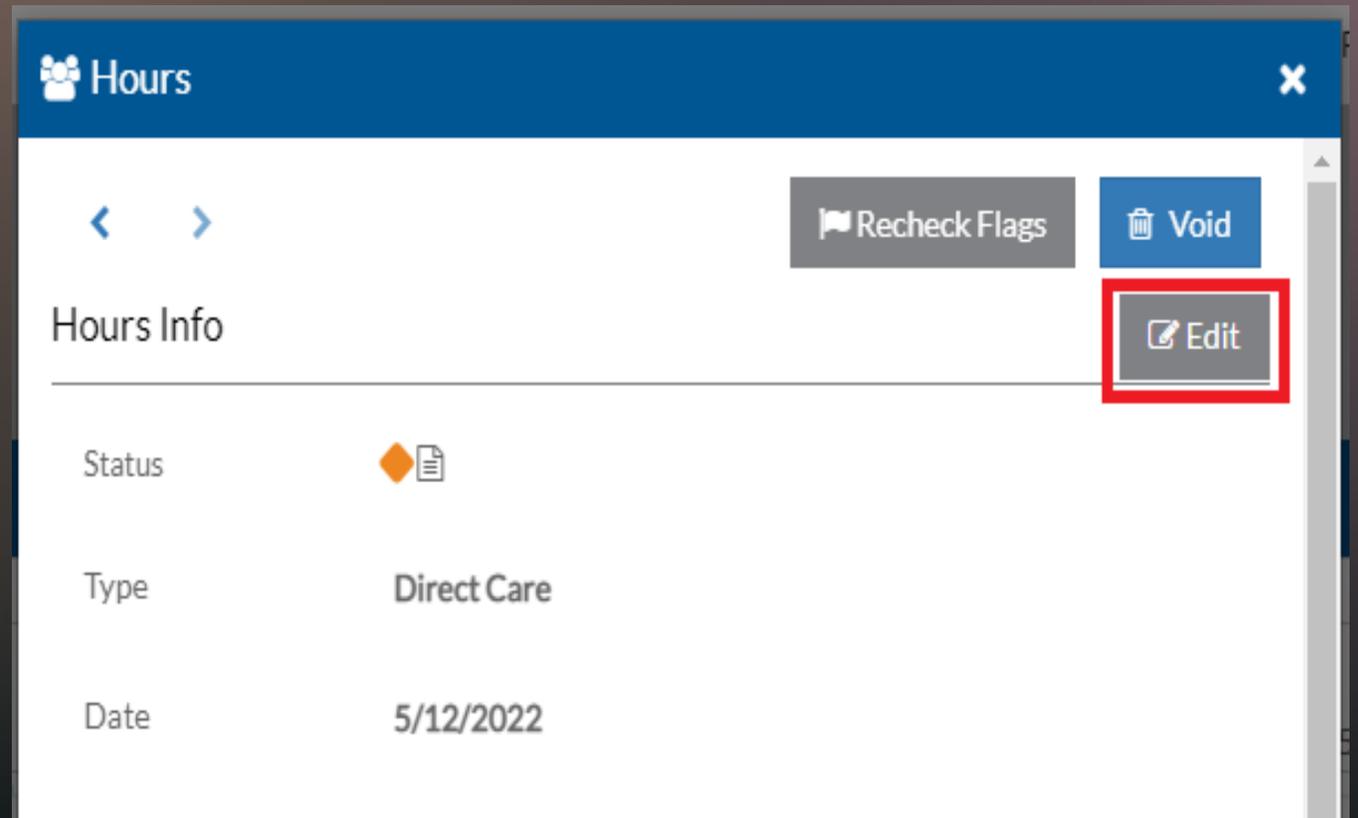
Logged Time  Only Show EVV Errors

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

CRSDAI...

# Edit a Time Log

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



The screenshot shows a web application window titled "Hours". At the top right, there are three buttons: "Recheck Flags" (grey), "Void" (blue), and "Edit" (grey). The "Edit" button is highlighted with a red rectangular box. Below the buttons is a section titled "Hours Info" which contains a table with the following data:

Status	 
Type	Direct Care
Date	5/12/2022

## Edit a Time Log

- Make the changes necessary for your time log.
  - **Type:** Direct Care or Non-Direct Care?
  - **Date:** The day you worked.
  - **Begin:** The time you started your shift.
  - **End:** The time you ended your shift.
  - **Service Location:** The site you worked at.
  - **Service:** This will normally default; however, if you are not sure please contact your Supervisor.
  - **Clients:** Choose the individuals you worked with.
  - **Notes:** Add in a note and explain why you had to fix your timecard.

Hours

Recheck Flags

### Hours Info

Status

Type

Date

Begin

End

Total Hours **1.00**

Service Location

Service

### Clients

- Crossman, James
- Nelson, David
- Ummel, Ryan



# Edit a Time Log

- Click **“Save”** after you finish editing your timecard.

Transaction ID

Notes

Forgot to clock in.

# How to Void a Time Log

**RESIDENTIAL, CRISIS, AND  
FAMILY SERVICES**



# Void a Time Log



- 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.
- Click “**Void**” in the upper right corner.

The screenshot shows a software interface for managing hours. At the top, there is a blue header bar with the text 'Hours' and a close button (X). Below the header, there are navigation arrows (left and right) and two buttons: 'Recheck Flags' and 'Void'. The 'Void' button is highlighted with a red rectangular box. Below these buttons, there is a section titled 'Hours Info' which contains a table with the following information:

Status	
Type	Direct Care

# Void a Time Log



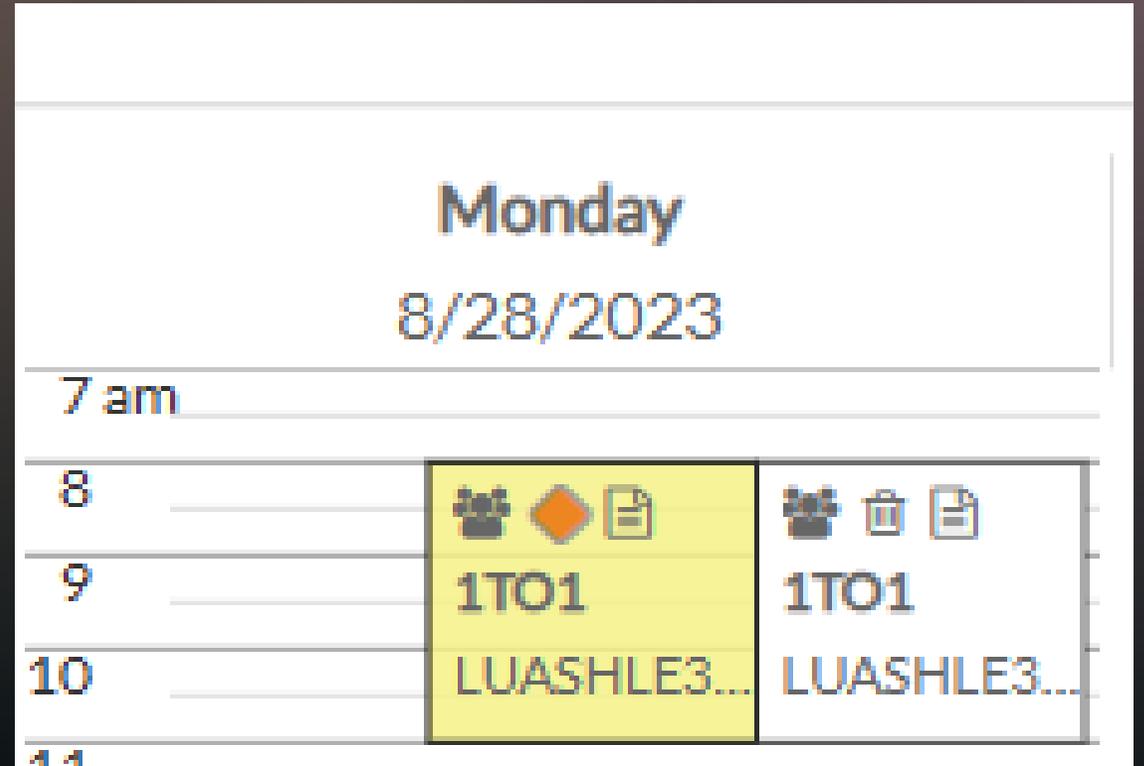
- Add the reason why you have to void the time log and click “**Void**” when you’re done.

The screenshot shows a dialog box titled "Void" with a close button (X) in the top right corner. The dialog contains the following elements:

- A label "Reason for voiding" above a text input field.
- A label "Notes:" followed by a dropdown menu labeled "Insert Template".
- A large yellow rectangular area, likely a placeholder for a note or reason.
- Two buttons at the bottom right: "Cancel" and "Void".

# Void a Time Log

- If you have an error (for ex. you clocked in twice for the same timecard), this 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

**RESIDENTIAL, CRISIS, AND  
FAMILY SERVICES**

# Requesting PTO

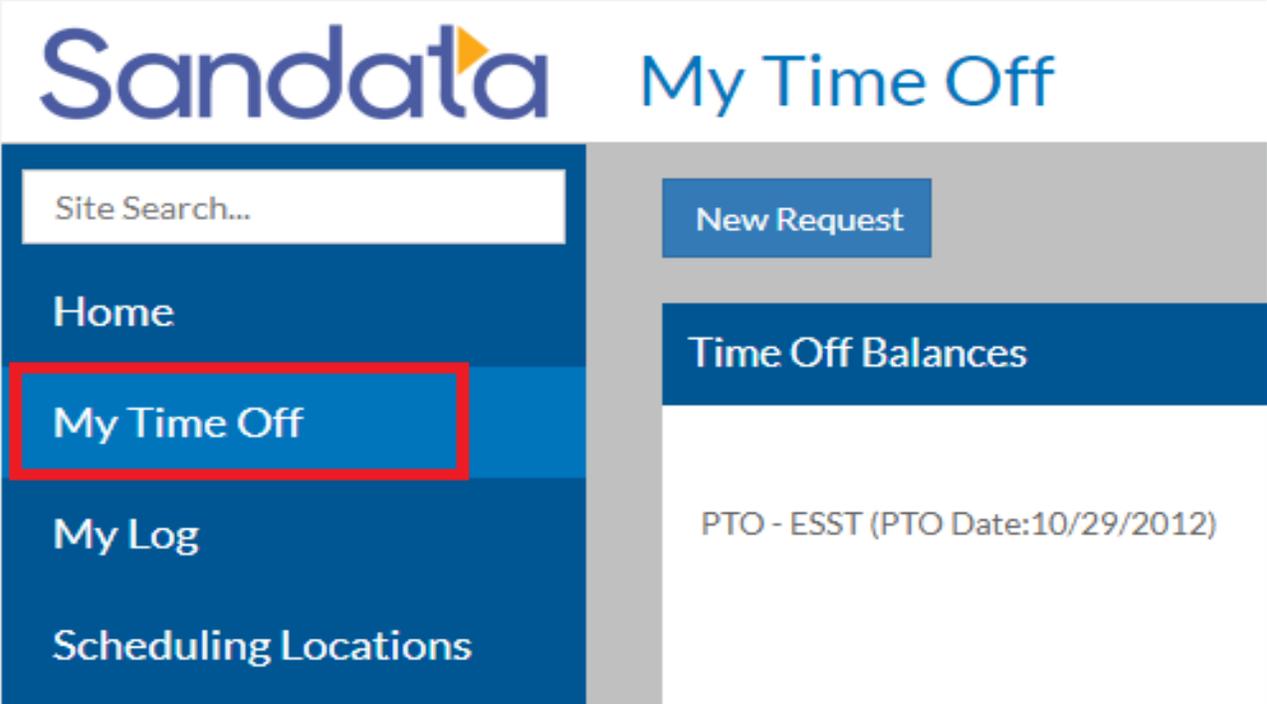
- Before requesting PTO on Sandata, have you done the following?
  - **Notify your Site Manager (RS and CS) or Senior Manager (FS) of your time off.**
    - Entering your PTO request does not equal notifying your Site Manager/FS Senior Manager. PTO requests in Sandata are for timecard purposes, not notification.
  - **Enter your PTO request(s) before the start of the shift you're requesting PTO for.**
  - 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.
  - Your PTO must be entered into Sandata by end of day Sunday.

## Requesting PTO

- When requesting PTO, please remember the following:
  - PTO requests are for any permanent or picked-up shifts. You can not use PTO to add to your paycheck.
  - You cannot request more PTO than the total hours of your shift (Example: If your shift is 8 hours long, you cannot request for 10 hours of PTO).
  - **PTO cannot total more than 40 hours for a given week.**
  - Please refer to the PTO Policy and Work Attendance Policy for more information.

# Requesting PTO

- Click on “My Time Off”



The screenshot shows the Sandata web application interface for "My Time Off". The top left features the Sandata logo. Below it is a search bar labeled "Site Search...". A vertical navigation menu on the left contains the following items: "Home", "My Time Off" (highlighted with a red border), "My Log", and "Scheduling Locations". The main content area on the right has a "New Request" button at the top. Below it is a section titled "Time Off Balances" which displays the text "PTO - ESST (PTO Date:10/29/2012)".

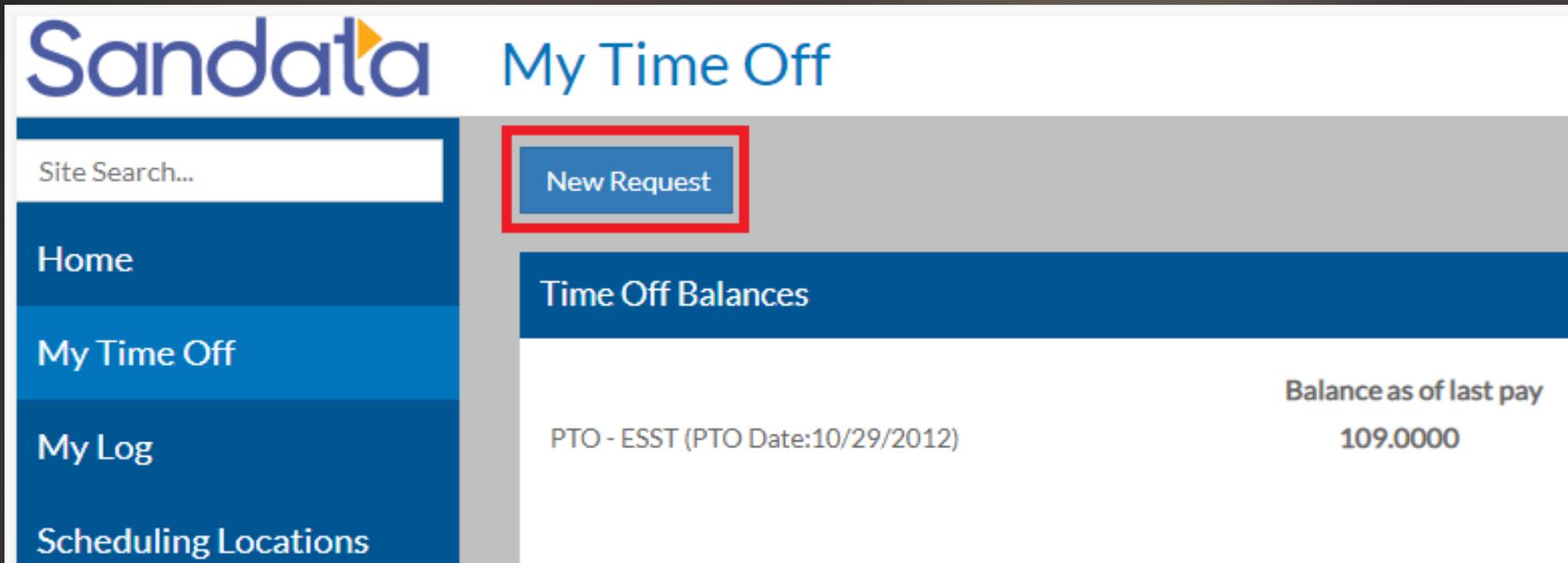
# Requesting PTO

- 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.

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

# Requesting PTO

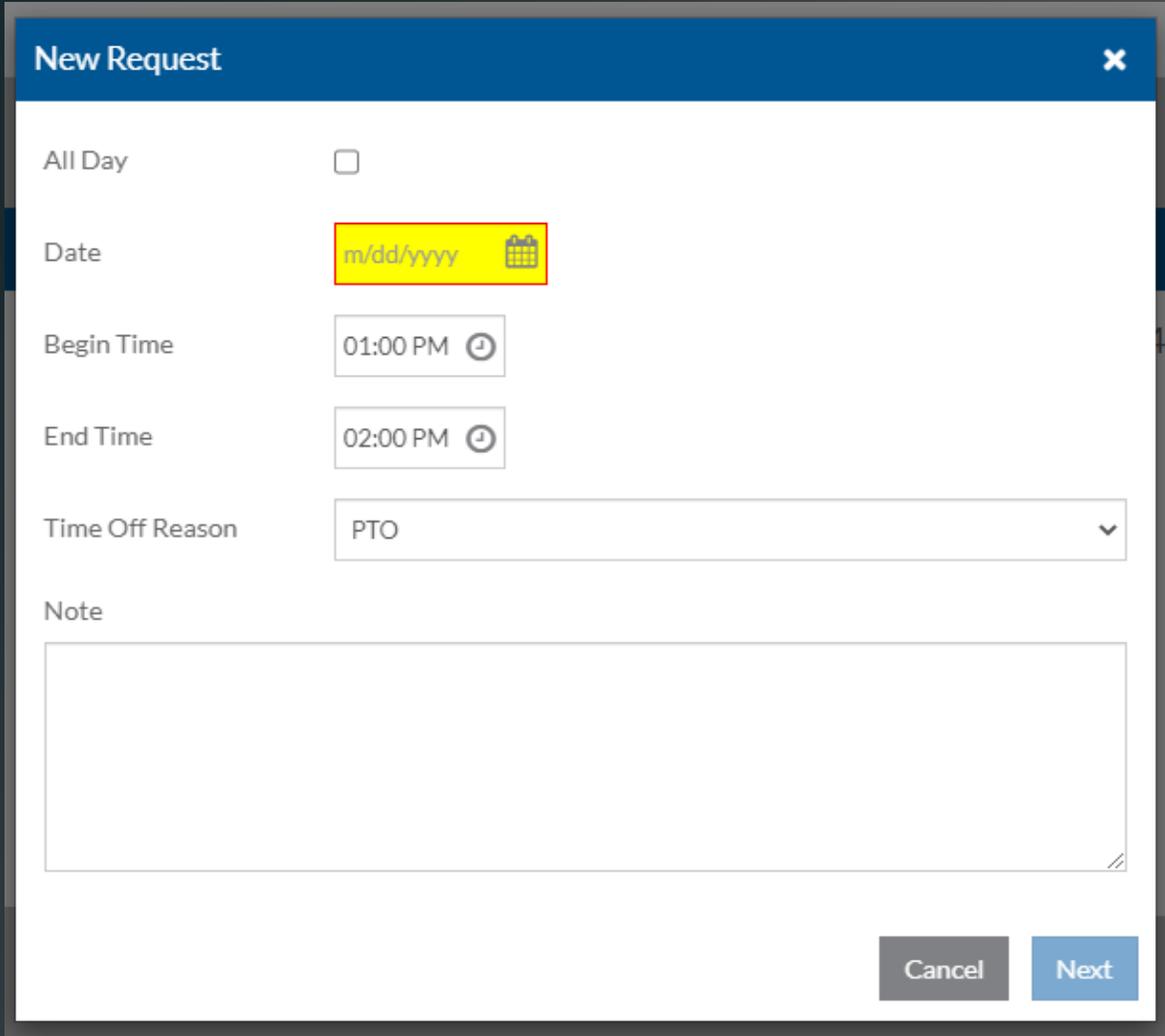
- Click on “New Request.”



The screenshot shows the Sandata My Time Off portal. The left sidebar contains navigation links: Site Search..., Home, My Time Off, My Log, and Scheduling Locations. The main content area features a 'New Request' button highlighted with a red box. Below this, the 'Time Off Balances' section displays the following information:

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

# Requesting PTO



The screenshot shows a 'New Request' form with the following fields:

- All Day:** A checkbox that is currently unchecked.
- Date:** A date input field with a yellow highlight, showing the placeholder 'm/dd/yyyy' and a calendar icon.
- Begin Time:** A time input field showing '01:00 PM' with a clock icon.
- End Time:** A time input field showing '02:00 PM' with a clock icon.
- Time Off Reason:** A dropdown menu with 'PTO' selected.
- Note:** A large text area for additional information.

At the bottom right, there are two buttons: 'Cancel' and 'Next'.

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

# Requesting PTO

- Sandata will calculate the hours of your PTO request(s).
  - **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.
  - **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

Cost Center

Task

[+](#)

---

### Summary

Total Hours: 8

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

# Requesting PTO



- 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

# Requesting PTO

- When you are adding in your Anniversary PTO request, in “Task” you would select “PTO-Anniversary.”

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

## Requesting PTO

- Once you verify your information, please click “**Save.**”
- 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/FS Senior Manager.

# How to Post or Pick Up Shifts

**RESIDENTIAL AND CRISIS  
SERVICES ONLY**



# How to Post or Pick Up Shifts

- 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:
  - 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.
  - Would you be in Over-Time? If so, is OT currently approved? If you are not sure, please contact your Site Manager.
  - Do the hours conflict with your permanent scheduled hours? Please consider the time it would take to drive between sites.
- Your Site Supervisor/Manager will either approve or deny your request to pick a shift.
- 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

**RESIDENTIAL AND CRISIS  
SERVICES ONLY**



# How to Pick Up Open Shifts

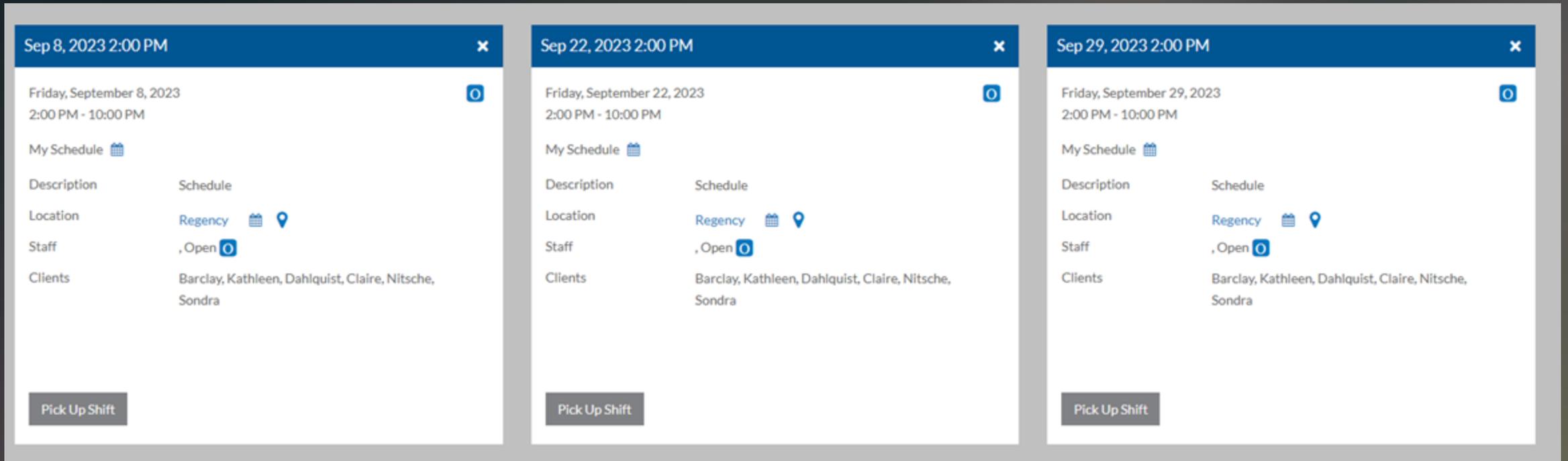


- There are two ways to view Open Hours:
  - On the Home Screen, next to the Available shifts box, click on **“Open.”**
  - On the blue menu bar, click on **“Available Shifts.”**

The screenshot displays 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 states 'You are not currently logging time.' There are date and time selection controls for Monday, August 28, with the time set to 12:47 PM. Below these are dropdown menus for 'Type' (Direct Care) and 'Location' (1 to 1), and a 'Service' field showing 'Loading...'. A 'Start' button is visible. At the bottom of the page, there is a blue bar with 'Available Shifts' and an 'Open' button (highlighted with a red box). Below this bar, a message reads: 'Select the Open link to see if there are available shifts for you to pick up.'

# How to Pick Up Open Shifts

- 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.



The image displays three side-by-side screenshots of a shift selection interface. Each screenshot shows a shift for Friday, September 8, 2023, Friday, September 22, 2023, and Friday, September 29, 2023, respectively. The shift is from 2:00 PM to 10:00 PM. The interface includes a 'My Schedule' link, a 'Description' field, a 'Location' field (Regency), a 'Staff' field (Open), and a 'Clients' field (Barclay, Kathleen, Dahlquist, Claire, Nitsche, Sondra). A 'Pick Up Shift' button is visible at the bottom of each screenshot.

Date	Time	Location	Staff	Clients
Sep 8, 2023	2:00 PM - 10:00 PM	Regency	, Open	Barclay, Kathleen, Dahlquist, Claire, Nitsche, Sondra
Sep 22, 2023	2:00 PM - 10:00 PM	Regency	, Open	Barclay, Kathleen, Dahlquist, Claire, Nitsche, Sondra
Sep 29, 2023	2:00 PM - 10:00 PM	Regency	, Open	Barclay, Kathleen, Dahlquist, Claire, Nitsche, Sondra

Sep 8, 2023 2:00 PM ✕

Friday, September 8, 2023 📅  
2:00 PM - 10:00 PM

My Schedule 📅

Description	Schedule
Location	Regency <span>📅</span> <span>📍</span>
Staff	, Open <span>📅</span>
Clients	Barclay, Kathleen, Dahlquist, Claire, Nitsche, Sondra

**Pick Up Shift**

## How to Pick Up Open Shifts 🔊

- 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.

# How to Pick Up Open Shifts



- 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						8:00 am - 10:00 am	8:00 am - 10:00 am
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

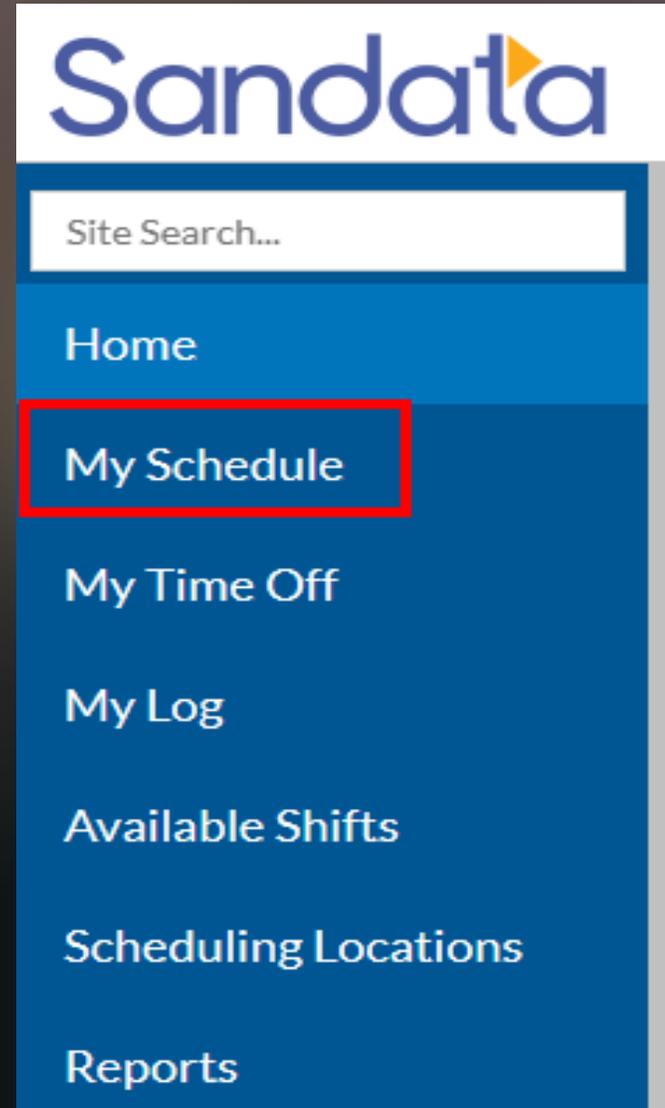
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SERVICES ONLY**



# How to Post a Shift



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



# How to Post a Shift



- 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
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

- Once you click on the shift you would like covered, you will get a pop-up that looks like this. Click on “**Post Shift.**”
- You will be updated once a staff picks up the open shift, and your Site Manager approves it.

Sep 2, 2023 6:00 AM ✕

Saturday, September 2, 2023  
6:00 AM - 10:00 AM

Description	Schedule
Location	Regency  
Staff	
Clients	Dahlquist, Claire, Barclay, Kathleen, Nitsche, Sondra

Post Shift Find Substitute

**Thank  
You For  
Your  
Time!**

