

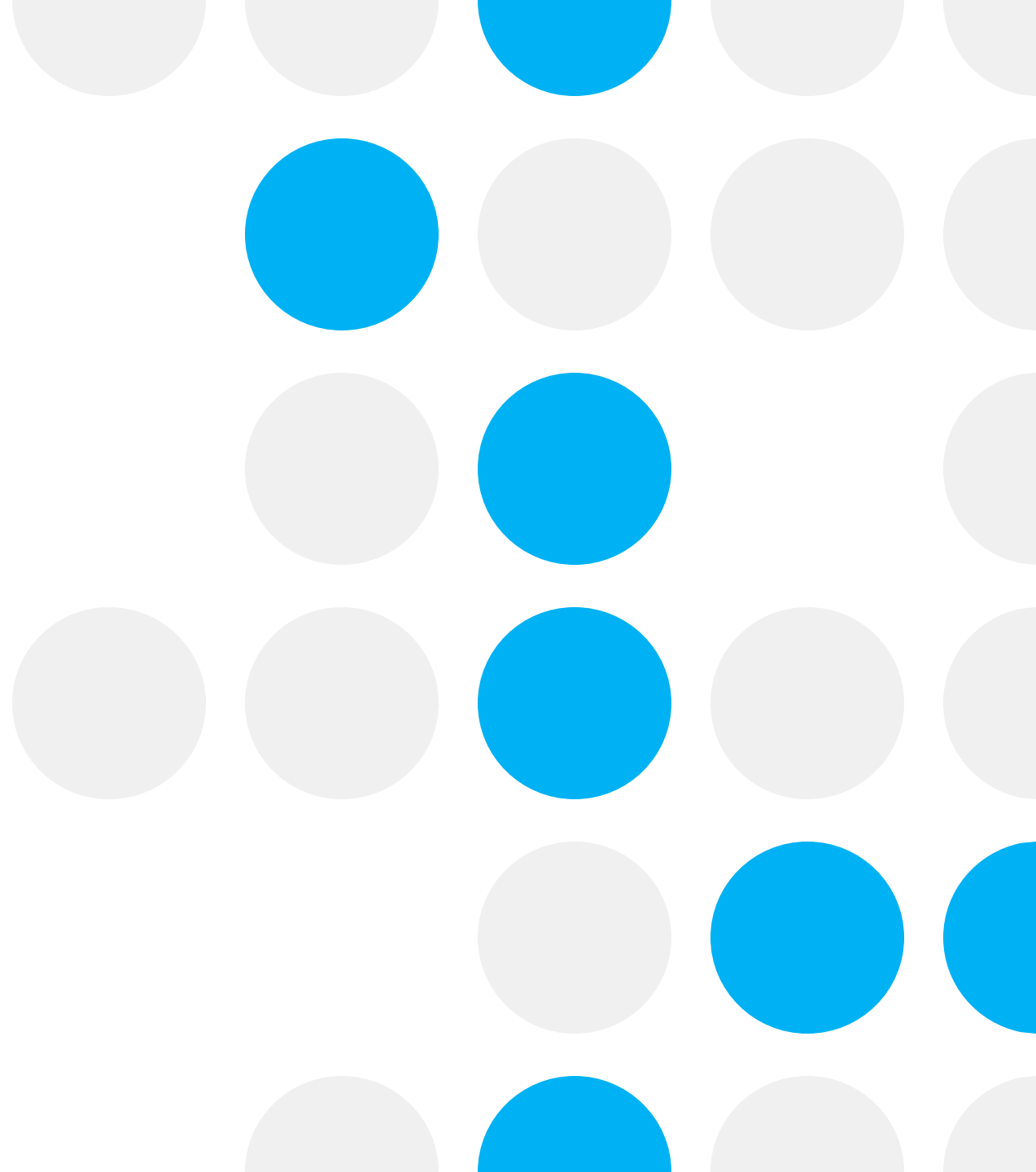
Pathways to Community Sandata Tutorial



Crisis Supervisors and
Managers



Approving and Checking Timecard Process

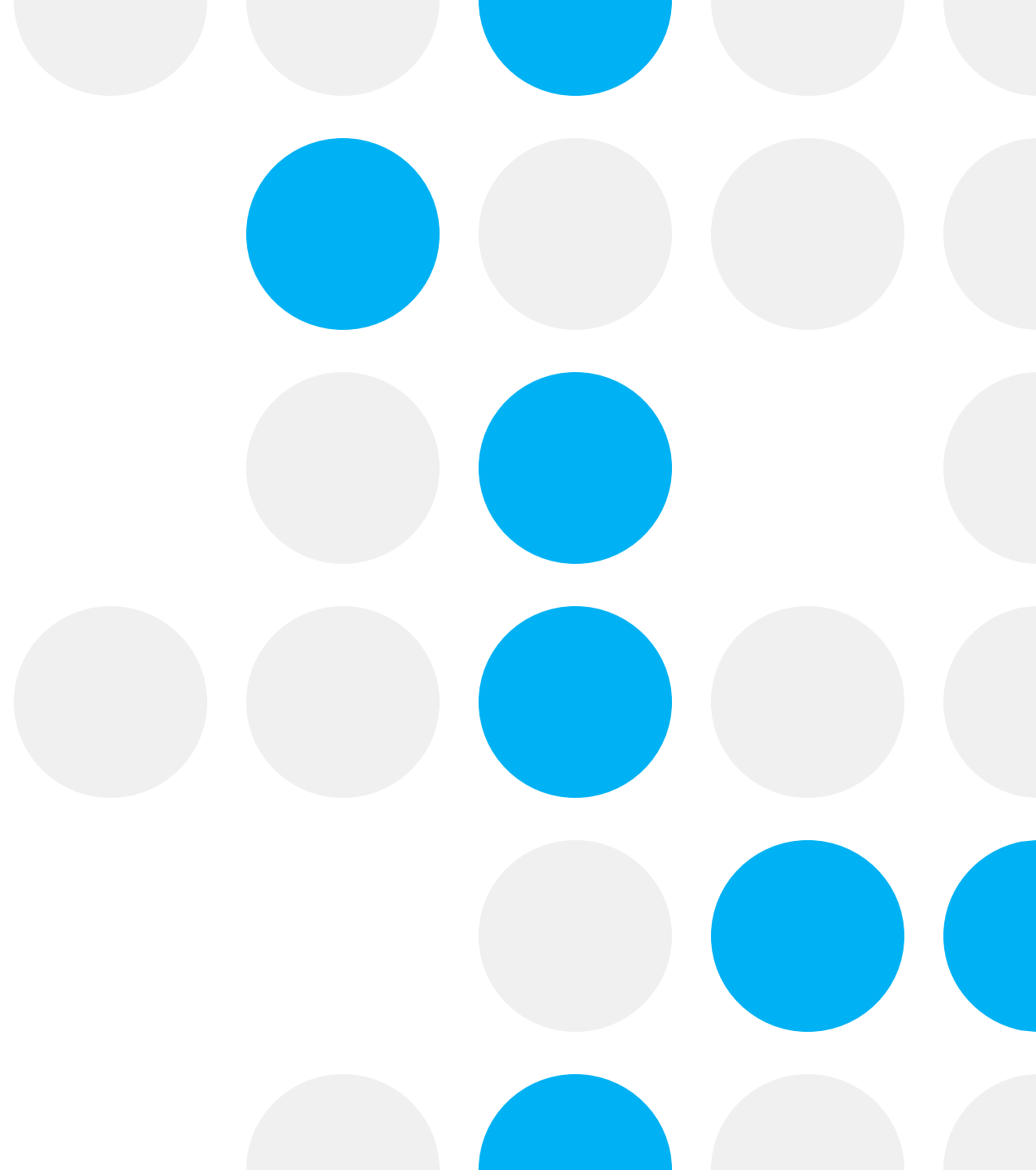


Approving and Checking Timecard Process



- **Supervisors:** Timecards must be approved for your designated sites on a daily basis Monday to Friday.
 - Monday's timecards are checked for the prior weekend.
 - Mondays all approvals must be completed by 10am.
 - If you are unable to complete any timecard tasks by the deadlines given, you must get permission from your direct Manager. This includes if you are using PTO, taking a vacation, are out sick, etc.
 - **Managers:** Timecards must be reviewed for your designated sites on a daily basis Monday to Friday.
 - Monday's timecards are checked for the prior weekend.
 - Mondays, all approvals must be completed by 5pm.
 - If your site does not have a designated Supervisor, you must also approve all timecards.
 - If you are unable to complete any timecard tasks by the deadlines given, you must get permission from the General Manager (GM). This includes making a plan if you are using PTO, taking a vacation, are out sick, etc. It is your responsibility to reach out and coordinate with the GM.
-

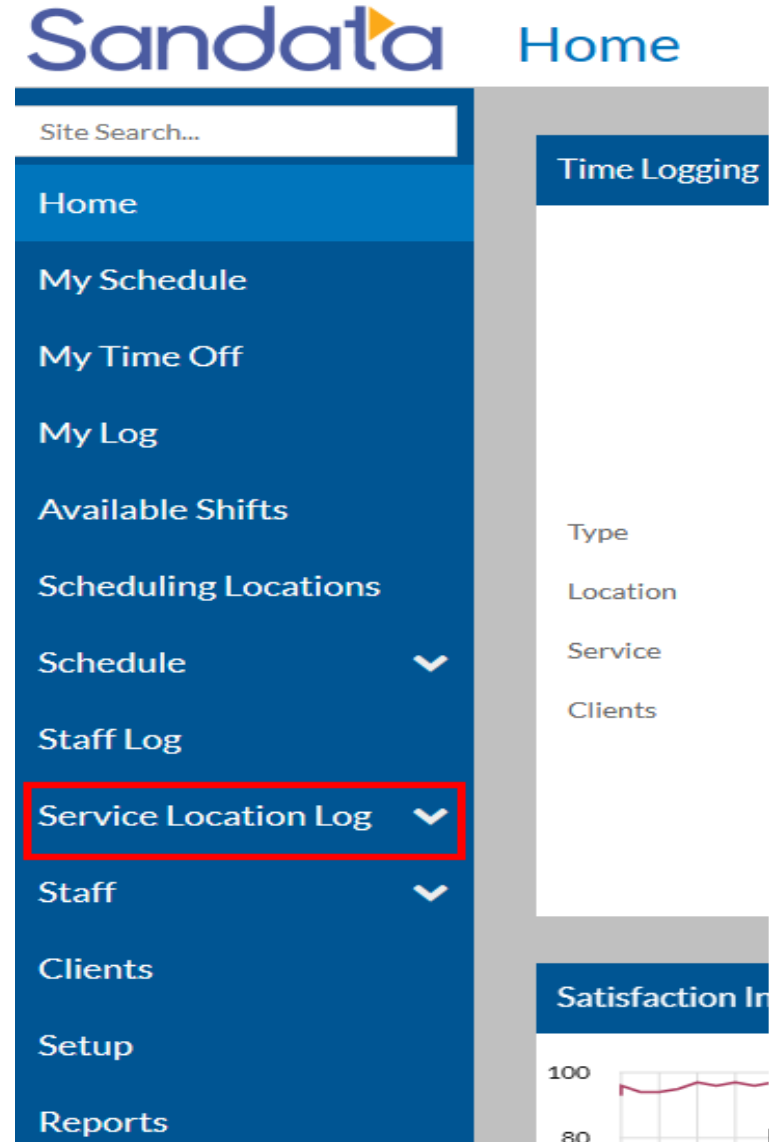
Approving Timecards – Direct Care Shifts



Approving Timecards – Direct Care Shifts



- Start by clicking on “**Service Location Log.**”



- 

Approving Timecards – Direct Care Shifts



- Under Managed Service Locations, find and click on the Site(s) you wish to review/approve timecards.

Service Location Log | McKnight

Mon 8/7 Tue 8/8 Wed 8/9

8/7/2023	8/7/2023	8/7/2023	8/7/2023
12 am	12 am	12 am	12 am
1	1	1	1
2	2	2	2
3	3	3	3
4	4	4	4
5	5	5	5
6	6	6	6
7	7	7	7
8	8	8	8
9	9	9	9
10	10	10	10
11	11	11	11
12 pm	12 pm	12 pm	12 pm
1	1	1	1
2	2	2	2
3	3	3	3
4	4	4	4
5	5	5	5
6	6	6	6
7	7	7	7
8	8	8	8
9	9	9	9
10	10	10	10
11	11	11	11

Approving Timecards – Direct Care Shifts



- The **blue boxes** will show what the staff was scheduled for. This shows that the staff that is normally scheduled did not clock in or did not work. If you do not know why the staff is missing their timecard, you must follow up with them. If they did work, you must ask them to enter in their own timecard.

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

Approving Timecards – Direct Care Shifts



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

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

Approving Timecards – Direct Care Shifts



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

Hours

Hours Info

Status	
Staff	
Type	Direct Care
Date	8/7/2023
Begin	2:00 PM
End	10:00 PM
Total Hours	8.00
Service	CRS

Recheck Flags Void Edit

Clients

Guest

Search: [] All Clear

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

Transaction ID: 128835

Flags Acknowledge All

Transaction has been reviewed/updated, and is waiting for approval
Transaction has been reviewed/updated, and is waiting for approval
[Acknowledge](#)

Notes Add Note

Approving Timecards – Direct Care Shifts



- **Status** indicates whether or not a timecard has been acknowledged yet.
- While in your staff's timecard, look at the Flags. Flags will indicate any error messages. Some flags will always be present. If everything appears accurate, click on **"Acknowledge All."**

Status



Flags

Acknowledge All



Transaction has been reviewed/updated, and is waiting for approval

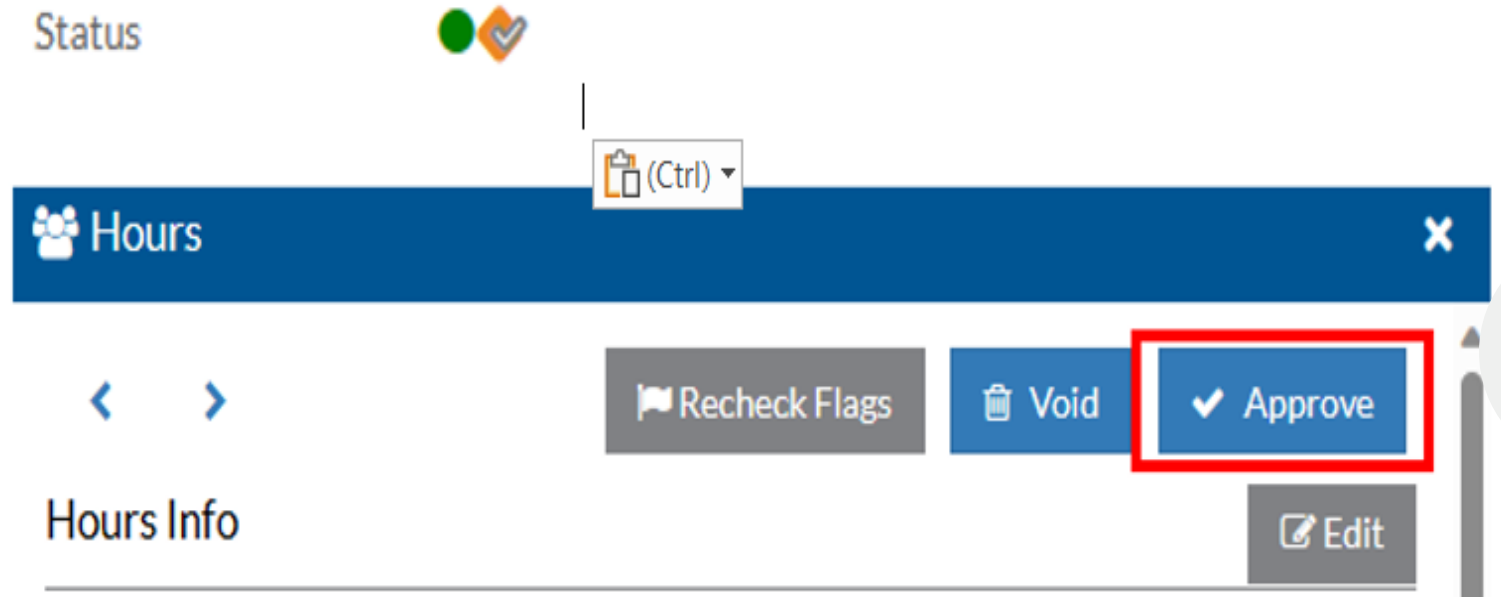
Transaction has been reviewed/updated, and is waiting for approval

Acknowledge

Approving Timecards – Direct Care Shifts



- Now that you have acknowledged, the Status will show a Check Mark.
- The Green Circle indicates that the timecard is now waiting for final approval. Click on “**Approve.**”

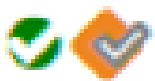


Approving Timecards – Direct Care Shifts



- Now that you have approved, you will see this Status.

Status



2	  
3	CRSDAILY
4	ANBOURG
5	JOCUNDY
6	SELINDSAY
7	KETHOMA203
8	
9	
0	

Approving Timecards – Direct Care Shifts



- If you see this, it indicates an incomplete timecard (looks similar to a torn piece of paper). The Red Triangle with the exclamation point also indicates an error (which in this case, is due to the timecard missing an end time). You will need to follow up with your staff and have them enter in their end time.



US



Approving Timecards – Direct Care Shifts



- Looking further into the error, you notice that both staff did not clock in with all the individuals at the same time.
- Please reach out to the staff to fix it first. If for some reason you are unable to get hold of the staff, you may fix to meet a payroll deadline.

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

Approving Timecards – Direct Care Shifts



- Now it is time to fix the error. Click on the Yellow Box for the staff that missed clocking in with one of the individuals. Click on **“Edit.”**

Hours

< >

Recheck Flags

Void

Edit

Status

Staff

Type

Date

Begin

End

Total Hours

Service

8/7/2023

2:00 PM

10:00 PM

8.00

CRS

Clients

Guest

Q

All

Clear

Bourgoin, Anthony

Cundy, John

Lindsay, Sean

Approving Timecards – Direct Care Shifts



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

Clients

+ Guest

AllClear

Bourgoin, Anthony

Cundy, John

Lindsay, Sean

Thomas, Kevin

Transaction ID128835

Notes

Insert Template

Cancel

Save

Approving Timecards – Direct Care Shifts



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

A screenshot of a software interface for approving timecards. It features a 'Notes' section with a text area containing the text 'Added Missing Individual--AnBo'. Above the text area is an 'Insert Template' dropdown menu. At the bottom right of the interface are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a red rectangular border.

Notes

Insert Template

Added Missing Individual--AnBo

Cancel Save

Tips for Viewing the Service Location Log

Tips for Viewing the Service Location Log



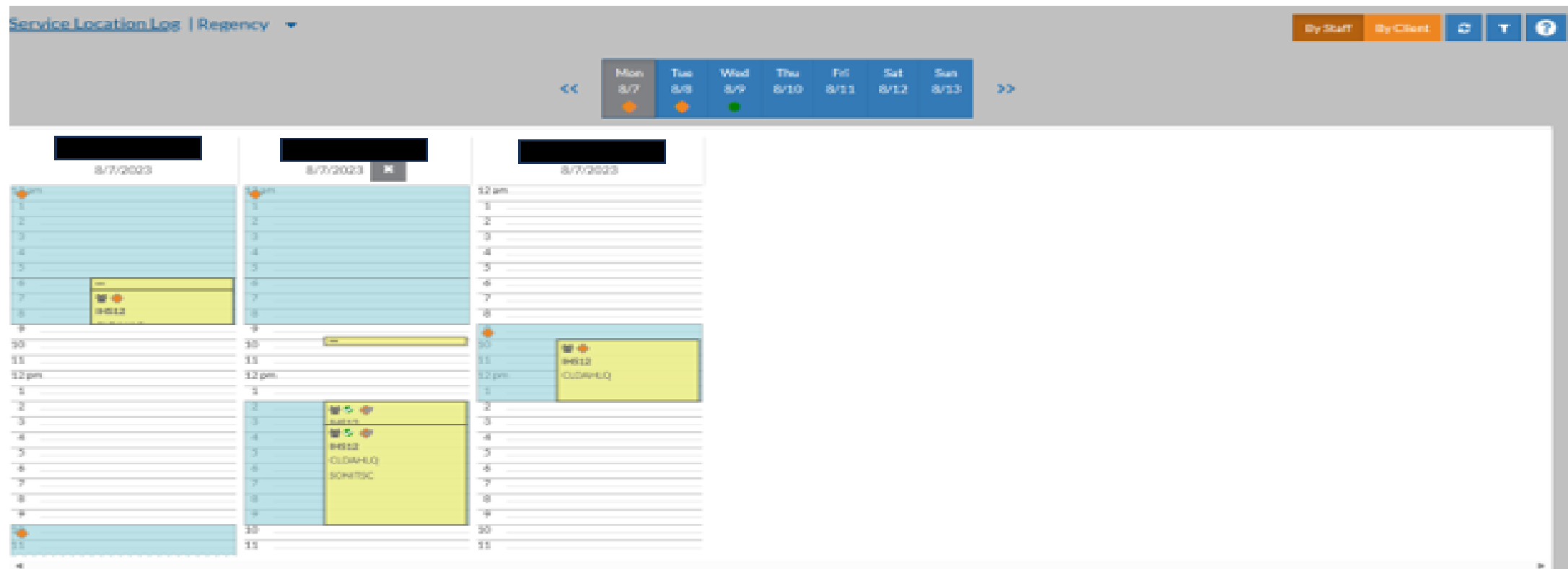
- There are two ways to filter in the Service Location Log—**By Staff** or **By Client**



Tips for Viewing the Service Location Log



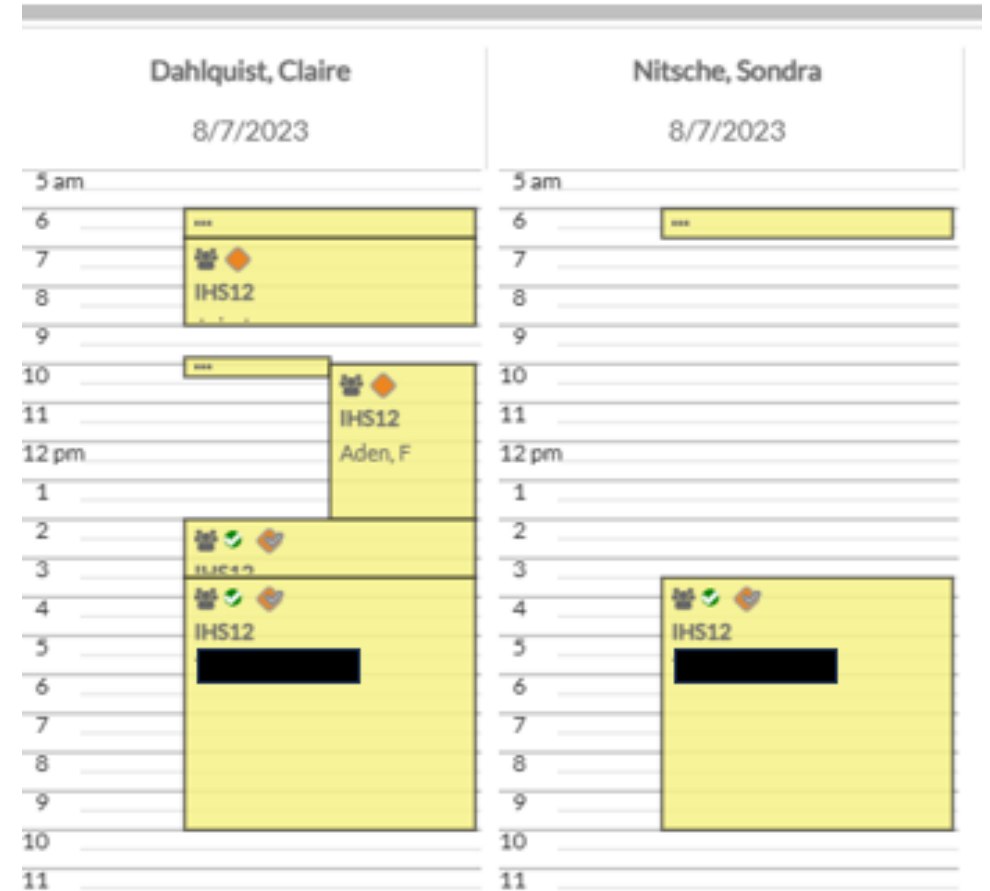
- If you view **By Staff**, you will see all the timecards laid out according to each Staff's time log and schedule. This is a great way to make sure all staff time logs are accounted for.



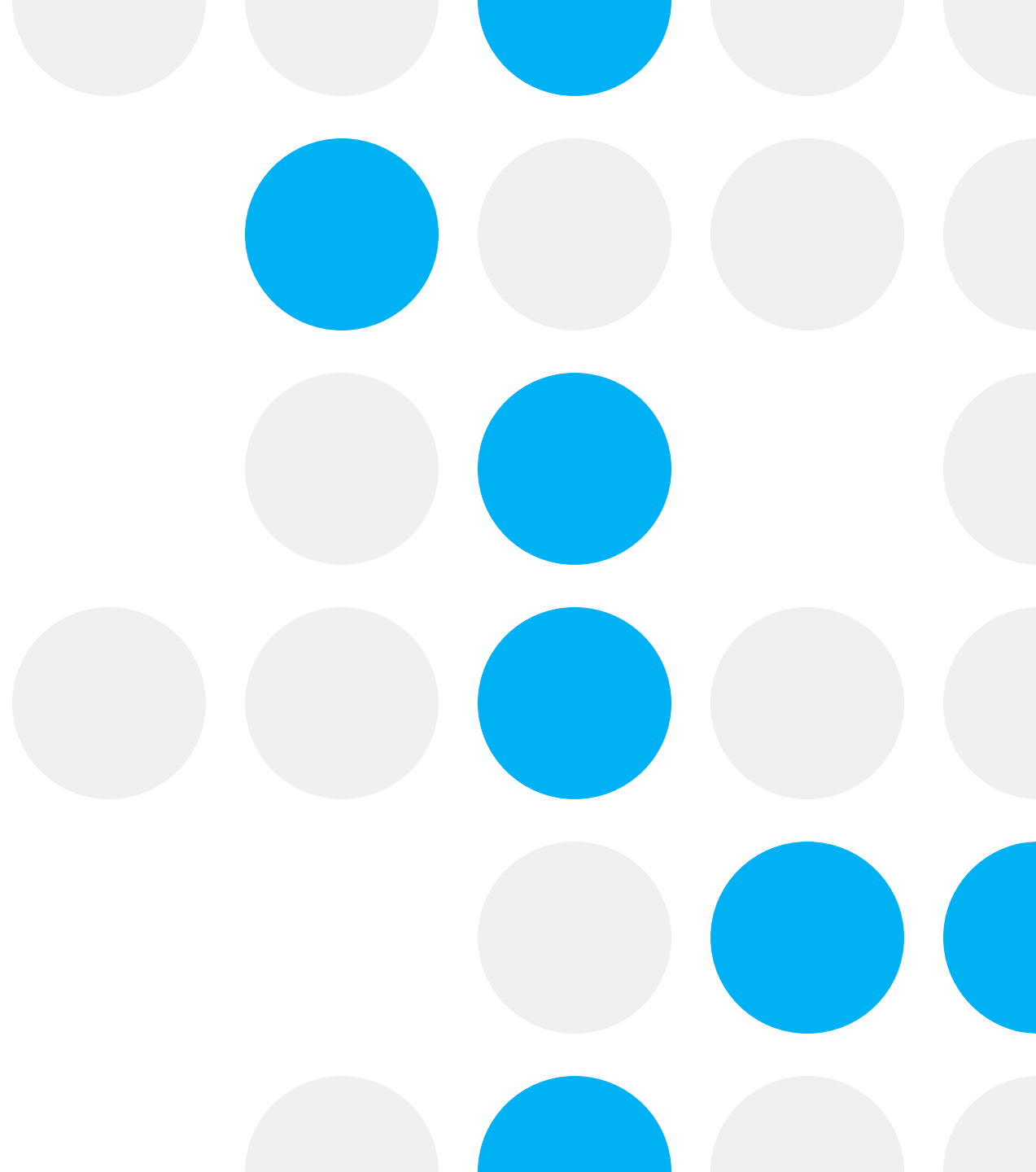
Tips for Viewing the Service Location Log



- If you view **By Client**, you will see all the timecards displayed according to each Individual's time that the staff logged in with them. This is very helpful when trying to see if individuals were not home/on leave, if individuals were overlapped, if staff didn't work with them, or even if someone forgot to clock in with someone.



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



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



- When an individual is discharged; it usually means that they are leaving for another service. Since both services cannot bill the same day (due to double billing), they can NOT be clocked in on their last day.
 - Example: If AaZz was discharged on 10/31 at 10:01PM, you would need to edit their timecard for billing so they are not clocked in on 10/31 AT ALL; meaning, their timecard on 10/30 would end at 12AM. It doesn't matter what time of day they leave; we can NOT bill.
-

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

- When an individual is brought to a hospital, it doesn't always mean that they were admitted. They could just have been in the ER. Even if they stayed the night, it does NOT mean they were admitted. You will need to look at their discharge paperwork and/or speak to someone at the hospital.
 - If they were admitted, we cannot clock them in on the day they went to the hospital (no matter what time they were brought to the hospital). For example, if they were brought to the hospital on 10/31 at 11:59PM, and the hospital decides to admit them, we cannot bill for them the entire day, meaning, their timecard on 10/30 would end at 12am. This is due to double billing.
 - On the day the individual is discharged from the hospital, you also can NOT bill for them; meaning, even if they were discharged at 12:03AM, their timecard would end at 12am the night before.
-

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



- Failure to adjust individual's timecards to prevent double-billing can become a serious issue. Please notify your Director immediately, and also send an email to the person responsible for overseeing billing.
-

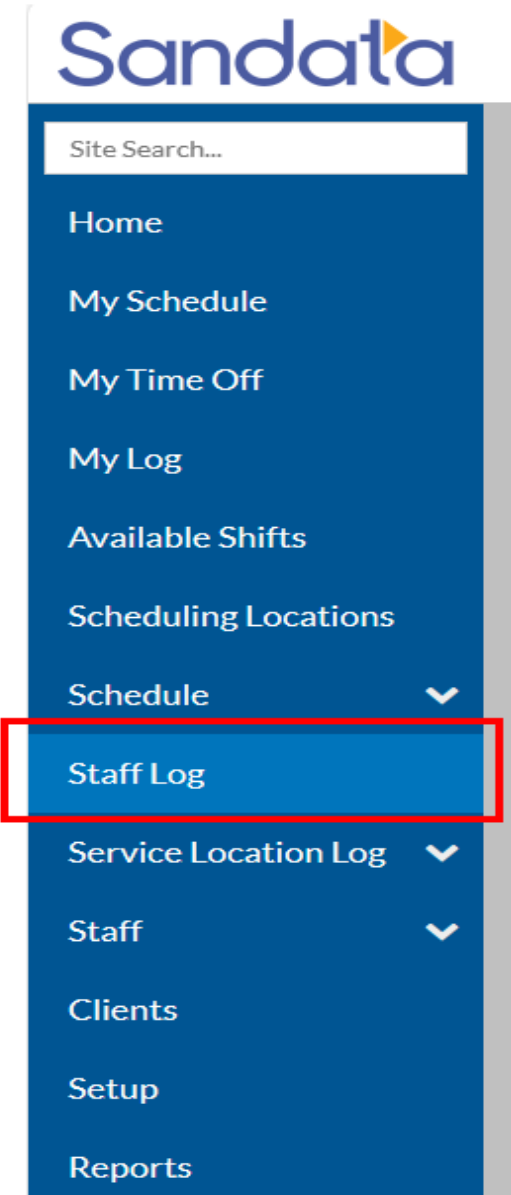
Approving Timecards – Non-Direct Care and Training Shifts



Approving Timecards – Non-Direct Care and Training Shifts



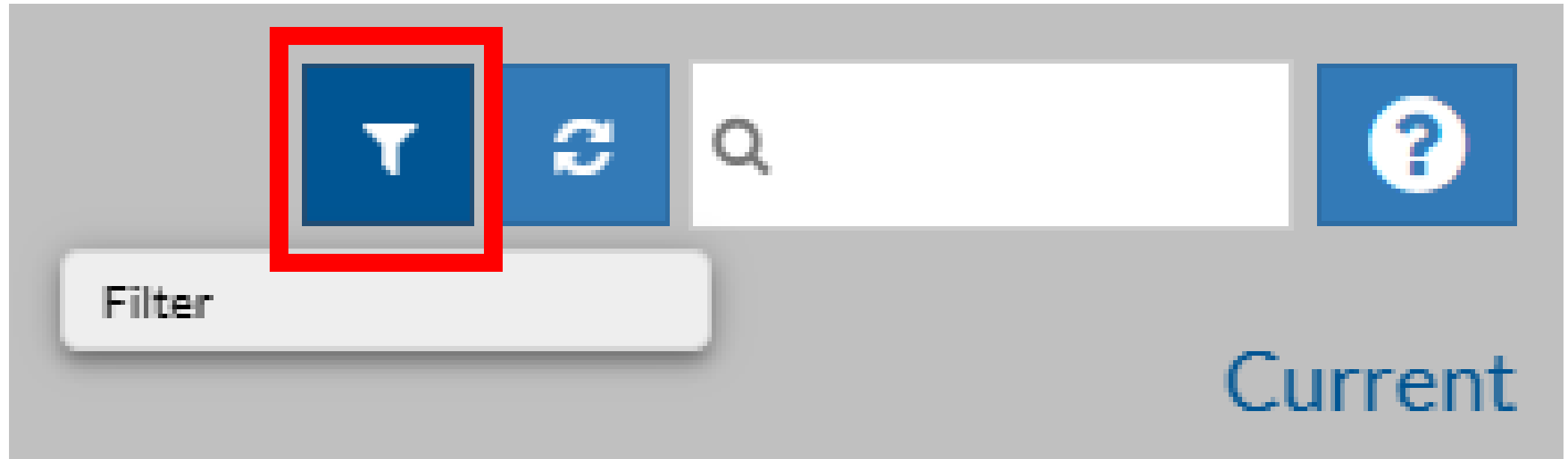
- After you finish viewing/approving Time Logs under the Service Location Log, you will now want to start viewing **Staff Logs**. This will allow you to see any Admin/Training/Non-Direct Care shifts that will NOT show up on Service Location Logs. Click on “**Staff Log**.”



Approving Timecards – Non-Direct Care and Training Shifts



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



Approving Timecards – Non-Direct Care and Training Shifts



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

The screenshot shows a sidebar menu with the following options:

- To Do**
Shows Staff data that needs approved or contains flags.
- Current Week**
Shows Current Staff data to keep up on what is going on this week.
- Historical by Date**
Set a week range to find historic data for all staff.
- Historical by Staff**
Set a staff and a week to find historic data for that staff.
- EVV To Do**
Shows EVV data that needs addressed/resubmitted.

At the bottom of the sidebar, the text "8/13/2020 Manager Type" is visible.

Approving Timecards – Non-Direct Care and Training Shifts



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

8/13/2

Manager Type

☒ Primary

☒ Department

☒ Backup

Done **Cancel**

Approving Timecards – Non-Direct Care and Training Shifts



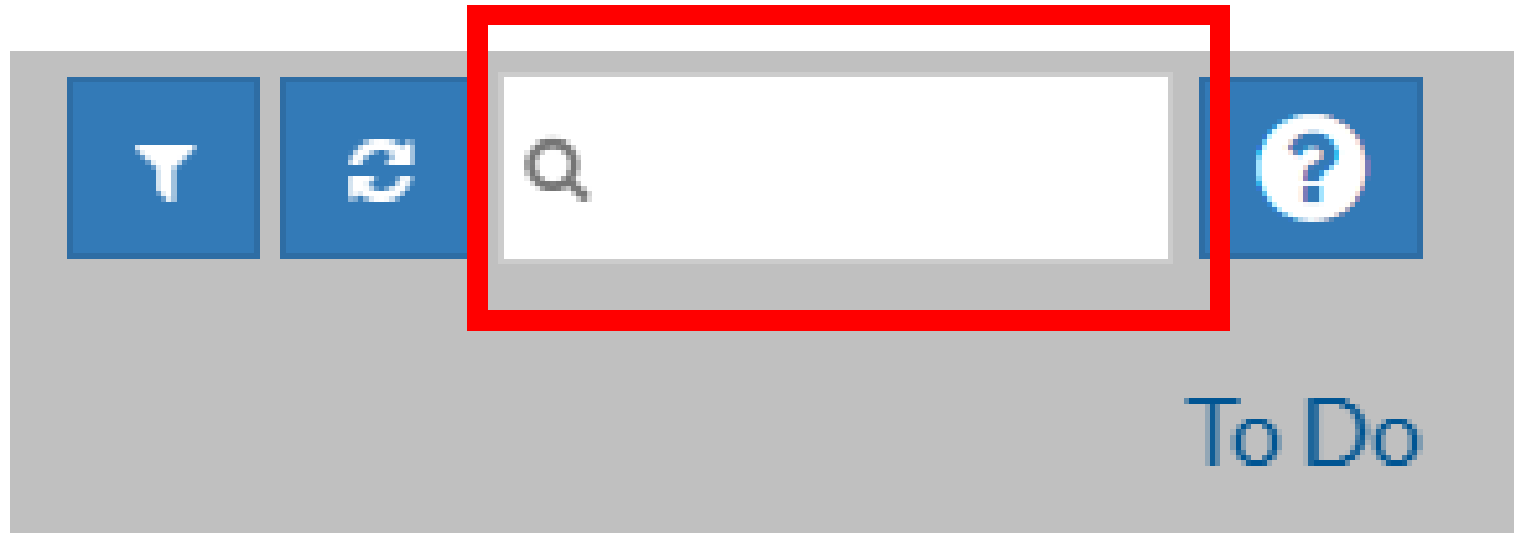
- You will need to know the Staff Names of those you Manage. Your screen will look like this.

Managed Staff											
[Redacted]				[Redacted]				[Redacted]			
08/07/2023-08/13/2023	Issues need to be resolved			08/07/2023-08/13/2023	Issues need to be resolved			08/07/2023-08/13/2023	Issues need to be resolved		
Paid Hours	15.00			Paid Hours	19.00			Paid Hours	12.33		
Worked Hours	15.00			Worked Hours	19.00			Worked Hours	12.33		
Non-Worked Hours	0.00			Non-Worked Hours	0.00			Non-Worked Hours	0.00		
Unpaid Breaks	0.00			Unpaid Breaks	0.00			Unpaid Breaks	0.00		
Paid Miles	0			Paid Miles	0			Paid Miles	0		
Company Miles	0			Company Miles	0			Company Miles	0		
Expenses	0.00			Expenses	0.00			Expenses	0.00		
[Redacted]				[Redacted]				[Redacted]			
08/07/2023-08/13/2023	Issues need to be resolved			08/07/2023-08/13/2023	Issues need to be resolved			08/07/2023-08/13/2023	Issues need to be resolved		
Paid Hours	21.00			Paid Hours	4.00			Paid Hours	13.40		
Worked Hours	21.00			Worked Hours	4.00			Worked Hours	13.40		
Non-Worked Hours	0.00			Non-Worked Hours	0.00			Non-Worked Hours	0.00		
Unpaid Breaks	0.00			Unpaid Breaks	0.00			Unpaid Breaks	0.00		
Paid Miles	0			Paid Miles	0			Paid Miles	62		
Company Miles	0			Company Miles	0			Company Miles	0		
Expenses	0.00			Expenses	0.00			Expenses	0.00		

Approving Timecards – Non-Direct Care and Training Shifts



- You can scroll down to view all the Staff or you can enter a staff name in the upper right corner Search Box to locate them.

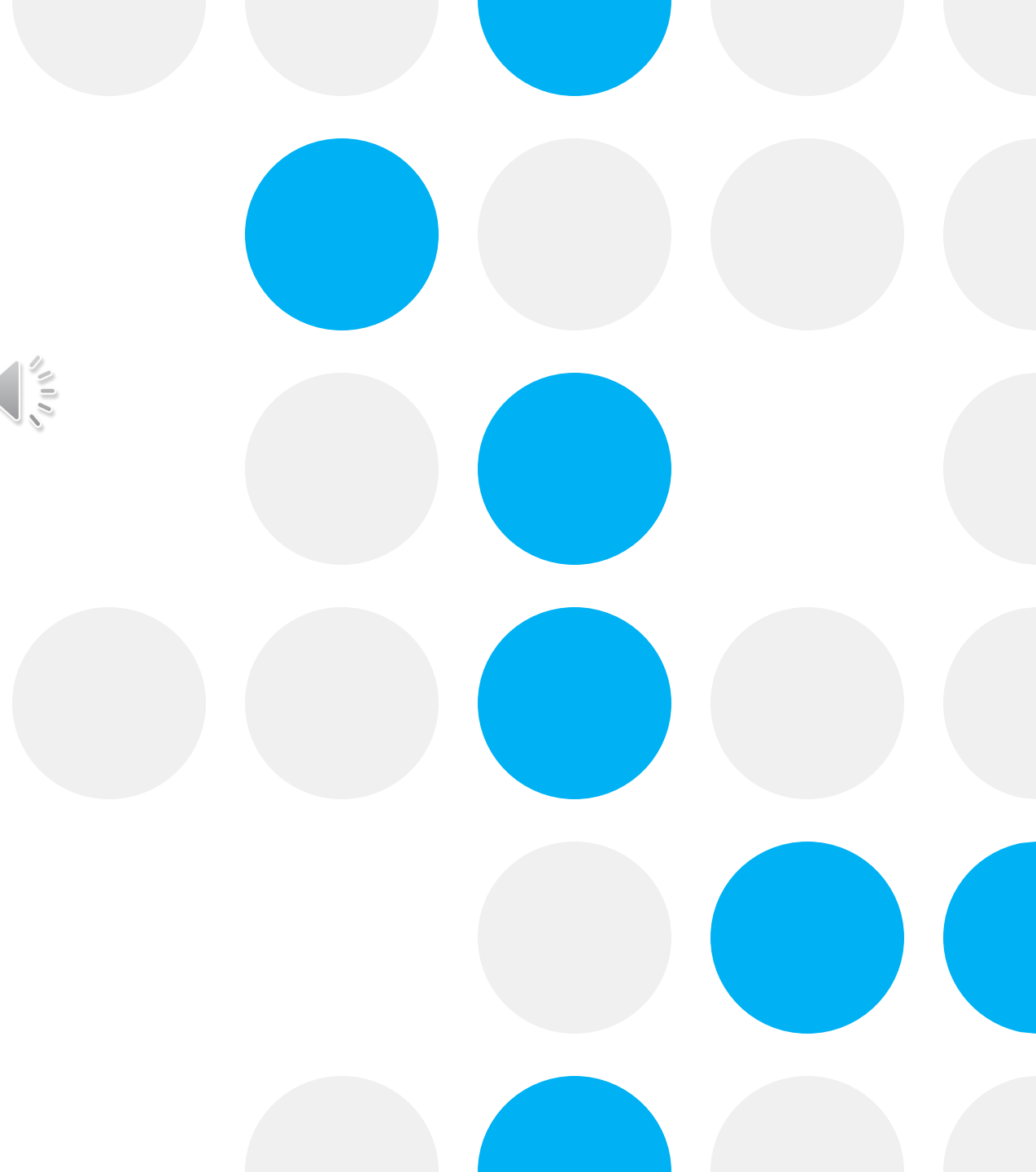


Approving Timecards – Non-Direct Care and Training Shifts



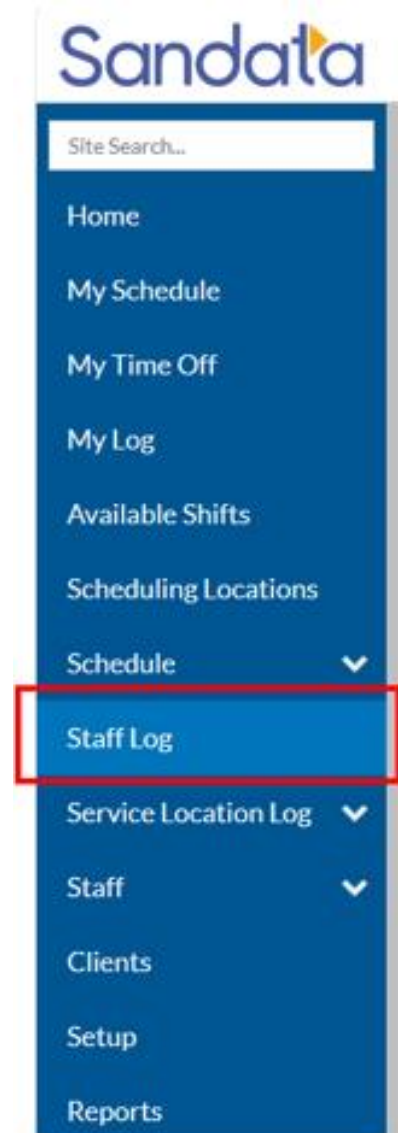
- Start going through all of your Managed Staff and reviewing/approving timecards. These are typically not Scheduled Shifts, so you will need to ask yourself the following questions before you approve:
 - Does the time appear accurate?
 - Why did the staff clock in under Admin/Non-Direct Care?
 - Did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

Approving Mileage Logs



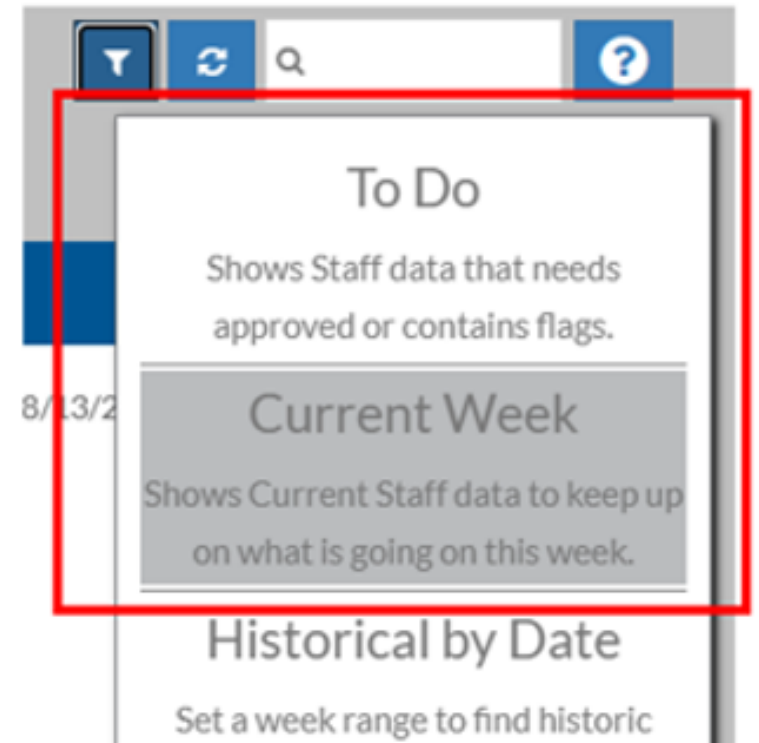
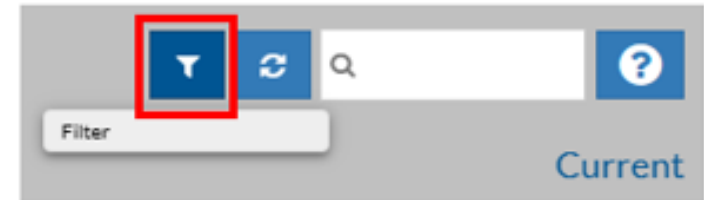
Approving Mileage Logs

- In order to approve Staff Mileage Logs, you need to view the **Staff Log**.



Approving Mileage Logs

- You will then use the **Filter Icon** and select **To Do**.



Approving Mileage Logs

- For each of your Managed Staff, you will click on their names, then scroll down to view their Mileage Logs.

Mileage											 Add
☐			Date	Description	Type	Vehicle	Clients	Begin	End	Miles	
☐			8/7/2023	First Ave 3945 - Transportation Mileage	Odometer Begin/End	Personal	RYVANHUYEN	115416	115443	27	Actions 
☐			8/7/2023	First Ave 3945 - Transportation Mileage	Odometer Begin/End	Personal	RYVANHUYEN	115416	115443	27	Actions 
☐			8/8/2023	First Ave 3945 - Transportation Mileage	Odometer Begin/End	Personal	RYVANHUYEN	115459	115505	46	Actions 

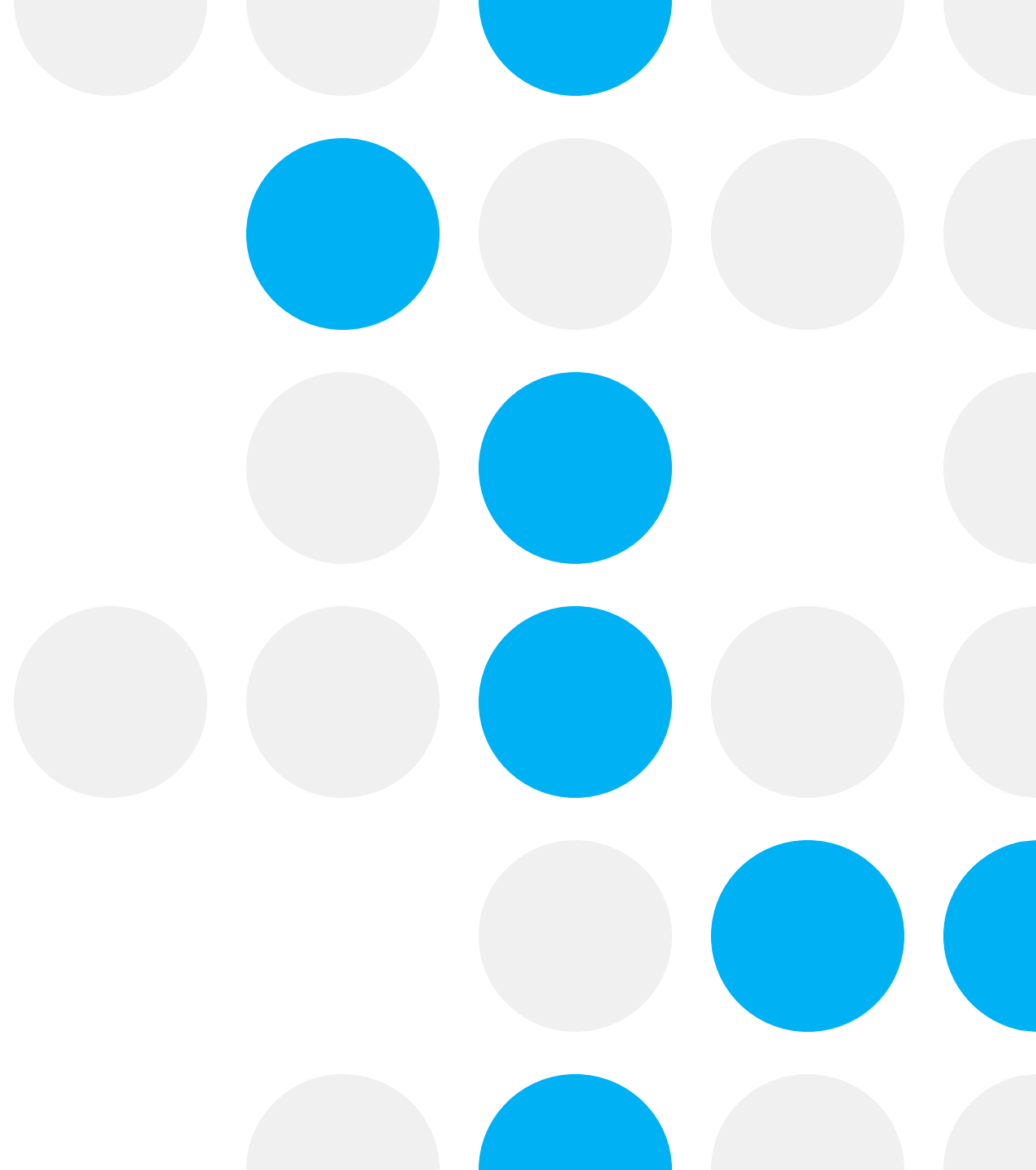
Approving Mileage Logs

- Just like approving timecards, you will need to click on each mileage entry and approve one at a time. Make sure to ask the following questions:
 - Does the mileage appear accurate? If not, are there any notes on where the staff went?
 - Does this staff drive a company vehicle? If so, it may appear a bit different.
 - Do the dates match the dates they worked, and the correct sites.
 - If they have staff mileage, were they approved to track mileage to drive between sites? (This is common for Float Staff, or staff that work at different sites on the same day).
 - If the mileage is over 100 miles, reach out to staff to confirm it is accurate.
 - If you are not sure of any of the above, please contact the staff directly before approving.
-

Approving Mileage Logs

- Important Notes:
 - If they are float staff, you are responsible for approving their mileage if they were driving “to” your site. For example, if a staff was leaving Plymouth and going to Parkfield, then the Site Manager for Parkfield would be responsible for approving their non-direct care mileage.
 - Mileage can not be approved/paid if entered in late. The deadline for mileage is end of day Sunday. Backpay can not be approved for missing mileage. If a staff tries to enter in their mileage late, you will need to void their mileage entry and notify the staff.
-

Approving PTO Process for Managers



Approving PTO Process for Managers

- PTO is approved on a weekly basis by the Managers for their designated sites by 5pm each Monday.
 - Approvals are for the previous week—Monday to Sunday.
 - If you are unable to meet this deadline, you must get approval and coordinate with the General Manager.
 - PTO approvals go hand in hand with Occurrence Tracking, so it is very important that you are cross checking PTO approvals with any missed shifts.
 - Sandata does not update a staff's PTO balance as you approve them. PTO balances are updated after payroll is processed. **Do not approve PTO for more hours than the staff has available to them.**
 - The first week of the pay period = the most accurate PTO balance
 - The second week of the pay period = the least accurate PTO balance. You must do the math by subtracting the first week of the pay period's approved PTO requests to get an accurate balance.
-

Approving PTO Process for Managers

- A staff is not eligible for PTO until after they've been with PTC for 90 days. If you're unsure of this date, you can find this in Asana or GoCo.
 - A staff cannot request more PTO than their scheduled shift. If someone has a permanent schedule of 4pm-10pm (6 hours), they cannot request 8 hours of PTO.
 - PTO is approved for all scheduled shifts—Permanent or Pick-up shifts.
 - PTO cannot be approved for a shift that a staff already worked. A staff cannot request PTO and also be clocked in for work.
 - Supervisors who have admin hours as part of their schedule must use PTO for it if they are choosing not to do any admin work during their time off.
-

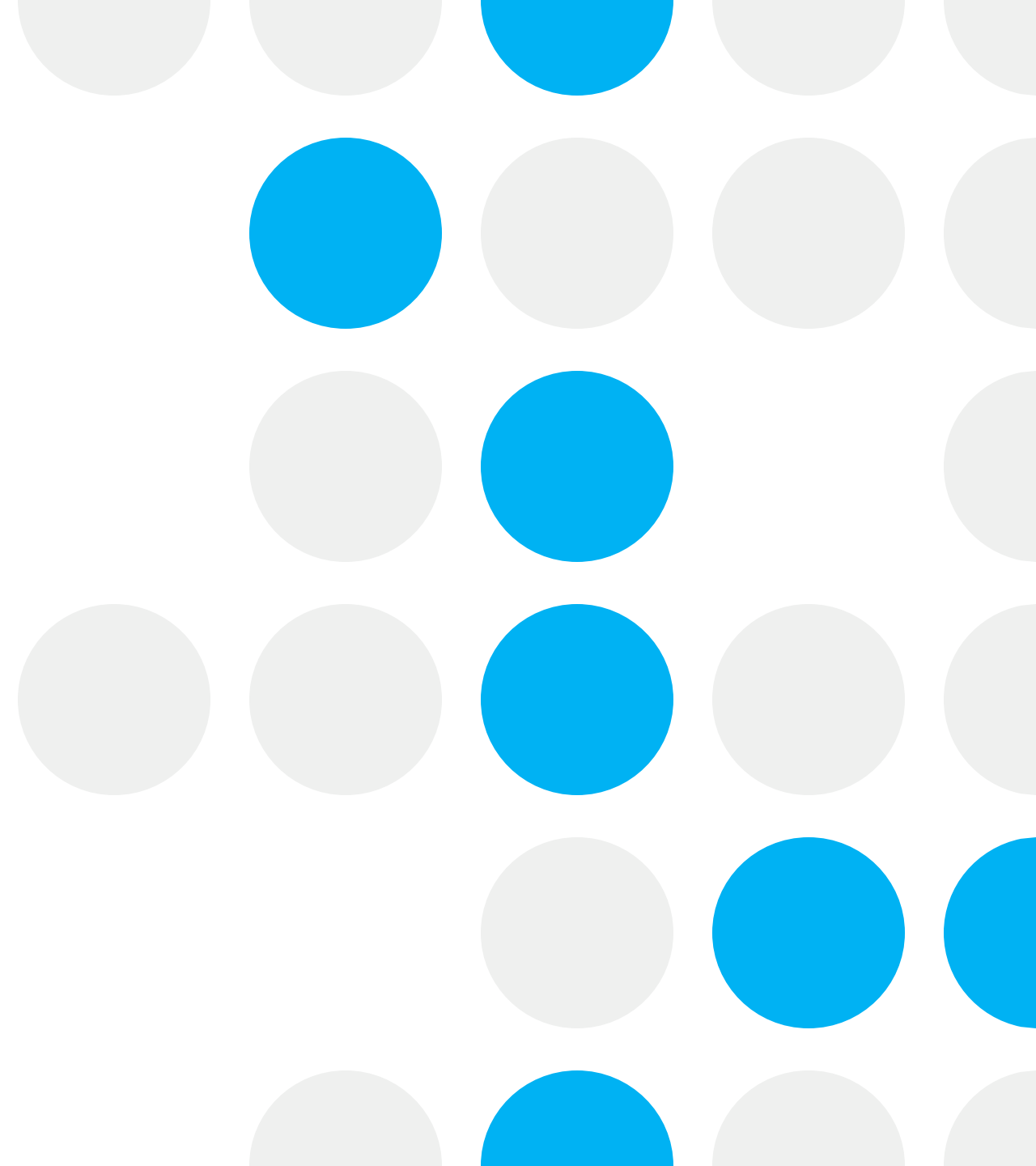
Approving PTO Process for Managers

- If a staff wasn't able to work their scheduled shift, and did not enter in any PTO, the Site Manager must enter in the PTO for them. If they do not have enough PTO to cover the missed shift, please reference the Work Attendance Policy.
 - Double check each of your Site Schedules to make sure all staff are accounted for, and PTO was entered accordingly.
 - PTO cannot be used during the last 14 days of a staff's employment.
 - Please review PTC's PTO Policy or Work Attendance Policy if you have more questions.
-

Approving PTO Process for Managers

- **Bereavement:** If you are entering in Bereavement for an employee, please immediately contact your Director. Once approved, send an email to Abigail Peterson (abigailp@pathwaystocommunity.com) and Ceallaigh Estep (ceallaigh.estepp@pathwaystocommunity.com), and cc Monica Mooney (monica.mooney@pathwaystocommunity.com).
 - **Only Directors can approve Bereavement.** If your director states it is not approved, you may change/deny.
 - **FMLA:** Deny any FMLA that has been entered in by a staff. Sarah Farinella, Talent Acquisition Specialist, will enter and approve all FMLA for employees. Please notify Sarah if you had to deny any FMLA requests, and also notify the staff.
-

Approving PTO



Approving PTO



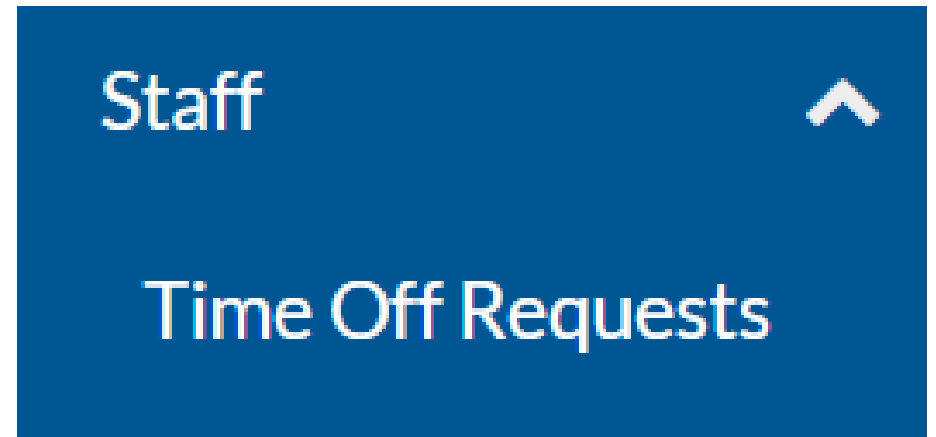
- Once you log into Sandata, you should see a box that says **"Time Off Requests"**

The screenshot displays the Sandata Home dashboard. On the left is a blue navigation sidebar with links: Home, My Time Off, My Log, Scheduling Locations, Schedule, Staff Log, Service Location Log, Staff, Clients, Setup, and Reports. The main content area has a top section with filters for Type (NonDirect Care Default Cost Cente), Cost Center (SLS Office Admin (530)), and Task (General Manager (Regular)), along with a Switch button. Below this are two panels. The 'Change Requests' panel shows a shift pick-up for Friday, September 30, 2022, from 10:00 PM to 9:00 AM at St Johns, with a note that the change request needs approval. The 'Time Off Requests' panel, highlighted with a red border, shows two requests: one for Tuesday, September 20, 2022, and another for Wednesday, September 21, 2022, both with the reason 'PTO' and status 'Pending'. Each request has 'Approve' and 'Deny' buttons.

Approving PTO



- On the blue panel on the left-hand side, you can also click on the down arrow next to "**Staff**" and the option for "**Time Off Requests**" will appear.



Approving PTO

- You should see all the time off requests by every employee at PTC. There is no way to sort this list by department, so it's important that you know your staff's names.

Time Off Requests

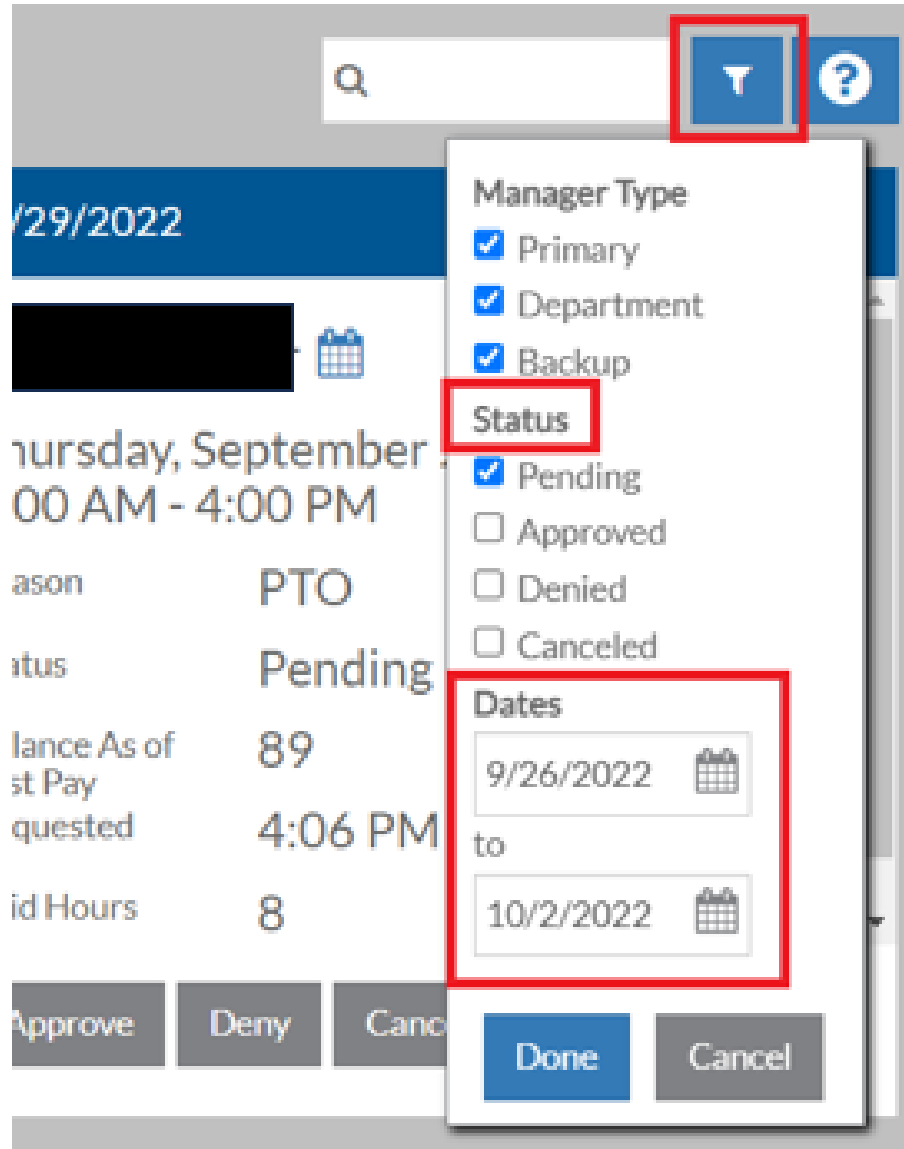
Lor, Ka
Pathways to Community Dataplus

Search [] [] []

09/28/2022 - 09/30/2022	09/28/2022	09/29/2022
 Wednesday, September 28, 2022 through Friday, September 30, 2022 Reason PTO Status Pending Balance As of Last Pay 42.2 Requested 9/24/2022 9:21 PM Approve Deny Cancel Request	 Wednesday, September 28, 2022 8:00 AM - 4:00 PM Reason PTO Status Pending Balance As of Last Pay 89 Requested 4:05 PM Paid Hours 8 Approve Deny Cancel Request	 Thursday, September 29, 2022 8:00 AM - 4:00 PM Reason PTO Status Pending Balance As of Last Pay 89 Requested 4:06 PM Paid Hours 8 Approve Deny Cancel Request
09/30/2022	10/02/2022	10/04/2022 - 10/18/2022
 Friday, September 30, 2022 4:00 PM - 9:00 PM Reason PTO Status Pending	 Sunday, October 2, 2022 8:00 AM - 4:00 PM Reason PTO Status Pending	 Tuesday, October 4, 2022 through Tuesday, October 18, 2022 Reason PTO Status Pending

Approving PTO

- It is easiest to filter the requests by the pay week. To filter your list, click on the **funnel icon** on the right-hand side, change your status to "**pending**" and put in your pay period start and end date. Click "**Done**."



The screenshot shows a web interface for managing PTO requests. A dropdown menu is open, showing filter options. The 'Status' section is selected, showing 'Pending' as the active filter. The 'Dates' section shows a date range from 9/26/2022 to 10/2/2022. The background shows a list of PTO requests with columns for 'Requester', 'Status', 'Pay Period', and 'Hours'.

Requester	Status	Pay Period	Hours
[Redacted]	Pending	Thursday, September 29, 2022 00 AM - 4:00 PM	8

Buttons at the bottom: Approve, Deny, Cancel, Done, Cancel.

Approving PTO



- From this new filtered list, find your staff from the list.
- 1. This is the name of the staff who is requesting time off.
- 2. This is the date of the time off the staff is requesting.
- 3. This is the current PTO balance the staff has available to them.
- 4. This is the date/time the staff put in the request.
- 5. This is number of PTO hours the staff is requesting.

09/26/2022

1.

Monday, September 26, 2022

2.

Reason

PTO

Status

Pending

Balance As of Last Pay

24

3.

Requested

9/26/2022 1:49 PM

4.

Paid Hours

10

5.

Approve

Deny

Cancel Request

Approving PTO



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

09/26/2022

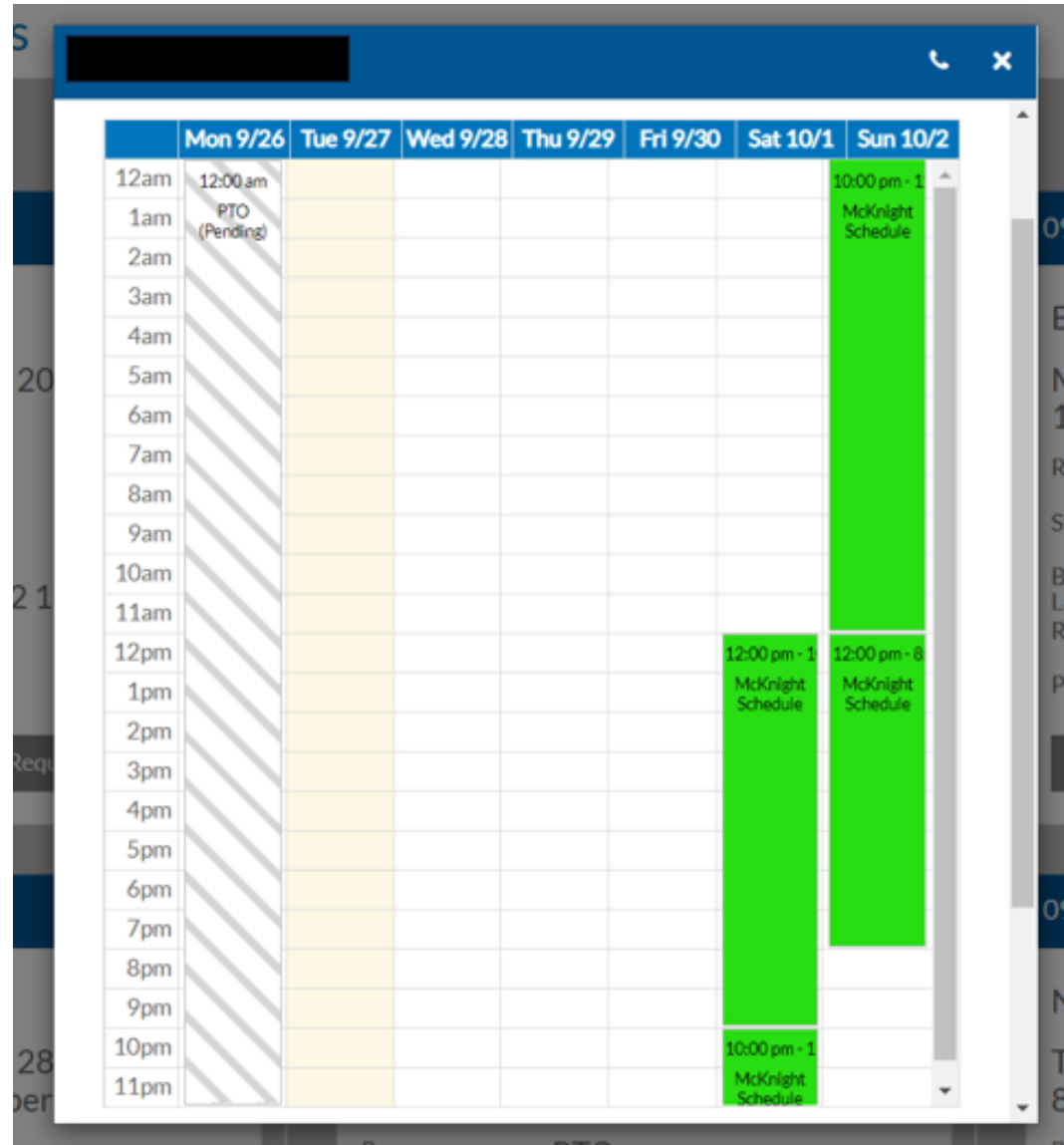


Monday, September 26, 2022

Reason PTO

Approving PTO

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



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

Approving PTO

- Once you've made sure the pending time off request meets all the requirements, you can go ahead and approve it. If the time off request does not meet all the requirements, you would deny the request.
 - If you Deny a time off request, you must reach out to the staff and explain why it was denied. Please also make sure you put a reason why you're denying it in the notes section.
-

Approving PTO

- A pop-up like this will appear after you click "**Approve.**"
Make sure the **Cost Center** reflects the name of the site. Under **Task** it should say DSP (PTO-ESST). Click "**Approve**" again once you have confirmed that everything is accurate.

Time Off Request

Audit

Request

Begin Date

9/26/2022

End Date

9/26/2022

Time Off Reason

PTO

Status

Pending

Monday 9/26/2022

Hours

10

Cost Center

Afton Road (800)

Task

DSP (PTO - ESST)

Summary

Total Hours:

10

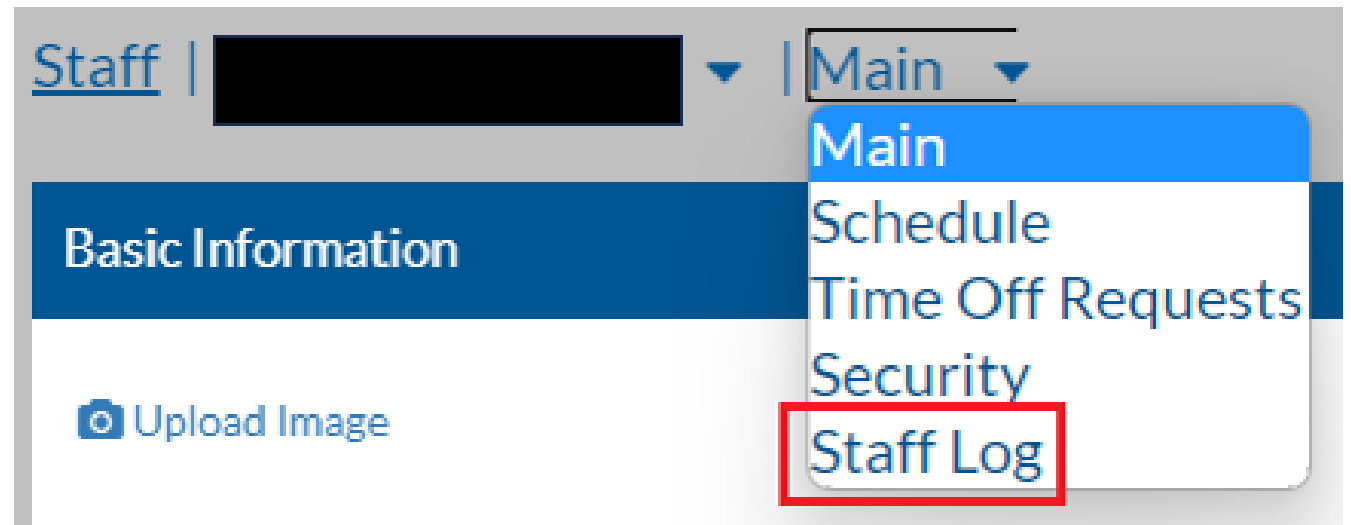
Notes

Approve

Deny

Approving PTO

- After you approve a time off request, you have to go into the staff's timecard to do a second approval. From the blue panel on the left-side, click on "**Staff**". Find the name of your staff from the list and click on it. Once you're on the staff's profile, find "**Staff Log**".



Approving PTO



- The time off request that you just finished approving will appear in the staff's timecard under "**Other Hours/Amounts**". You will need to acknowledge and approve this entry.

Staff Log | [Redacted]

< 9/26/2022 - 10/2/2022 >

Monday 9/26/2022	Tuesday 9/27/2022	Wednesday 9/28/2022	Thursday 9/29/2022	Friday 9/30/2022	Saturday 10/1/2022	Sunday 10/2/2022
12 am	12 am	12 am	12 am	12 am	12 am	12 am
1	1	1	1	1	1	1
2	2	2	2	2	2	2
3	3	3	3	3	3	3
4	4	4	4	4	4	4
5	5	5	5	5	5	5
6	6	6	6	6	6	6
7	7	7	7	7	7	7
8	8	8	8	8	8	8
9	9	9	9	9	9	9
10	10	10	10	10	10	10
11	11	11	11	11	11	11
12 pm	12 pm	12 pm	12 pm	12 pm	12 pm	12 pm
1	1	1	1	1	1	1
2	2	2	2	2	2	2
3	3	3	3	3	3	3
4	4	4	4	4	4	4
5	5	5	5	5	5	5
6	6	6	6	6	6	6
7	7	7	7	7	7	7
8	8	8	8	8	8	8
9	9	9	9	9	9	9
10	10	10	10	10	10	10
11	11	11	11	11	11	11

Other Hours/Amounts

Add

	Date	Type/Task	Location/Cost Center	Clients	Hours/Amt	
☐	9/26/2022	DSP (PTO - ESST)	Afton Road (800)		10.00	Actions

Approving PTO

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

Hours

< >

Recheck Flags

Void

Hours Info

Edit

Status	
Type	Staff Non-Worked Time
Date	9/26/2022
Total Hours	10.00
Cost Center	Afton Road (800)
Task	DSP (PTO - ESST)
Transaction ID	3503

[View Time Off Request](#)

Flags

Acknowledge All



Transaction has been reviewed/updated, and is waiting for approval

Transaction has been reviewed/updated, and is waiting for approval

Acknowledge

Notes

Add Note

Sep 28, 2022 06:10 PM

Lor Ka

Approving PTO

- Under where it says, "**Flags**", read to see if Sandata noticed anything wrong with this PTO request.
- If you accidentally approve a staff for more PTO than they have available to them, you will see a flag that looks like the following (in this photo, it says that that you approved 32 hours, but the staff only has 18 hours of PTO). When this happens, you must edit all their time request entries, so they all total up to only 18 hours. Notify the staff of this when you're done.

Flags



Hours greater than current PTO balance for this non-worked time log

Hours greater than current PTO balance for this non-worked time log: 32.000000 vs 18.0000

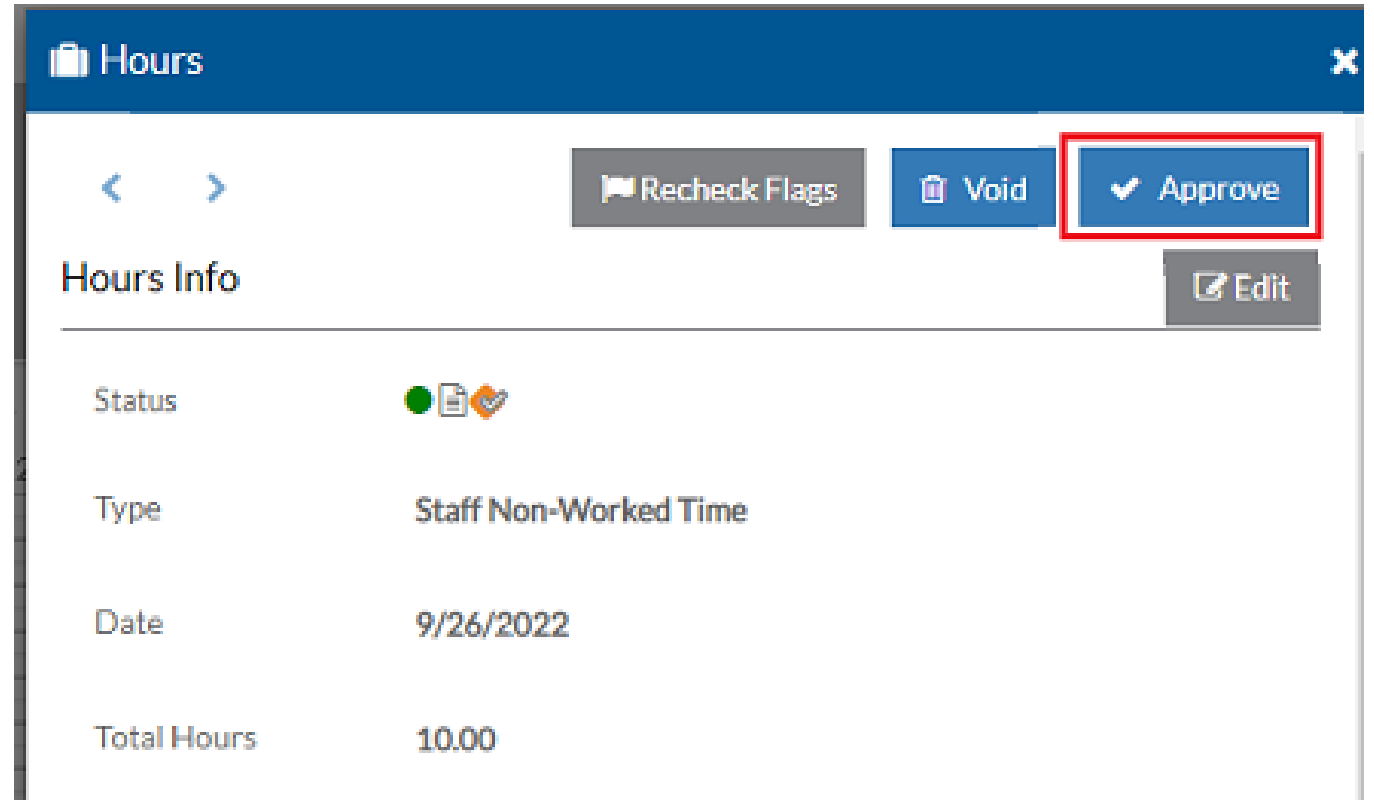


Transaction has been reviewed/updated, and is waiting for approval

Transaction has been reviewed/updated, and is waiting for approval

Approving PTO

- If there's nothing wrong with the PTO request, click on "**Acknowledge All**". After you click on this, a new button should appear at the top right-hand corner for you to approve the entry.

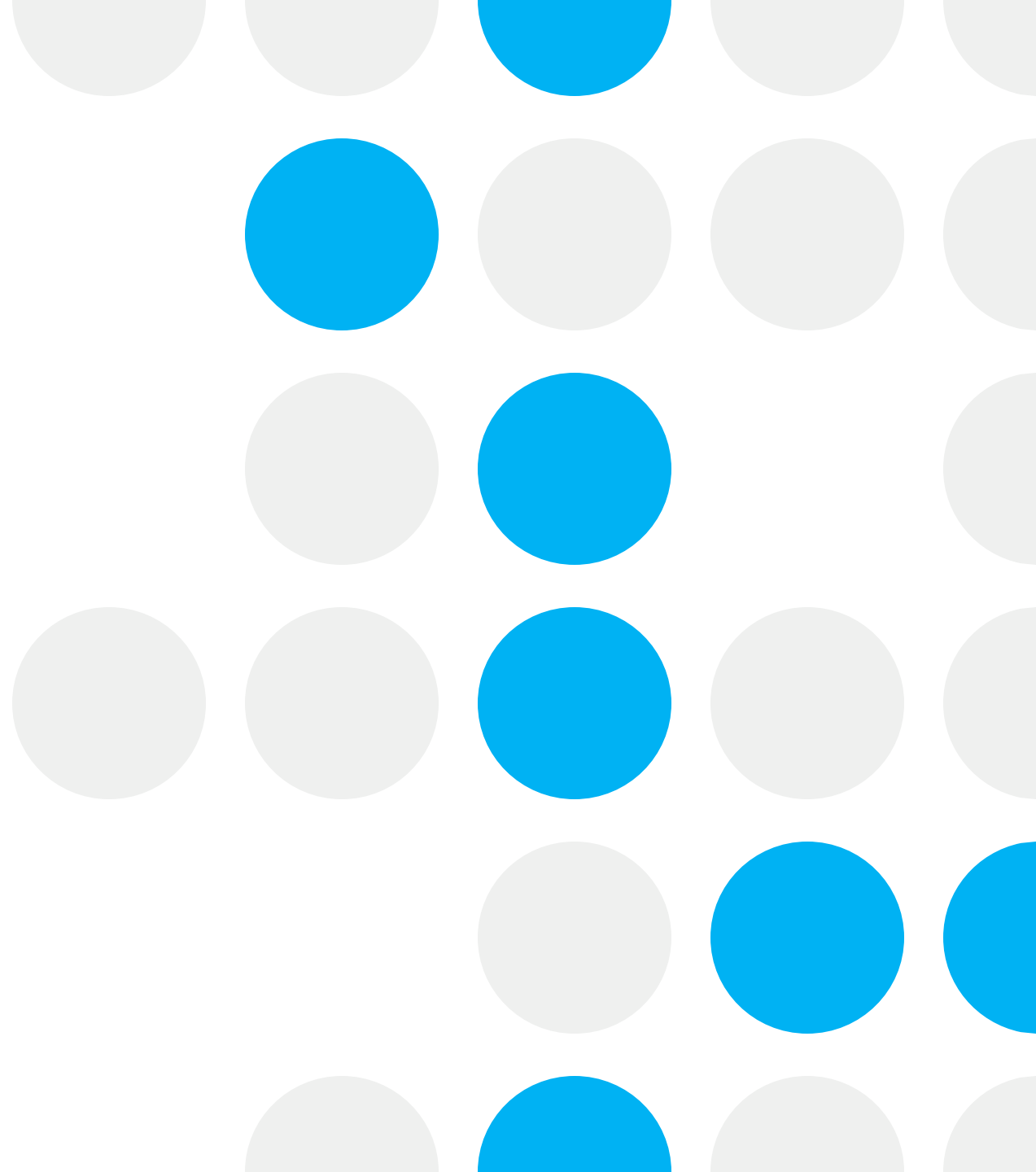


The screenshot shows a web form titled "Hours" with a close button (X) in the top right corner. Below the title bar, there are three buttons: "Recheck Flags" (disabled), "Void" (disabled), and "Approve" (active and highlighted with a red box). Below these buttons is a section titled "Hours Info" with an "Edit" button. The "Hours Info" section contains the following details:

Status	  
Type	Staff Non-Worked Time
Date	9/26/2022
Total Hours	10.00

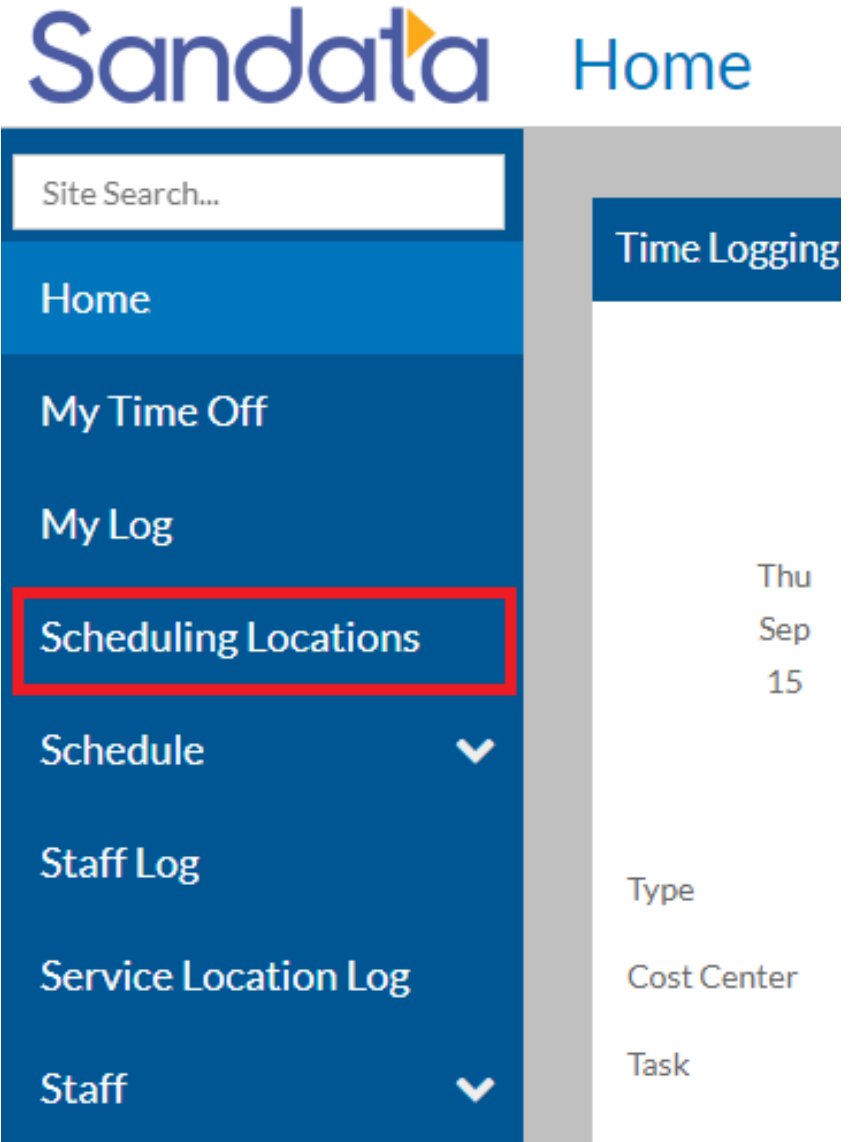
-

Creating Permanent Schedules



Creating Permanent Schedules

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



The screenshot displays the Sandata application interface. At the top, the Sandata logo is on the left, and a "Home" link is on the right. Below the logo is a "Site Search..." input field. A vertical navigation menu on the left contains the following items: "Home", "My Time Off", "My Log", "Scheduling Locations" (highlighted with a red rectangular border), "Schedule" (with a downward arrow), "Staff Log", "Service Location Log", and "Staff" (with a downward arrow). To the right of the navigation menu, there is a "Time Logging" button. Further right, the date "Thu Sep 15" is displayed. At the bottom right, there are labels for "Type", "Cost Center", and "Task".

Creating Permanent Schedules

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

[Scheduling Locations](#) | Champlin 2 ▾

Shift Templates

Schedule

Delete

Audit

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

Creating Permanent Schedules



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

Tuesday	Wednesday	Thursday	Friday	Saturday
10:00 pm - 9:00 am Schedule [A, B]	10:00 pm - 9:00 am Schedule [A, B]	10:00 pm - 9:00 am Schedule [A, B]	10:00 pm - 9:00 am Schedule [A, B] [A, B]	10:00 pm - 10:00 am Schedule [A, B]
9:00 am - 2:00 pm Schedule [A, B]	9:00 am - 2:00 pm Schedule [A, B]	9:00 am - 2:00 pm Schedule [A, B]	9:00 am - 2:00 pm Schedule [A, B]	10:00 am Schedule [A, B]
10:00 pm - 10:00 am Schedule [A, B] [A, B]	2:00 pm - 10:00 am Schedule [A, B] [A, B]	2:00 pm - 10:00 am Schedule [A, B] [A, B]	2:00 pm - 10:00 am Schedule [A, B]	2:00 pm - 2:00 am Schedule [A]
3:00 pm - 8:00 pm Schedule [A, B]	3:00 pm - 8:00 pm Schedule [A, B]	2:00 pm - 7:00 pm Schedule [A, B]	3:00 pm - 8:00 pm Schedule [A, B]	4:00 pm - 10:00 pm Schedule [A, B]
10:00 pm - 9:00 am Schedule	10:00 pm - 9:00 am Schedule	10:00 pm - 9:00 am Schedule	10:00 pm - 10:00 am Schedule	10:00 pm - 9:00 am Schedule

Creating Permanent Schedules



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

Time Slot

Edit

Audit

Shift Template	Schedule
Begin Day	Tuesday
Begin Time	9:00 AM
End Time	2:00 PM
Service Type 2 Hours	0.00
Weeks	A ☒ B ☒
Notes	
Mandatory Employees	1
Staff	

Delete

+ Add

Creating Permanent Schedules

- A list of staff trained at this site will appear for you to choose from. If the staff you're adding is not on the list, this means they were never trained at this site, or they have not been added to the schedule (they do not have access to this site's schedule). If they do not have access to this site's location, see the next section on how to give a staff access.
-

Creating Permanent Schedules



- Some sites will have an A & B Schedule. If a staff works every week, you want to make sure that A & B is selected. If a staff is every other, you want to make sure you select the correct week for them.

Shift Template	Schedule
Begin Day	Tuesday
Begin Time	9:00 AM
End Time	2:00 PM
Service Type 2 Hours	0.00
Weeks	A ☒ B ☒
Notes	
Mandatory Employees	1
Staff	Weeks: A ☒ B ☐

Creating Permanent Schedules



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

Scheduling Locations | Champlin 1

Shift TemplatesScheduleDeleteAudit

Basic InformationEdit		Other InformationEdit		NotesEdit
Description	Champlin 1	Include Clients	☐	Notes Site Supervisor: 651-641-4009 Ext. 220 Manager: Ext. 507 General Manager: Ext 502
Active	☒	Mandatory Staff Count	1	
Address 1	401 Kimball Drive	Shift Swaps Require Approval	☒	
Address 2	0	Disallow Posting of Shift: Hours Before Shift	0	
City	Champlin	Auto Unpost Posted Shifts: Hours Before Shift	0	
State	MN	Scheduling Method	Schedule From Source	
Zip Code	55316	Weeks In Cycle	1	

Creating Permanent Schedules



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

Include Clients	☐
Mandatory Staff Count	1
Shift Swaps Require Approval	☒
Disallow Posting of Shift: Hours Before Shift	0
Auto Unpost Posted Shifts: Hours Before Shift	0
Scheduling Method	Schedule From Source
Weeks In Cycle	1
Week A Start	9/9/2019
Time Zone	Central

Creating Permanent Schedules



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

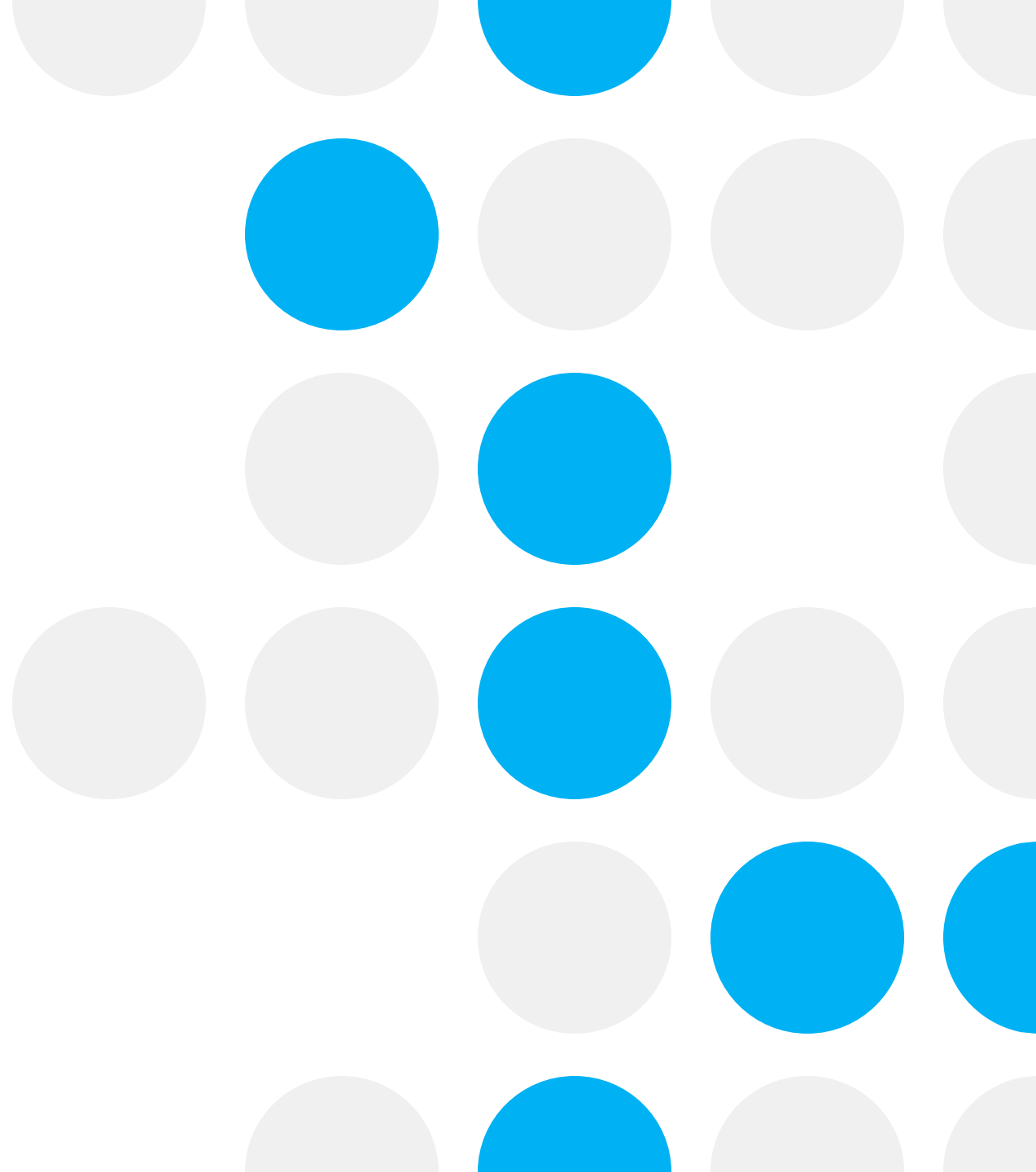
Time Slot

Edit

Shift Template	Schedule
Begin Day	Tuesday
Begin Time	9:00 AM
End Time	2:00 PM
Service Type 2 Hours	0.00
Weeks	A ☒ B ☒
Notes	
Mandatory Employees	1
Staff	

Delete

Giving Staff Access to a Site for Scheduling



Giving Staff Access to a Site for Scheduling

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

Giving Staff Access to a Site for Scheduling



- Click on "**Scheduling Location**" and find the site you want to give the staff access to.

The screenshot displays the Sandata application interface. At the top, the Sandata logo is on the left and a "Home" link is on the right. Below the logo is a "Site Search..." input field. A vertical navigation menu on the left contains the following items: "Home", "My Time Off", "My Log", "Scheduling Locations" (highlighted with a red rectangular border), "Schedule" (with a downward arrow), "Staff Log", "Service Location Log", and "Staff" (with a downward arrow). To the right of this menu, a "Time Logging" button is visible. Further right, the date "Thu Sep 15" is displayed. At the bottom right, there are labels for "Type", "Cost Center", and "Task".

Giving Staff Access to a Site for Scheduling



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

Scheduling Locations | Champlin 2

Shift Templates Schedule Delete Audit

Basic Information Edit	Other Information Edit	Notes Edit								
Description Champlin 2 Active ☒ Address 1 8140 115th Lane N. Address 2 0 City Champlin State MN Zip Code 55316 Phone Number Email Address	Include Clients ☐ Mandatory Staff Count 1 Shift Swaps Require Approval ☒ Disallow Posting of Shift: Hours Before Shift 0 Auto Unpost Posted Shifts: Hours Before Shift 0 Scheduling Method Schedule From Source Weeks In Cycle 2 Week A Start 9/9/2019 Time Zone Central	Notes Site Supervisor: 651-641-4009 Ext. 240 Manager: Ext. 507 General Manager: Ext 502								
Time Tracking Information Edit	Qualifications Add	Approved Staff Add								
Service Location Champlin 2 Cost Center Champlin 2 (240) Require Registered Device ☐		<table><tr><td></td><td></td></tr><tr><td></td><td></td></tr><tr><td></td><td></td></tr><tr><td></td><td></td></tr></table>								

Giving Staff Access to a Site for Scheduling



- Using the search bar, find the staff's name and click on it. Once their name is highlighted, click “**Save.**”
- This staff now has access to view the schedule at this site.

Approved Staff

Select items you would like to add and click Save

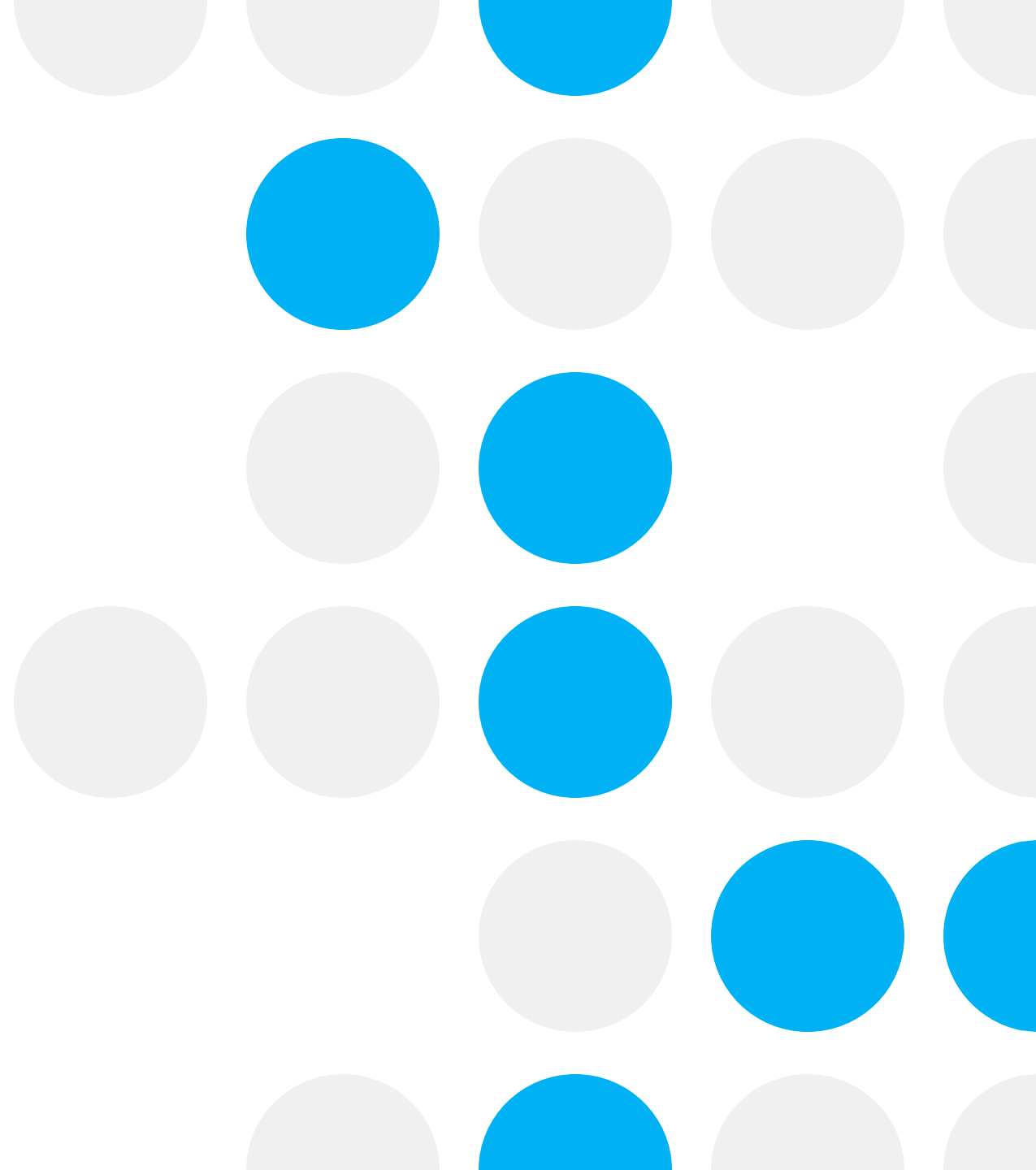
Select All Clear

[Redacted]
[Redacted]
[Redacted]
[Redacted]
[Redacted]
[Redacted]
[Redacted]
[Redacted]
[Redacted]
[Redacted]

Selected: 0

Cancel Save

Removing a Staff from a Permanent Schedule 🔊



Removing a Staff from a Permanent Schedule



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

Time Slot

Edit

Audit

Shift Template	Schedule
Begin Day	Tuesday
Begin Time	9:00 AM
End Time	2:00 PM
Service Type 2 Hours	0.00
Weeks	A ☒ B ☒
Notes	
Mandatory Employees	1

Staff

Add

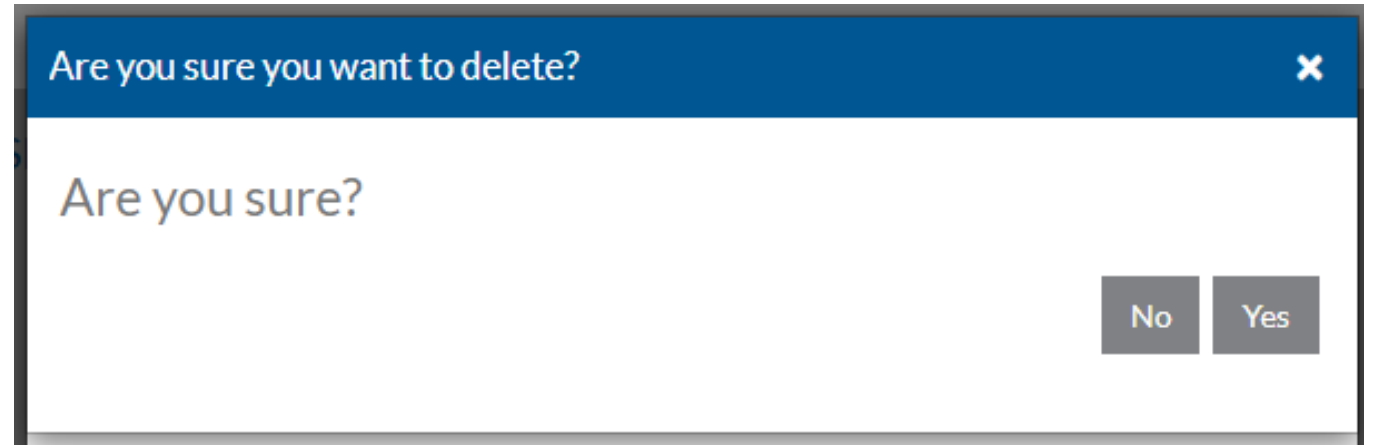
Weeks: A ☒ B ☐

Delete

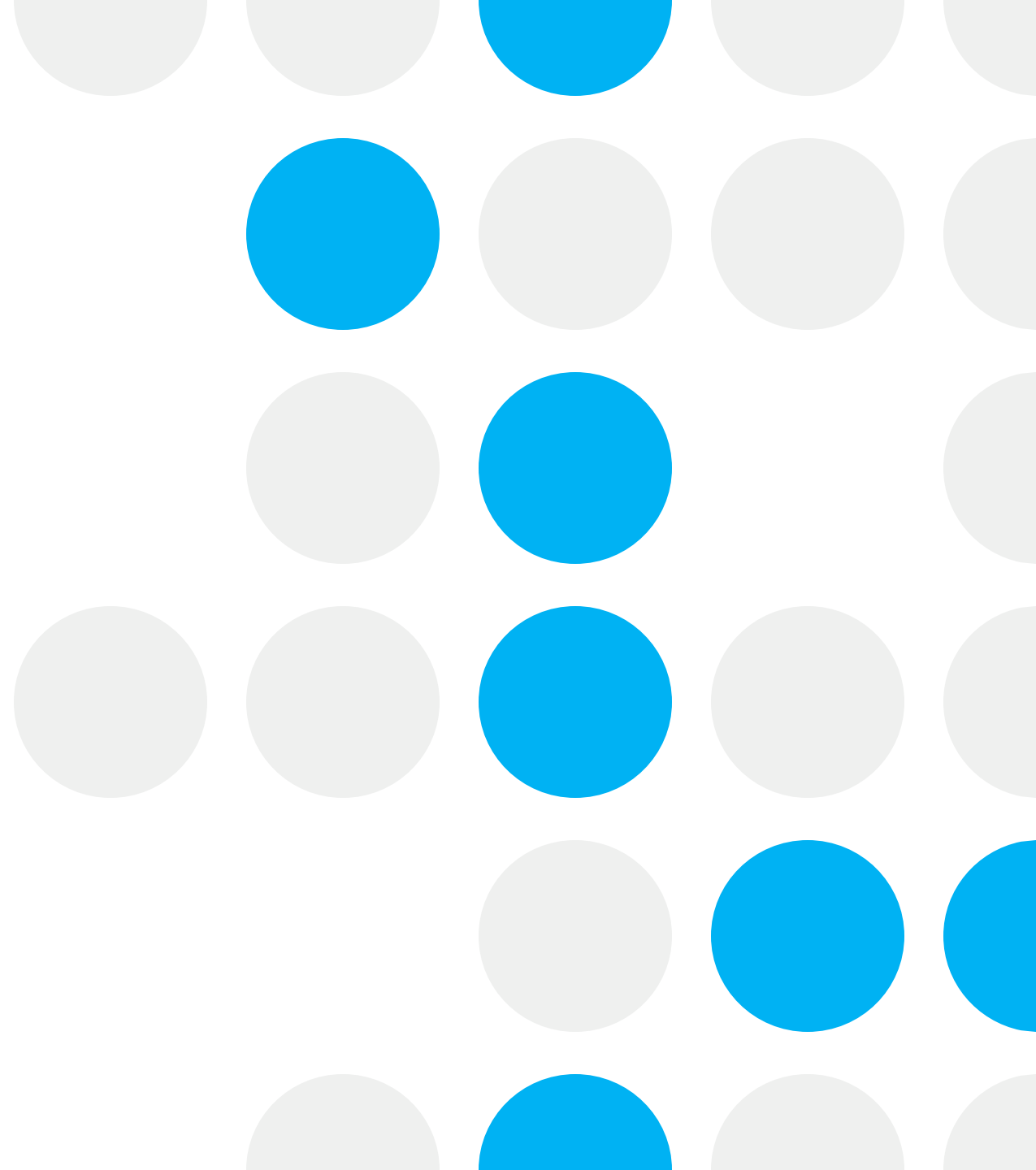
Removing a Staff from a Permanent Schedule



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



Approving Change Requests and Changing Schedules



Approving Change Requests and Changing Schedules



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

Approving Change Requests and Changing Schedules



- There are two ways to view Change Requests:
 - On the Home Screen, go to **“Change Requests”** and click **“Open.”**
 - On the blue menu, go to **“Schedule”** then **“Change Requests.”**

The screenshot displays the Sandata Schedule Status interface. The left sidebar contains a blue menu with the following items: Home, My Time Off, My Log, Scheduling Locations, **Schedule** (highlighted with a red box), Staff Log, Service Location Log, Staff, Time Off Requests, Satisfaction Index, Import, Clients, Setup, and Reports. The main content area is titled 'Time Logging' and shows a clock at 2:50:09 PM with the message 'You are not currently logging time.' Below this are dropdown menus for Type (Direct Care), Location (Afton Road), and Service (IHS 1:1), and a 'None Selected' button for Clients. A 'Start' button is also present. The bottom section is titled 'Change Requests' and features an 'Open' button (highlighted with a red box). Below this, a notification states: 'Mogosanu, Helene has picked up this open shift. Saturday, September 9, 2023 5:00 PM - 10:00 PM'. A warning icon is next to the text: 'Unfilled Shift Slot: Change request for open shift needs to be approved/denied Unfilled Shift Slot: There is no staff scheduled'. A table below shows details for a shift at 'Maple Grove' with the status 'Open'.

Approving Change Requests and Changing Schedules



- Your screen should now look similar to this, showing any requests that are still pending.

The screenshot displays the Sandata Change Requests interface. On the left is a blue sidebar with navigation links: Home, My Time Off, My Log, Scheduling Locations, Schedule, Flags, Change Requests (highlighted), Copy, Generate, Auto Schedule, Publish, More, Staff Log, Service Location Log, Staff, and Time Off Requests. The main area shows a grid of four pending change requests, each with a red triangle warning icon in the top right corner.

Top Left Request: Sep 9, 2023 5:00 PM. Description: [Redacted] ed up this open shift. Saturday, September 9, 2023 5:00 PM - 10:00 PM. Unfilled Shift Slot: Change request for open shift needs to be approved/denied. Unfilled Shift Slot: There is no staff scheduled. Location: Maple Grove. Staff: Open. Clients: Soto, Blossom. Buttons: Approve, Deny, Details.

Top Right Request: Sep 16, 2023 9:00 AM. Description: [Redacted] up this open shift. Saturday, September 16, 2023 9:00 AM - 2:00 PM. Unfilled Shift Slot: Change request for open shift needs to be approved/denied. Unfilled Shift Slot: There is no staff scheduled. Location: McKnight. Staff: Open. Clients: Bourgeois, Anthony, Cundy, John. Shift Notes: 1:1. Buttons: Approve, Deny, Details.

Bottom Left Request: Sep 9, 2023 9:00 AM. Description: [Redacted] ed up this open shift. Saturday, September 9, 2023 9:00 AM - 2:00 PM. Unfilled Shift Slot: Change request for open shift needs to be approved/denied. Unfilled Shift Slot: There is no staff scheduled. Buttons: Approve, Deny, Details.

Bottom Right Request: Sep 3, 2023 10:00 AM. Description: [Redacted] ed up this open shift. Sunday, September 3, 2023 10:00 AM - 10:00 PM. Unfilled Shift Slot: Change request for open shift needs to be approved/denied. Unfilled Shift Slot: There is no staff scheduled. Buttons: Approve, Deny, Details.

Approving Change Requests and Changing Schedules



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

Sep 9, 2023 5:00 PM

has picked up this open shift.

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

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

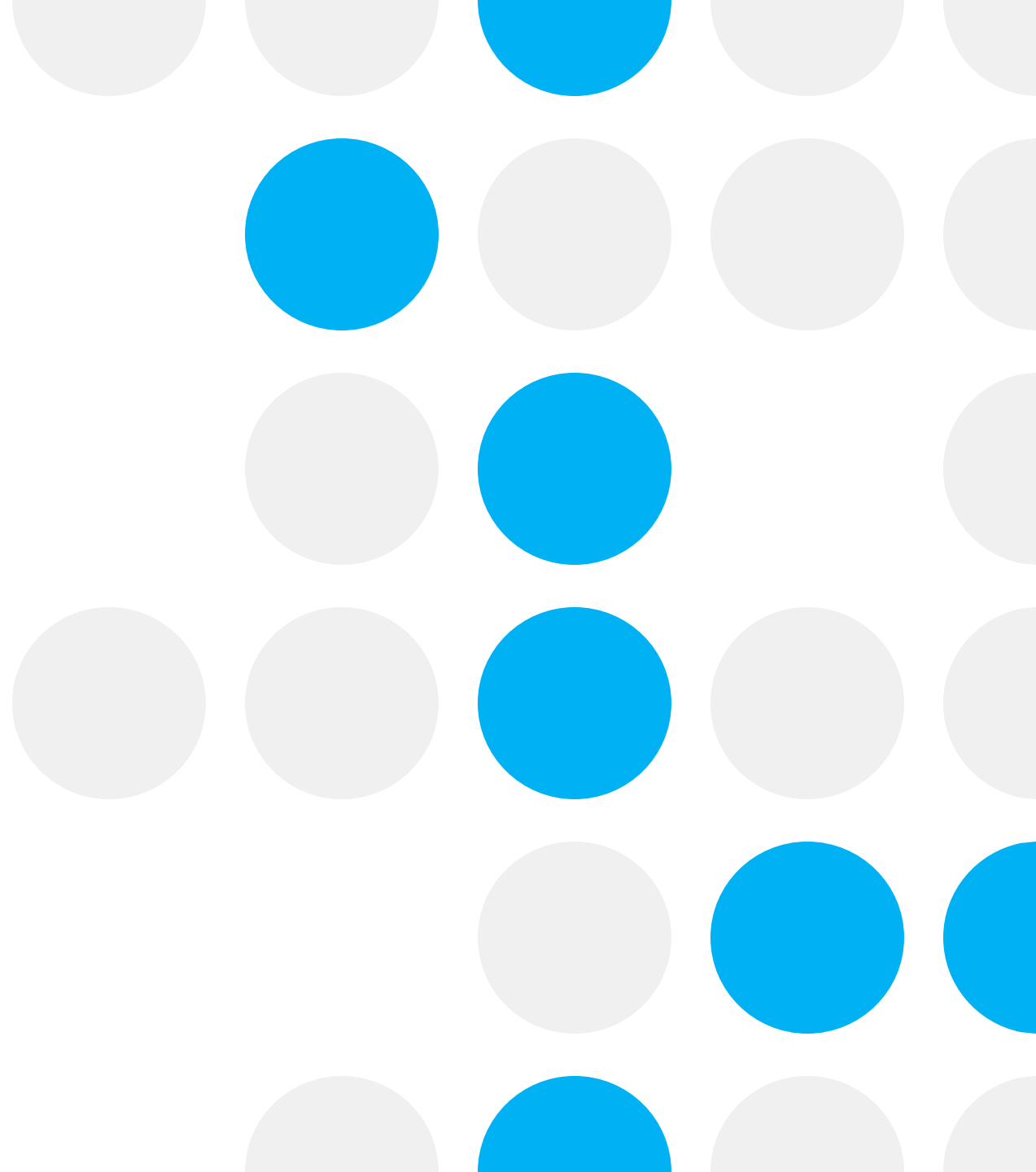
Description	Schedule
Location	Maple Grove
Staff	, Open
Clients	Soto, Blossom

Approve

Deny

Details

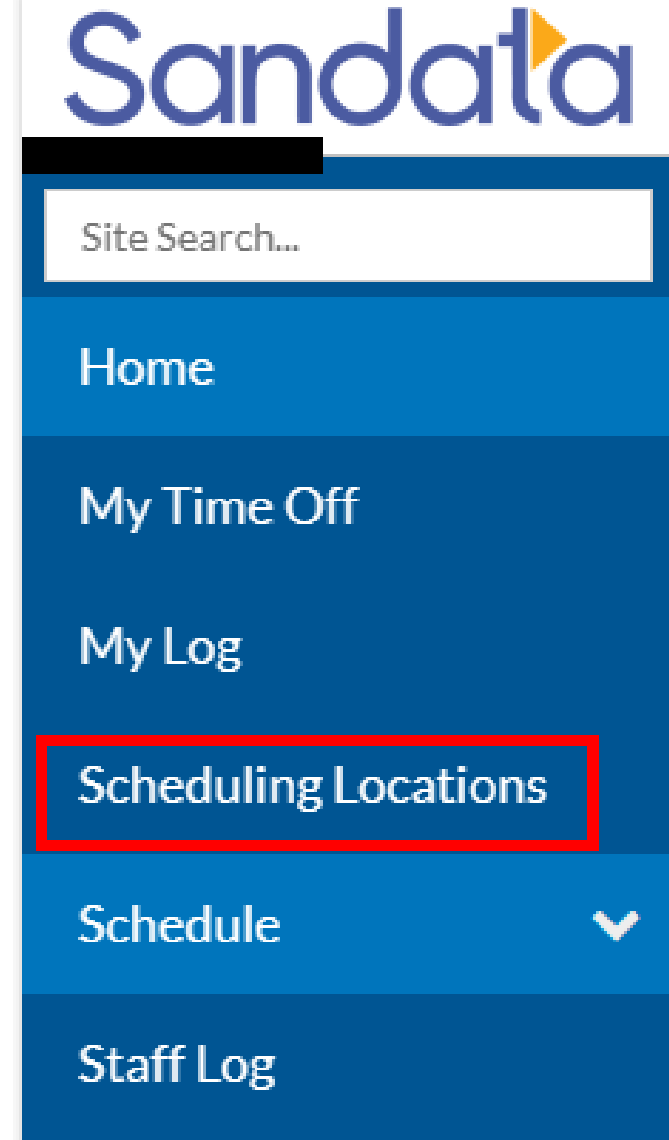
How to Manually Add a Staff to a Shift



How to Manually Add a Staff to a Shift



- Click on “Scheduling Locations.”



How to Manually Add a Staff to a Shift



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

Scheduling Locations | Regency ▾

Shift Templates **Schedule** Delete Audit

Basic Information Edit		Other Information Edit		Notes Edit
Description	Regency	Include Clients	☐	Notes
Active	☒	Mandatory Staff Count	1	Site Supervisor: 651-641-4009 Ext. 280
Address 1	3521 37th Ave NE	Shift Swaps Require Approval	☒	Manager: Ext. 506
Address 2		Disallow Posting of Shift:	0	General Manager: Ext 502

How to Manually Add a Staff to a Shift

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



September 2023						
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
28	29	30	31	1	2	3
6:00 am - 9:00 am [Green box with staff]	6:00 am - 9:00 am [Green box with staff]	6:00 am - 9:00 am [Green box with staff]	6:00 am - 9:00 am [Green box with staff]	6:00 am - 9:00 am [Green box with staff]	6:00 am - 10:00 am [Green box with staff]	6:00 am - 10:00 am [Green box with staff]
9:00 am - 2:00 pm [Green box with staff]	9:00 am - 2:00 pm [Green box with staff]	9:00 am - 2:00 pm [Green box with staff]	9:00 am - 2:00 pm [Green box with staff]	9:00 am - 2:00 pm [Green box with staff]	10:00 am - 10:00 pm [Green box with staff]	10:00 am - 10:00 pm [Green box with red '!']
2:00 pm - 10:00 pm [Green box with staff]	2:00 pm - 10:00 pm [Green box with staff]	2:00 pm - 10:00 pm [Green box with staff]	2:00 pm - 10:00 pm [Green box with staff]	2:00 pm - 10:00 pm [Red box with blue 'O']		
4	5	6	7	8	9	10
6:00 am - 9:00 am [Green box with staff]	6:00 am - 9:00 am [Green box with staff]	6:00 am - 9:00 am [Green box with staff]	6:00 am - 9:00 am [Green box with staff]	6:00 am - 9:00 am [Green box with staff]	6:00 am - 10:00 am [Green box with staff]	6:00 am - 10:00 am [Green box with staff]
9:00 am - 2:00 pm [Green box with staff]	9:00 am - 2:00 pm [Green box with staff]	9:00 am - 2:00 pm [Green box with staff]	9:00 am - 2:00 pm [Green box with staff]	9:00 am - 2:00 pm [Green box with staff]	10:00 am - 10:00 pm [Green box with staff]	10:00 am - 10:00 pm [Red box with blue 'O']
2:00 pm - 10:00 pm [Green box with staff]	2:00 pm - 10:00 pm [Green box with staff]	2:00 pm - 10:00 pm [Green box with staff]	2:00 pm - 10:00 pm [Green box with staff]	2:00 pm - 10:00 pm [Red box with blue 'O']		

How to Manually Add a Staff to a Shift



- Click on the red shift you would like to schedule a staff in. Click on **“Assign.”**



How to Manually Add a Staff to a Shift



- Now you can select that staff name.

Fill Slot

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

12 of 12 shown

			Week: 64	Day: 8	24 Hr: 12	Score: 100	
			Week: 8	Day: 8	24 Hr: 8	Score: 100	
			Week: 41	Day: 8	24 Hr: 8	Score: 100	
			Week: 8	Day: 8	24 Hr: 8	Score: 100	
			Week: 8	Day: 8	24 Hr: 8	Score: 100	
			Week: 16	Day: 8	24 Hr: 12	Score: 100	
			Week: 8	Day: 8	24 Hr: 8	Score: 100	
			Week: 8	Day: 8	24 Hr: 8	Score: 100	
			Week: 30	Day: 16	24 Hr: 8	Score: 100	
			Week: 8	Day: 8	24 Hr: 8	Score: 100	
			Week: 104	Day: 16	24 Hr: 24	Score: 100	
			Week: 20	Day: 20	24 Hr: 8	Score: 100	

How to Manually Add a Staff to a Shift



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

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

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- Edit the **Begin** and **End Time** for what hours the staff is picking up, and for the **Description**, you can write a brief summary of the change.
- For example, if a staff wanted to only work 4pm to 10pm, instead of 2pm, it would look like this.
- Once the new shift time is saved, then you can **Assign** a staff, as noted previously.

Basic Information

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

Cancel Save

How to Manually Add a Staff to a Shift



- To post the open hours of 2pm to 4pm, go to the main schedule and click on the open time slot that doesn't have a shift listed. Your screen will then look similar to this. Fill it out for the open time and click **“Save.”**

The screenshot shows a web-based form for adding a shift. At the top, there are 'Save' and 'Cancel' buttons. Below them is a 'Basic Information' section. The form contains the following fields:

Field	Value
Description	Open Shift
Begin Date	9/2/2023
Begin Time	02:00 AM
End Time	04:00 PM
Mandatory Staff	1
Service Type	
Service Type 2	
Service Type 2 Hours	
Scheduling Method	Schedule From Source
On Call	☐

How to Manually Add a Staff to a Shift



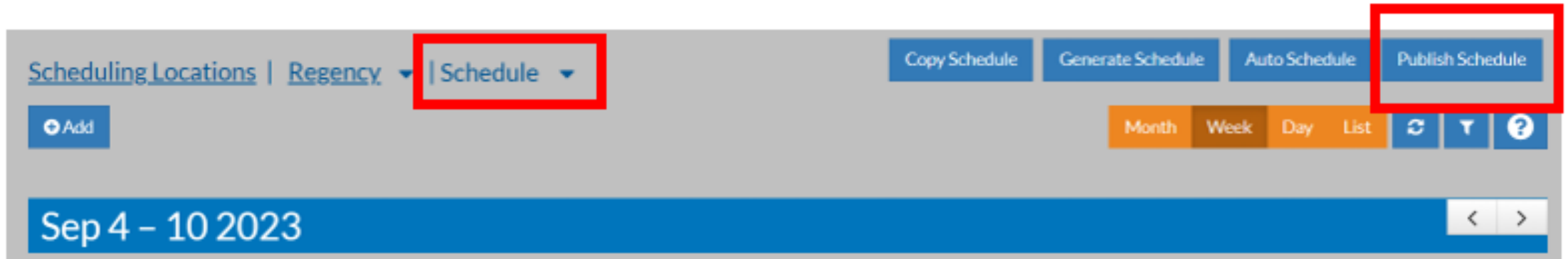
- It will not automatically show for staff to pick up. Once the previous information is entered, it will look like this.

Saturday	
1	2
	6:00 am - 10:00 am [Redacted] Schedule
	10:00 am - 10:00 pm [Redacted] Schedule
	2:00 pm - 4:00 pm [Redacted] Open Shift

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



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

Publish Schedule



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

Week

9/4/2023 to 9/10/2023



Number Of Weeks

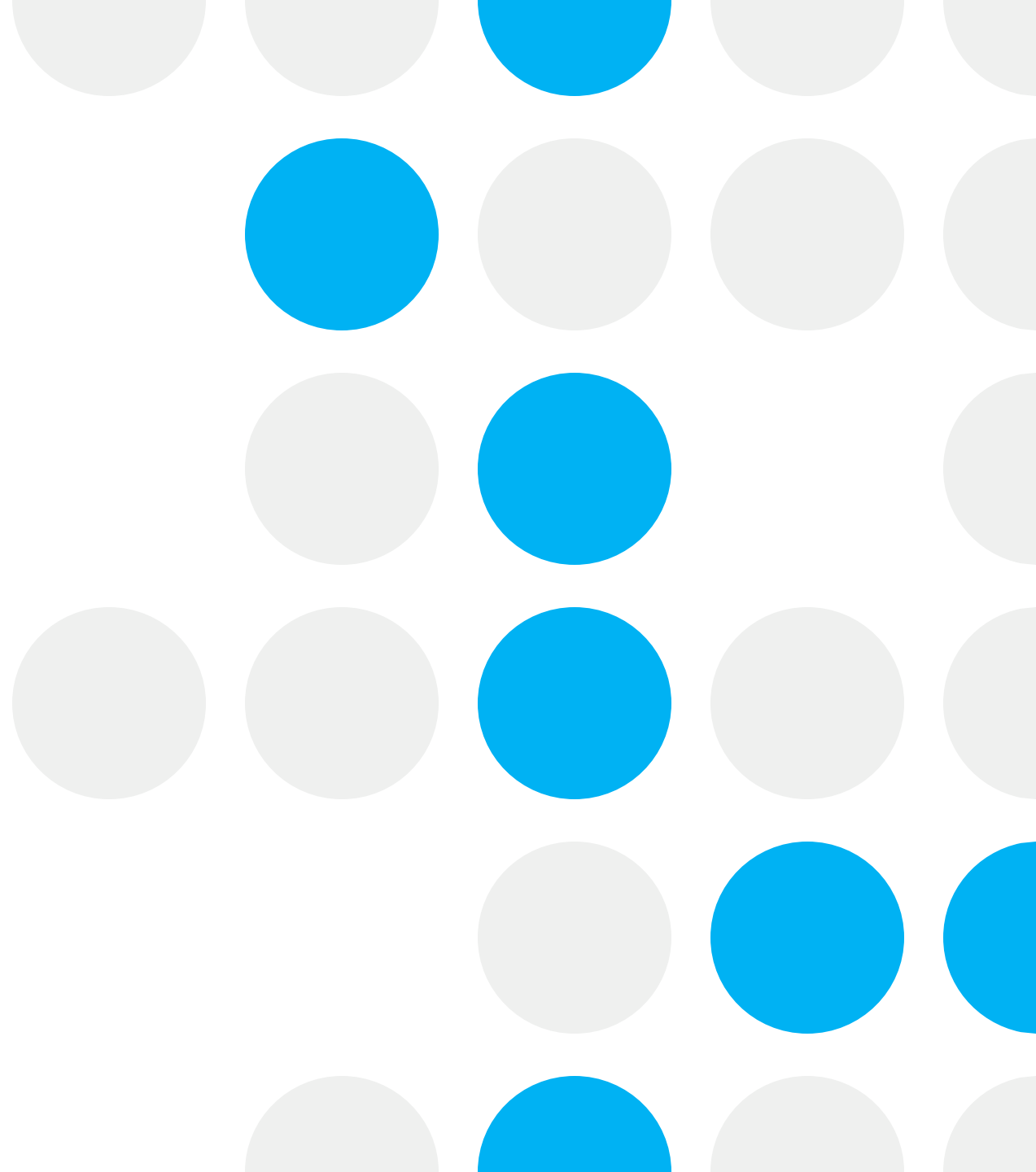
1 - (9/4/2023 - 9/10/2023)



Cancel

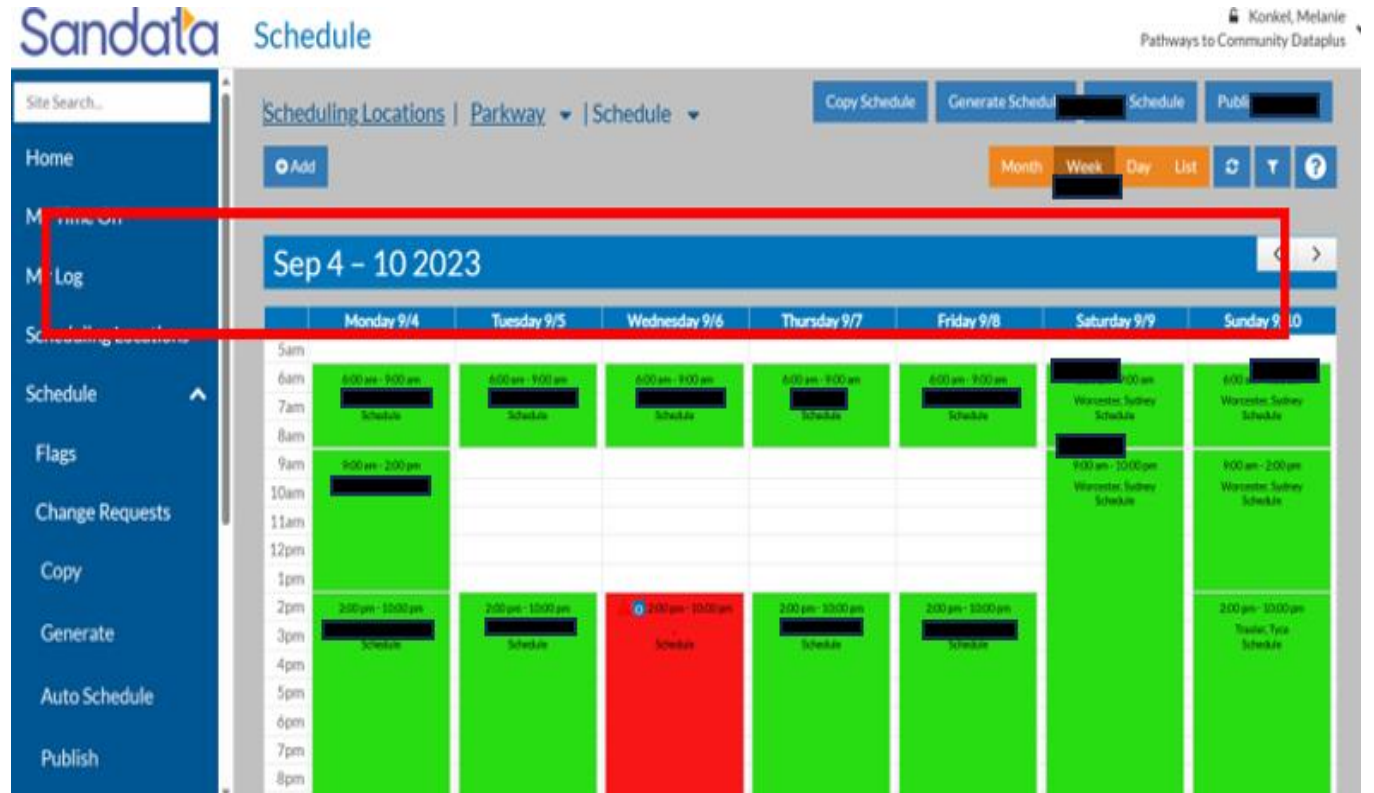
Publish

How to Inactivate a Shift



How to Inactivate a Shift

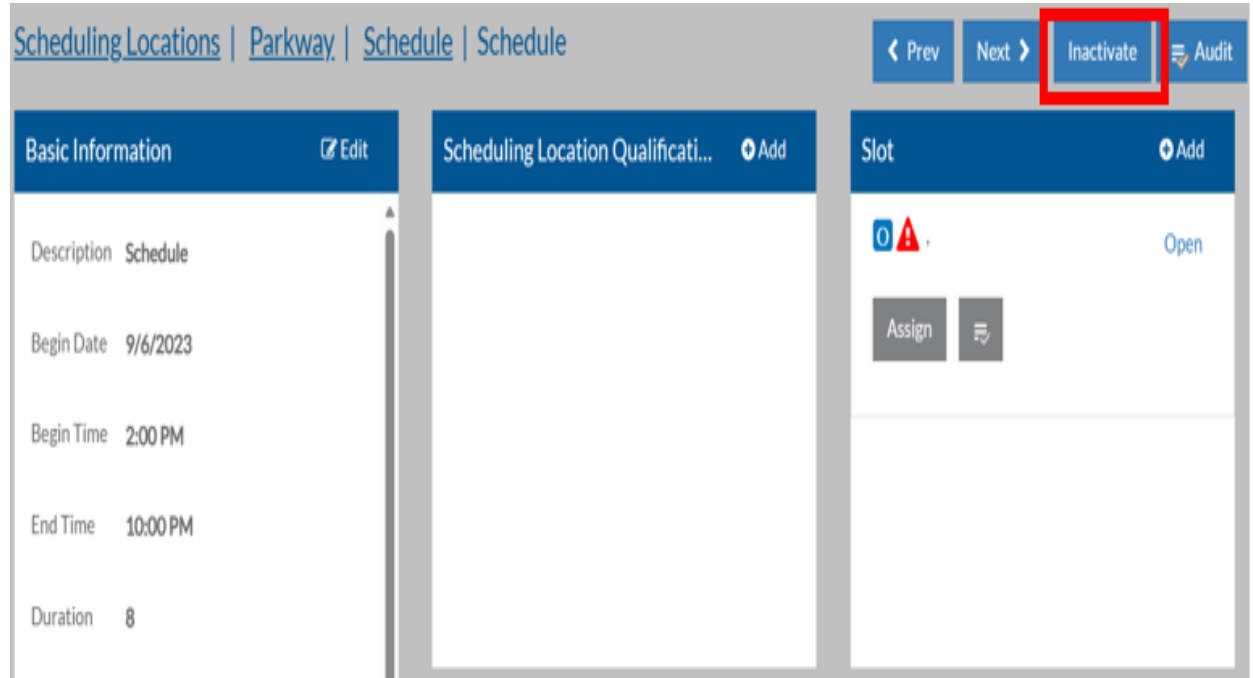
- If you need to inactivate a shift, for example, you made a mistake when creating a schedule or an individual will not be home and you don't need any staffing for a shift, follow these next few steps.
- Go to “**Scheduling Locations**,” and select your **Site** you would like to make the change, and then click on “**Schedule**” (as described in previous steps). It will bring you back to this screen.



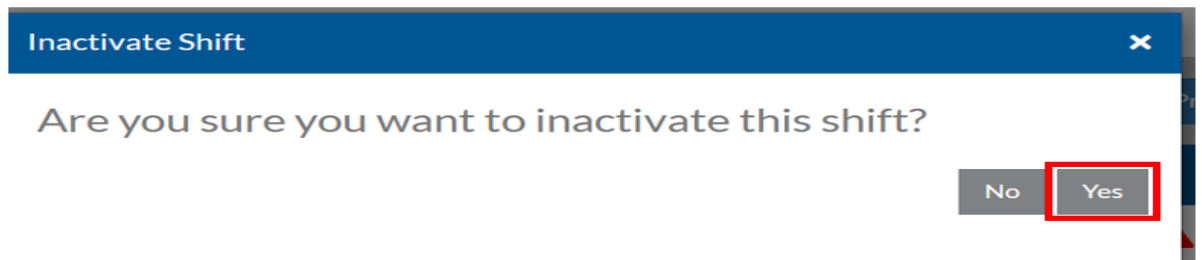
The screenshot displays the Sandata Schedule application interface. On the left is a blue sidebar with navigation options: Home, M... (partially visible), M... Log (partially visible), Scheduling Locations, Schedule (highlighted with a red rectangle), Flags, Change Requests, Copy, Generate, Auto Schedule, and Publish. The main content area shows a calendar for the week of September 4-10, 2023. The top of the main area includes the Sandata logo, the word 'Schedule', and a user profile for 'Konkel, Melanie' with the role 'Pathways to Community Dataplus'. Below this is a header bar with 'Scheduling Locations | Parkway' and a 'Schedule' dropdown menu. To the right of the header are buttons for 'Copy Schedule', 'Generate Schedule', and 'Publish'. Below the header is a row of tabs for 'Month', 'Week' (selected), 'Day', and 'List'. The calendar grid shows time slots from 5am to 8pm. Most slots are green and labeled 'Schedule'. One slot on Wednesday, September 6th, at 3pm is highlighted in red. A red rectangle highlights the 'Schedule' button in the sidebar and the date range 'Sep 4 - 10 2023' in the top header.

How to Inactivate a Shift

- Click on the shift you would like to remove. Now click on **“Inactivate”** in the top right corner of your screen. Your screen should look like this.
- Click **“Yes,”** and that shift will no longer show on the schedule for that week.



The screenshot shows a software interface for managing shifts. At the top, there are navigation links: [Scheduling Locations](#), [Parkway](#), [Schedule](#), and [Schedule](#). To the right of these links are buttons for navigation: [< Prev](#), [Next >](#), and [Inactivate](#) (highlighted with a red box). There is also an [Audit](#) button. Below the navigation bar, the interface is divided into three main sections: **Basic Information** (with an [Edit](#) icon), **Scheduling Location Qualificati...** (with an [Add](#) icon), and **Slot** (with an [Add](#) icon). The **Basic Information** section contains the following details: Description: Schedule, Begin Date: 9/6/2023, Begin Time: 2:00 PM, End Time: 10:00 PM, and Duration: 8. The **Slot** section shows a warning icon (a red triangle with an exclamation mark) and an [Open](#) link. Below the warning icon is an [Assign](#) button and a dropdown menu icon.



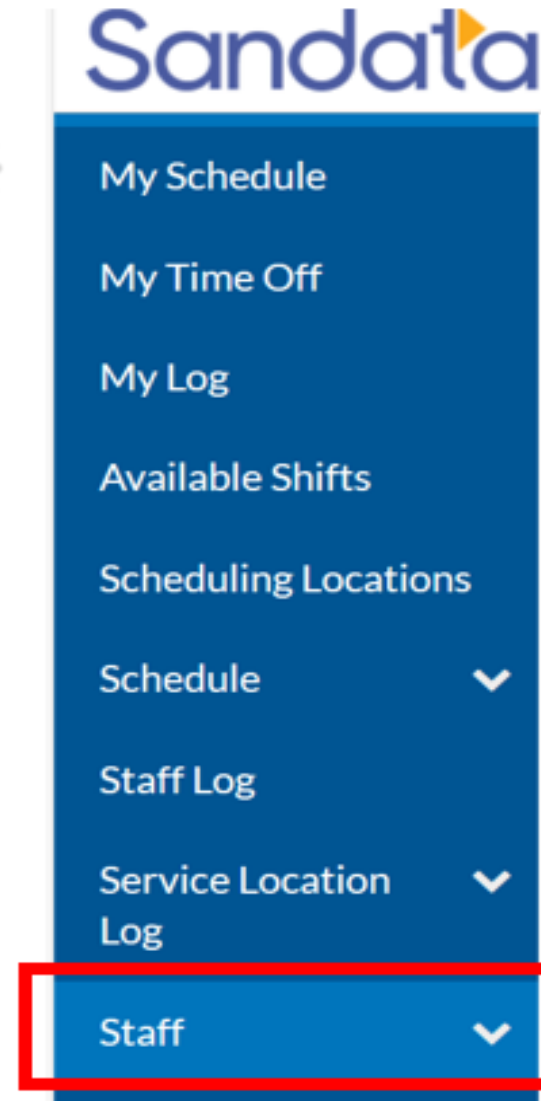
The screenshot shows a confirmation dialog box titled **Inactivate Shift**. The dialog box contains the text: "Are you sure you want to inactivate this shift?". At the bottom right of the dialog box, there are two buttons: [No](#) and [Yes](#) (highlighted with a red box).

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



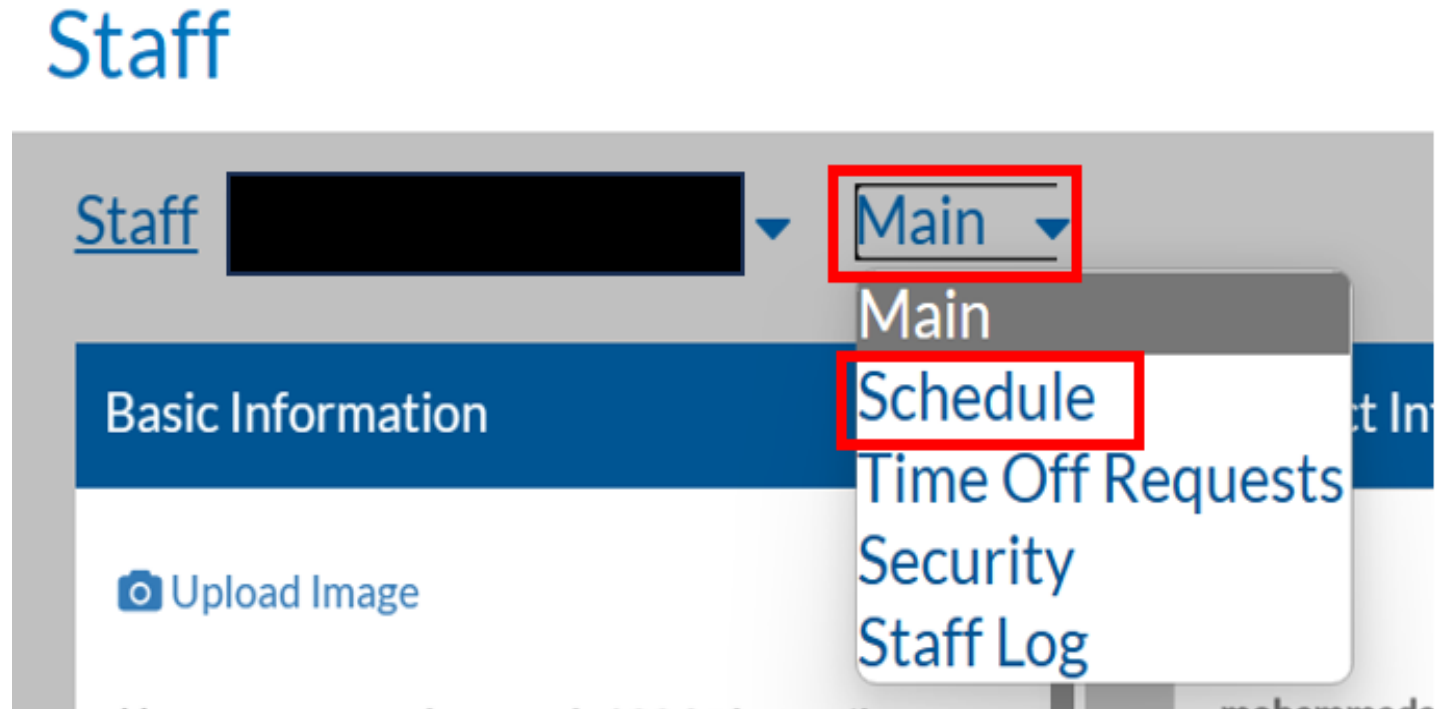
How to Remove Staff from Schedules for a Period of Time or Permanently

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



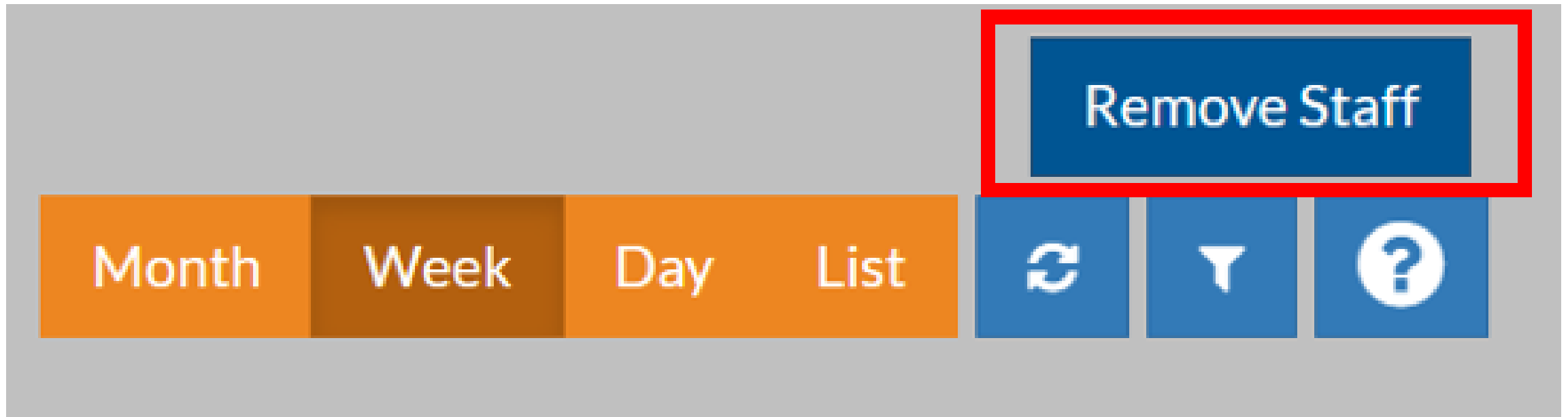
How to Remove Staff from Schedules for a Period of Time or Permanently

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



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

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



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



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

Remove Staff

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

Start

9/6/2023

End

9/16/2024

Remove From Templates

☐

Cancel

Remove

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

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

Start

9/6/2023

End

9/16/2023

Remove From
Templates





**Thank you
for your
Time!** 
