Pathways to Community Sandata Tutorial

Residential Supervisors and Managers

Approving and Checking Timecard Process

Approving and Checking Timecard Process

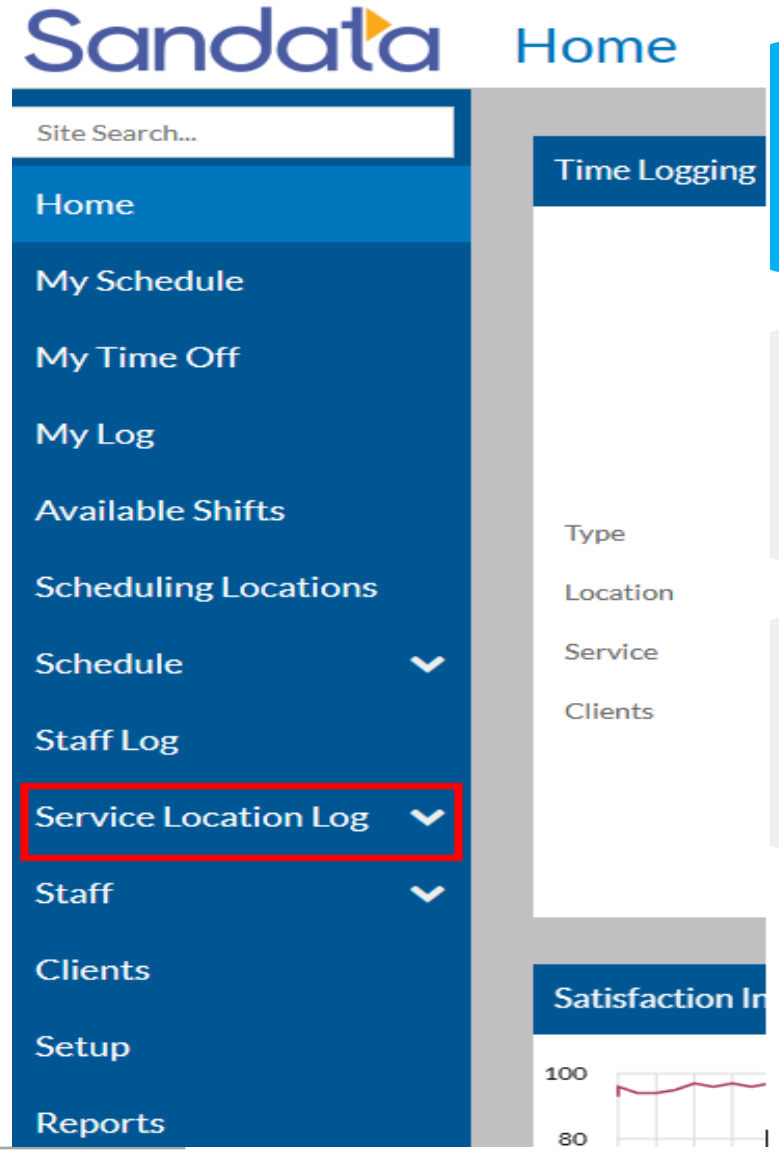
- **Supervisors**: Timecards must be approved for your designated sites on a daily basis.
  - Monday's timecards are checked for the prior weekend—Friday to Sunday.
  - All approvals must be completed by 2pm Monday through Thursday.
  - If you are unable to complete any timecard tasks by the deadlines 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.
  - All approvals must be completed by 5pm Monday to Friday.
  - 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) or Director. This includes making a plan if you are using PTO, taking a vacation, are out sick, etc. It is your responsibility to reach out and coordinate with the GM or Director.

Approving Timecards – Direct Care Shifts

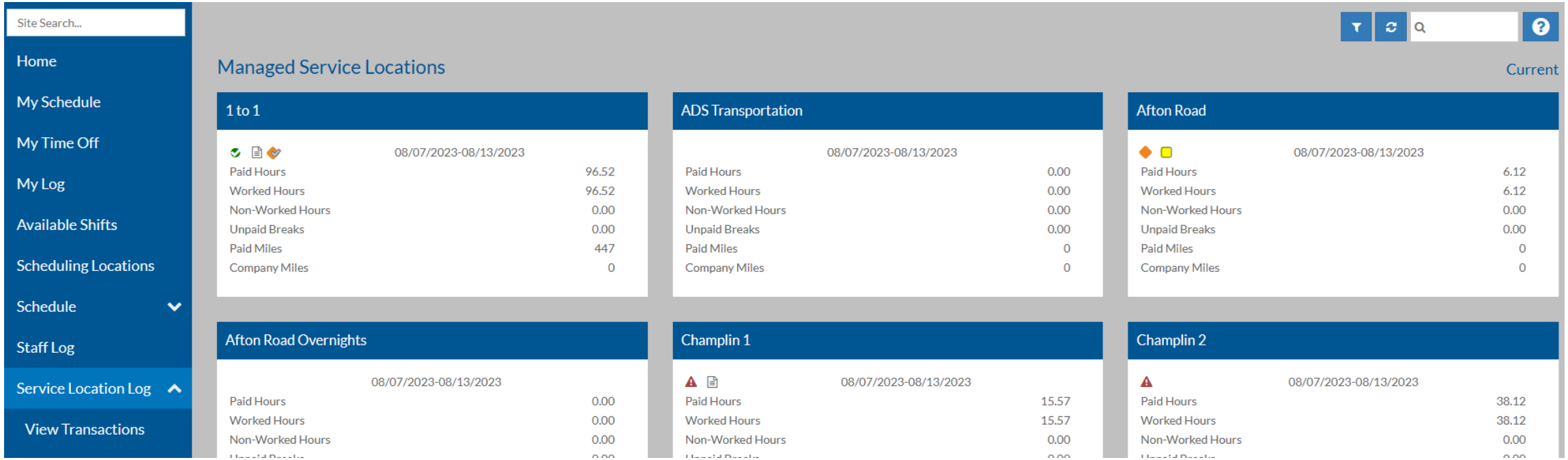
Approving Timecards – Direct Care Shifts

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



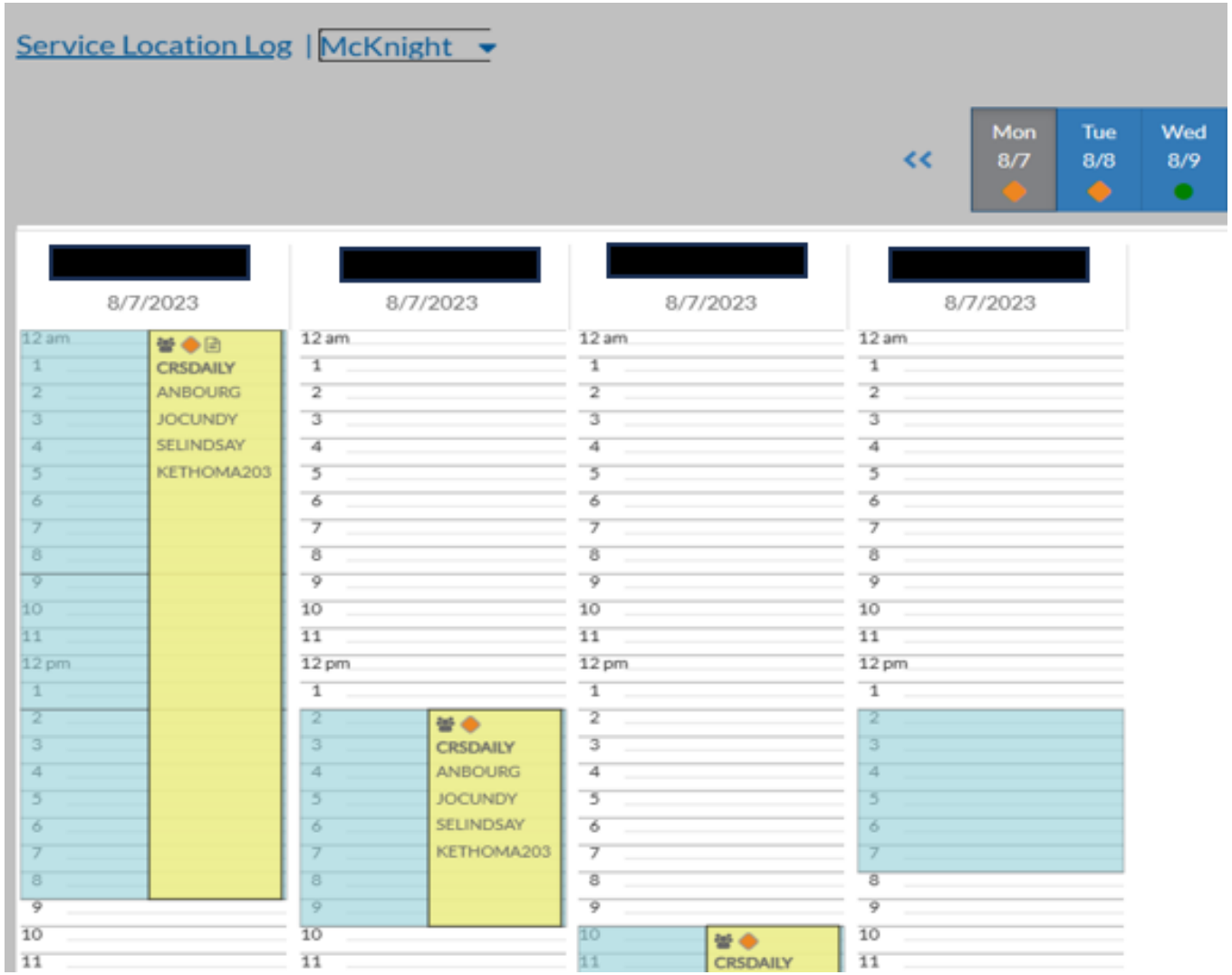
Approving Timecards – Direct Care Shifts

- Your screen should look similar to this.



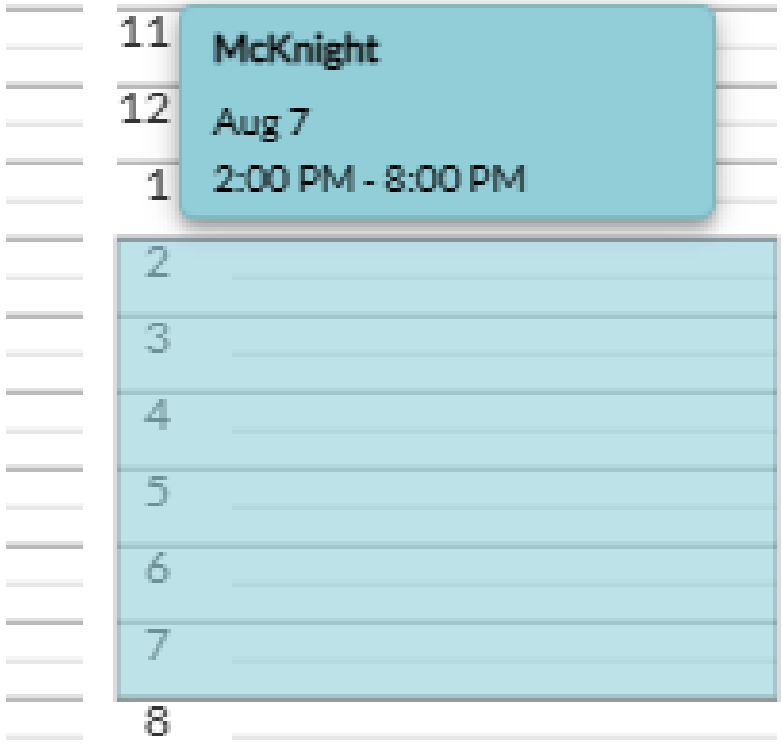
Approving Timecards – Direct Care Shifts

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



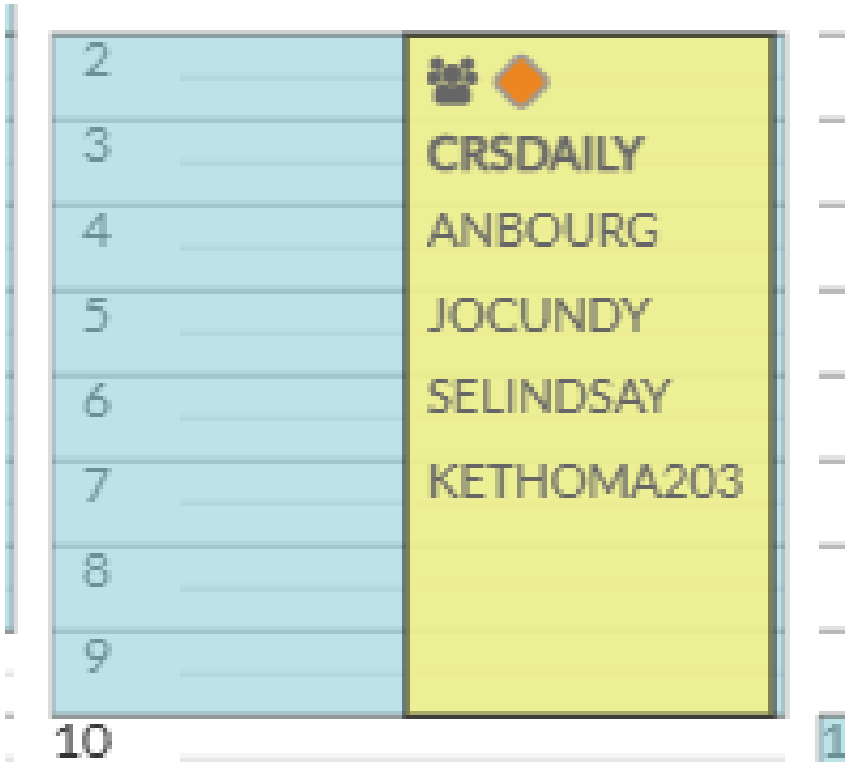
Approving Timecards – Direct Care Shifts

- 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.



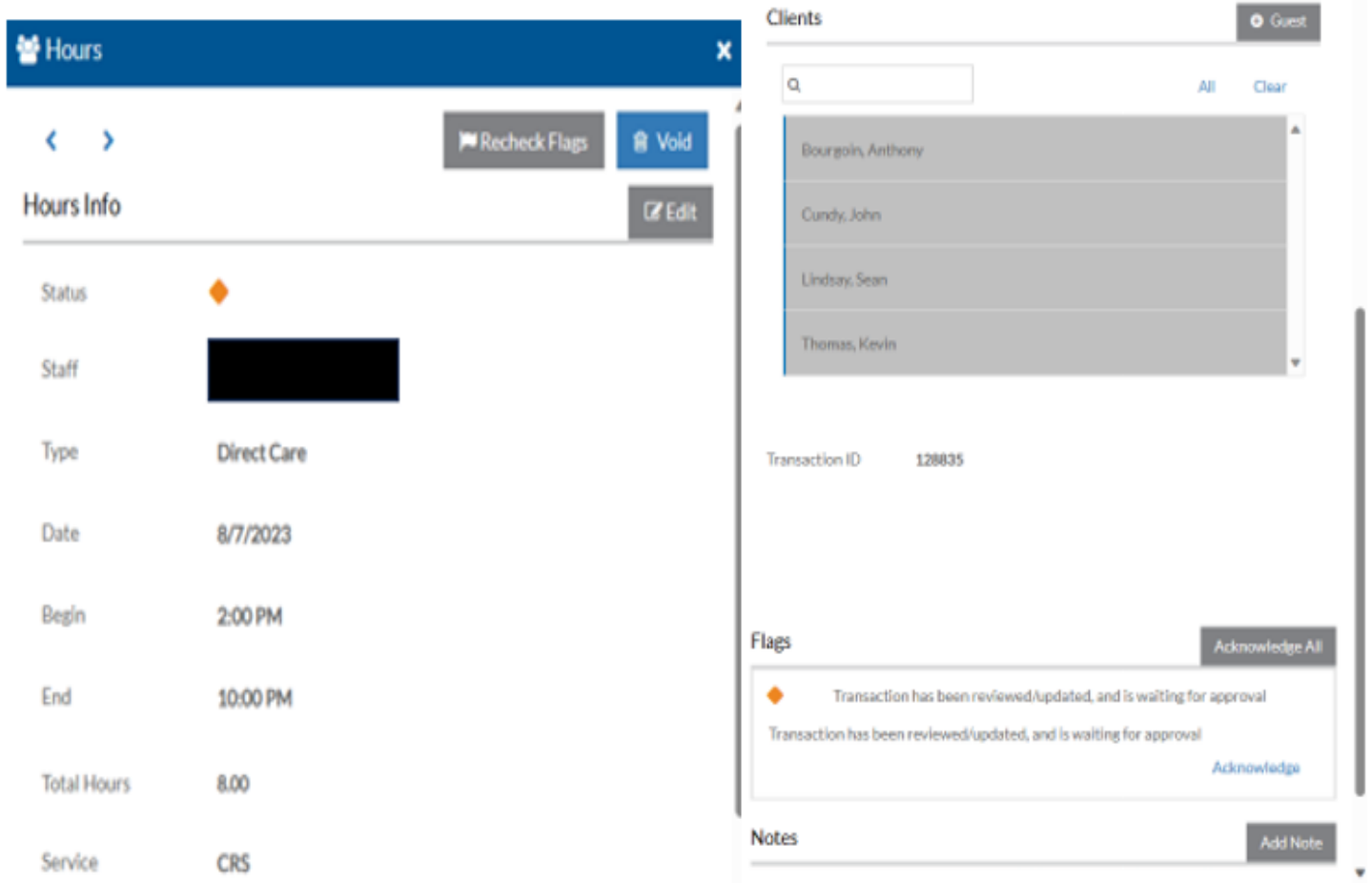
Approving Timecards – Direct Care Shifts

- 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?



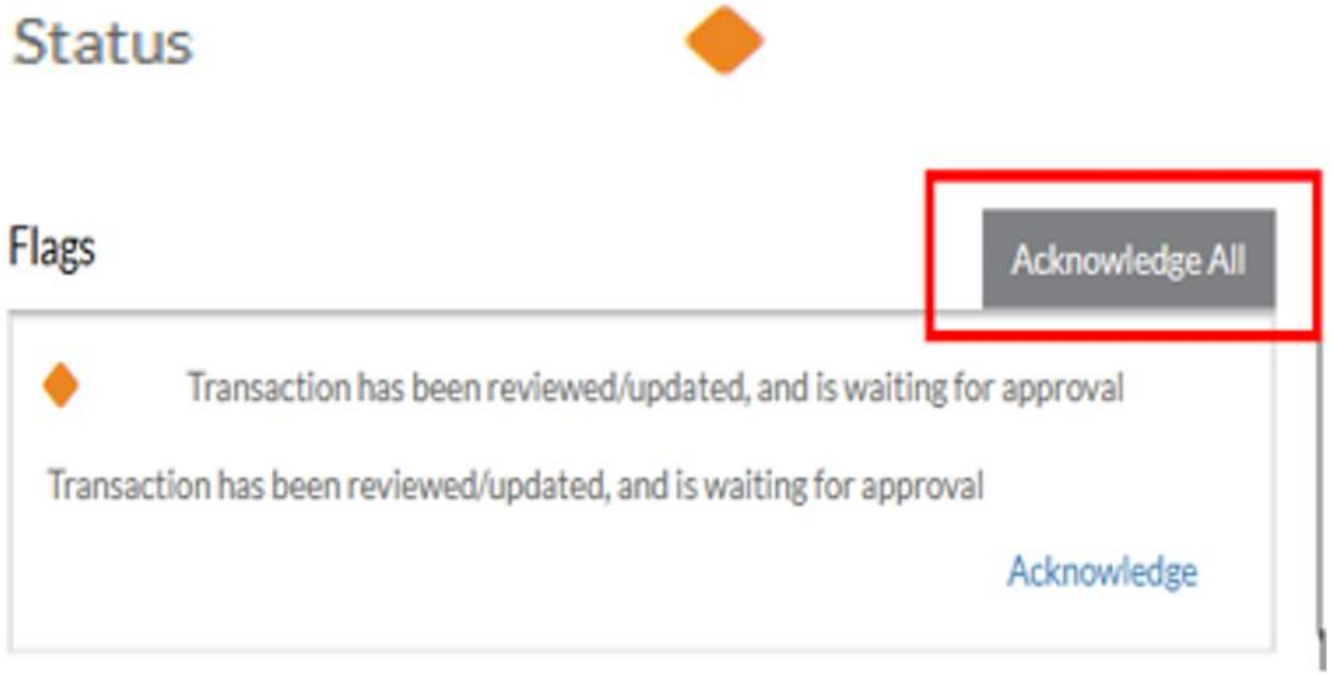
Approving Timecards – Direct Care Shifts

- 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).



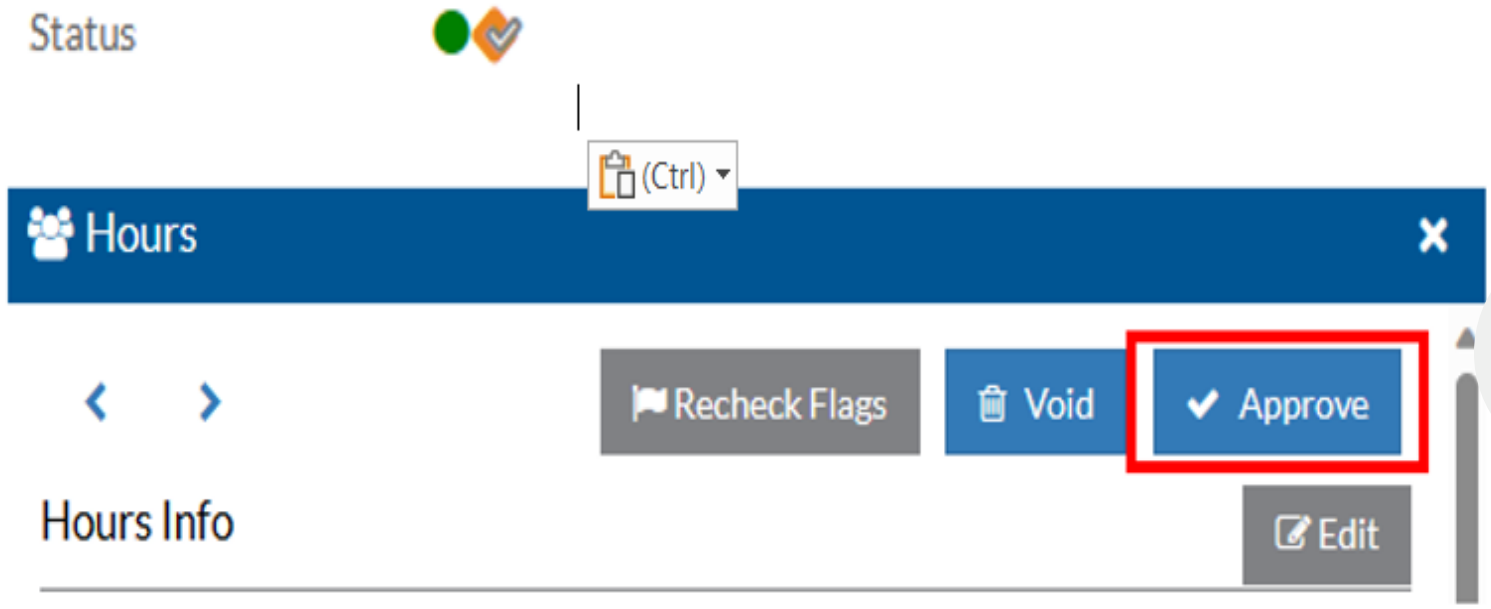
Approving Timecards – Direct Care Shifts

- **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**."



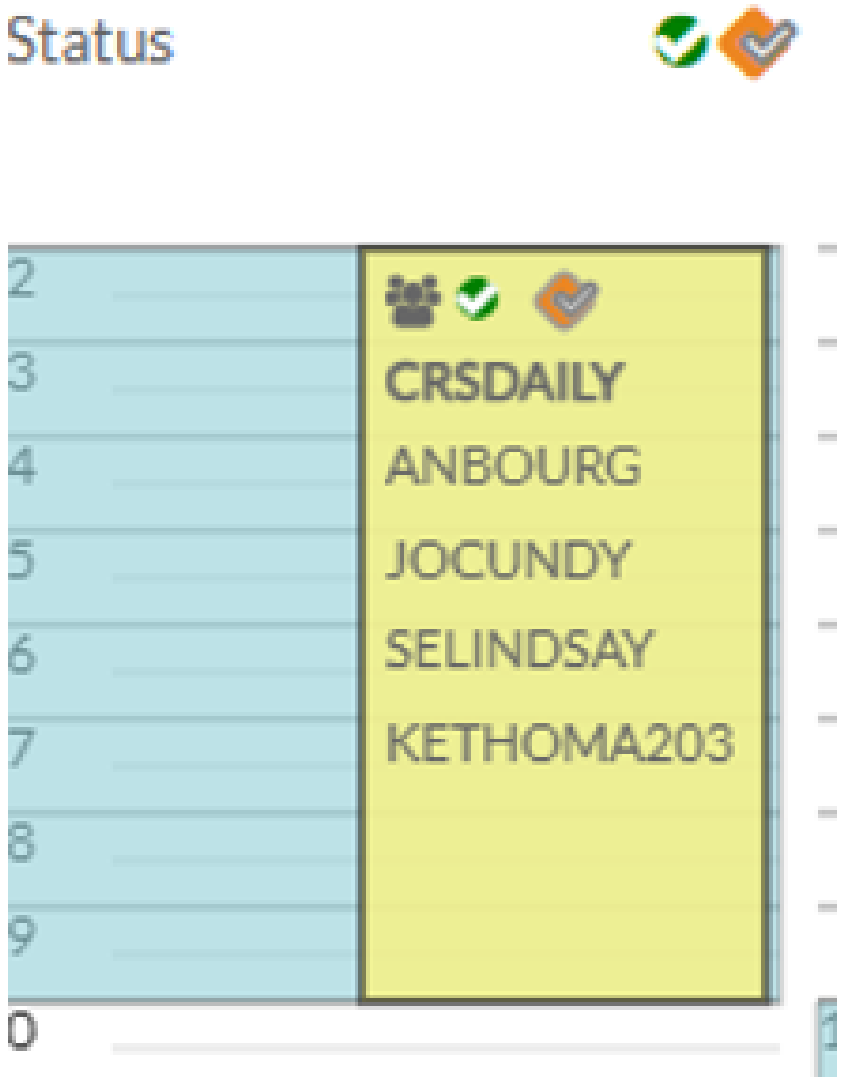
Approving Timecards – Direct Care Shifts

- 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.



Approving Timecards – Direct Care Shifts

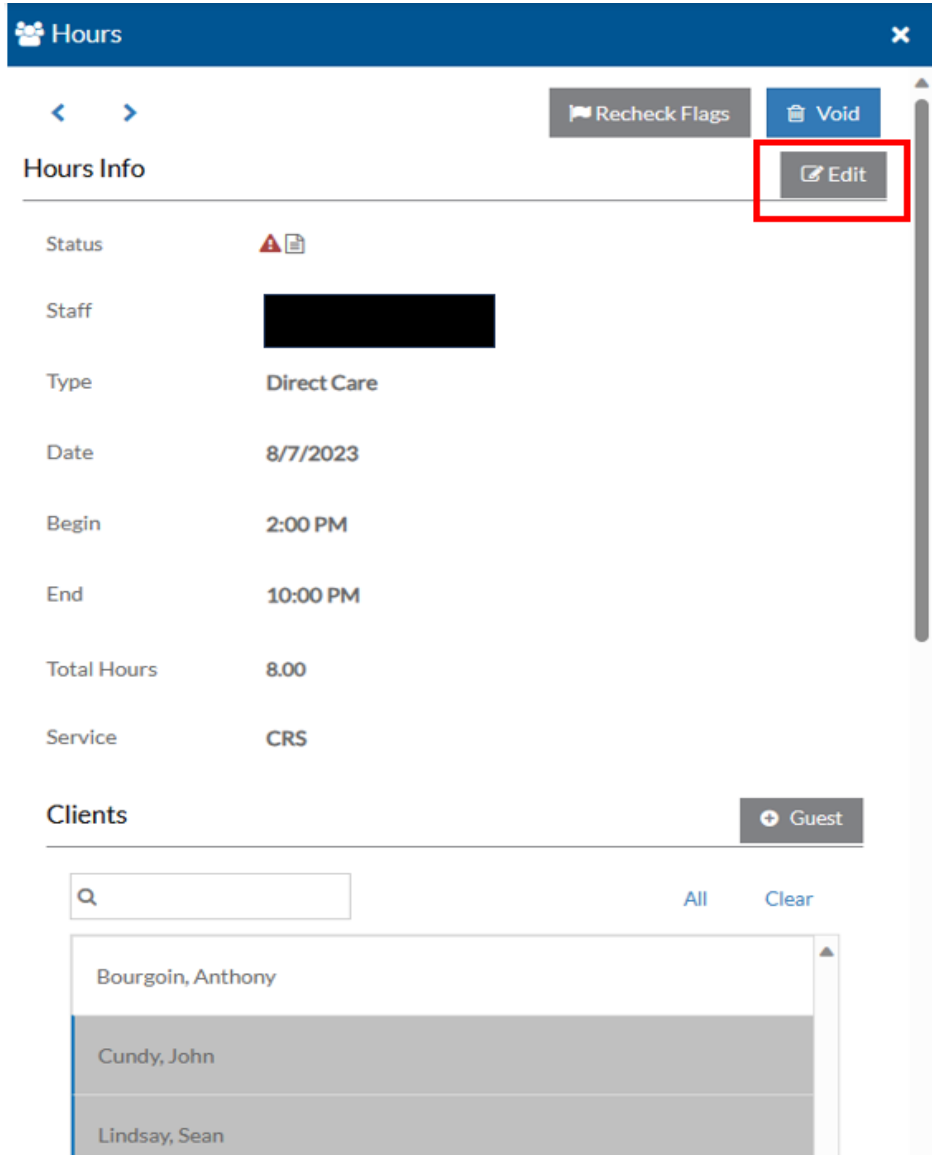
- If you see this, it indicates an incomplete timecard (looks similar to a torn piece of paper). The Red Triangle with the exclamation point also indicates an error (which in this case, is due to the timecard missing an end time). You will need to follow up with your staff and have them enter in their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

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.

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**."

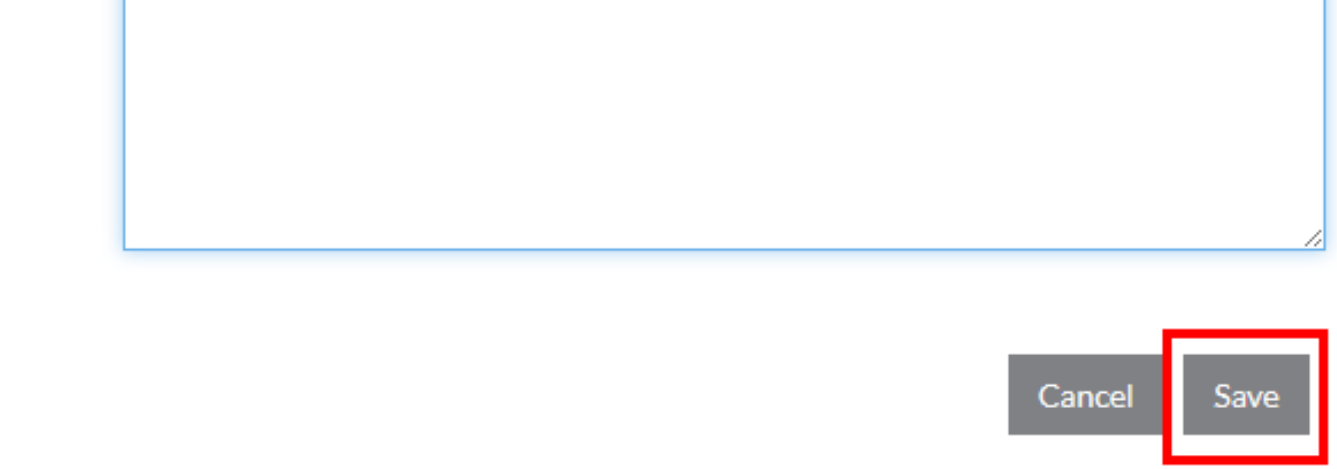


Approving Timecards – Direct Care Shifts

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

Approving Timecards – Direct Care Shifts

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



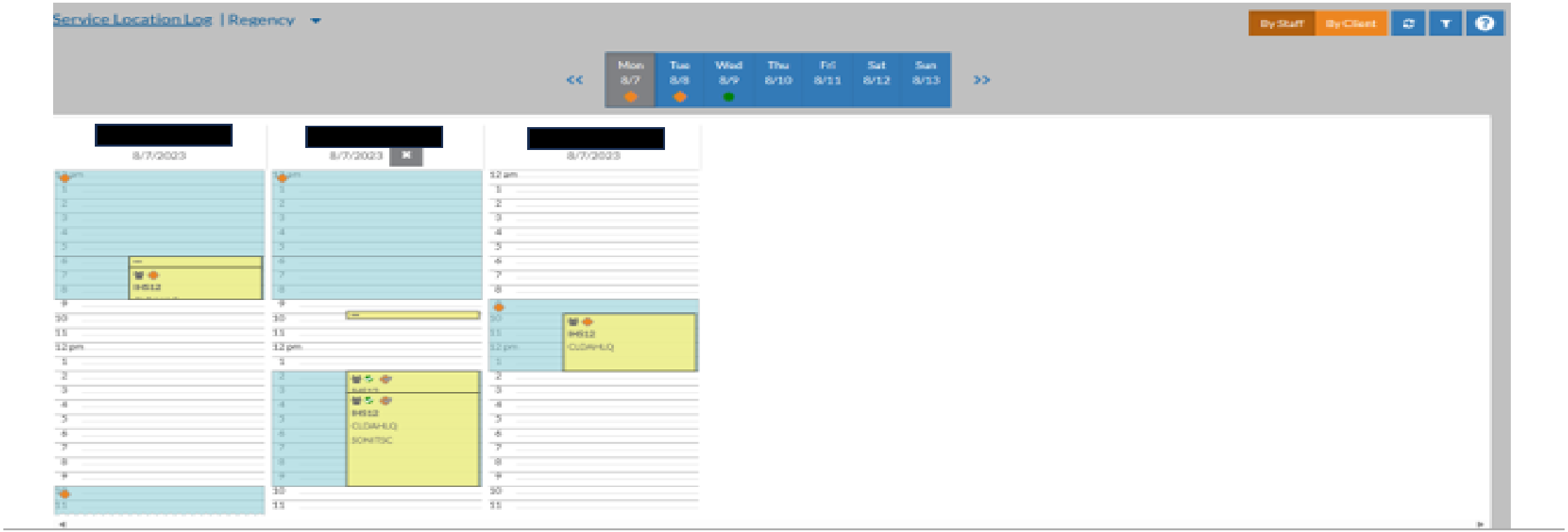
Tips for Viewing the Service Location Log

Tips for Viewing the Service Location Log

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

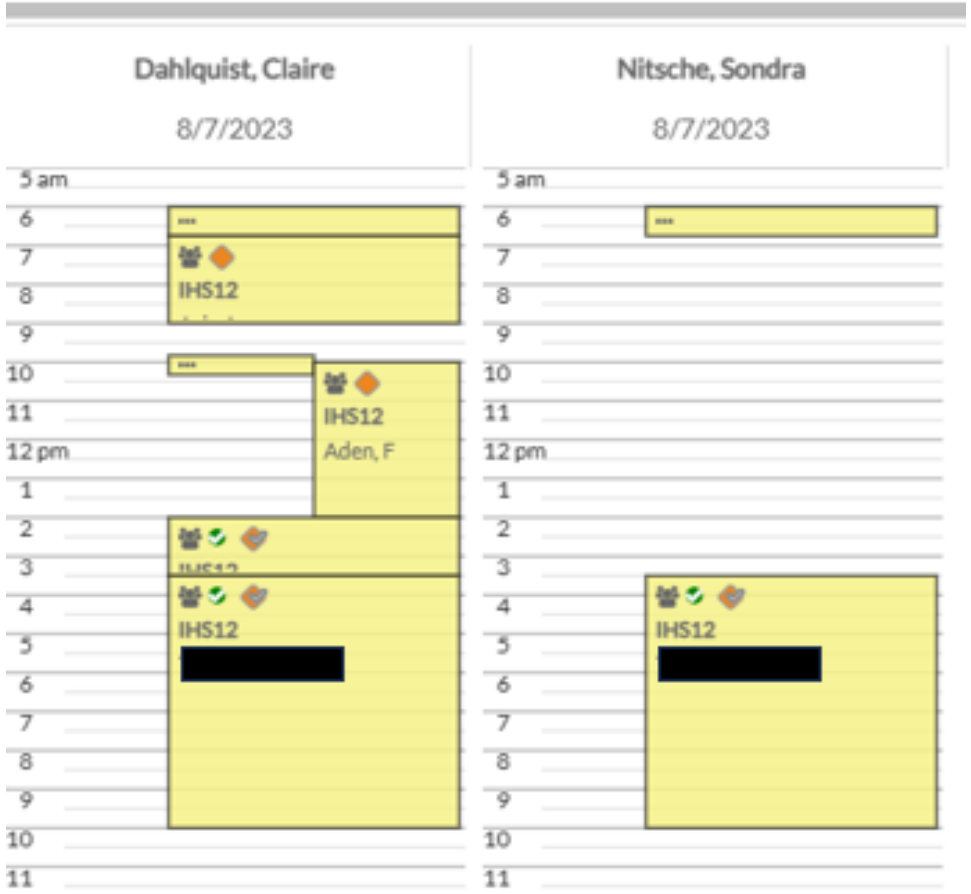
Tips for Viewing the Service Location Log

- 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.



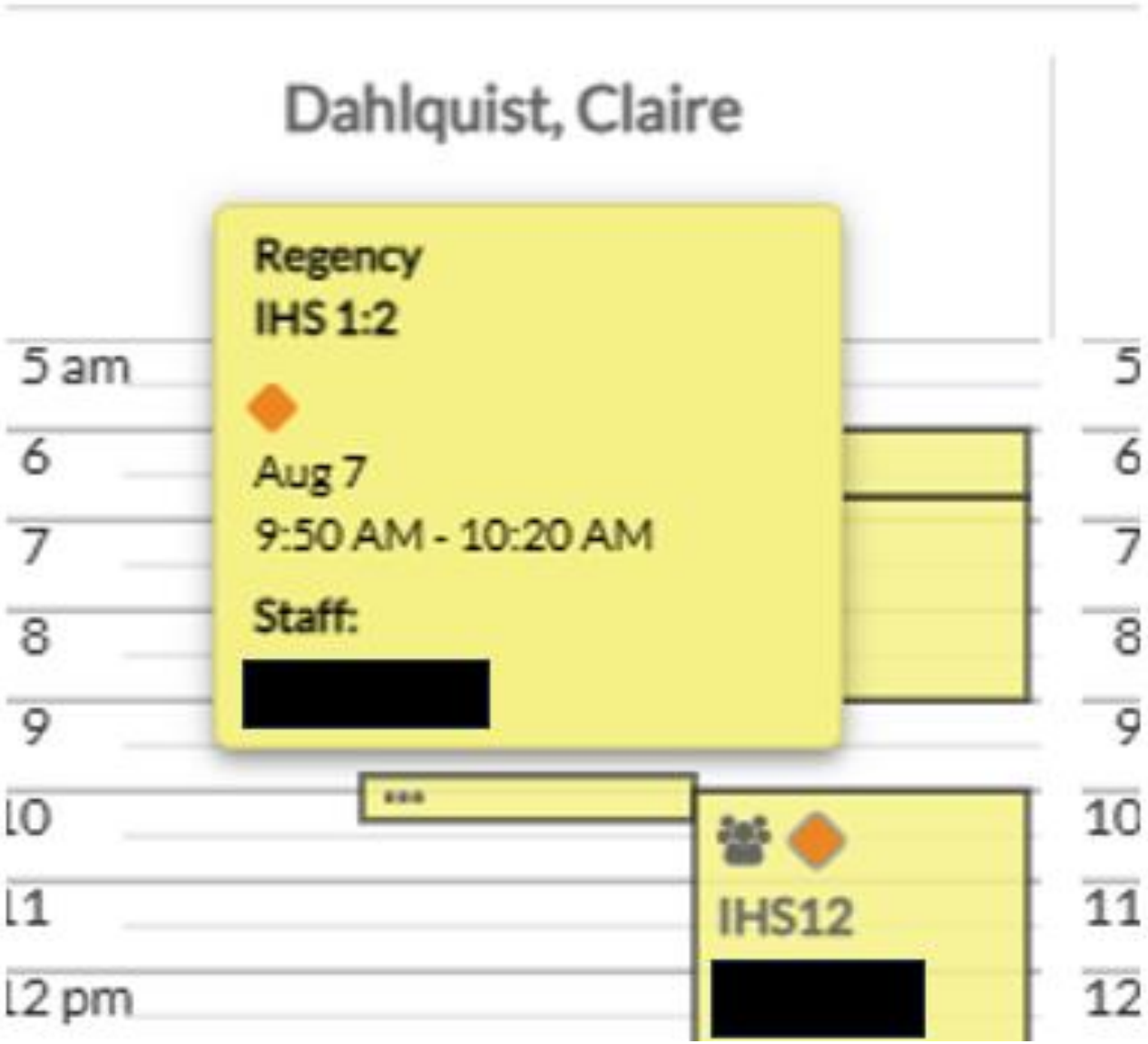
Tips for Viewing the Service Location Log

- 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.



Tips for Viewing the Service Location Log

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



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

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

- Whan 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.

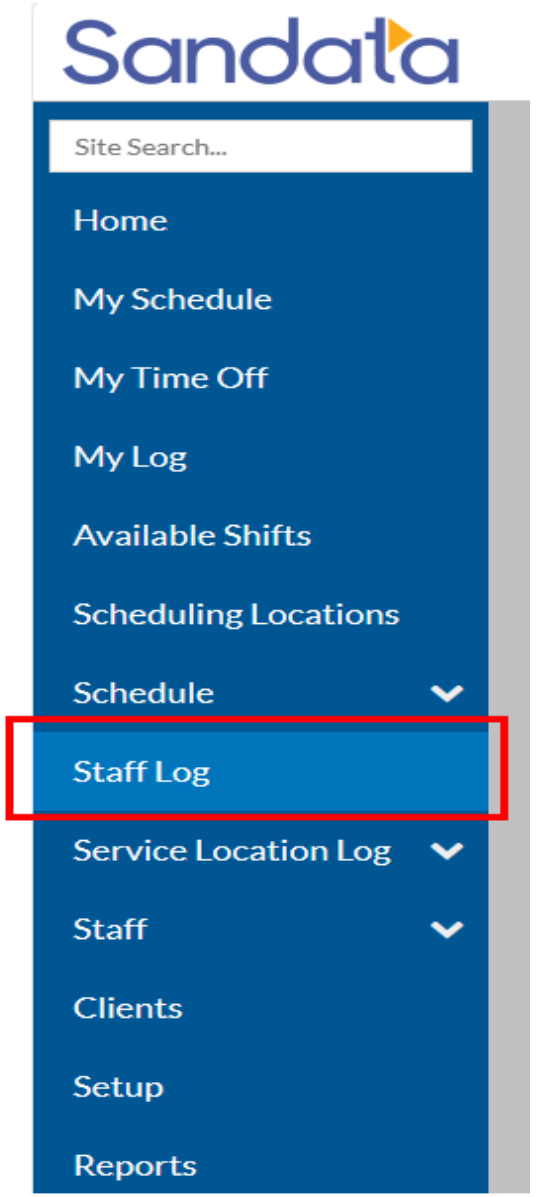
How to Edit Timecards for an Individual that is Discharged or Hospitalized

- 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

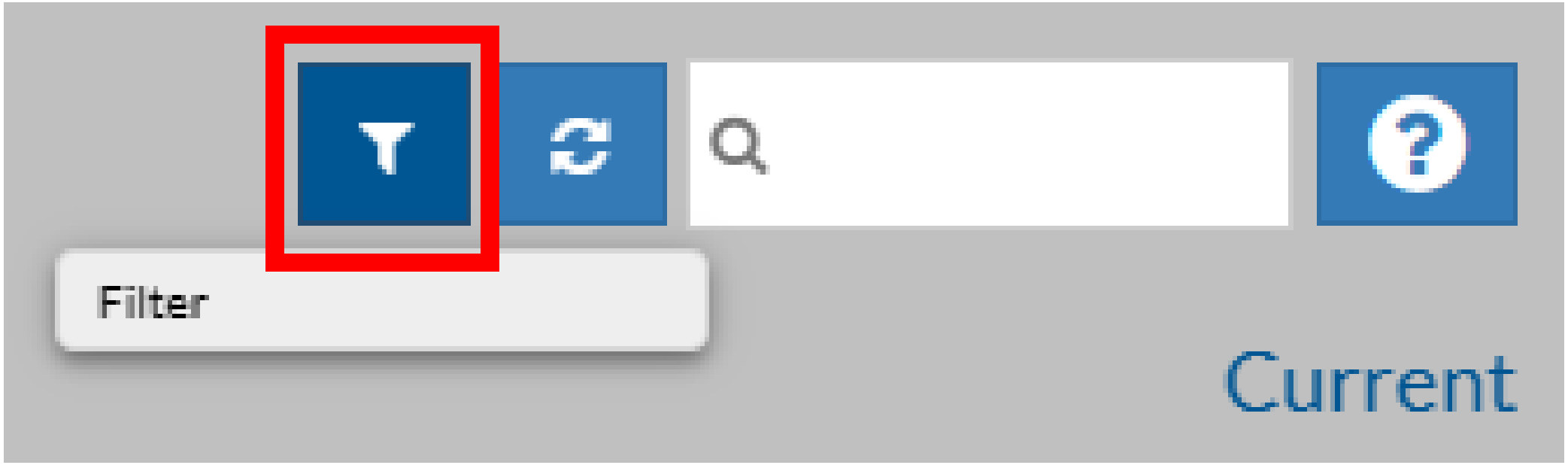
Approving Timecards – Non-Direct Care and Training Shifts

- 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.**"



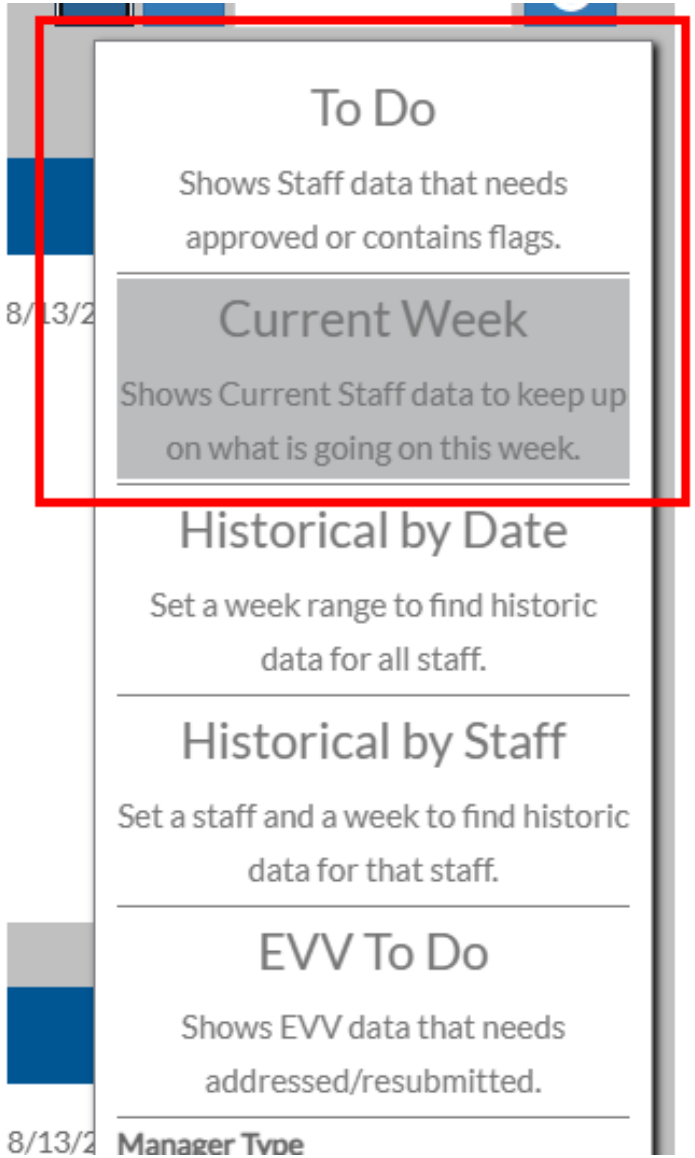
Approving Timecards – Non-Direct Care and Training Shifts

- 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).



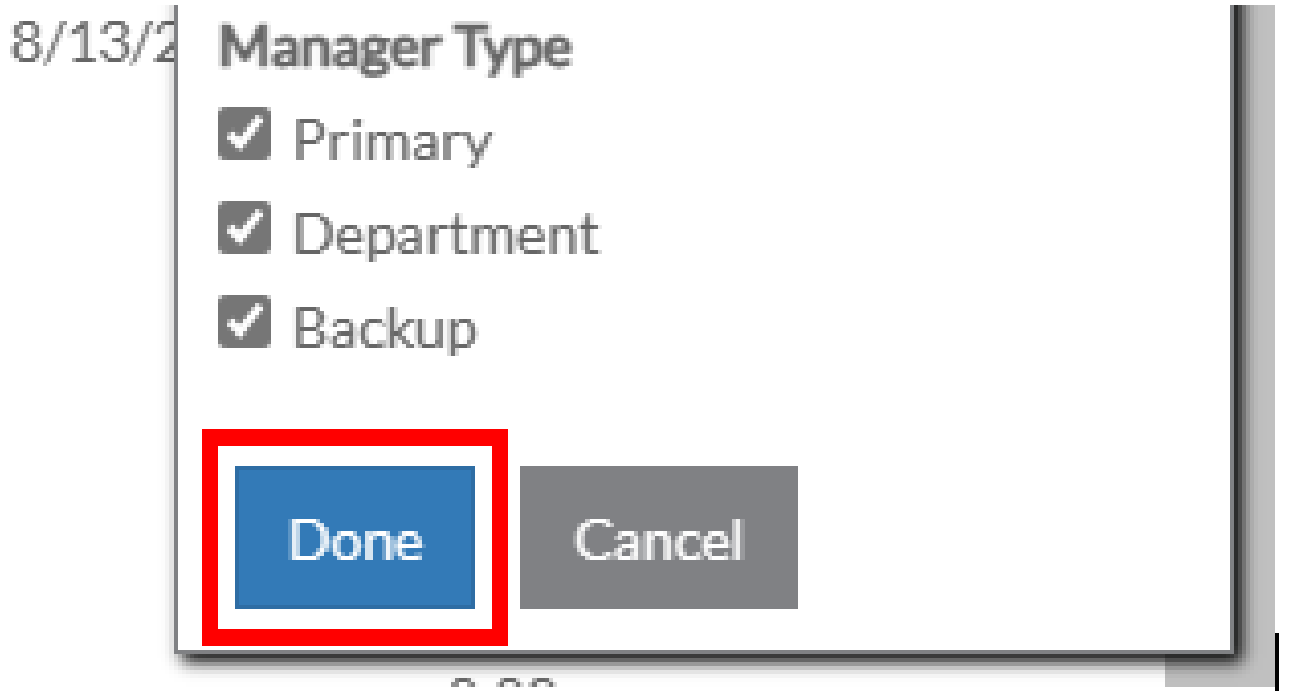
Approving Timecards – Non-Direct Care and Training Shifts

- 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.



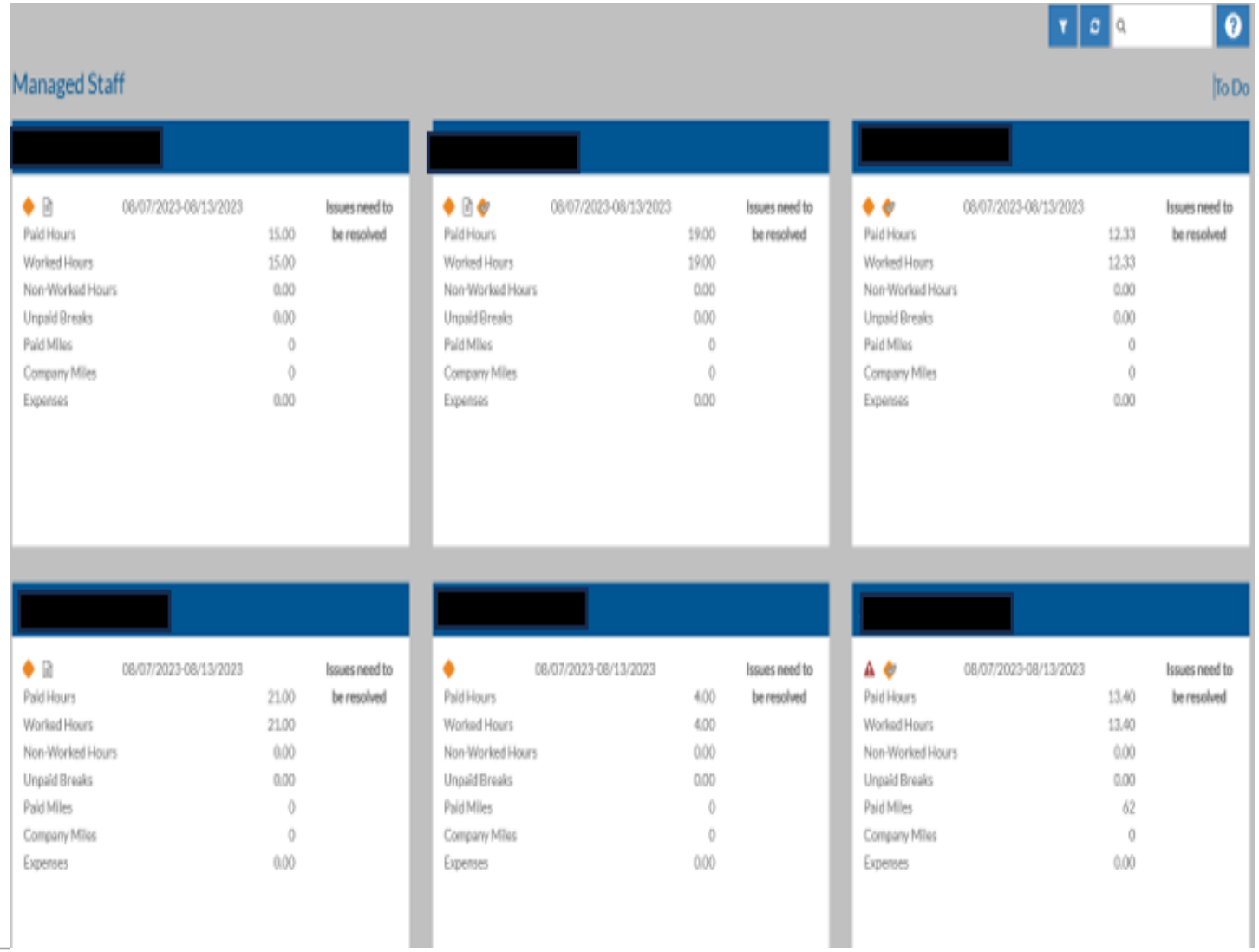
Approving Timecards – Non-Direct Care and Training Shifts

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



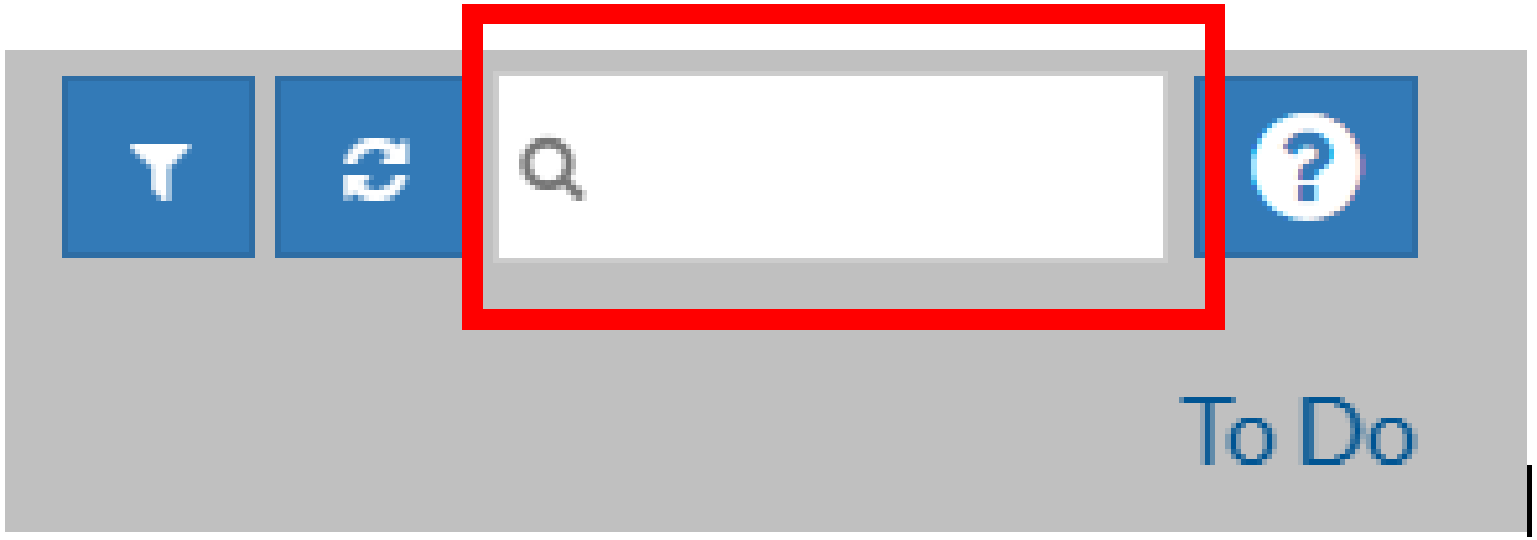
Approving Timecards – Non-Direct Care and Training Shifts

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



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.



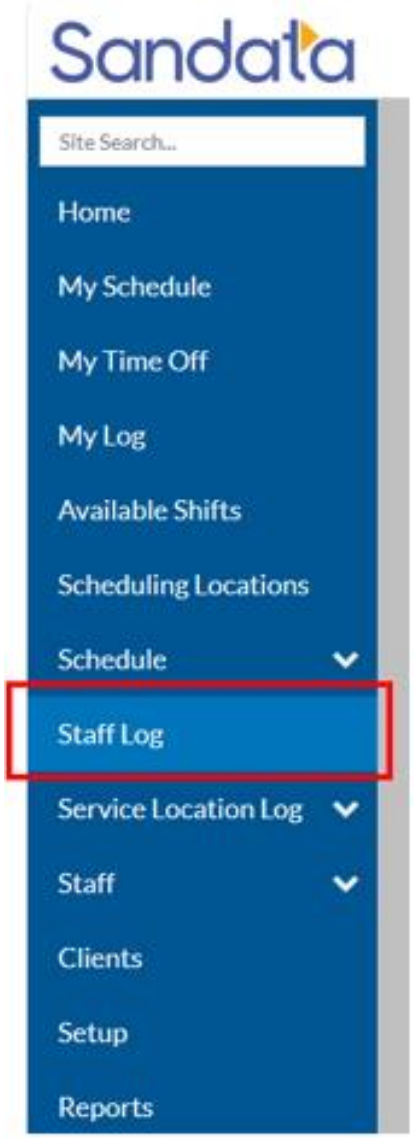
Approving Timecards – Non-Direct Care and Training Shifts

- 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

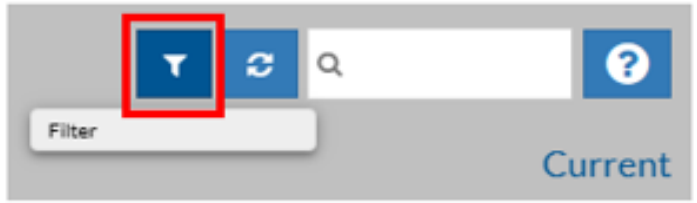
Approving Mileage Logs

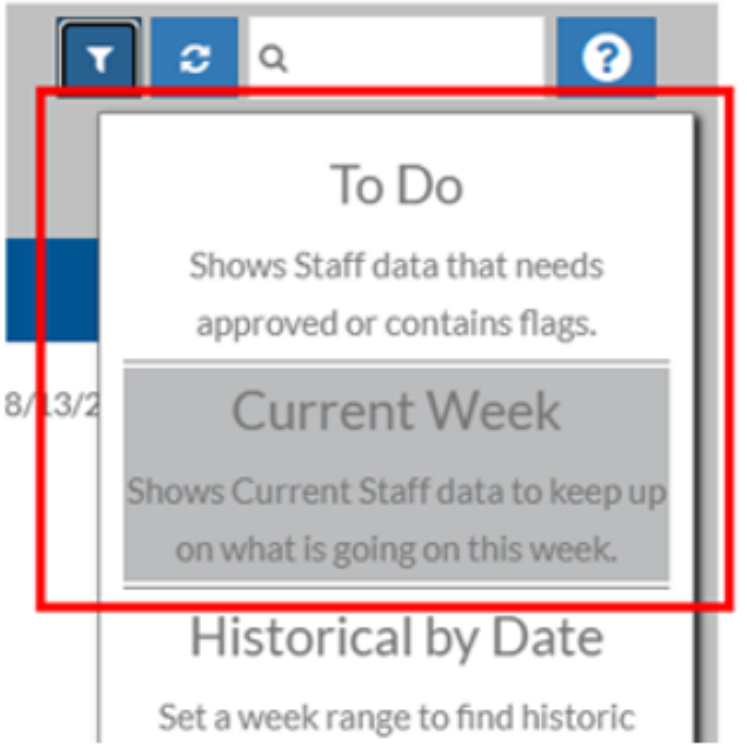
- In order to approve Staff Mileage Logs, you need to view the **Staff Log.**



Approving Mileage Logs

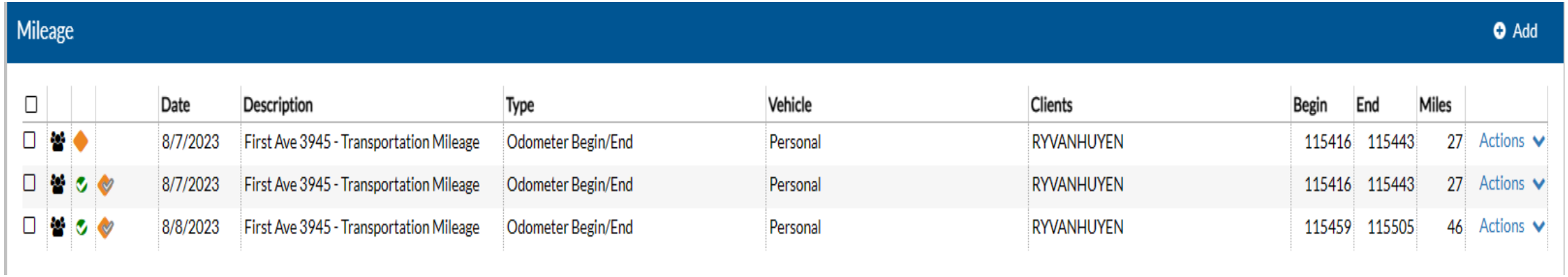
- You will then use the **Filter Icon** and select **To Do**.





Approving Mileage Logs

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



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 in Residential, 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 a float staff, you are responsible for approving their mileage if they were driving “to” your site. For example, if a staff was leaving Champlin 1 and going to St. John’s, then the Site Manager for St. John’s would be responsible for approving their non-direct care mileage.
  - Mileage can not be approved/paid if entered in late. The deadline for mileage is end of day Sunday. Back-pay can not be approved for missing mileage. If a staff tries to enter in their mileage 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.

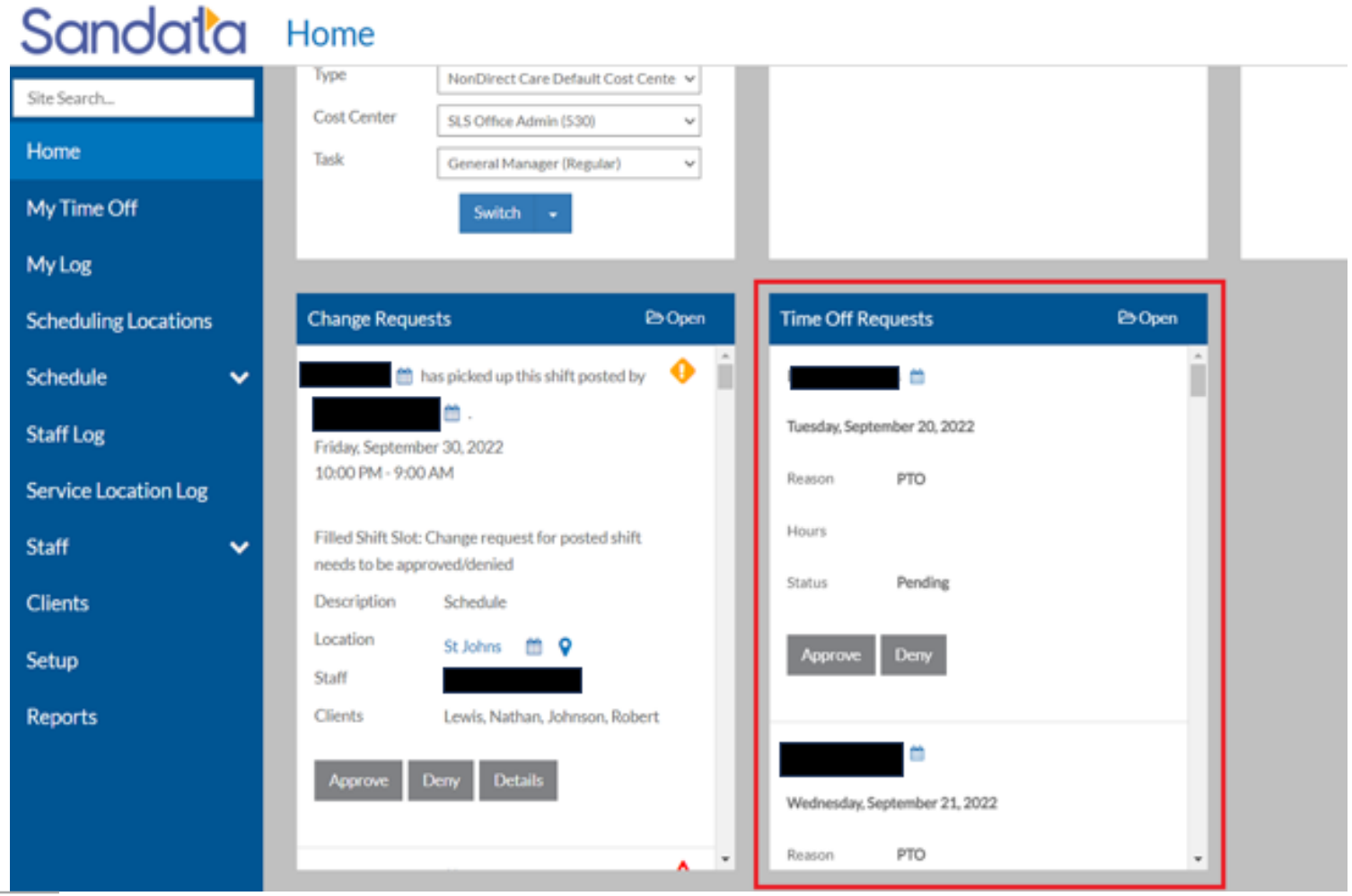
Approving PTO Process for Managers

- **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 Estepp (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

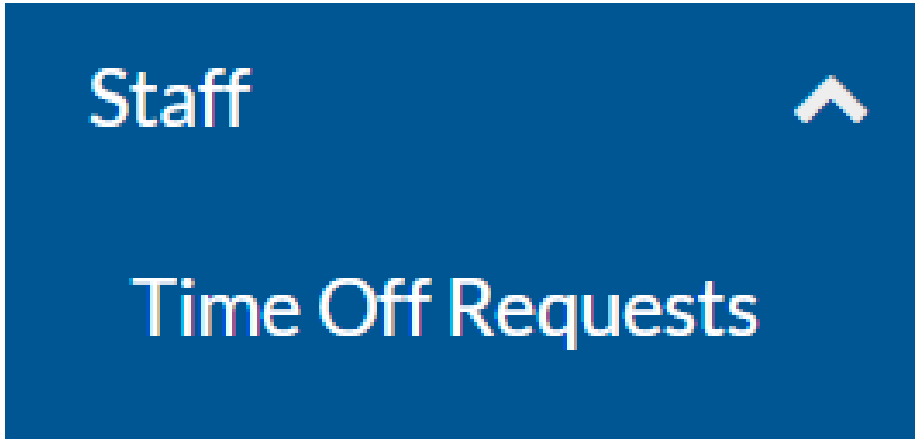
Approving PTO

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



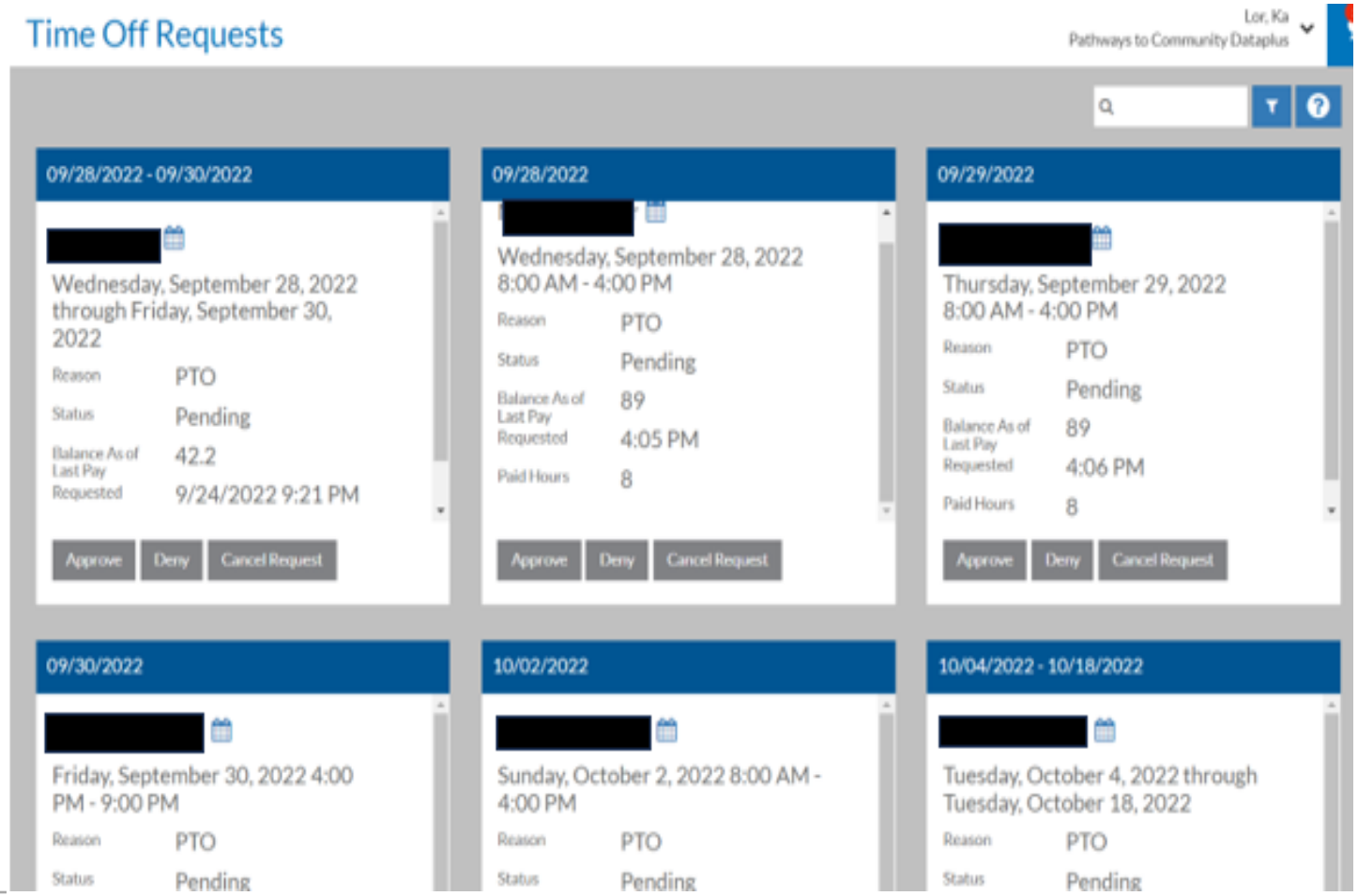
Approving PTO

- 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.



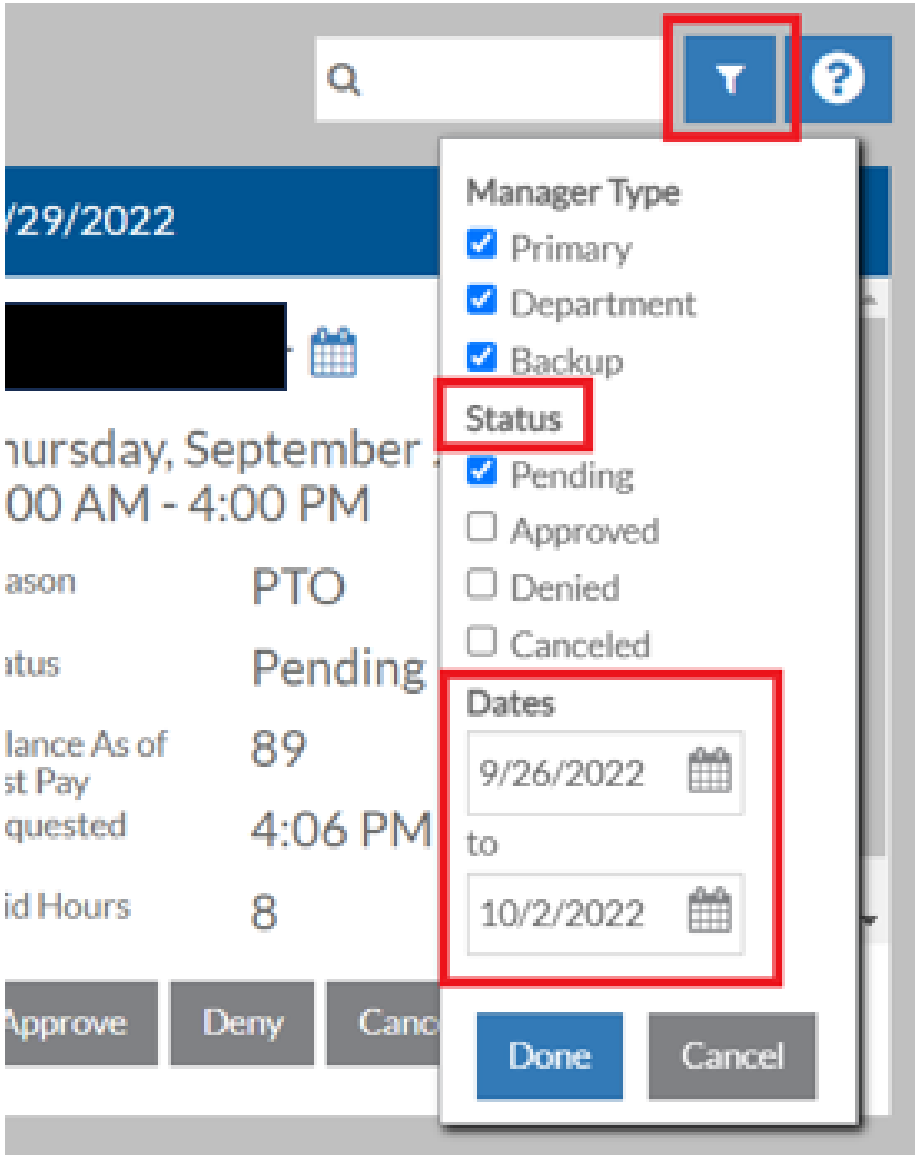
Approving PTO

- 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.



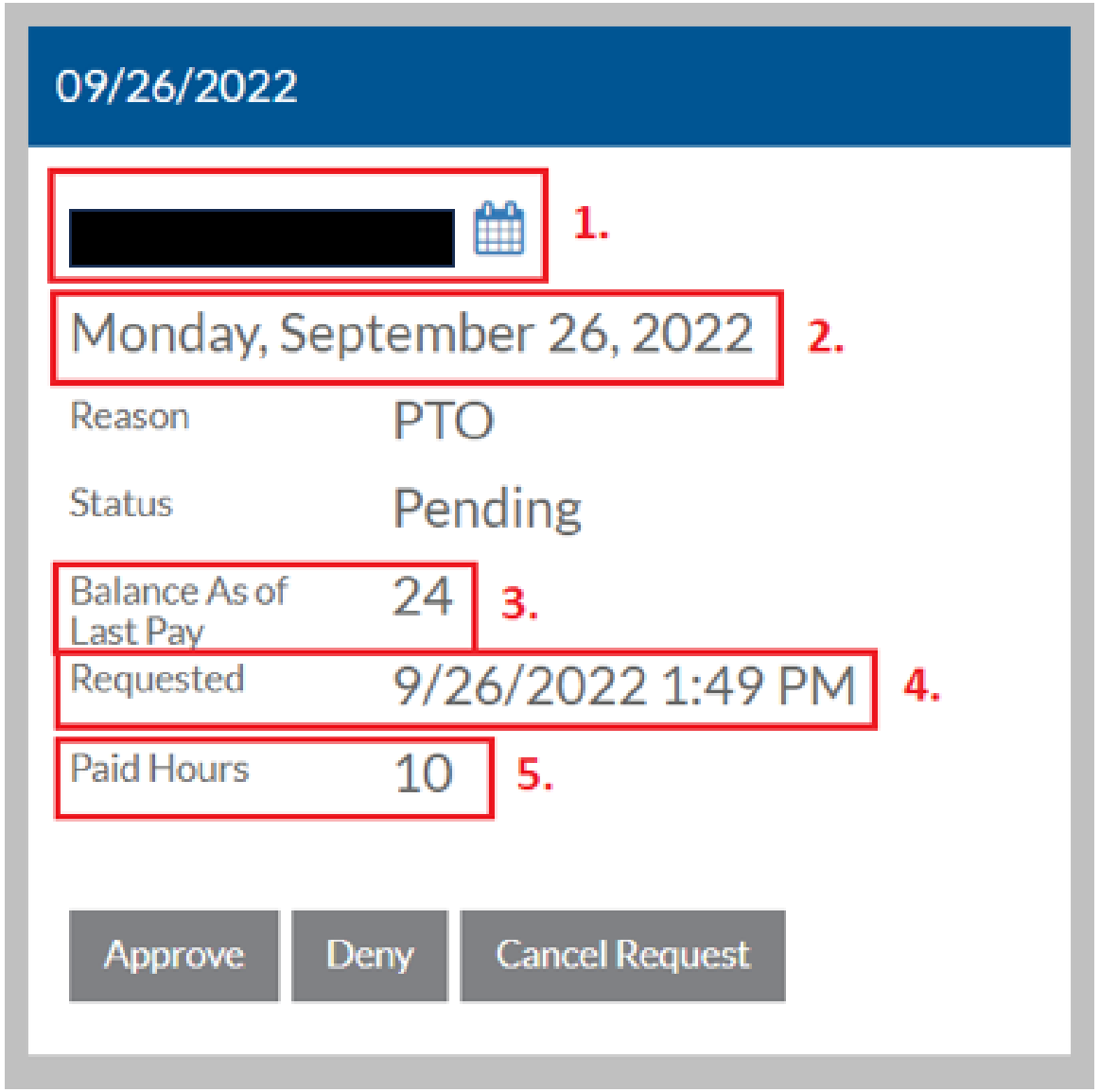
Approving PTO

- 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**."



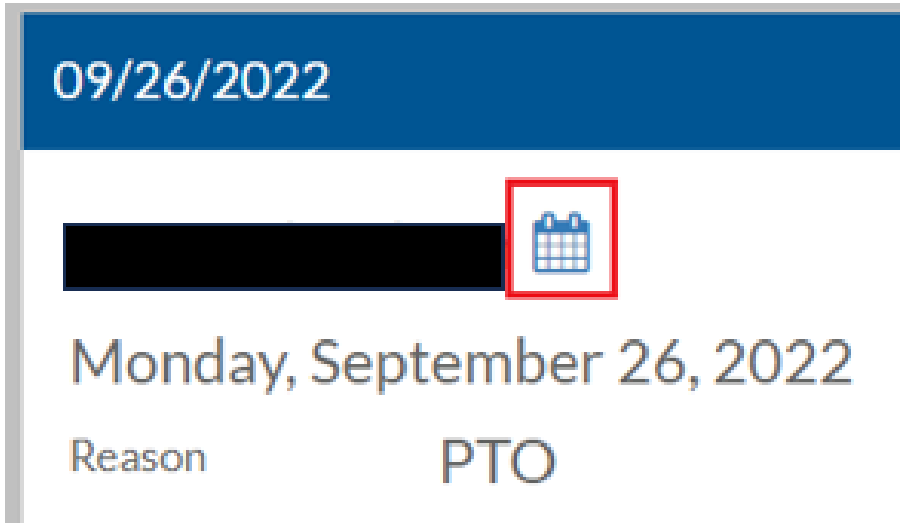
Approving PTO

- 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.



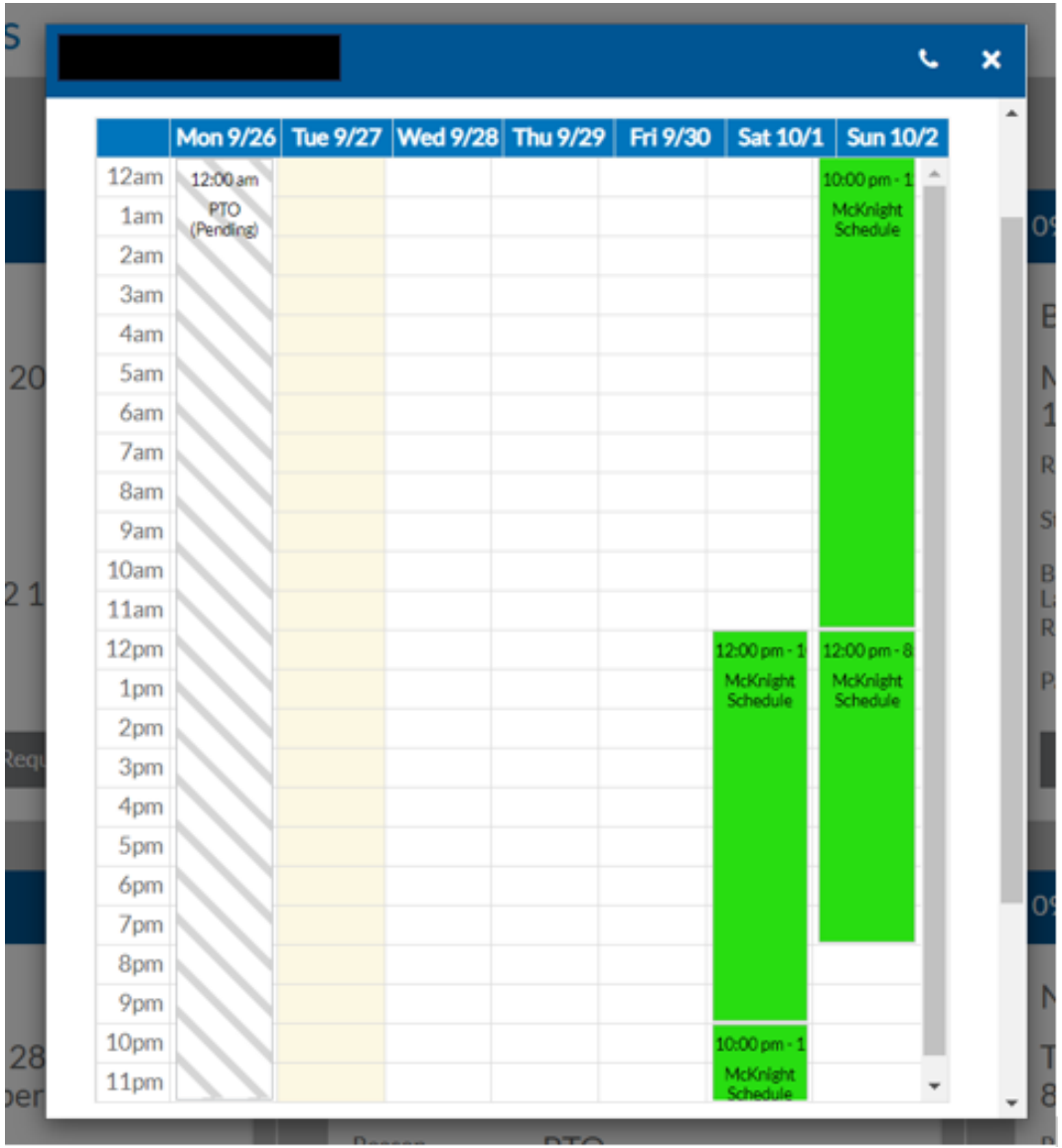
Approving PTO

- 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.



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).

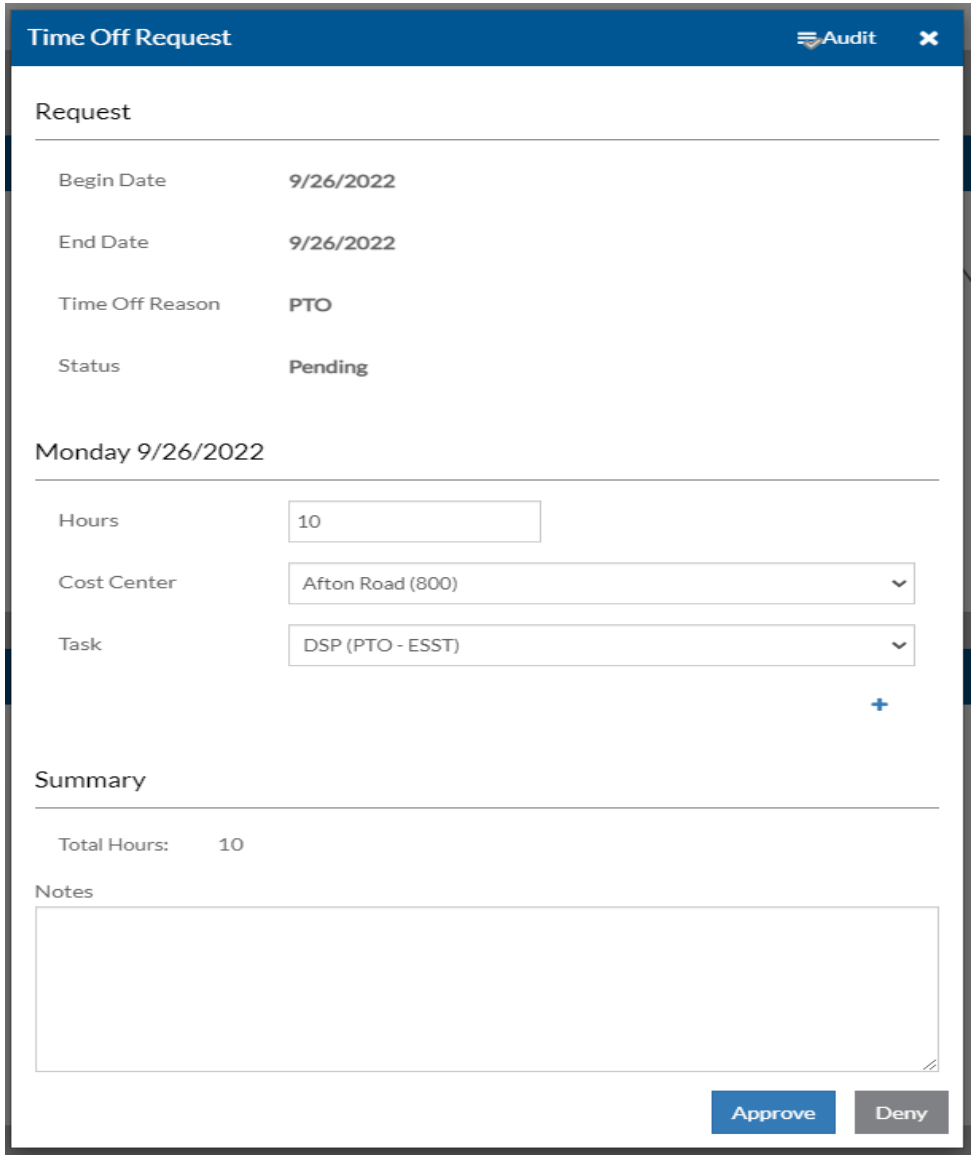


Approving PTO

- 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.

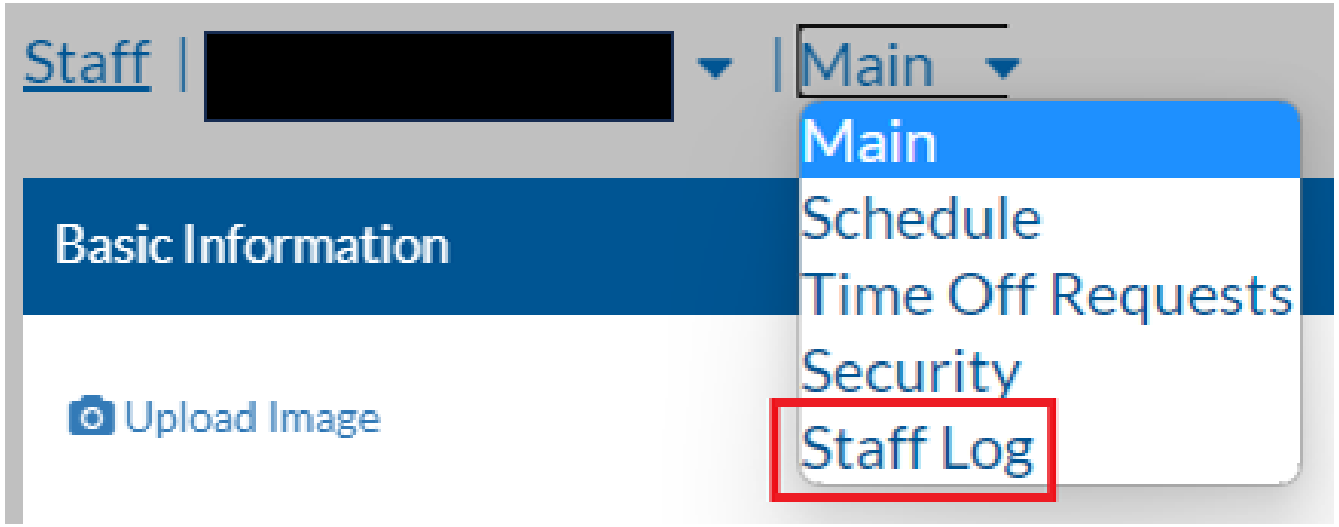
Approving PTO

- 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.



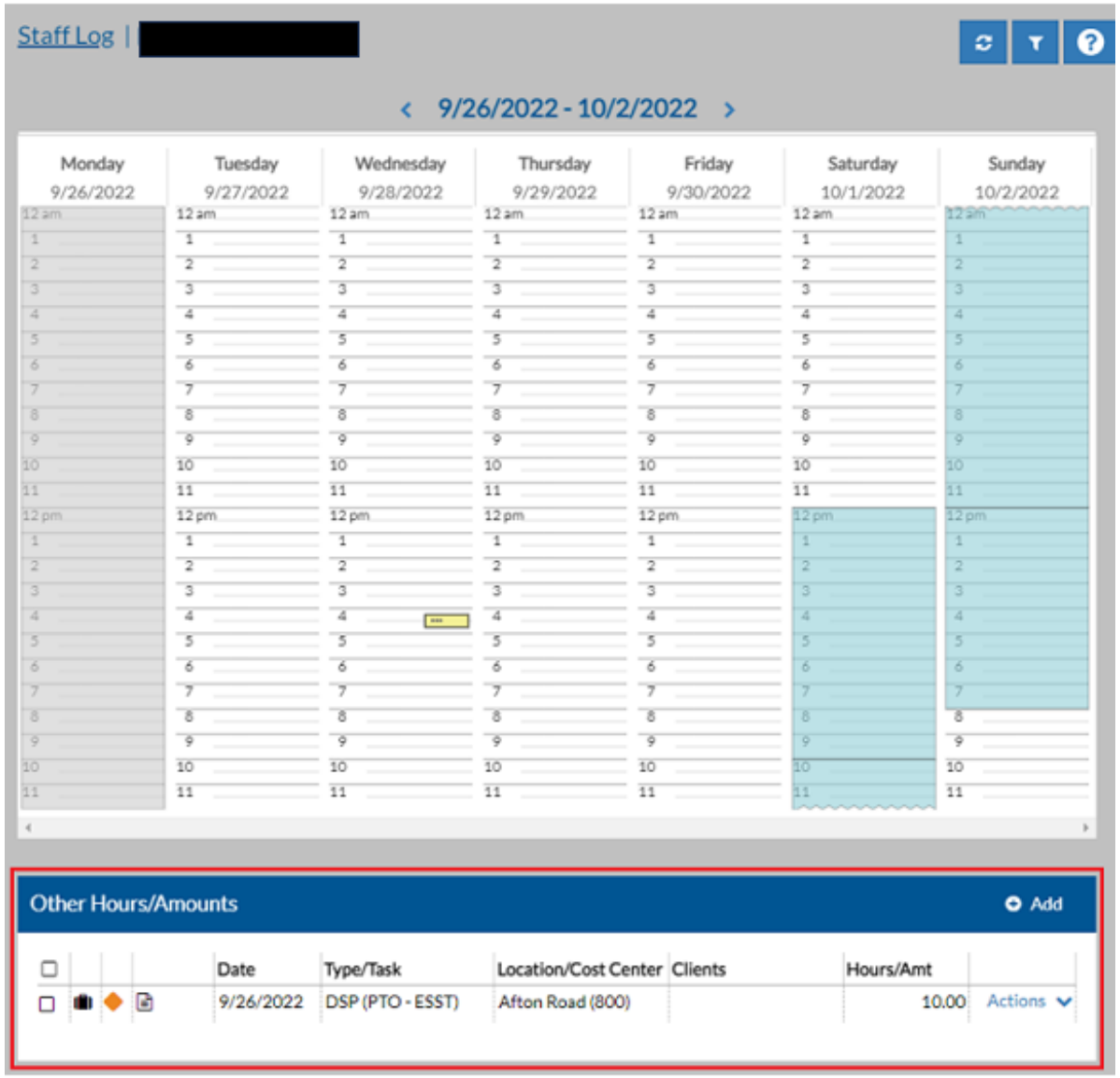
Approving PTO

- 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**".



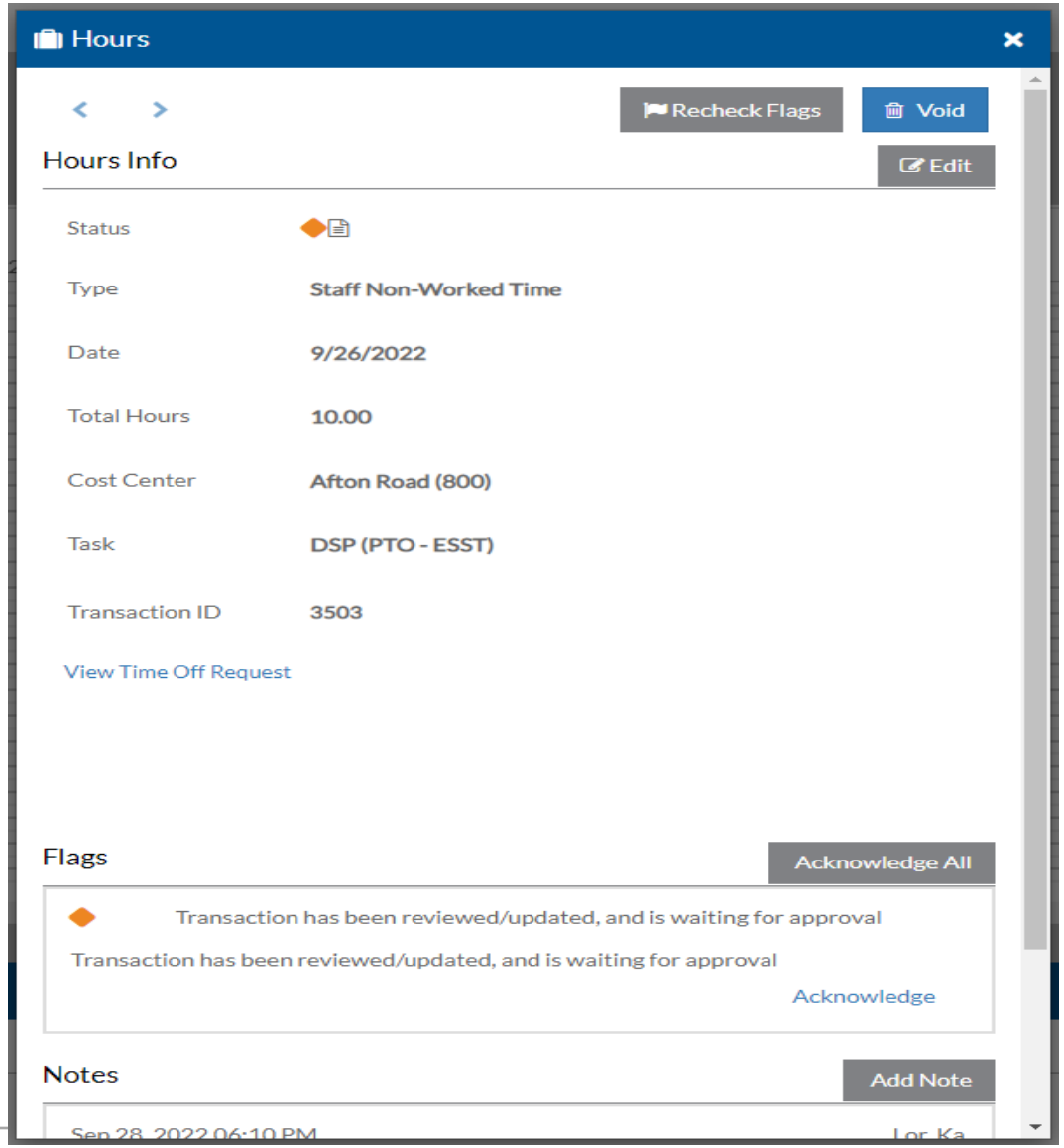
Approving PTO

- 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.



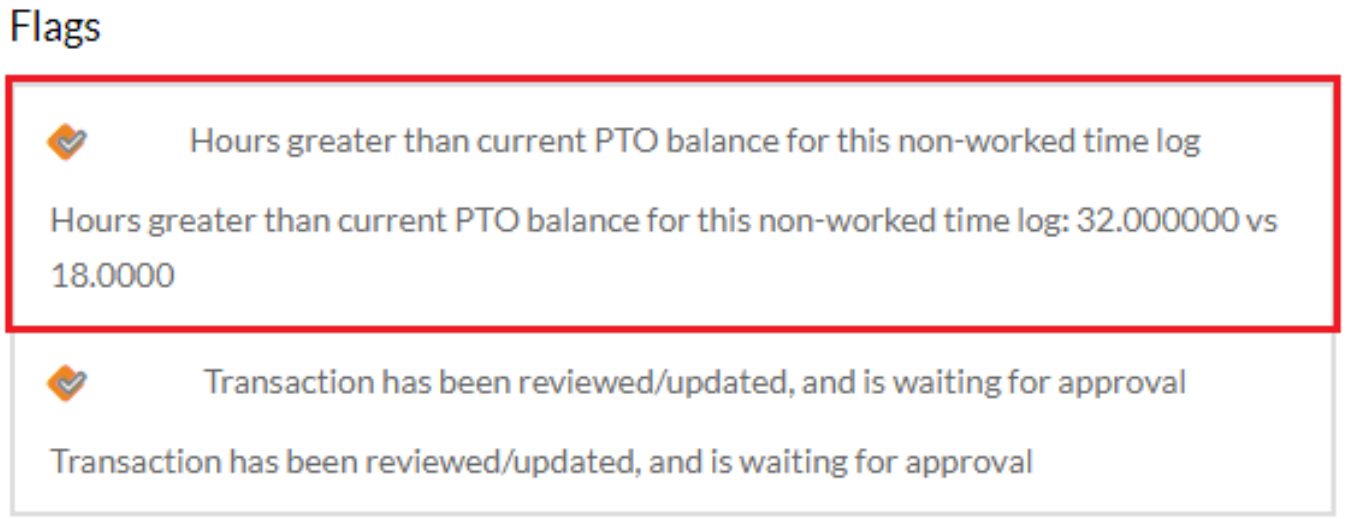
Approving PTO

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



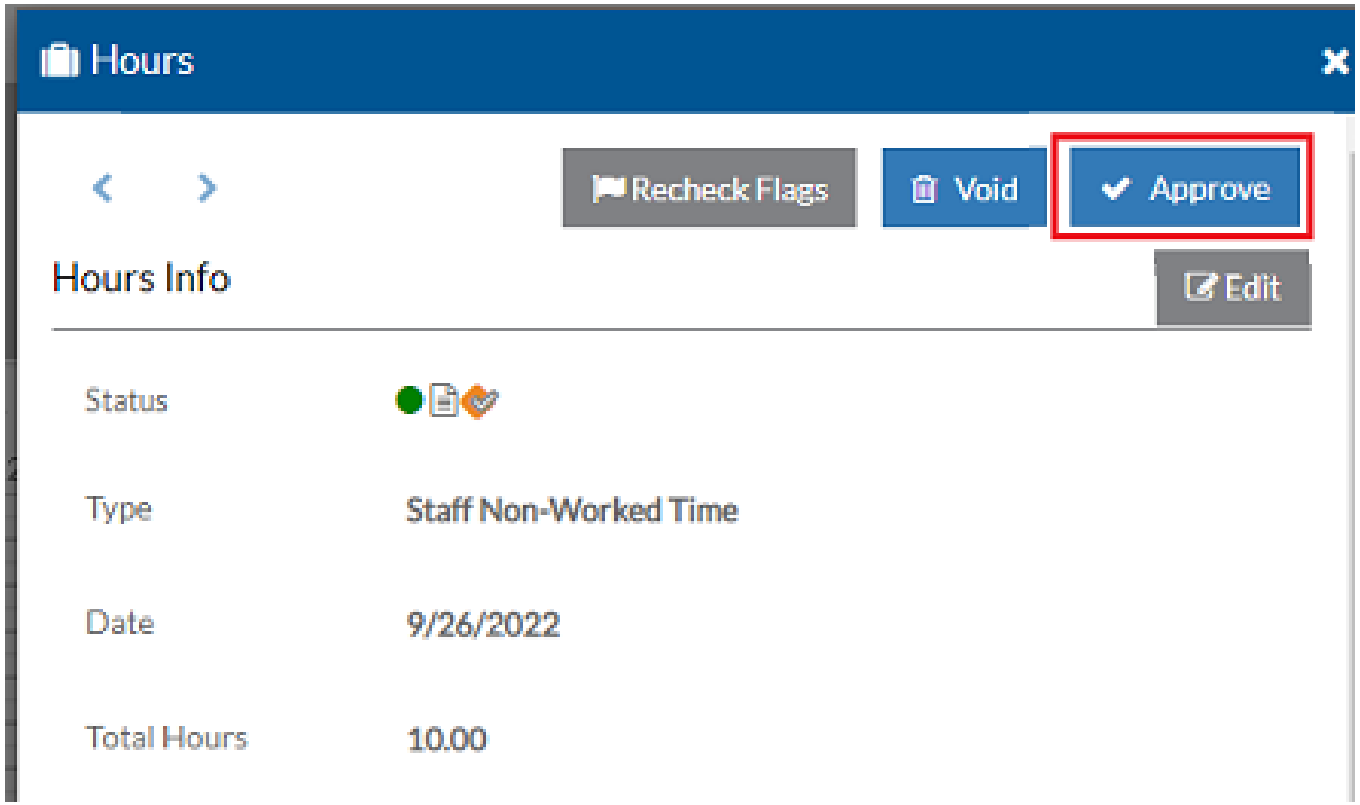
Approving PTO

- 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.



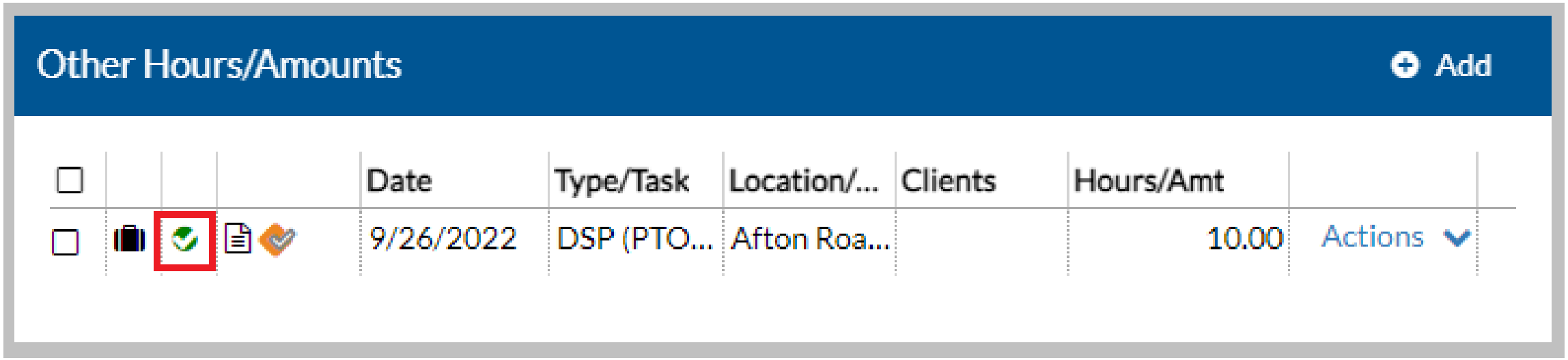
Approving PTO

- 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.



Approving PTO

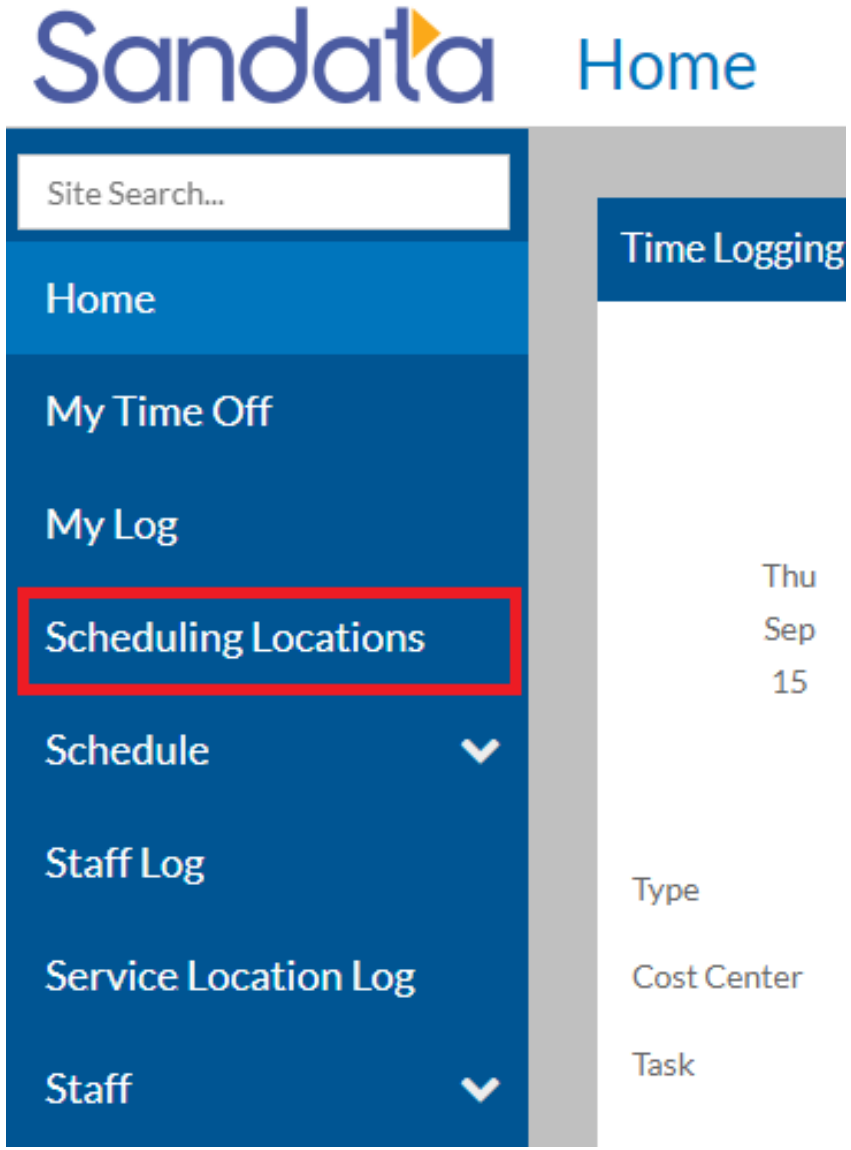
- An entry is approved when you see this green circle with a checkmark next to the time off request.



Creating Permanent Schedules

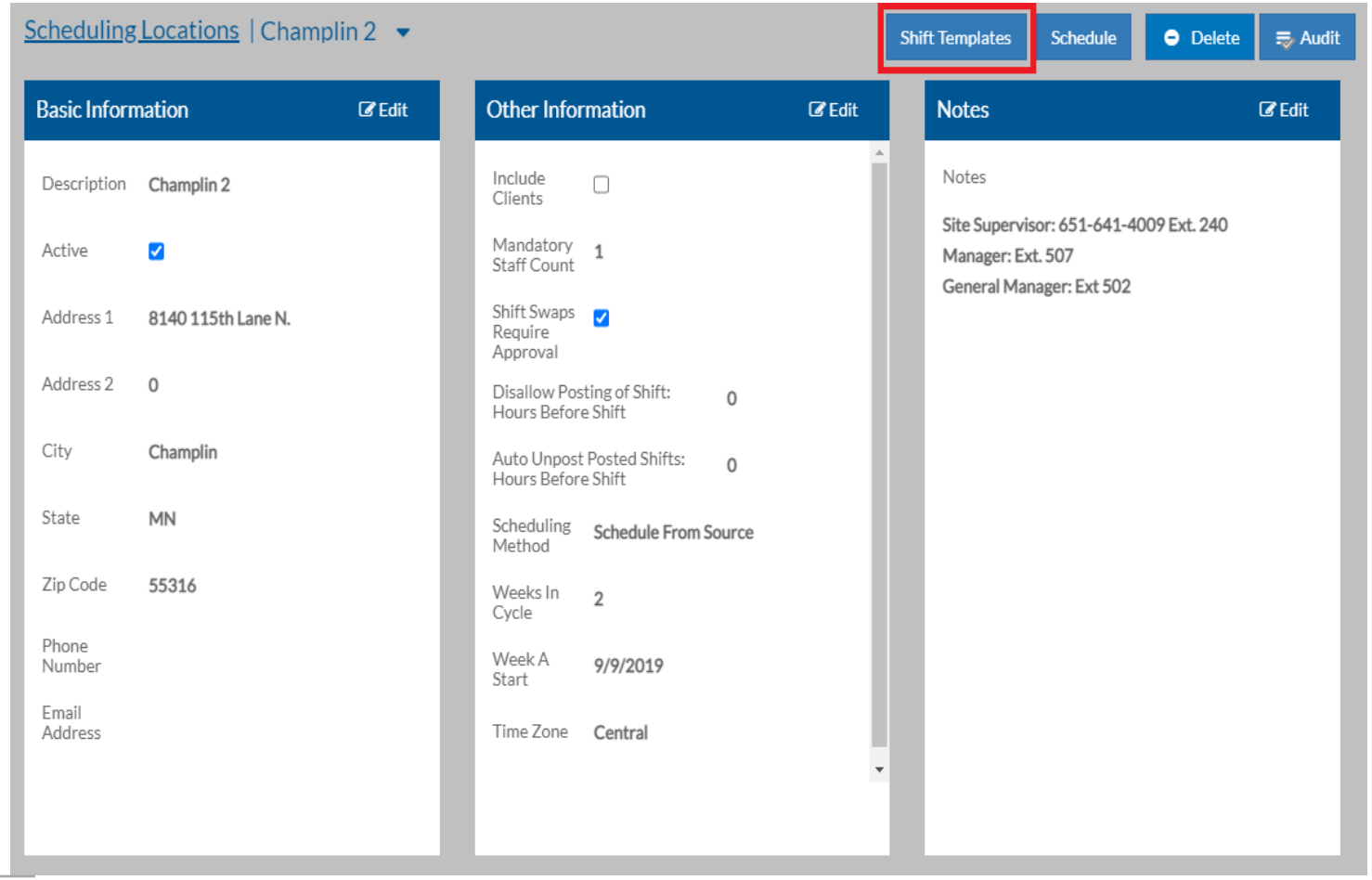
Creating Permanent Schedules

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



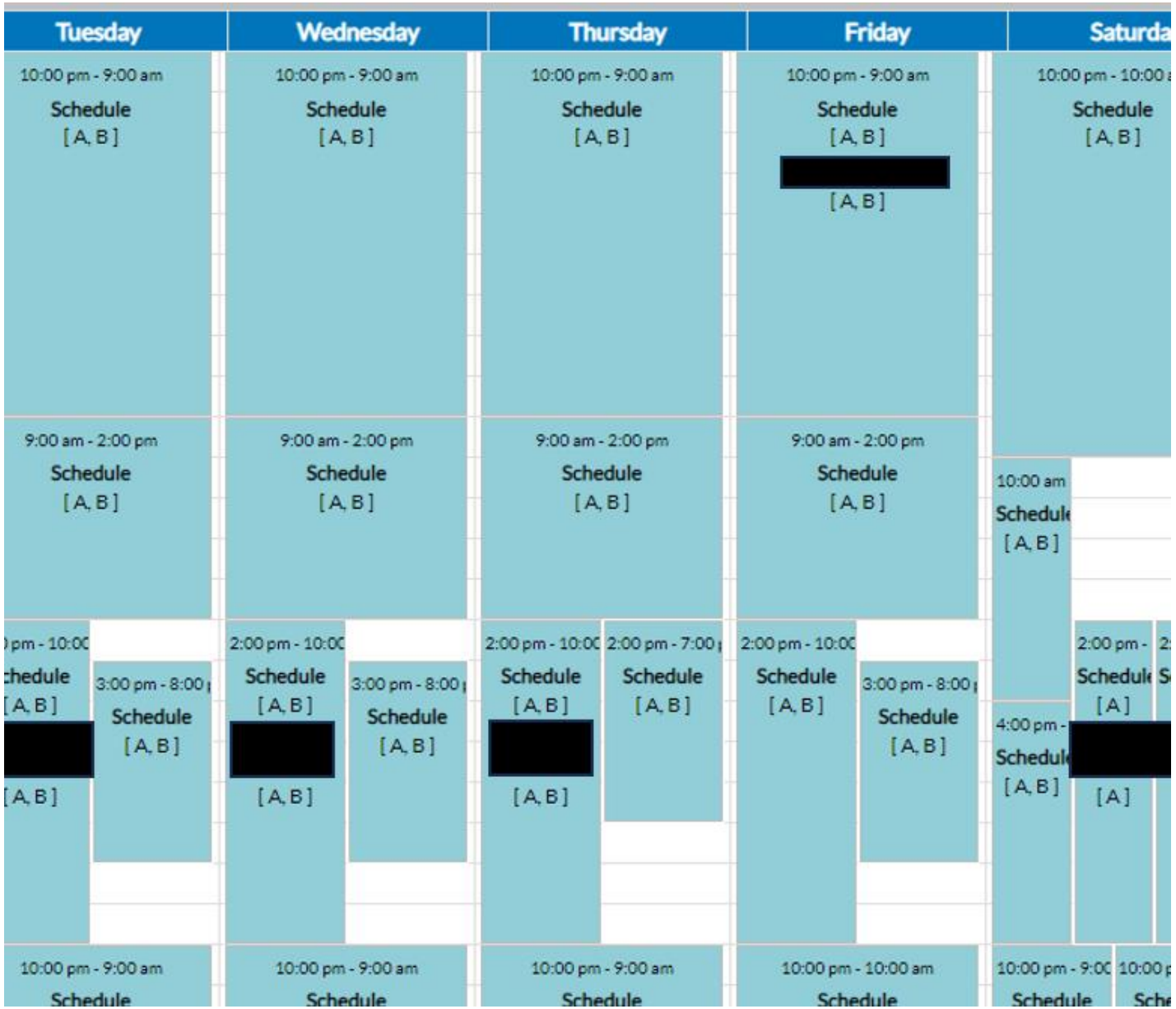
Creating Permanent Schedules

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



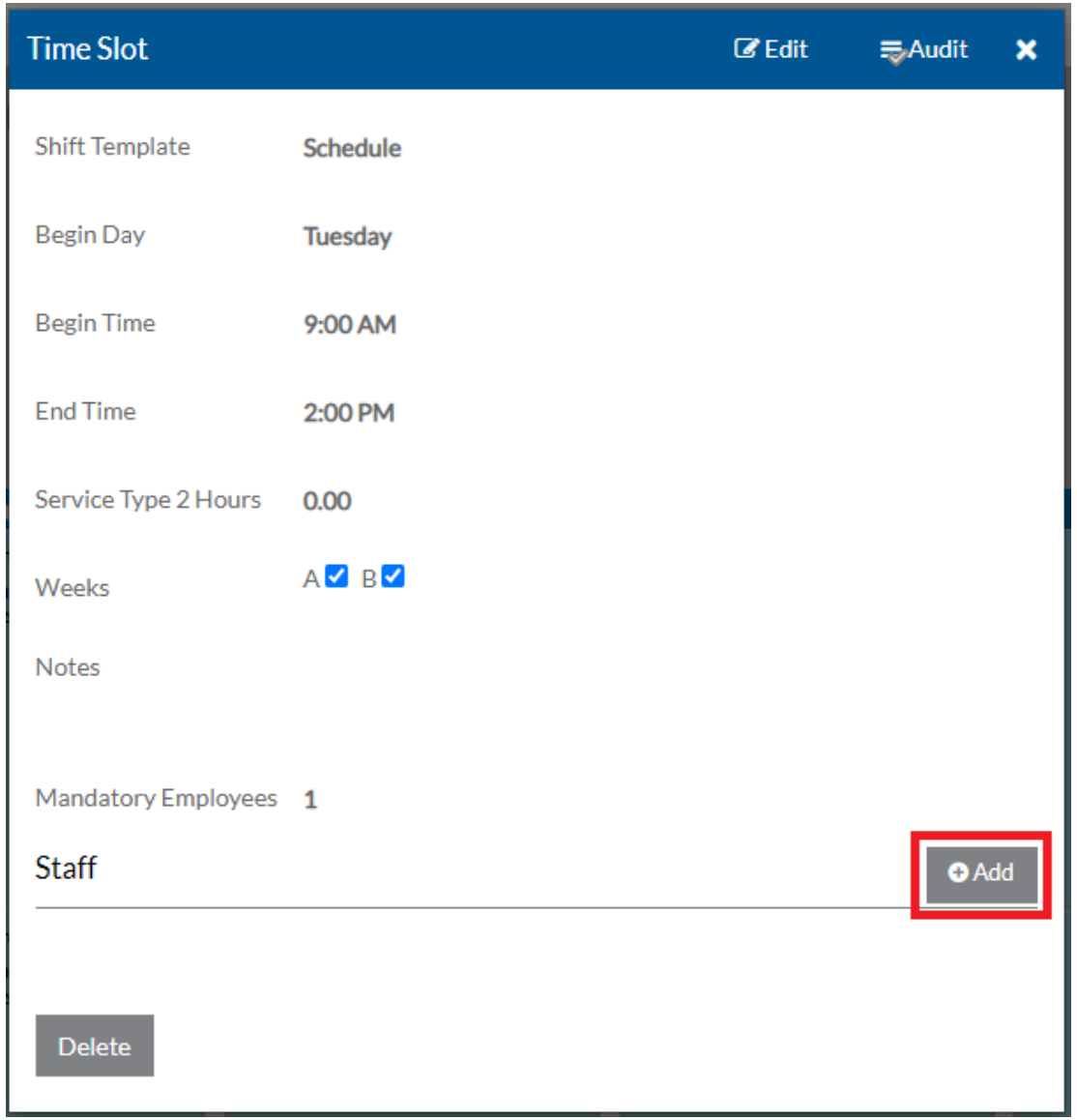
Creating Permanent Schedules

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



Creating Permanent Schedules

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

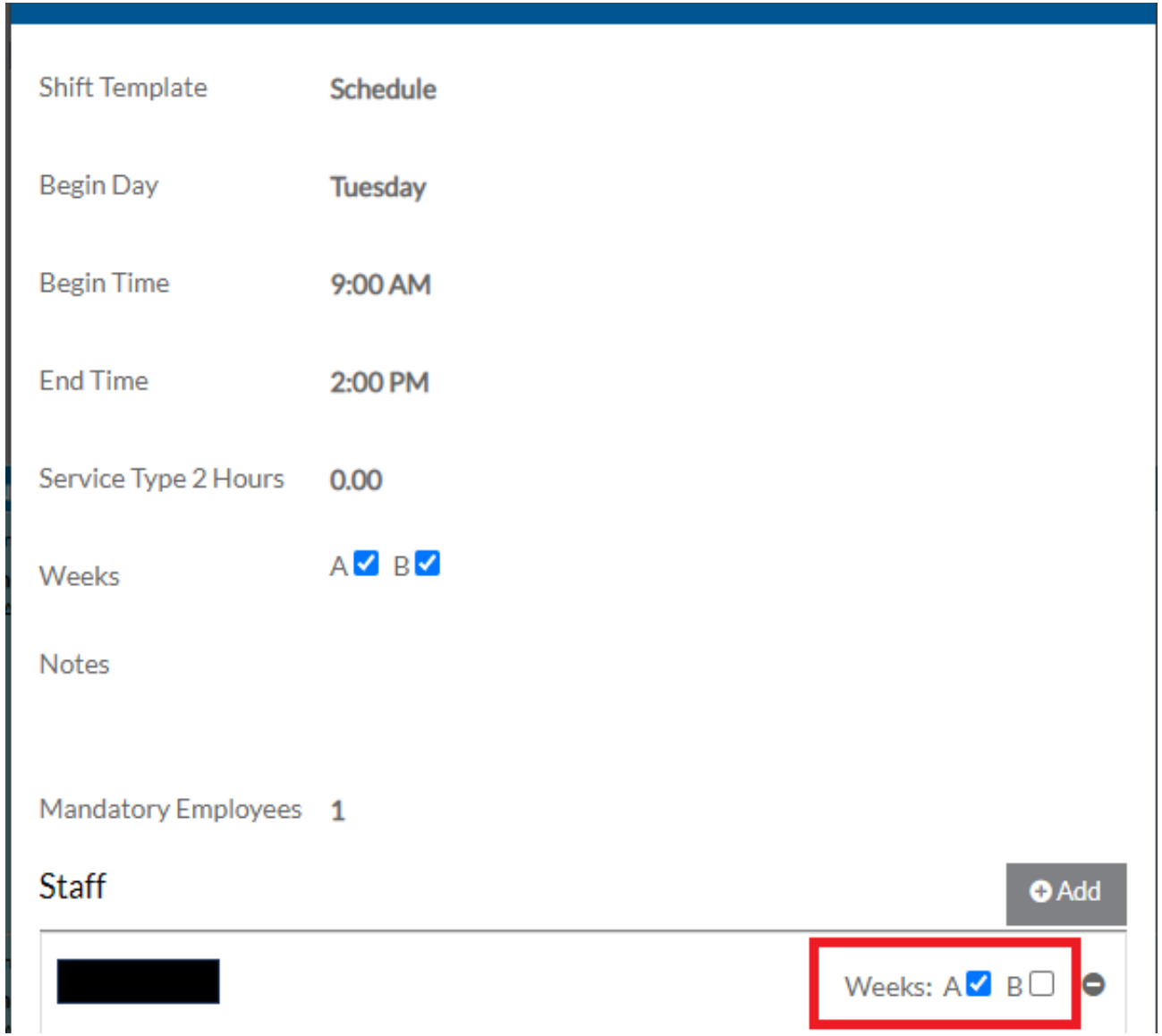


Creating Permanent Schedules

- 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.

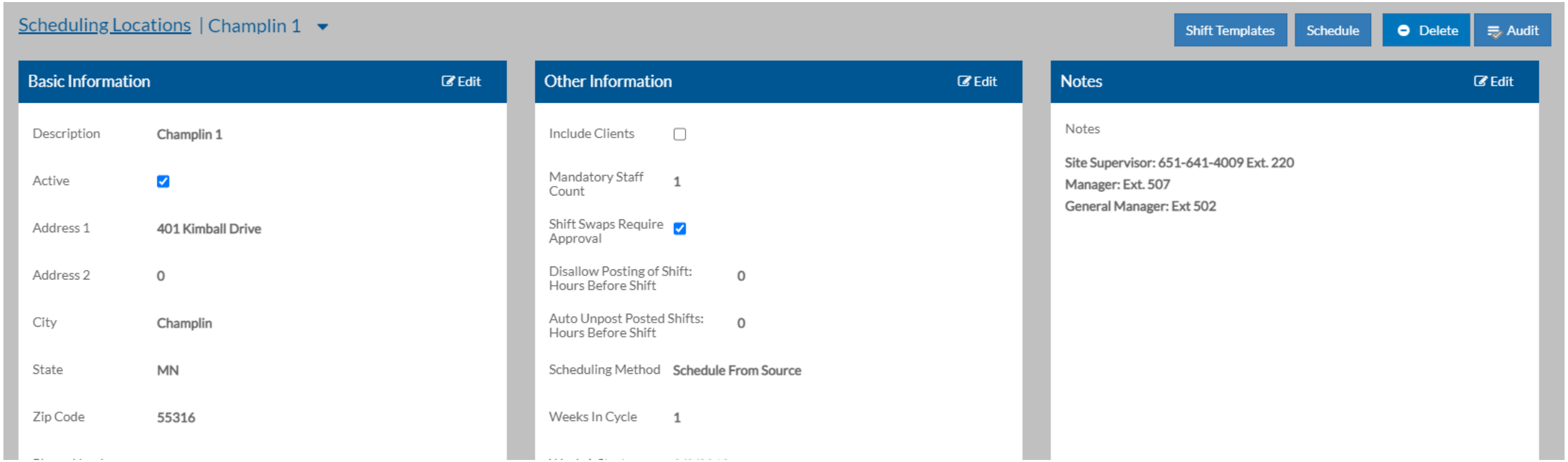
Creating Permanent Schedules

- 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.



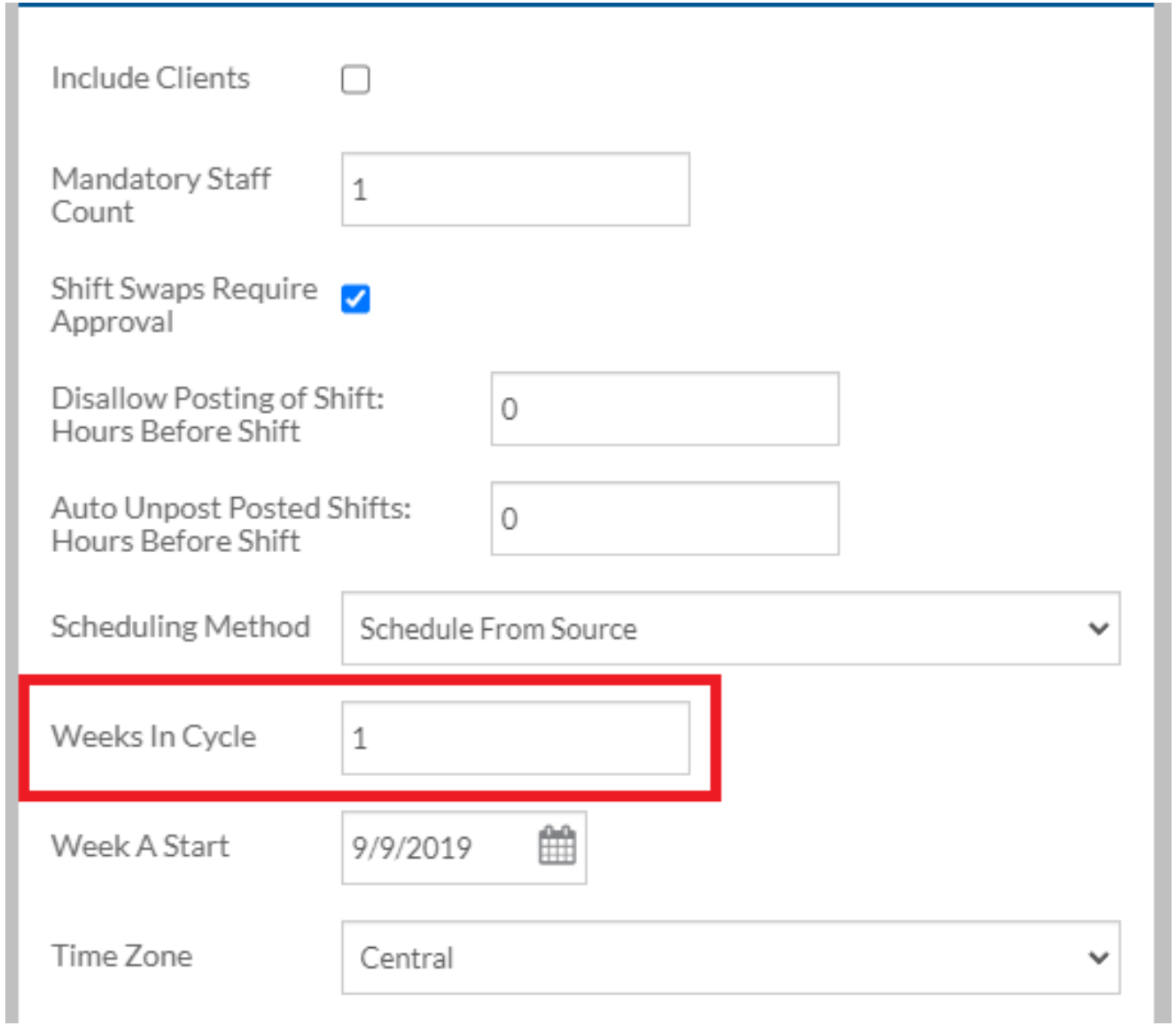
Creating Permanent Schedules

- 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.



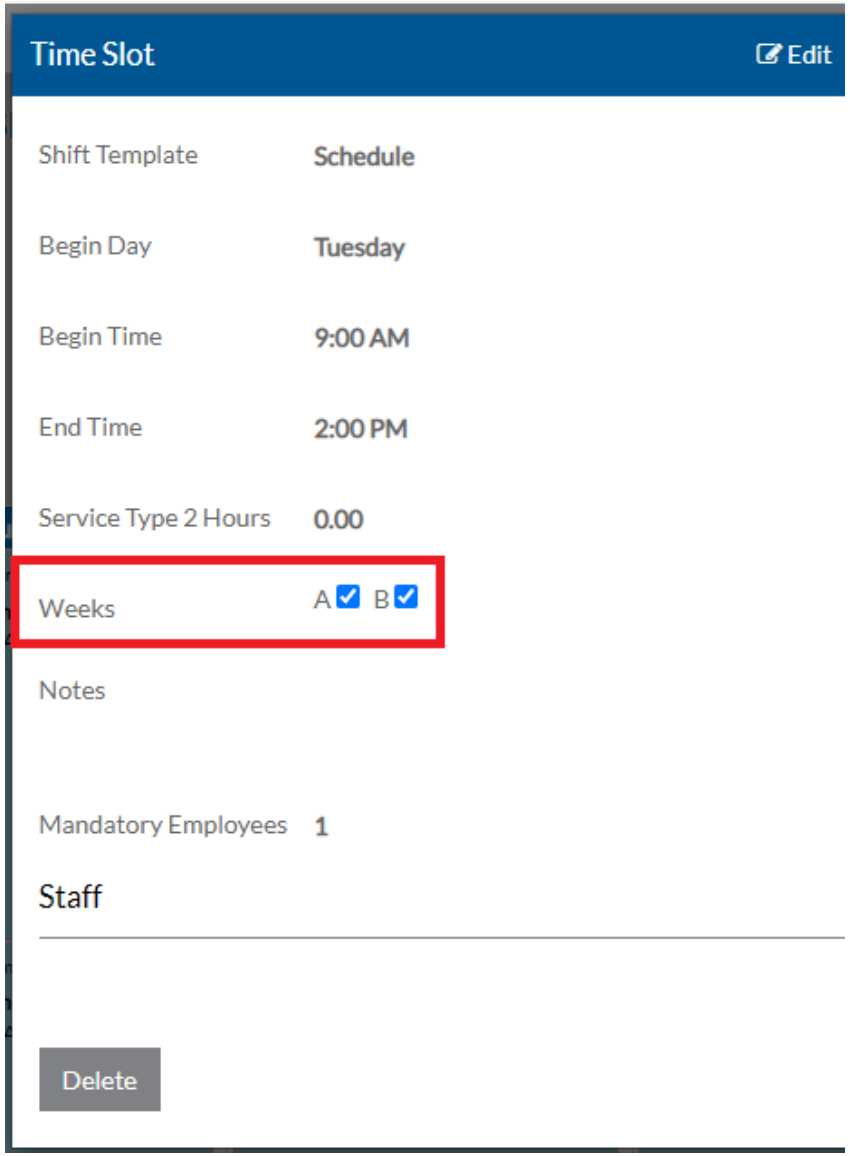
Creating Permanent Schedules

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



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.



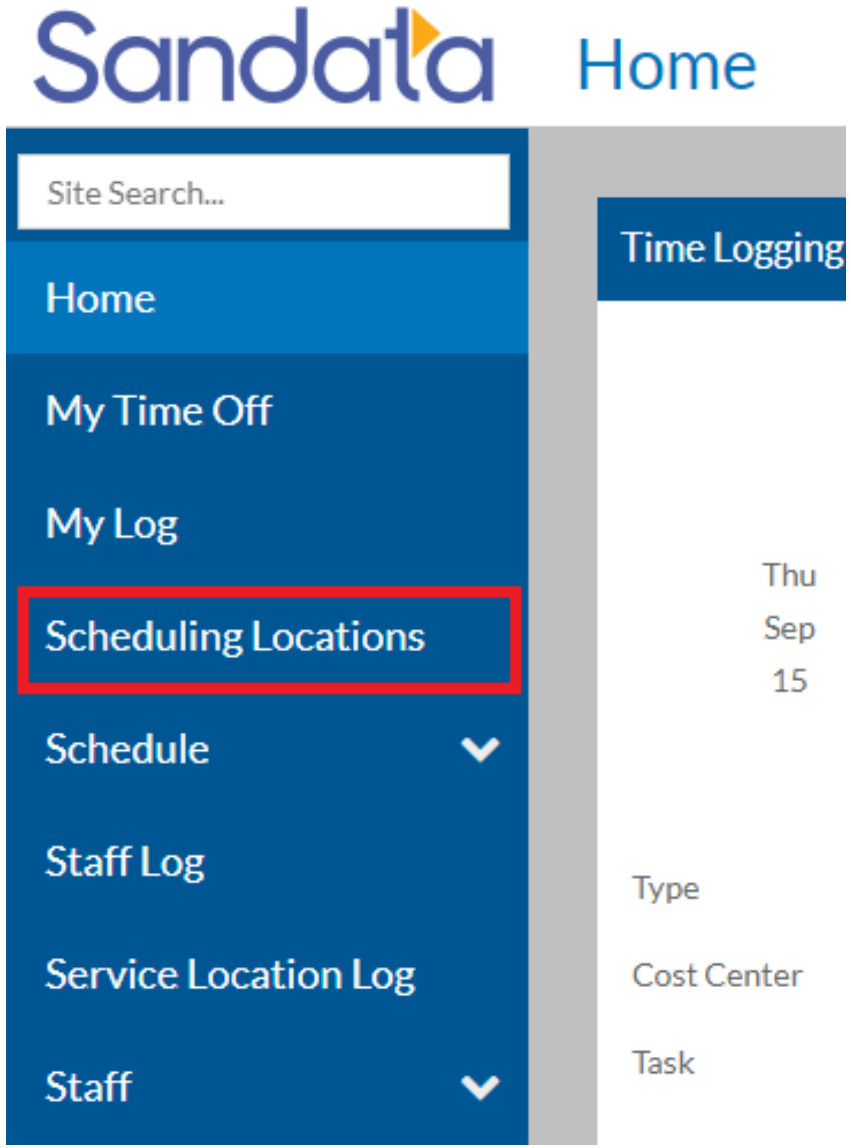
Giving Staff Access to a Site for Scheduling

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.)

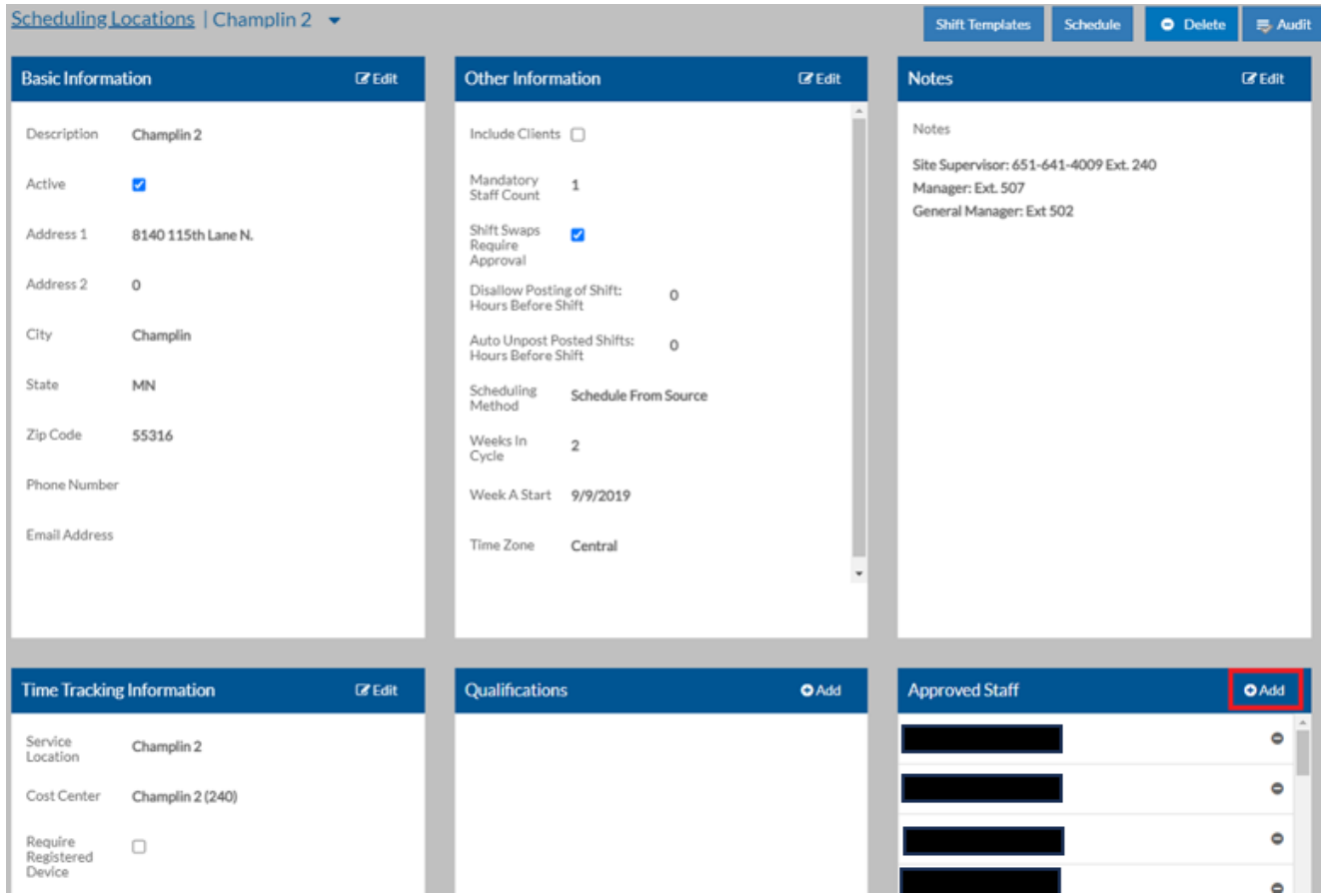
Giving Staff Access to a Site for Scheduling

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



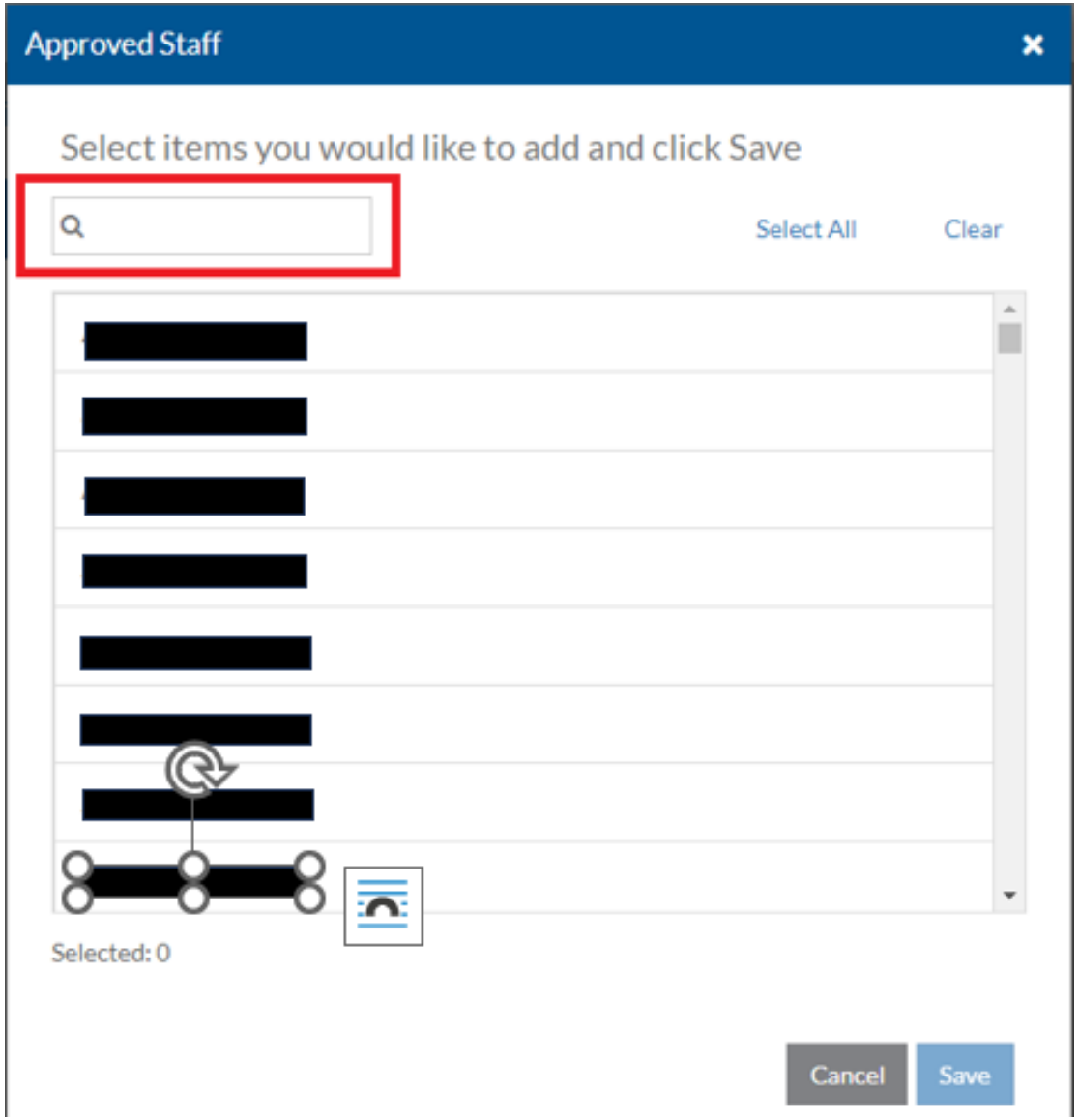
Giving Staff Access to a Site for Scheduling

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



Giving Staff Access to a Site for Scheduling

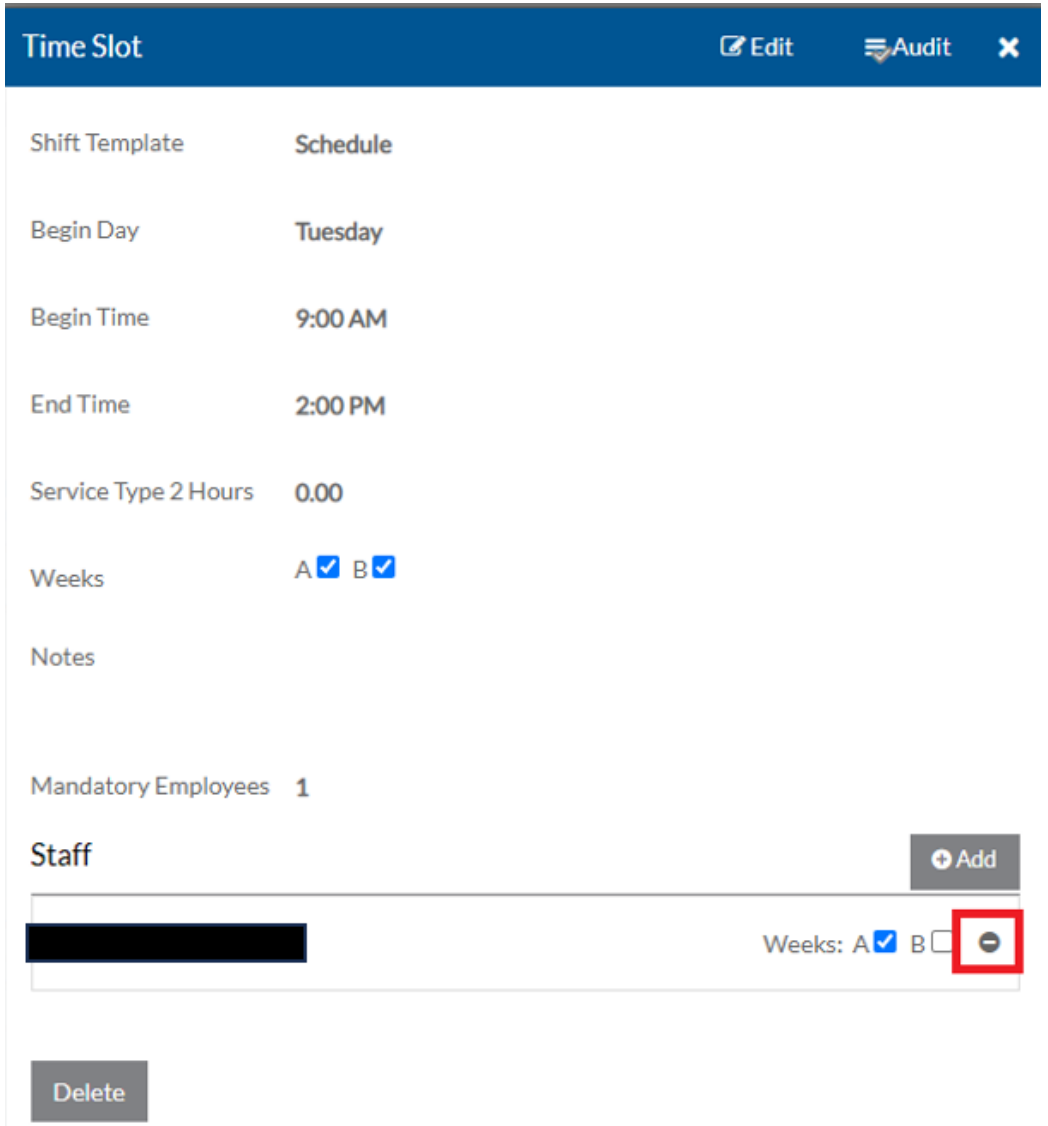
- Using the search bar, find the staff's name and click on it. Once their name is highlighted, click "**Save.**"
- This staff now has access to view the schedule at this site.



Removing a Staff from a Permanent Schedule

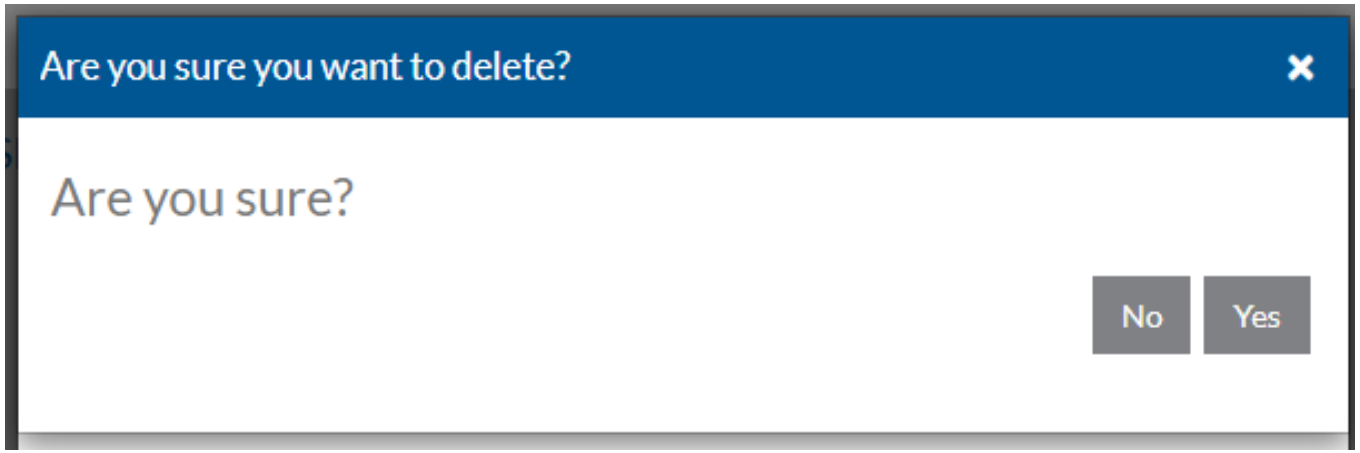
Removing a Staff from a Permanent Schedule

- 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.



Removing a Staff from a Permanent Schedule

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



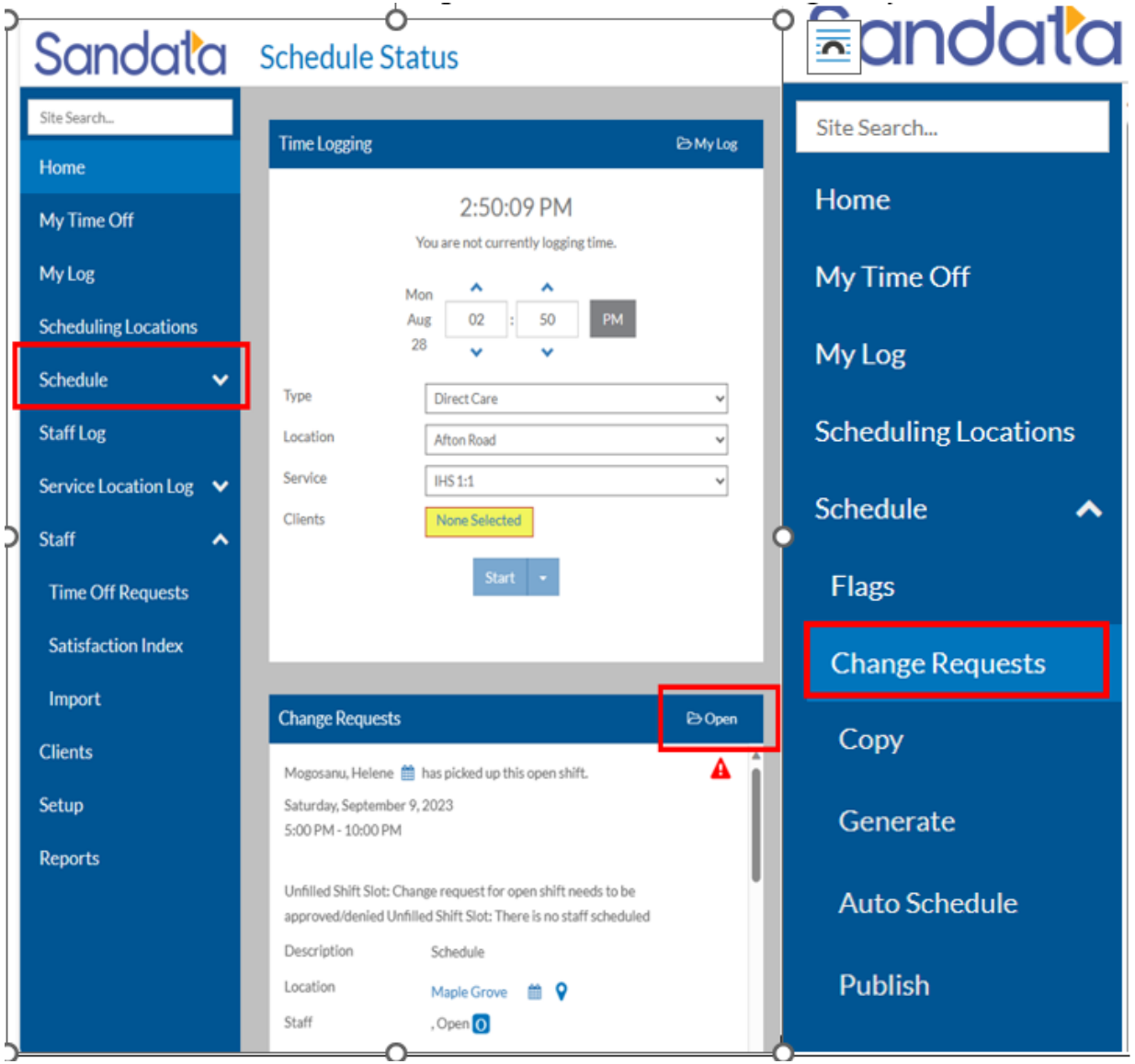
Approving Change Requests and Changing Schedules

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?

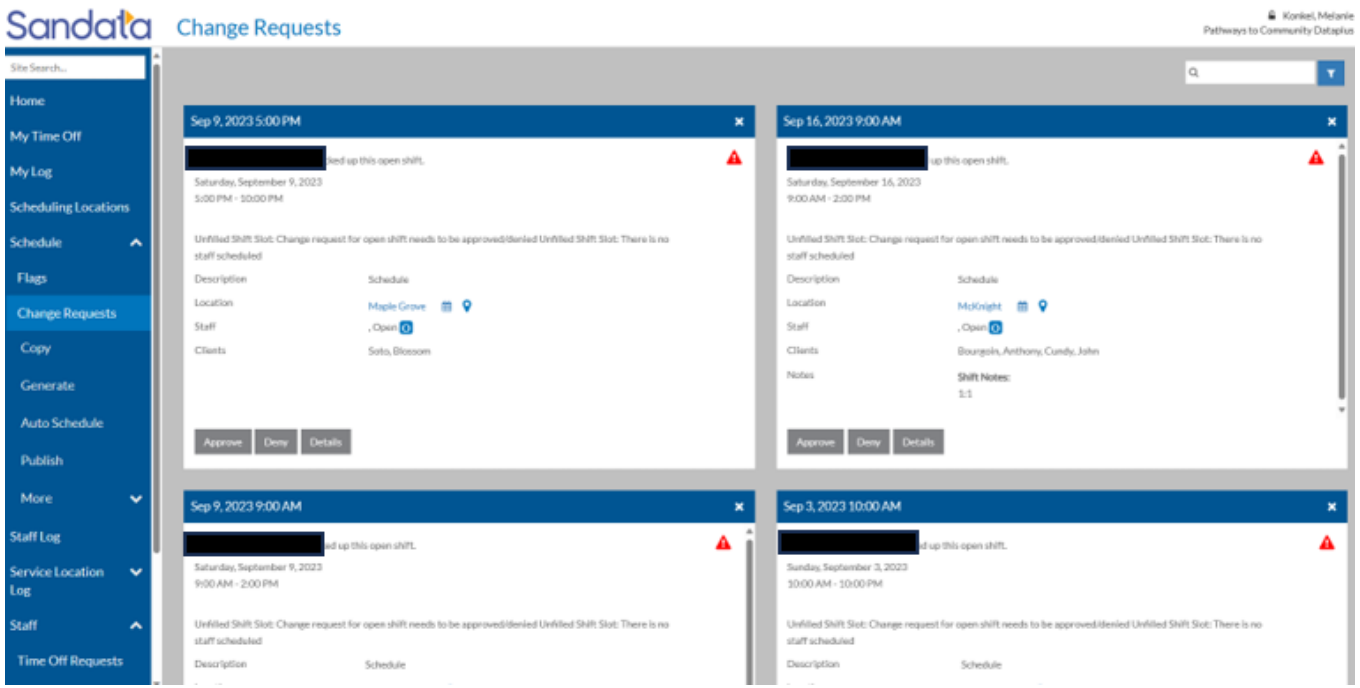
Approving Change Requests and Changing Schedules

- 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**.”



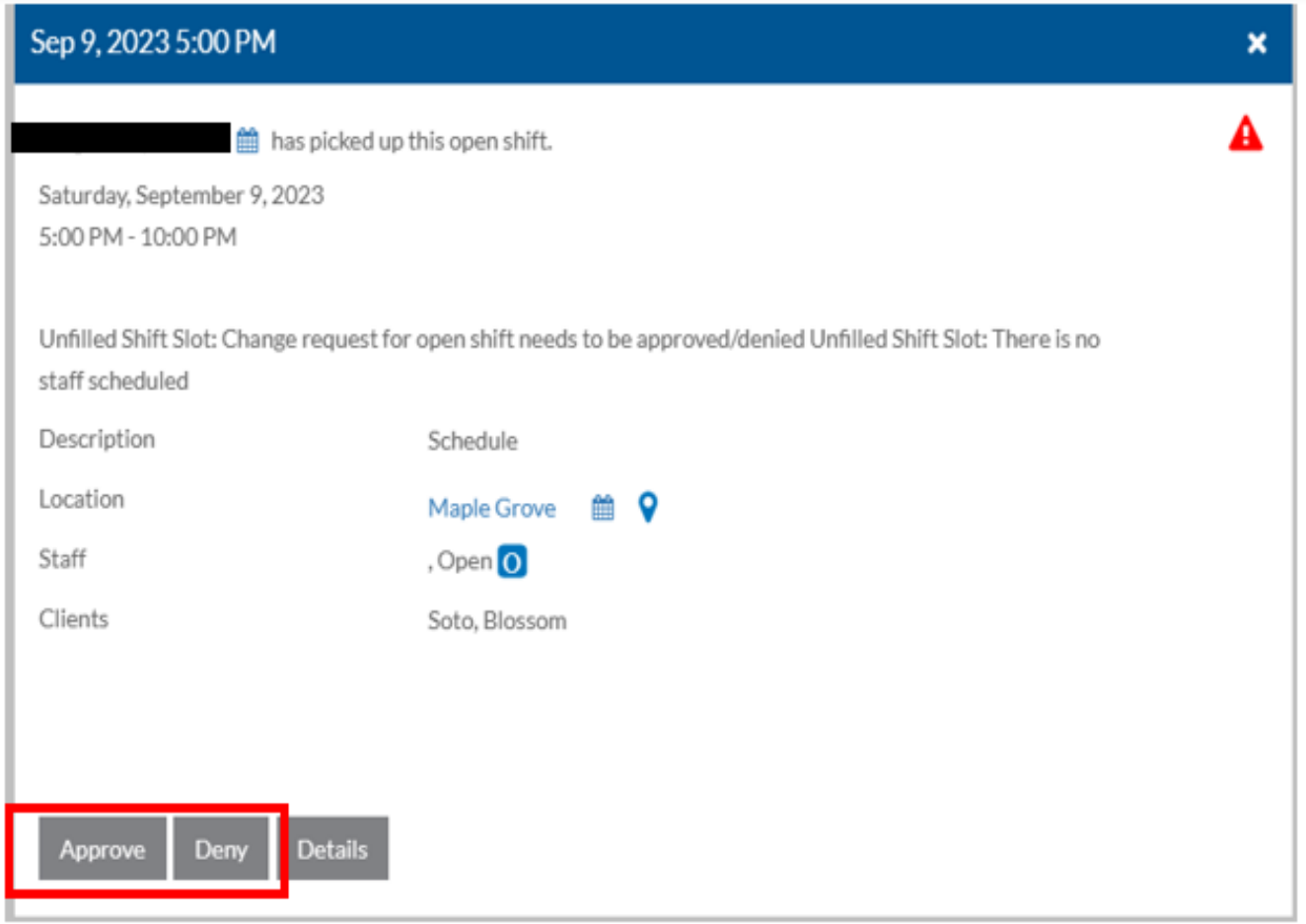
Approving Change Requests and Changing Schedules

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



Approving Change Requests and Changing Schedules

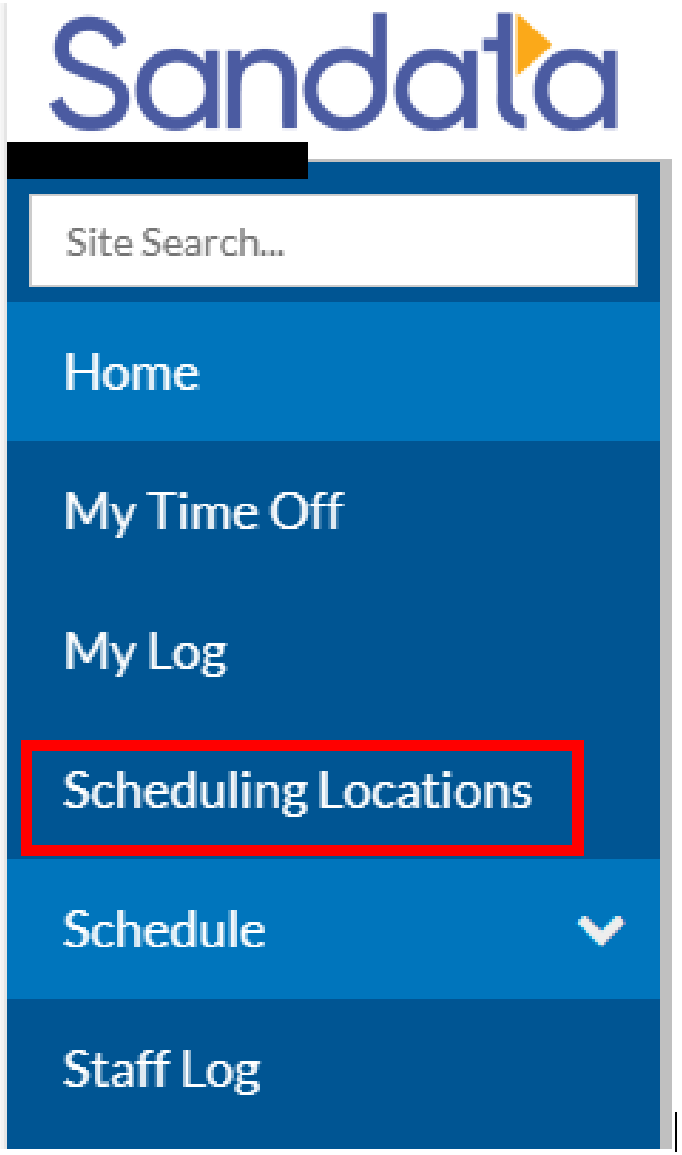
- Click on “**Approve**” or “**Deny**.”
- Note: If you Deny a request, you will need to write a note and notify the staff.



How to Manually Add a Staff to a Shift

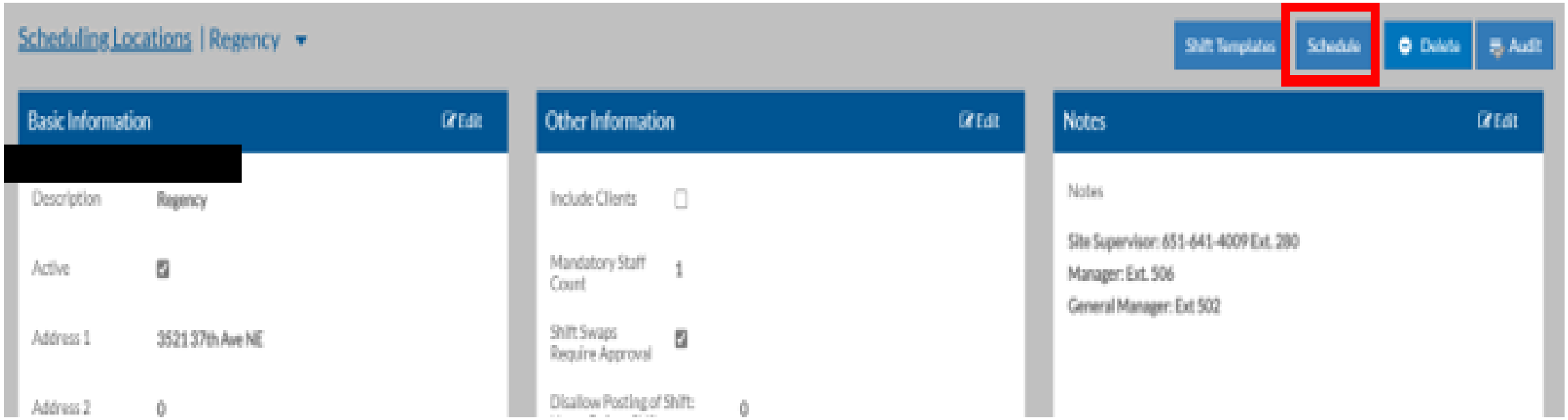
How to Manually Add a Staff to a Shift

- 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**."



How to Manually Add a Staff to a Shift

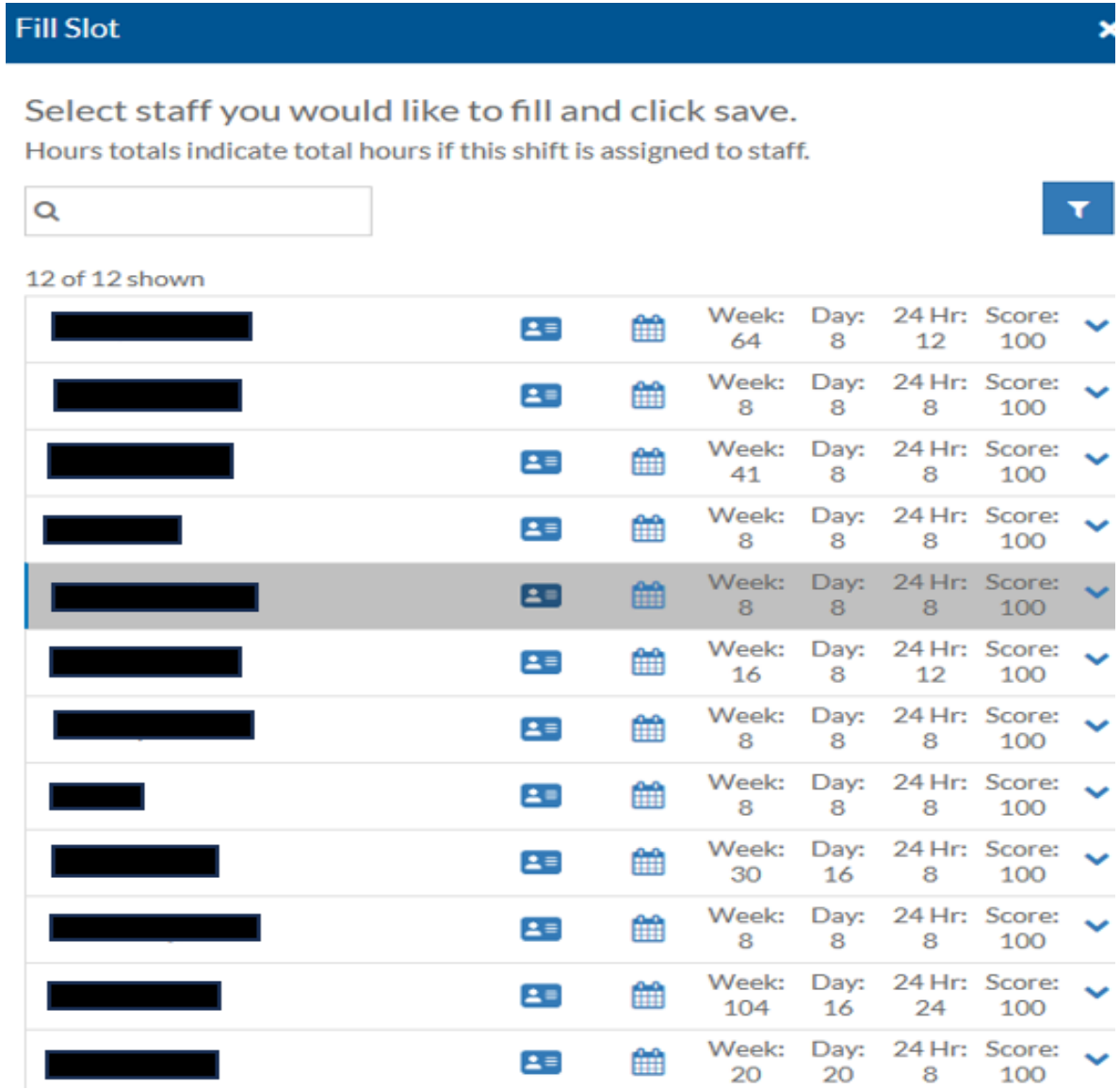
- Your screen will look similar to this. The Green boxes already have scheduled staff, the red box with the blue “O” is OPEN, and the Green box with the red “!” is a shift waiting for approval (a staff already requested to work this shift, and the shift is pending approval).

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**.”

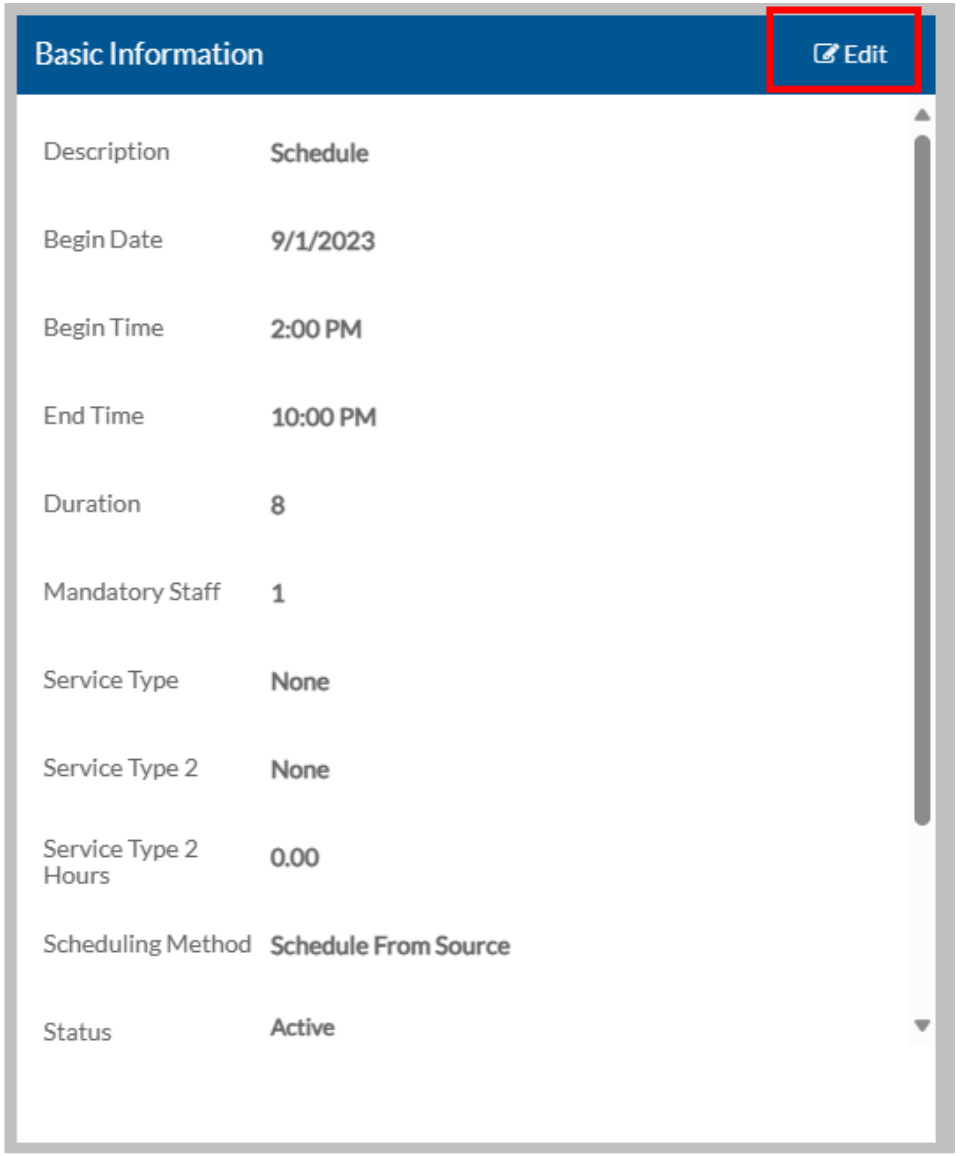
How to Manually Add a Staff to a Shift

- Now you can select that staff name.



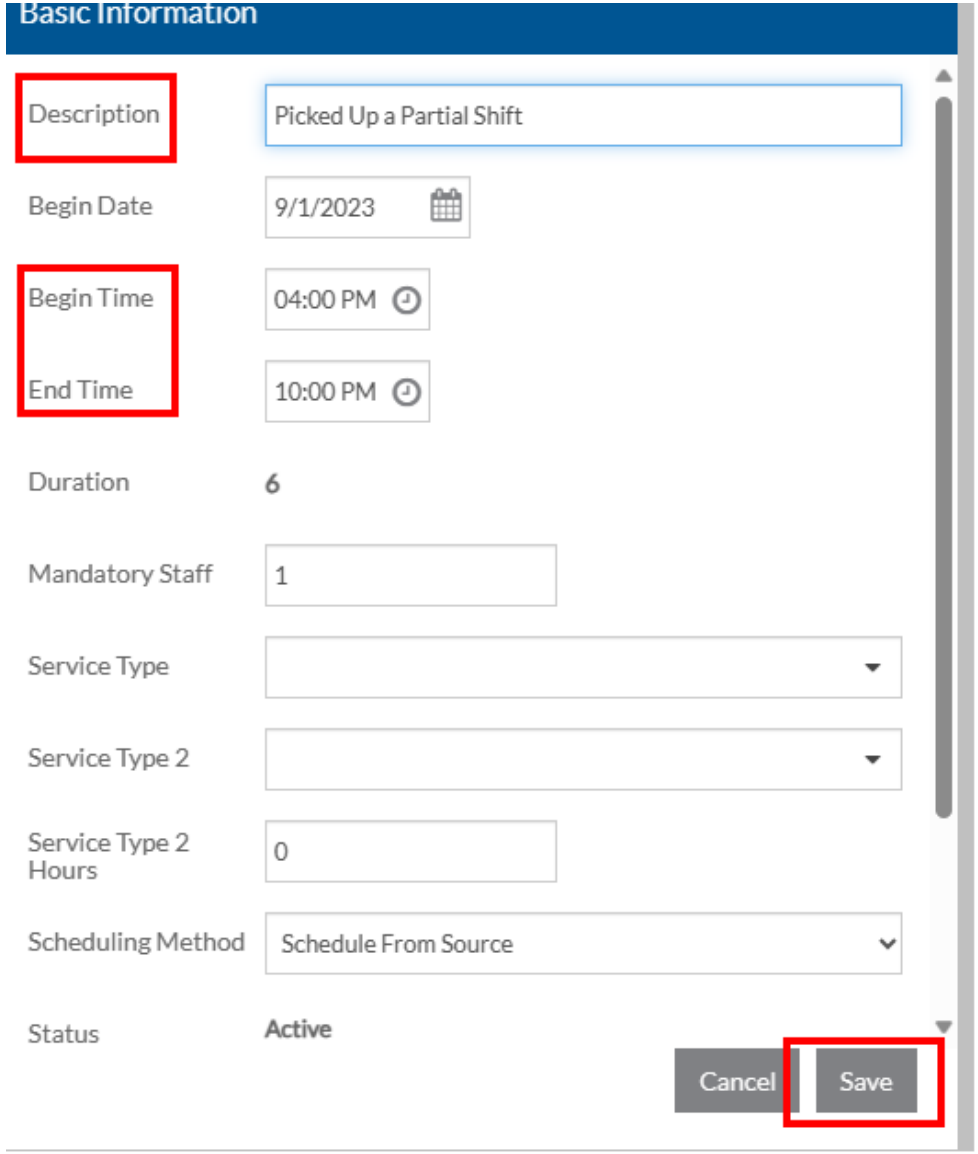
How to Manually Add a Staff to a Shift

- 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**.”



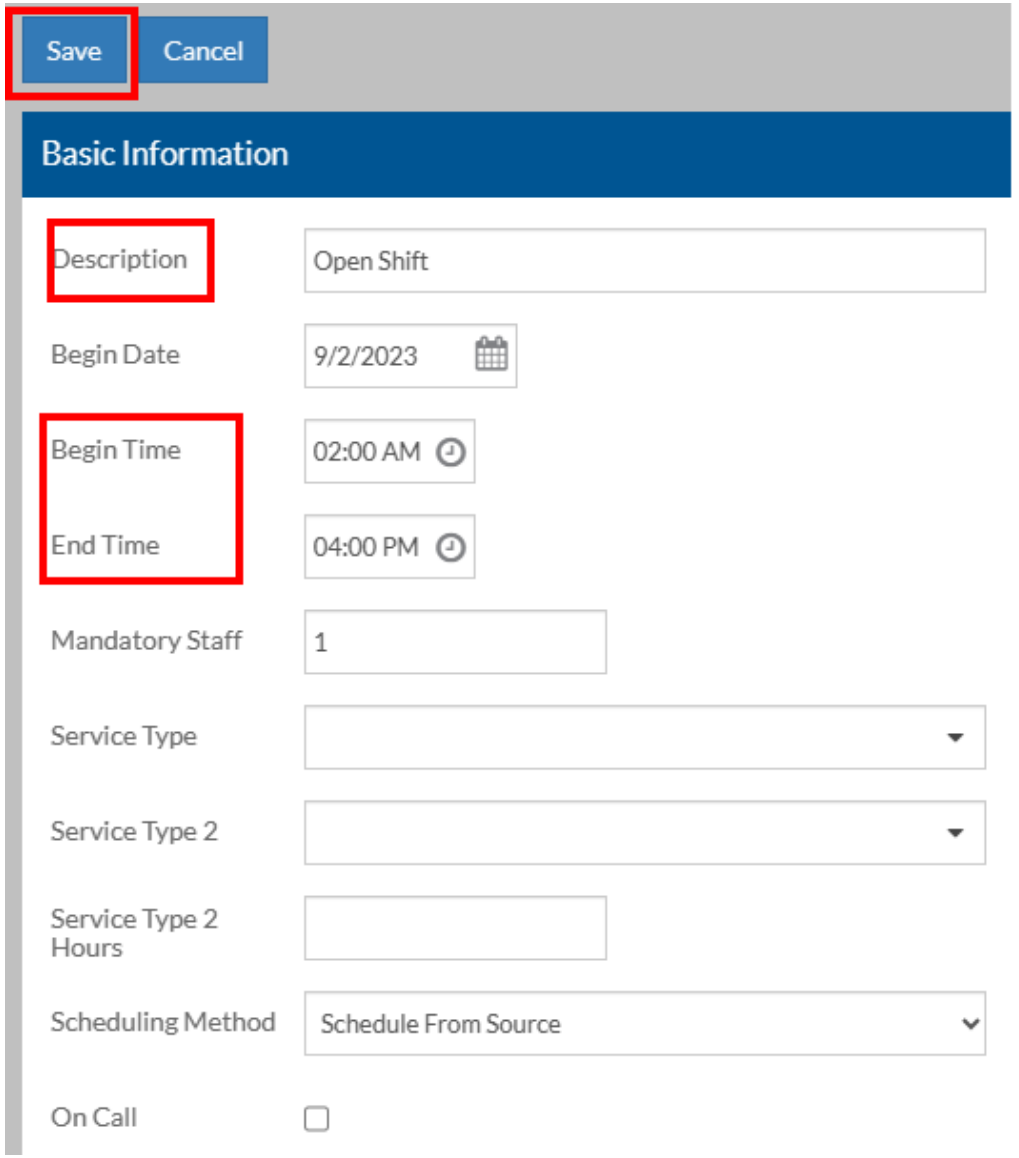
How to Manually Add a Staff to a Shift

- 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.



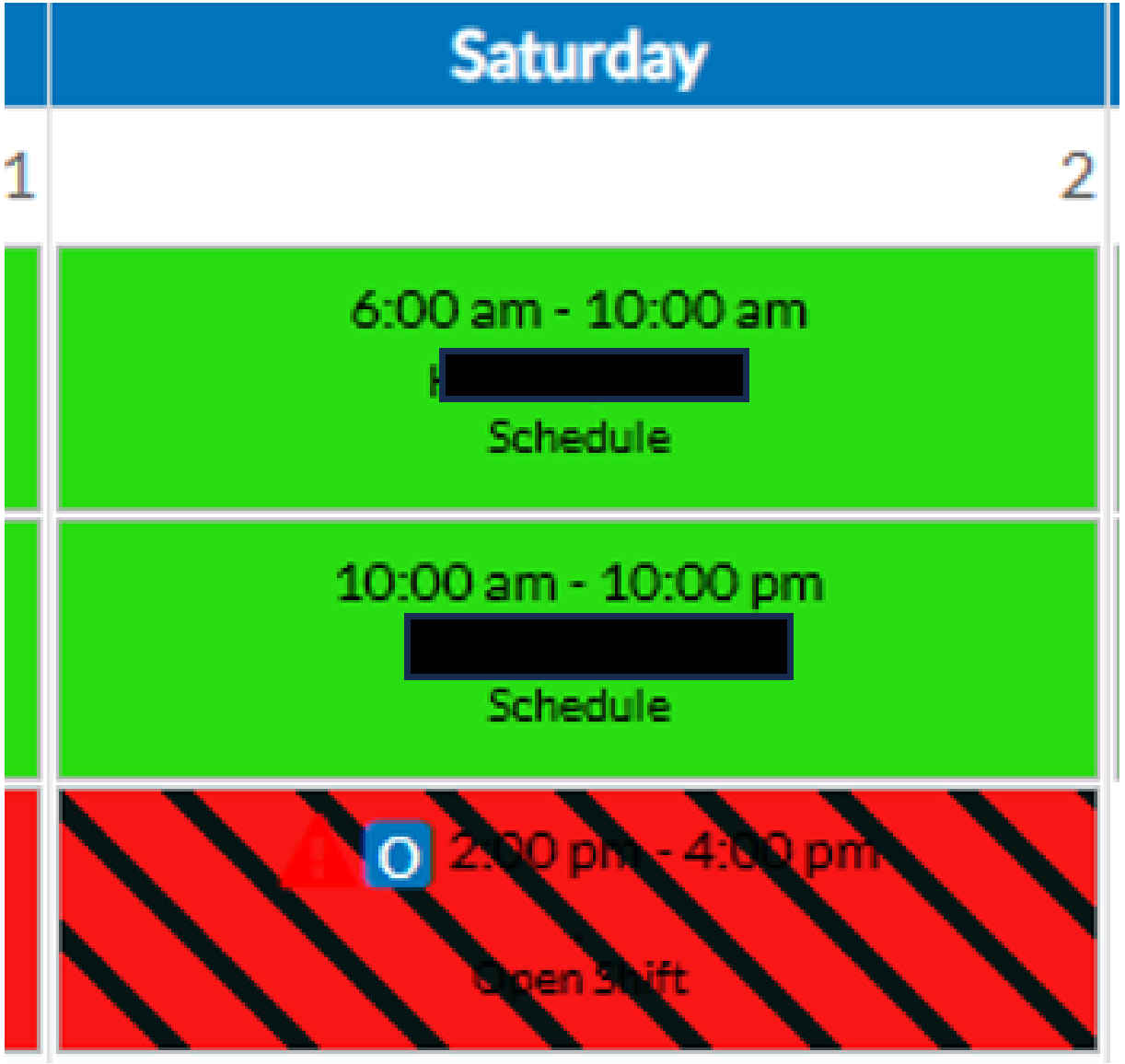
How to Manually Add a Staff to a Shift

- 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**."



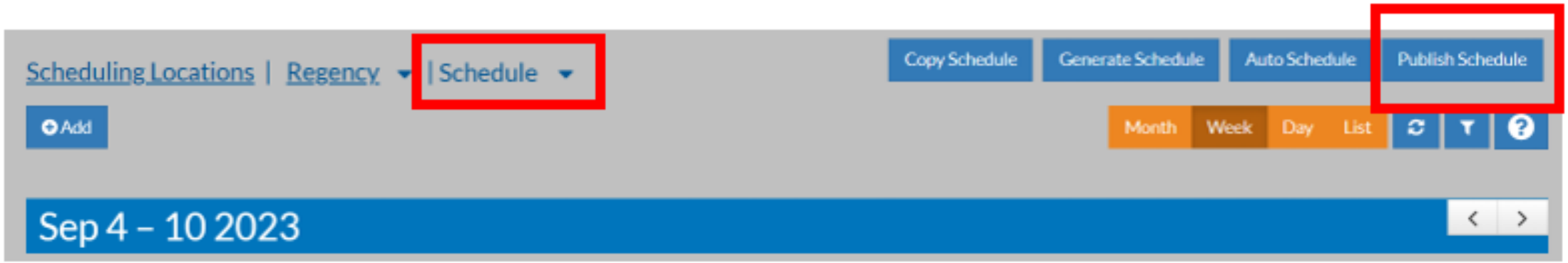
How to Manually Add a Staff to a Shift

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



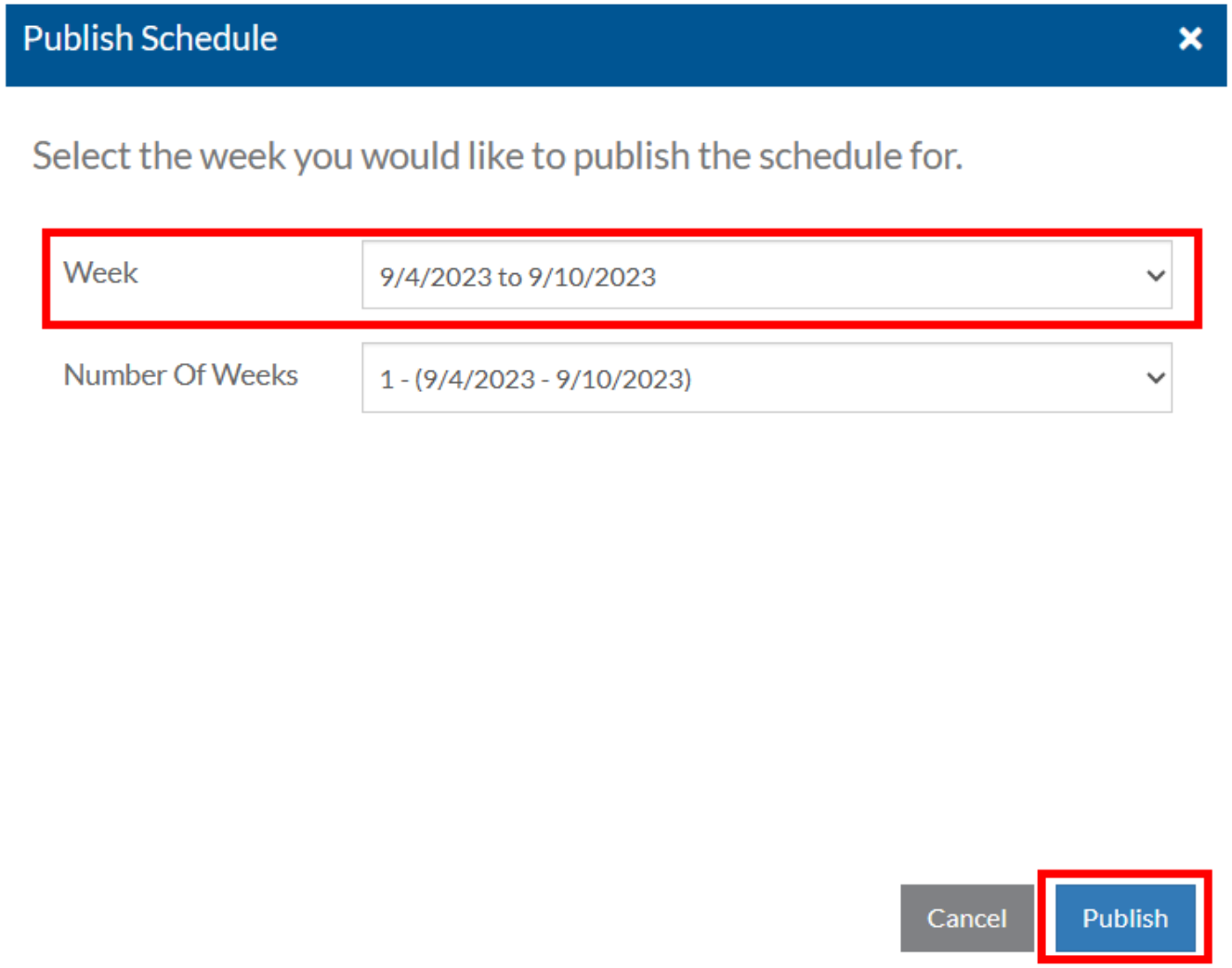
How to Manually Add a Staff to a Shift

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



How to Manually Add a Staff to a Shift

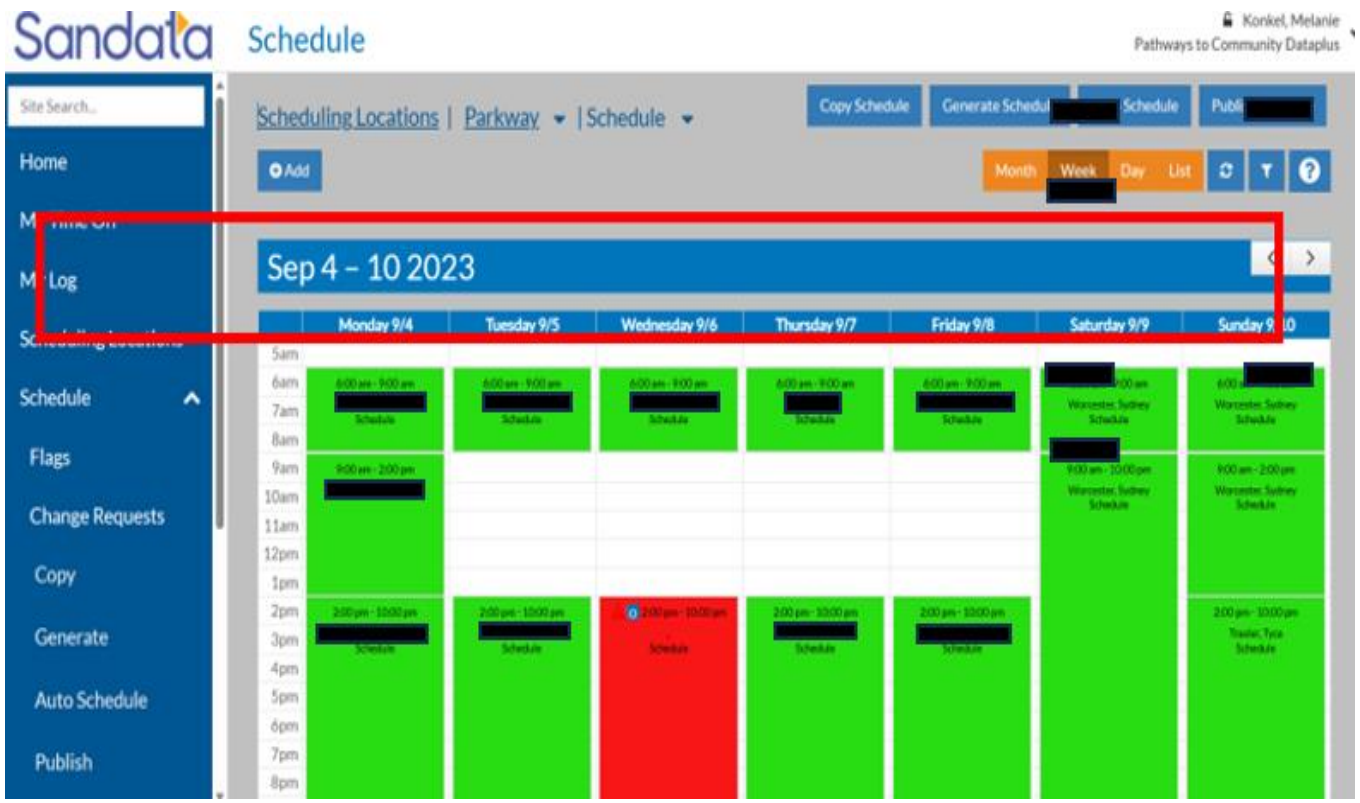
- A pop-up will now ask you to select the week you want to publish, so select the correct "**Week**", then click "**Publish**."
- You would not need to select "**Number of Weeks**" unless you are wanting to Publish changes you made for more than one week at a time.
- You have now posted an Open partial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



How to Inactivate a Shift

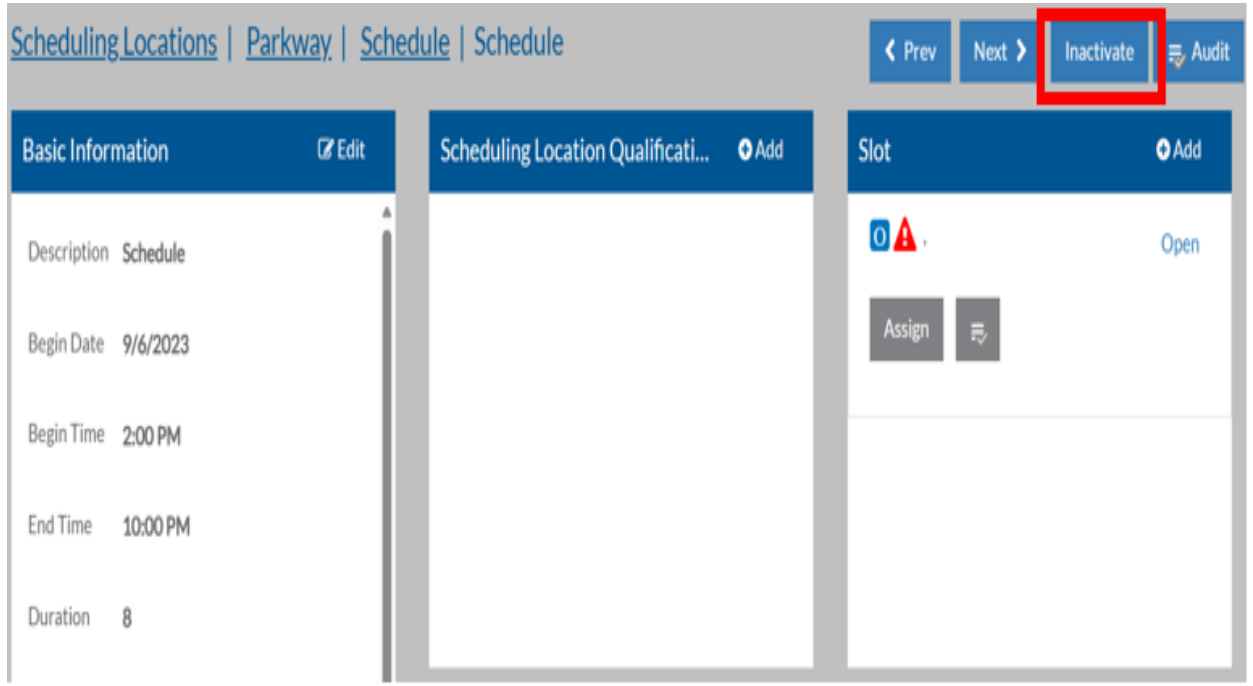
How to Inactivate a Shift

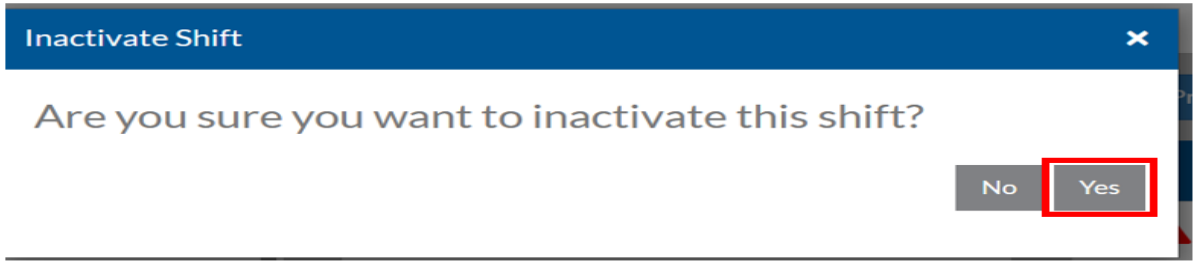
- If you need to inactivate a shift, for example, you made a mistake when creating a schedule or an individual will not be home and you don't need any staffing for a shift, follow these next few steps.
- Go to "**Scheduling Locations**," and select your **Site** you would like to make the change, and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



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.

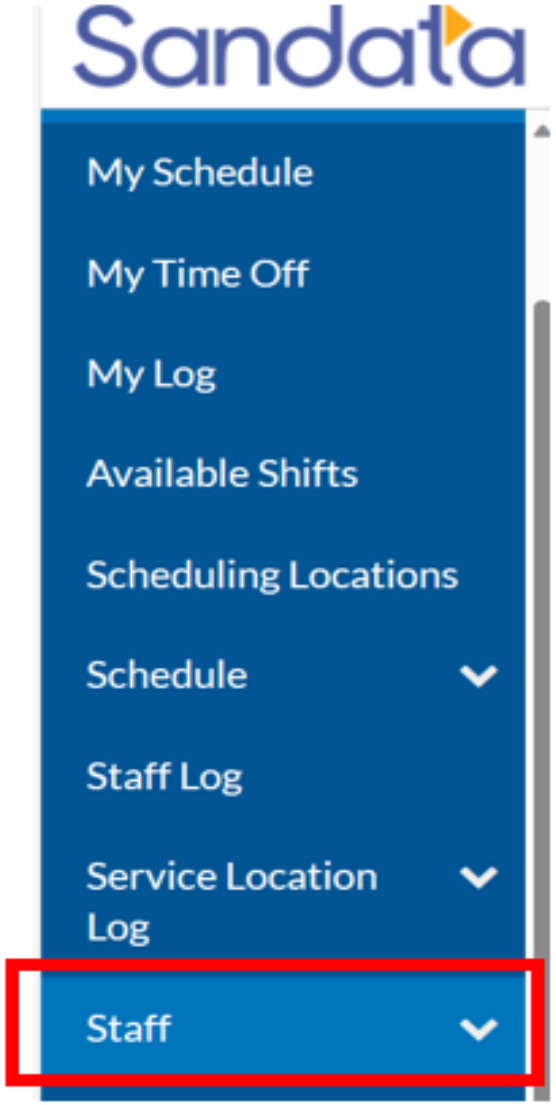




How to Remove Staff from Schedules for a Period of Time or Permanently

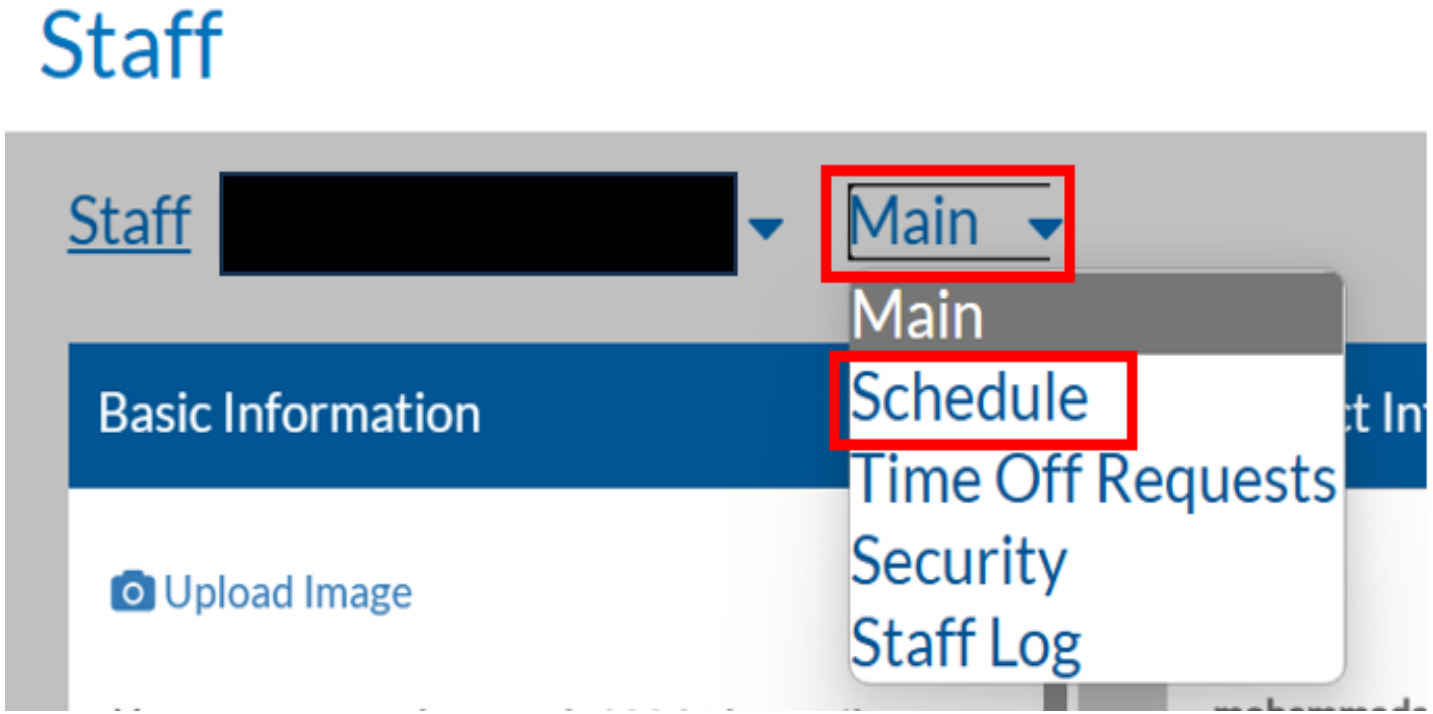
How to Remove Staff from Schedules for a Period of Time or Permanently

- 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**."



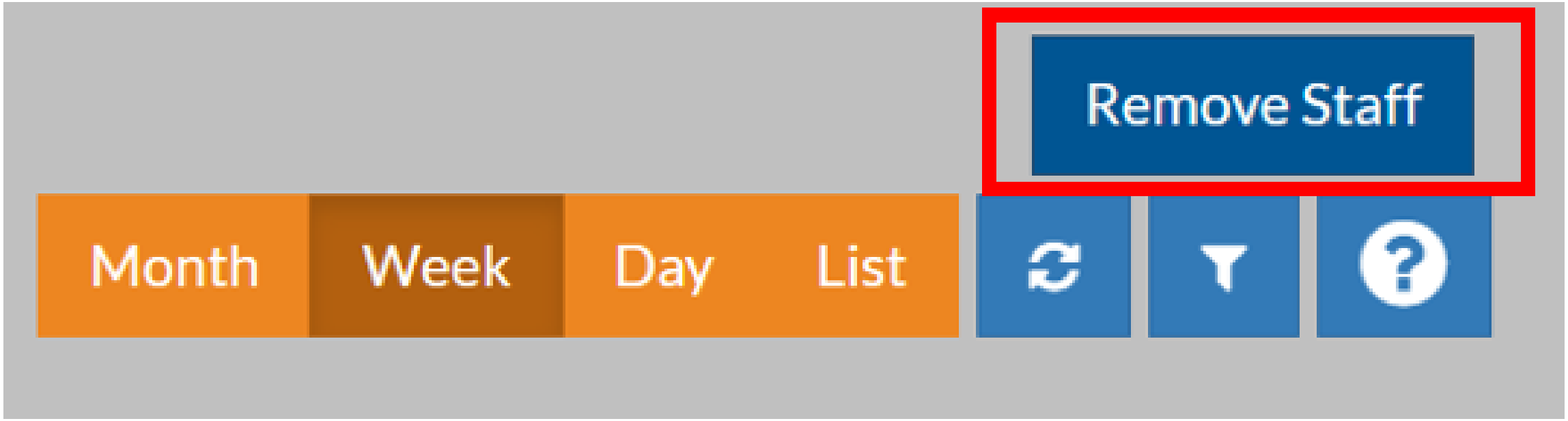
How to Remove Staff from Schedules for a Period of Time or Permanently

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



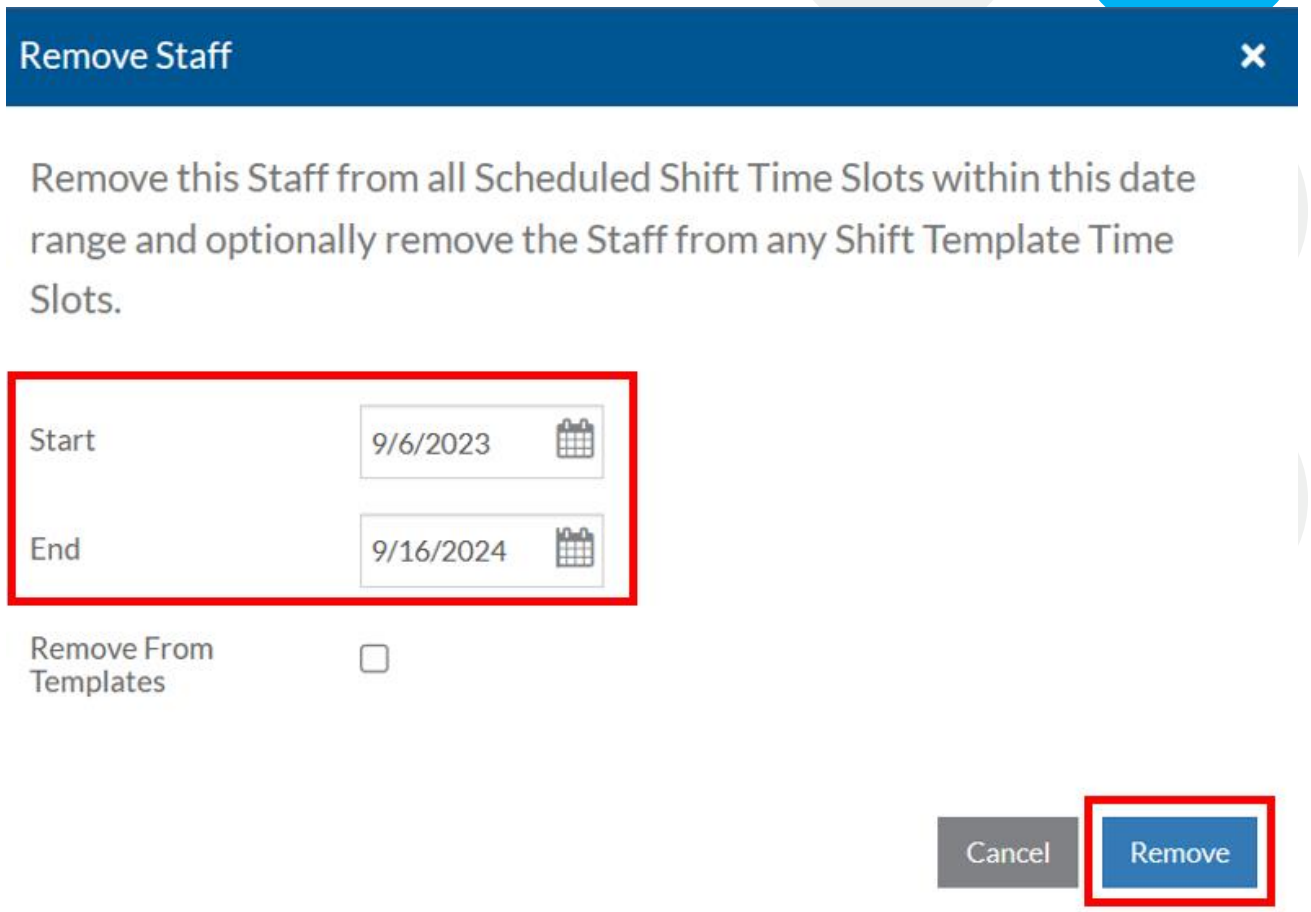
How to Remove Staff from Schedules for a Period of Time or Permanently

- 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**."



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.

Thank you for your Time!