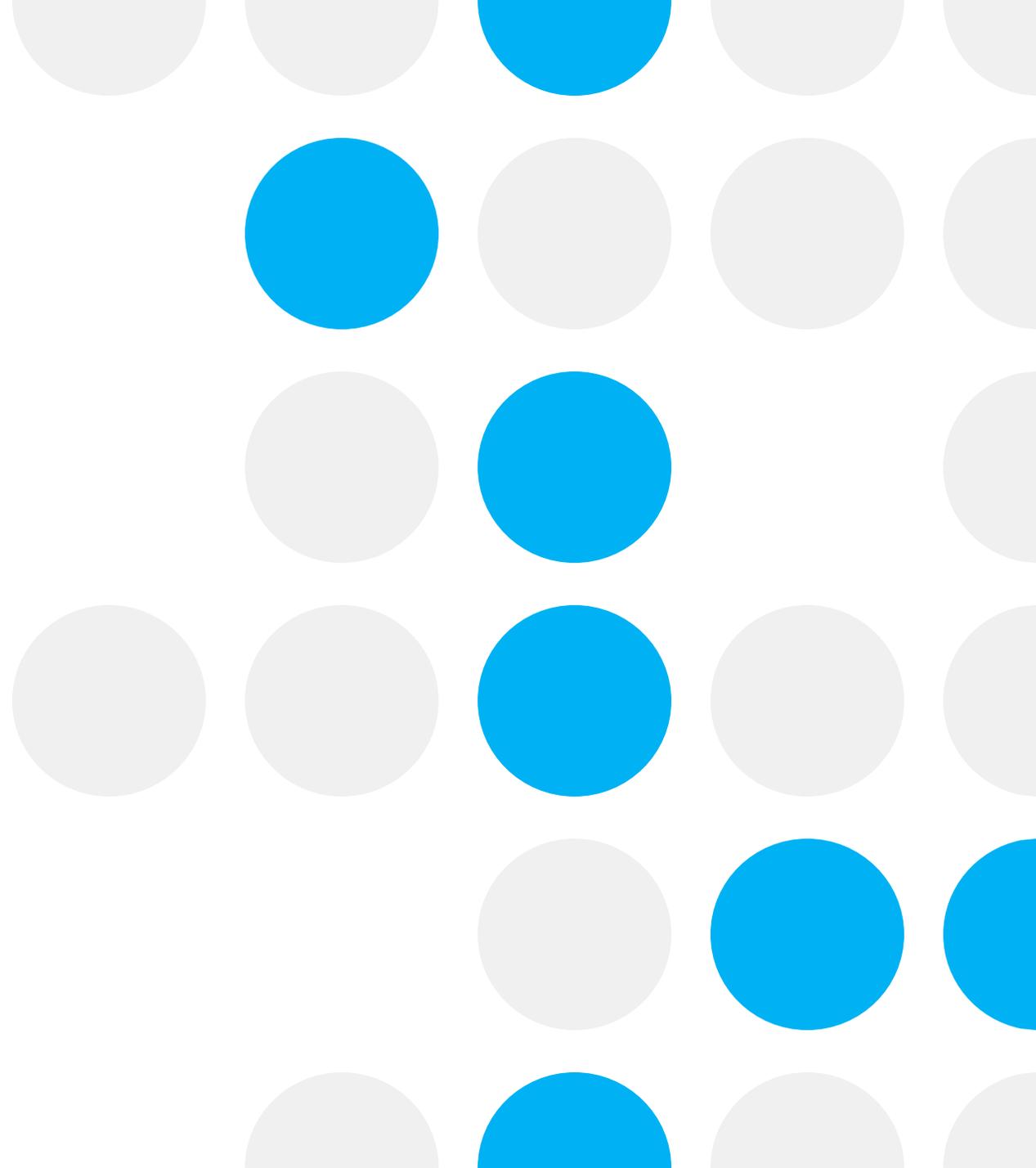


Pathways to Community Sandata Tutorial

Residential Supervisors
and Managers



Approving and Checking Timecard Process



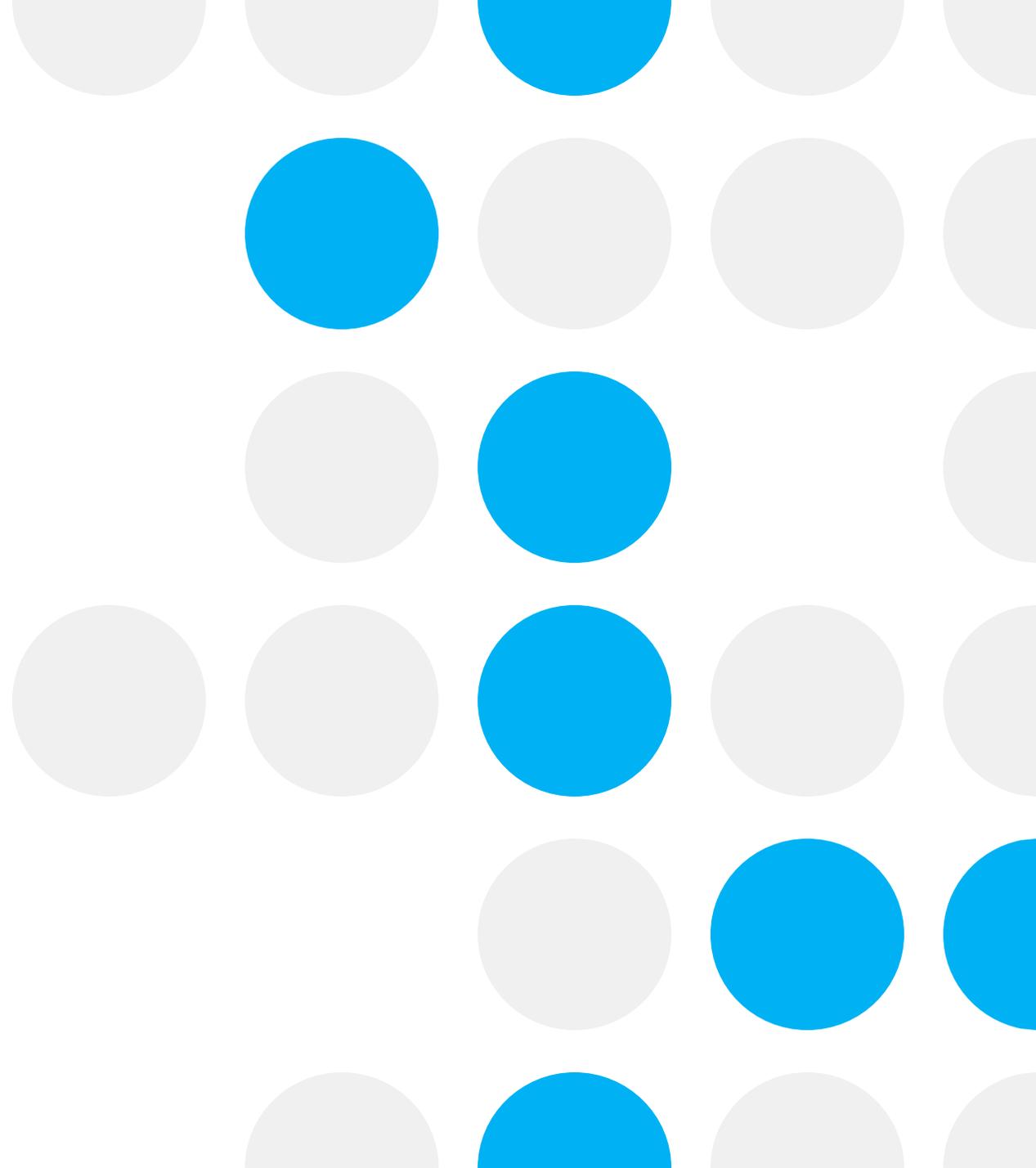
Approving and Checking Timecard Process



- **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.”**

The screenshot displays the Sandata application interface. At the top left is the Sandata logo, and at the top right is a 'Home' button. Below the logo is a search bar labeled 'Site Search...'. A vertical navigation menu on the left contains the following items: Home, My Schedule, My Time Off, My Log, Available Shifts, Scheduling Locations, Schedule (with a dropdown arrow), Staff Log, Service Location Log (highlighted with a red box and a dropdown arrow), Staff (with a dropdown arrow), Clients, Setup, and Reports. To the right of the navigation menu is a 'Time Logging' section with a dropdown arrow. Below this section are labels for 'Type', 'Location', 'Service', and 'Clients'. At the bottom right, there is a 'Satisfaction In' section with a line graph showing data points between 80 and 100.

Approving Timecards – Direct Care Shifts



- Your screen should look similar to this.

Site Search... T ↻ Q ?

Managed Service Locations Current

1 to 1	ADS Transportation	Afton Road
08/07/2023-08/13/2023 Paid Hours 96.52 Worked Hours 96.52 Non-Worked Hours 0.00 Unpaid Breaks 0.00 Paid Miles 447 Company Miles 0	08/07/2023-08/13/2023 Paid Hours 0.00 Worked Hours 0.00 Non-Worked Hours 0.00 Unpaid Breaks 0.00 Paid Miles 0 Company Miles 0	08/07/2023-08/13/2023 Paid Hours 6.12 Worked Hours 6.12 Non-Worked Hours 0.00 Unpaid Breaks 0.00 Paid Miles 0 Company Miles 0
Afton Road Overnights	Champlin 1	Champlin 2
08/07/2023-08/13/2023 Paid Hours 0.00 Worked Hours 0.00 Non-Worked Hours 0.00 Unpaid Breaks 0.00	08/07/2023-08/13/2023 Paid Hours 15.57 Worked Hours 15.57 Non-Worked Hours 0.00 Unpaid Breaks 0.00	08/07/2023-08/13/2023 Paid Hours 38.12 Worked Hours 38.12 Non-Worked Hours 0.00 Unpaid Breaks 0.00

[Home](#)
[My Schedule](#)
[My Time Off](#)
[My Log](#)
[Available Shifts](#)
[Scheduling Locations](#)
[Schedule](#) ▼
[Staff Log](#)
[Service Location Log](#) ▲
[View Transactions](#)

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

CRSDAILY ANBOURG JOCUNDY SELINDSAY KETHOMA203

CRSDAILY ANBOURG JOCUNDY SELINDSAY KETHOMA203

CRSDAILY

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	 
3	CRSDAILY
4	ANBOURG
5	JOCUNDY
6	SELINDSAY
7	KETHOMA203
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).

The screenshot displays a software interface for managing timecards. The top section, titled 'Hours', includes navigation arrows, a 'Recheck Flags' button, and a 'Void' button. Below this is the 'Hours Info' section, which contains a table of details:

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

An 'Edit' button is located to the right of the 'Hours Info' section. The 'Clients' section on the right features a search bar, a list of names (Bourgoin, Anthony; Cundy, John; Lindsay, Sean; Thomas, Kevin), and a 'Guest' button. Below the client list, the 'Transaction ID' is 128835. The 'Flags' section shows a yellow diamond icon and the message 'Transaction has been reviewed/updated, and is waiting for approval', with an 'Acknowledge All' button and an 'Acknowledge' link. The 'Notes' section at the bottom has an 'Add Note' button.

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.”**

The screenshot displays a user interface for managing timecards. At the top, the word "Status" is followed by a green circle and a checkmark icon. Below this is a blue header bar with a group of people icon and the word "Hours", and a close button (X) on the right. A dropdown menu is open, showing a clipboard icon and the text "(Ctrl)". Below the header bar, there are navigation arrows (left and right) and three buttons: "Recheck Flags" (grey), "Void" (blue), and "Approve" (blue with a checkmark icon). The "Approve" button is highlighted with a red rectangular box. Below the buttons is a section labeled "Hours Info" with an "Edit" button (grey with a pencil icon).

Approving Timecards – Direct Care Shifts



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

Status

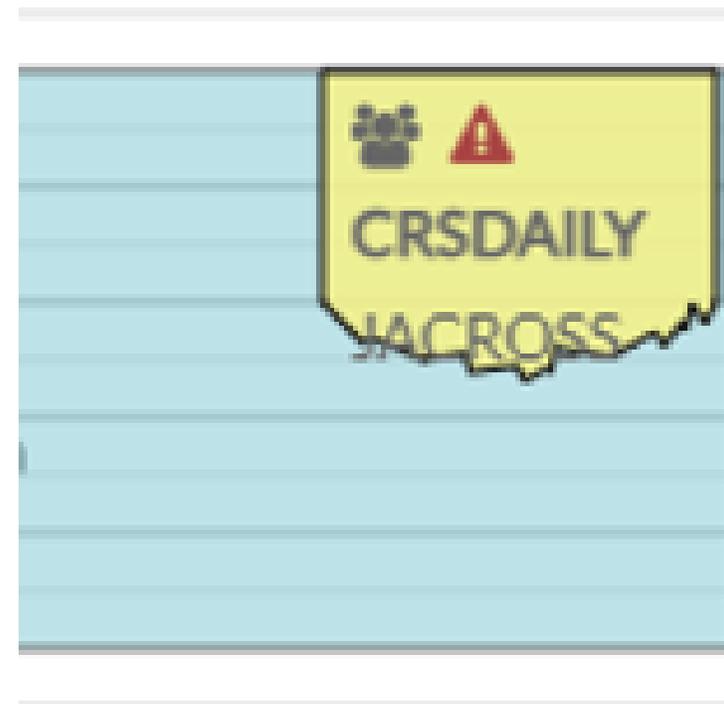


2	  
3	CRSDAILY
4	ANBOURG
5	JOCUNDY
6	SELINDSAY
7	KETHOMA203
8	
9	
0	

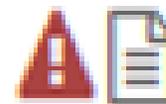
Approving Timecards – Direct Care Shifts



- 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.

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

The screenshot shows the 'Hours' application interface. At the top, there is a blue header with the title 'Hours' and a close button. Below the header, there are navigation arrows and two buttons: 'Recheck Flags' and 'Void'. The 'Hours Info' section contains a table with the following data:

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

Below the 'Hours Info' section, there is a 'Clients' section with a search bar and a list of clients. The search bar contains the text 'Q'. The list of clients includes:

- Bourgoin, Anthony
- Cundy, John
- Lindsay, Sean

The 'Edit' button in the top right corner of the 'Hours Info' section is highlighted with a red box.

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

All Clear

Bourgoin, Anthony
Cundy, John
Lindsay, Sean
Thomas, Kevin

Transaction ID **128835**

Notes Insert Template

Approving Timecards – Direct Care Shifts

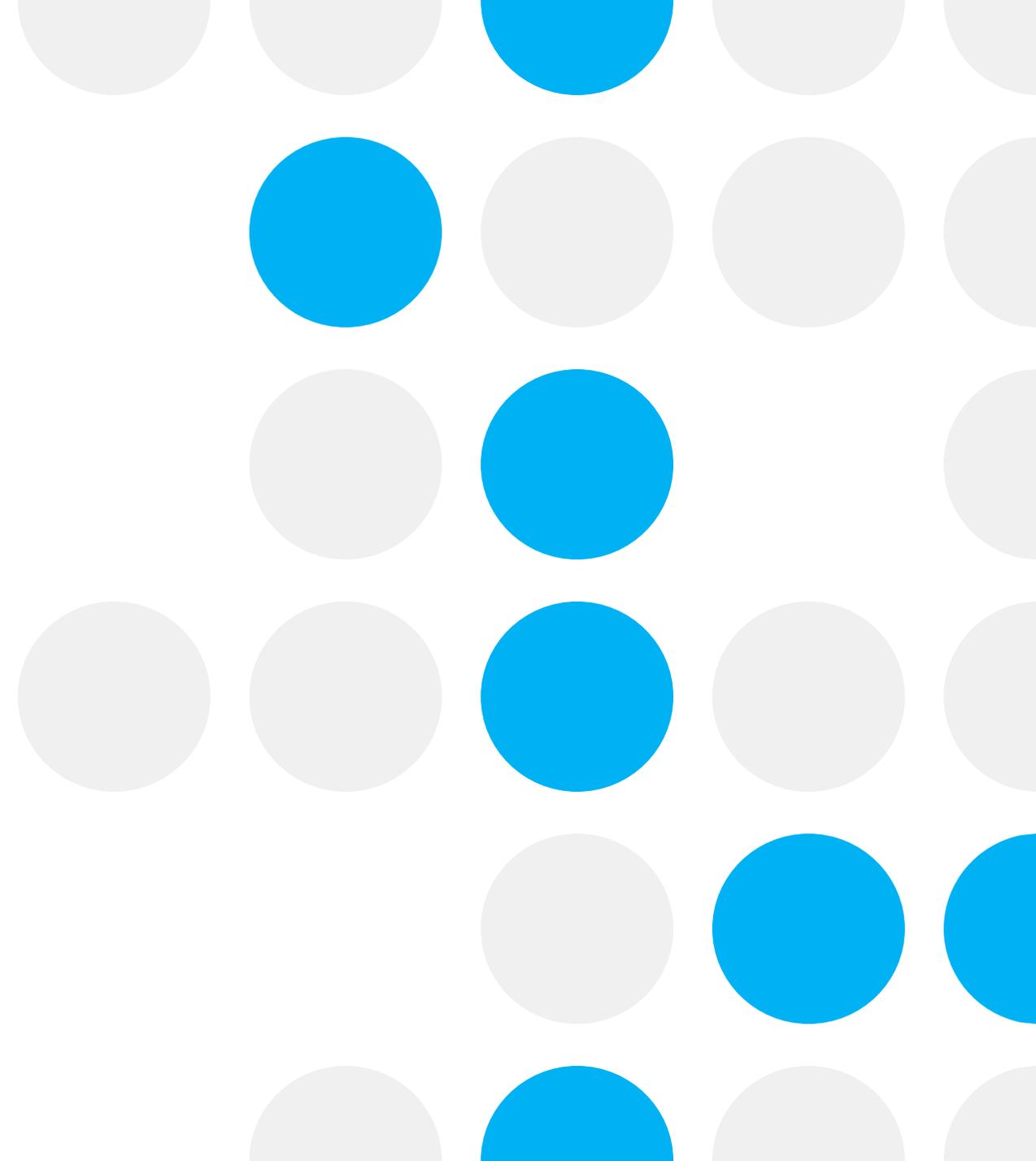


- Once you have entered in your Note, click “**Save.**” You can now finish approving this timecard.

Notes Insert Template

Added Missing Individual--AnBo|

Tips for Viewing the Service Location Log



Tips for Viewing the Service Location Log



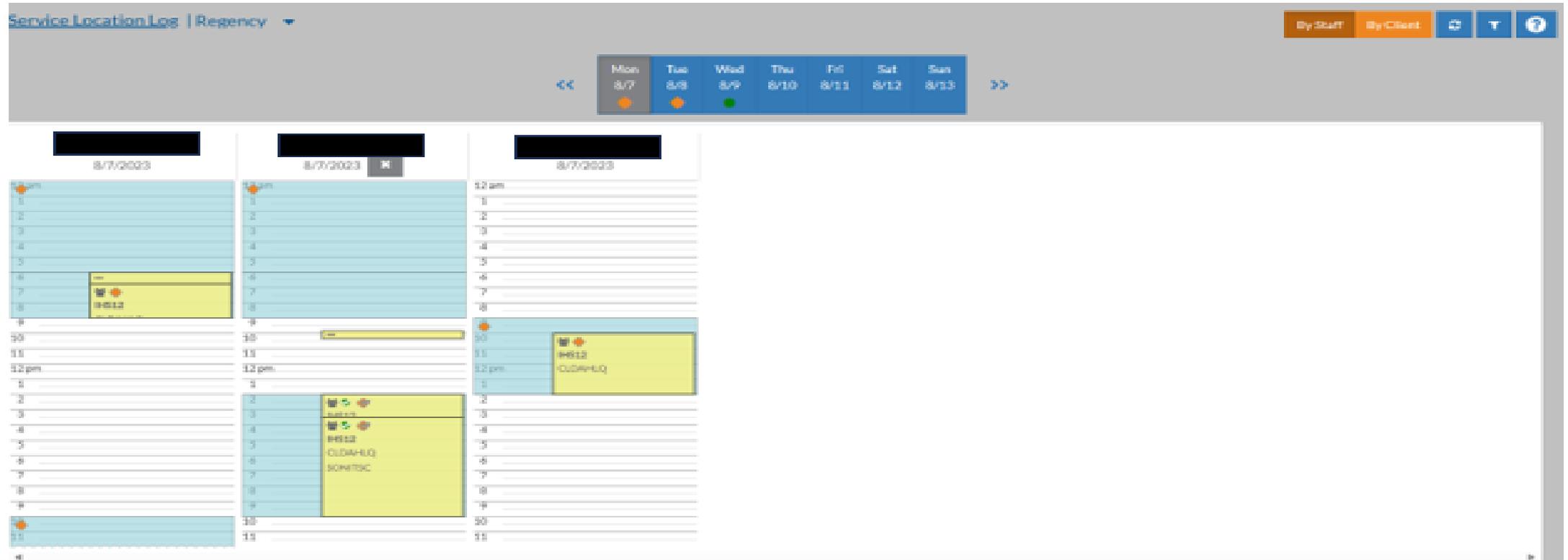
- There are two ways to filter in the Service Location Log—**By Staff** or **By Client**



Tips for Viewing the Service Location Log



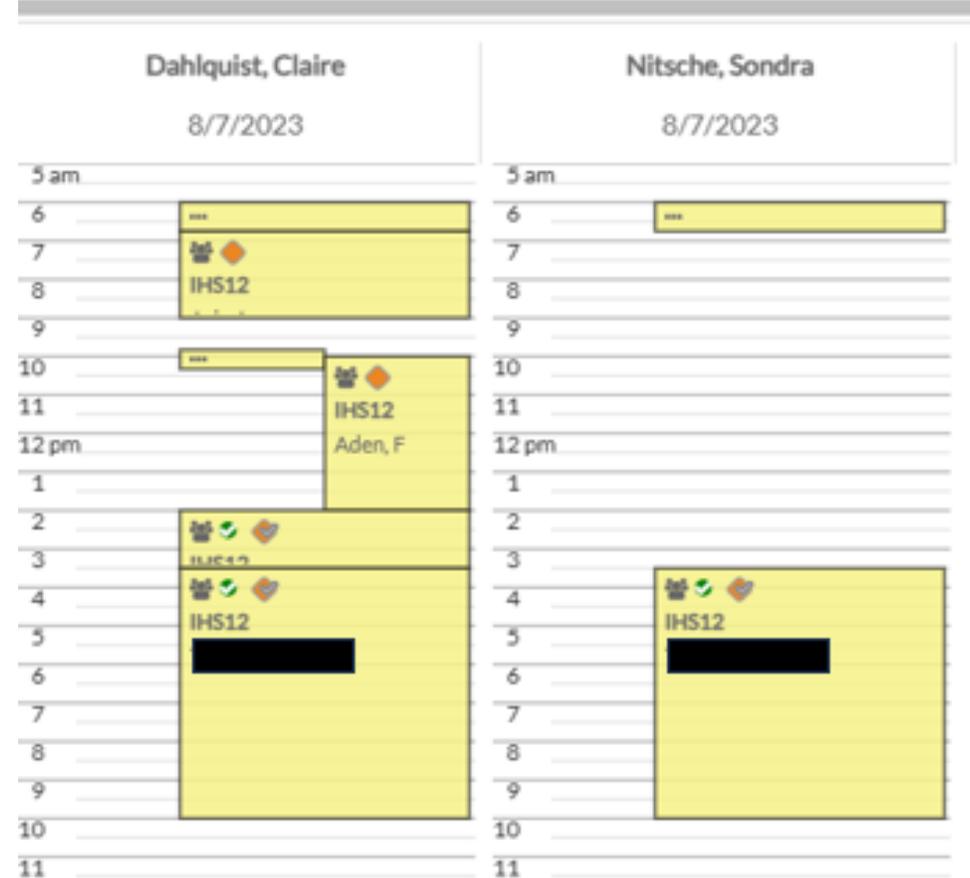
- If you view **By Staff**, you will see all the timecards laid out according to each Staff's time log and schedule. This is a great way to make sure all staff time logs are accounted for.



Tips for Viewing the Service Location Log



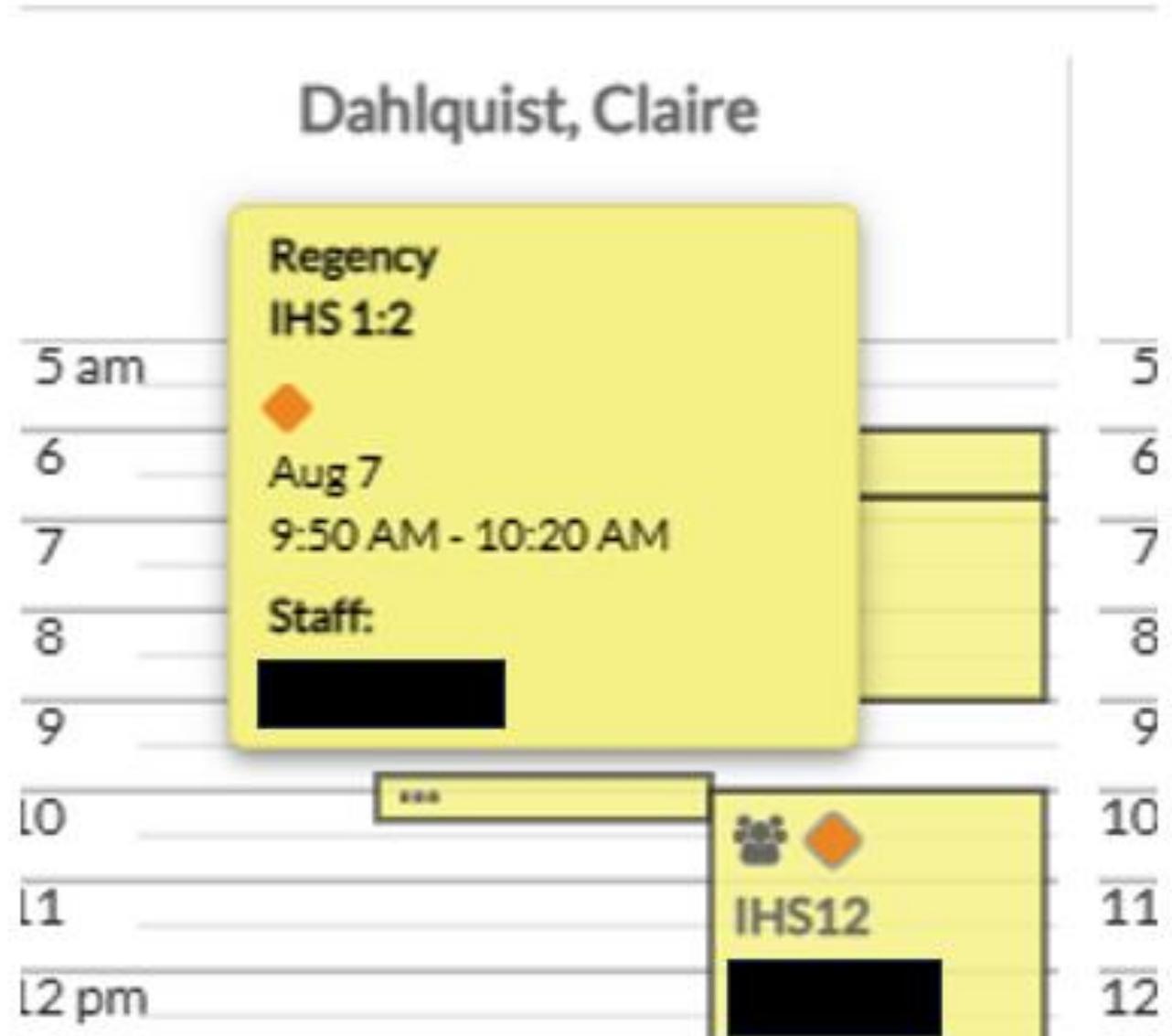
- If you view **By Client**, you will see all the timecards displayed according to each Individual's time that the staff logged in with them. This is very helpful when trying to see if individuals were not home/on leave, if individuals were overlapped, if staff didn't work with them, or even if someone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



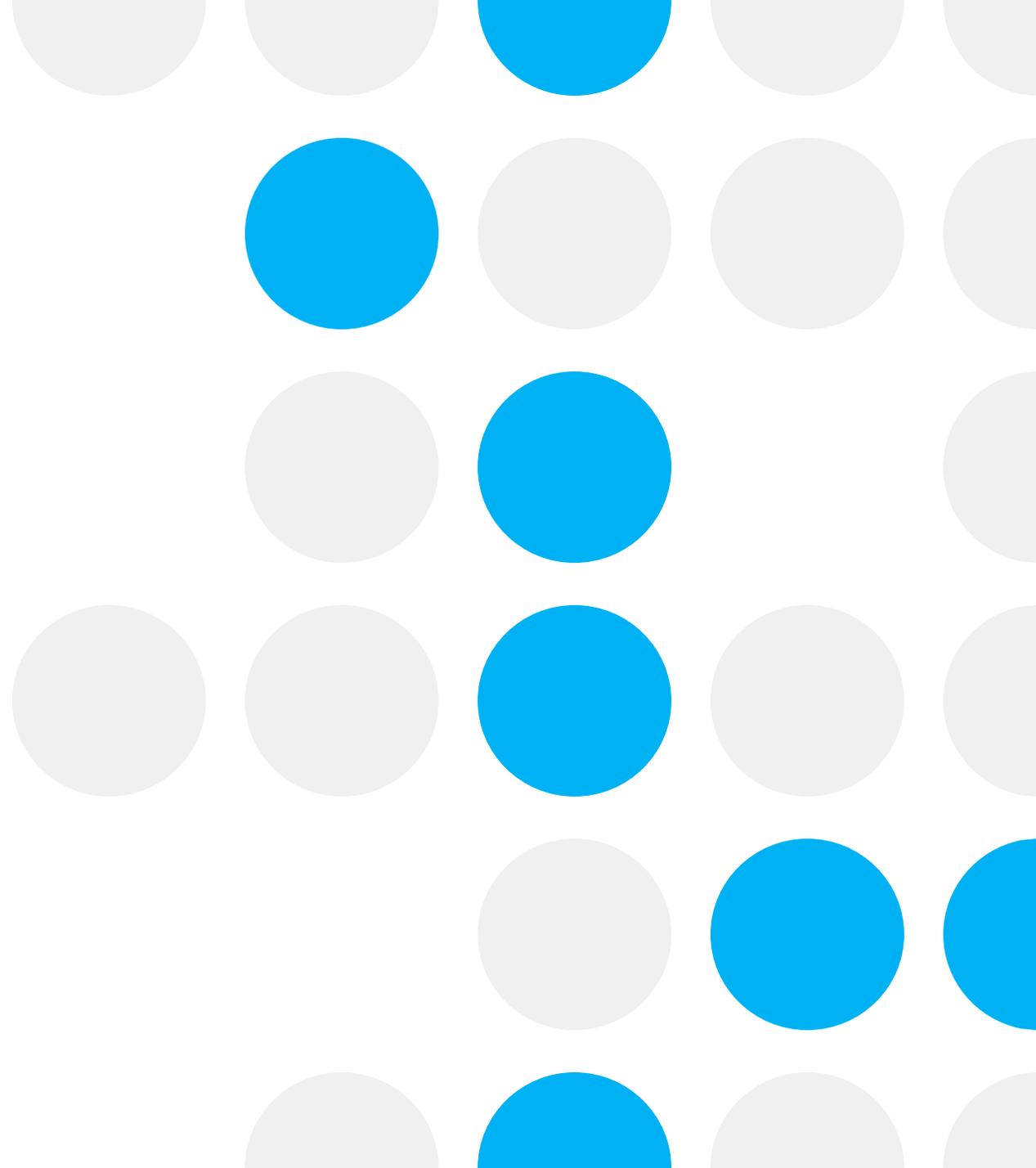
Tips for Viewing the Service Location Log



- 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



- 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.
-

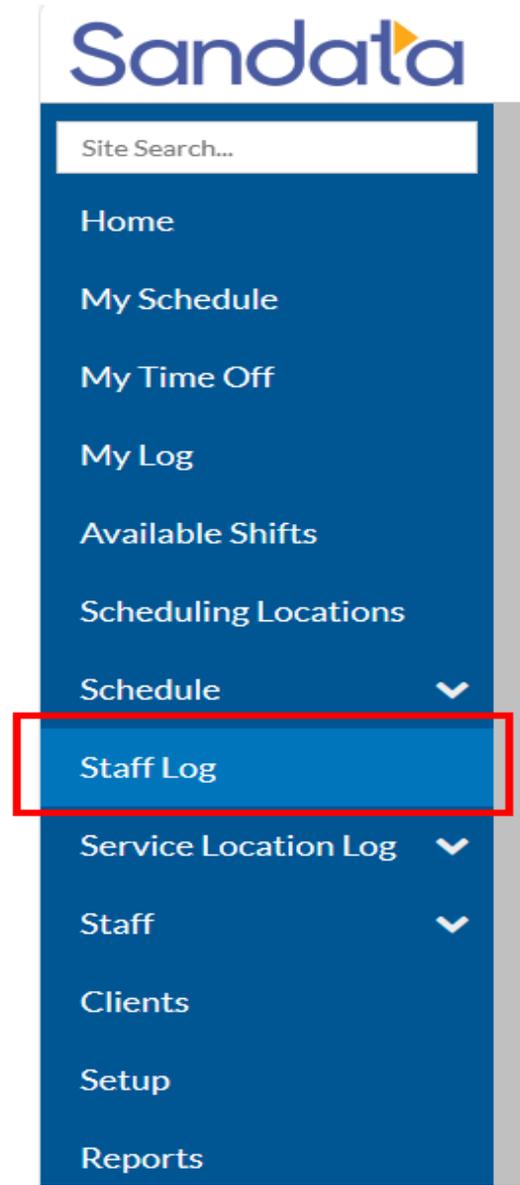
Approving Timecards – Non-Direct Care and Training Shifts



Approving Timecards – Non-Direct Care and Training Shifts



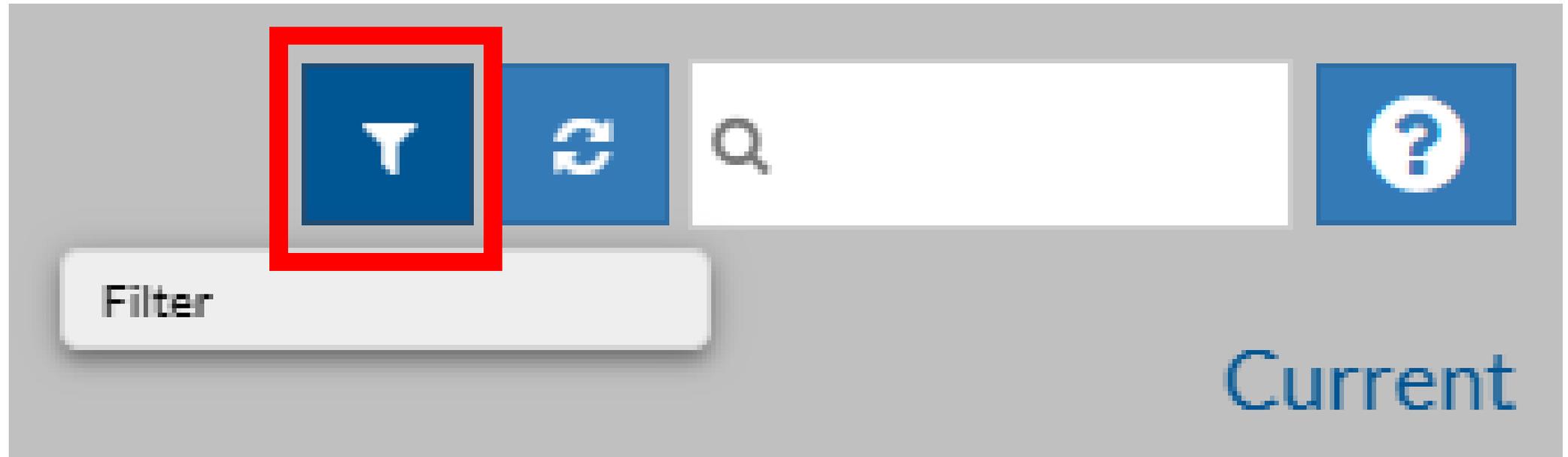
- After you finish viewing/approving Time Logs under the Service Location Log, you will now want to start viewing **Staff Logs**. This will allow you to see any Admin/Training/Non-Direct Care shifts that will NOT show up on Service Location Logs. Click on “**Staff Log.**”



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 mobile application interface with a list of filter options. A red rectangular box highlights the first two options: 'To Do' and 'Current Week'. The 'To Do' option is described as 'Shows Staff data that needs approved or contains flags.' The 'Current Week' option is described as 'Shows Current Staff data to keep up on what is going on this week.' Below these are '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.), and 'EVV To Do' (Shows EVV data that needs addressed/resubmitted.). At the bottom, there is a date '8/13/2' and a label 'Manager Type'.

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

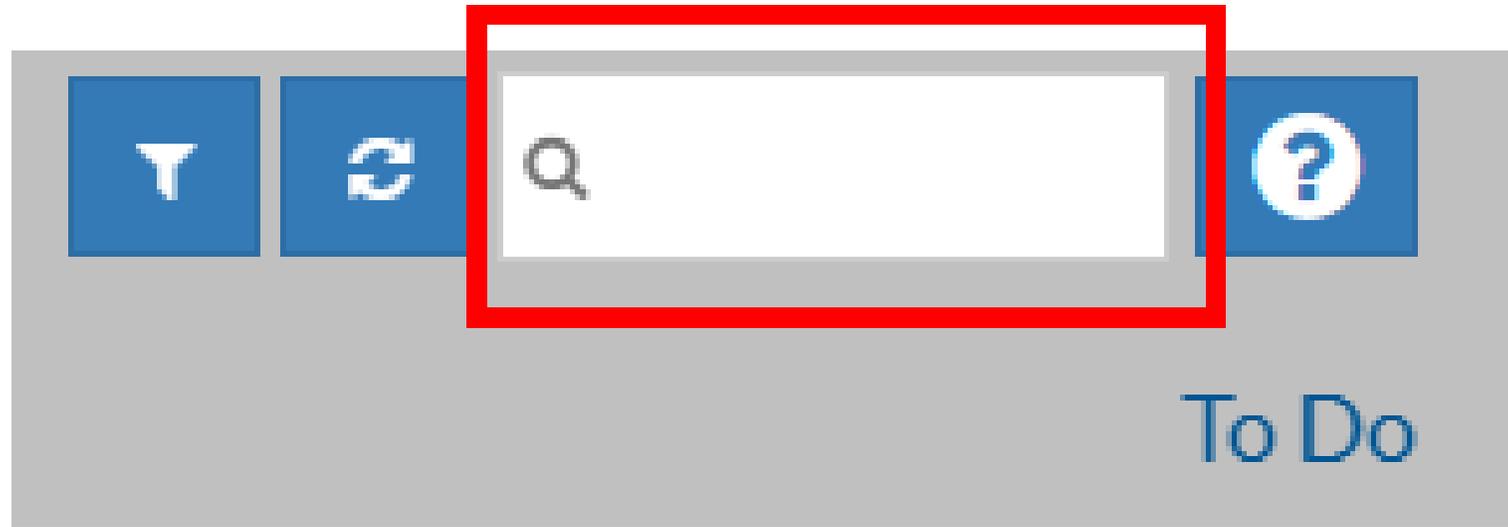
Staff Name	Period	Issues need to be resolved
[Redacted]	08/07/2023-08/13/2023	15.00
[Redacted]	08/07/2023-08/13/2023	19.00
[Redacted]	08/07/2023-08/13/2023	12.33
[Redacted]	08/07/2023-08/13/2023	21.00
[Redacted]	08/07/2023-08/13/2023	4.00
[Redacted]	08/07/2023-08/13/2023	13.40

The screenshot displays a grid of six timecard summary cards for 'Managed Staff'. Each card shows a list of metrics for a specific staff member (name redacted) over the period 08/07/2023-08/13/2023. The metrics include Paid Hours, Worked Hours, Non-Worked Hours, Unpaid Breaks, Paid Miles, Company Miles, and Expenses. A status indicator 'Issues need to be resolved' is present on each card, with a red diamond icon indicating the number of unresolved issues. The top right of the interface includes navigation icons (back, forward, search) and a 'To Do' link.

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.

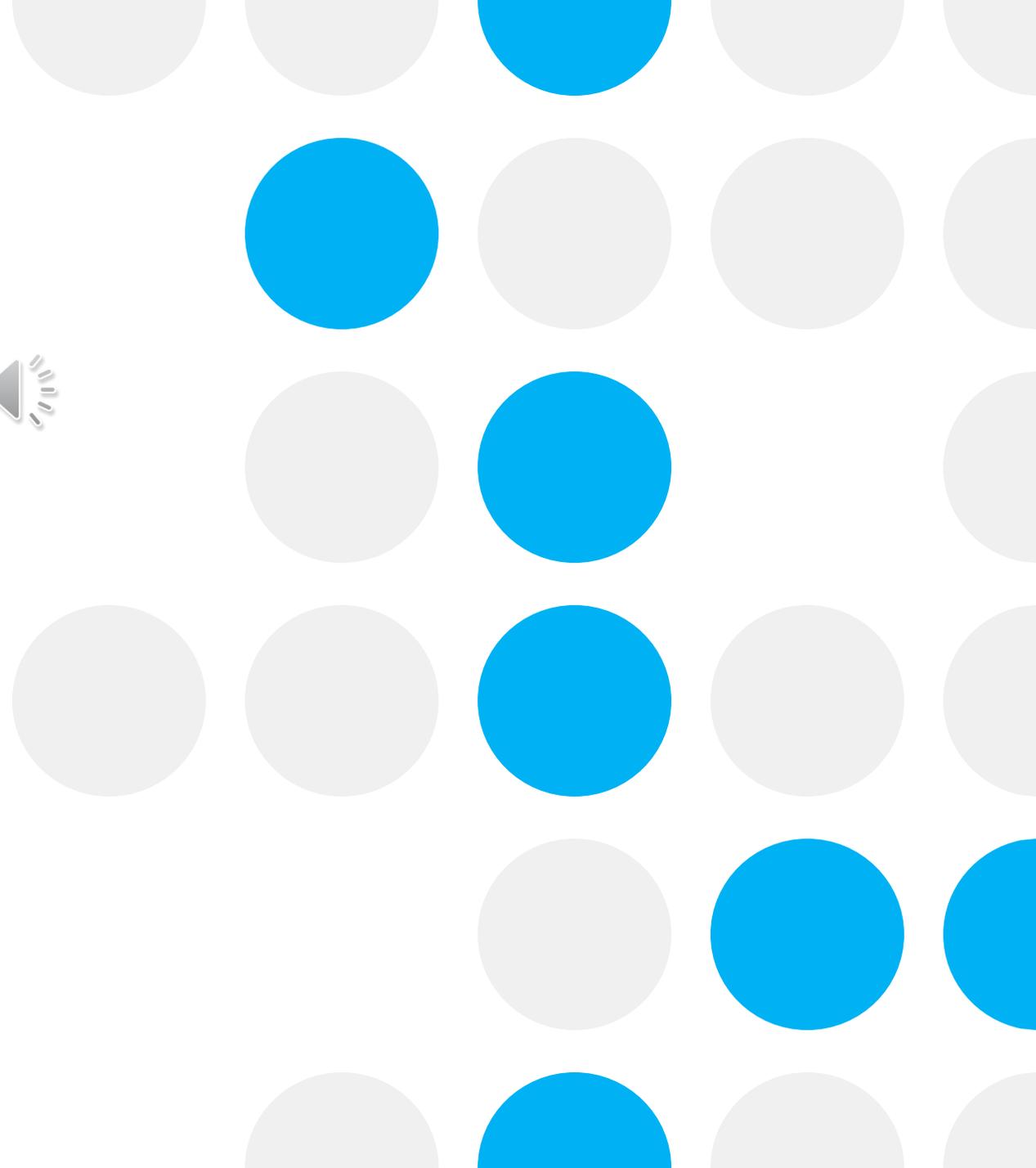


Approving Timecards – Non-Direct Care and Training Shifts



- 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.
-

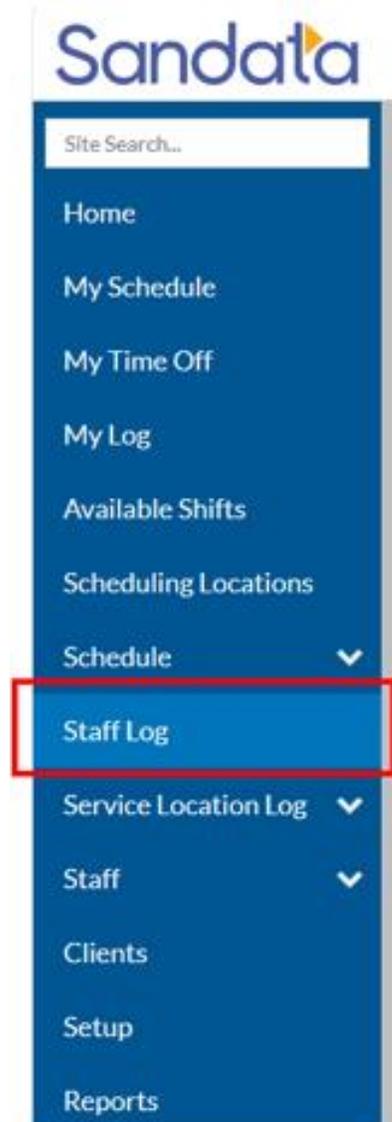
Approving Mileage Logs



Approving Mileage Logs

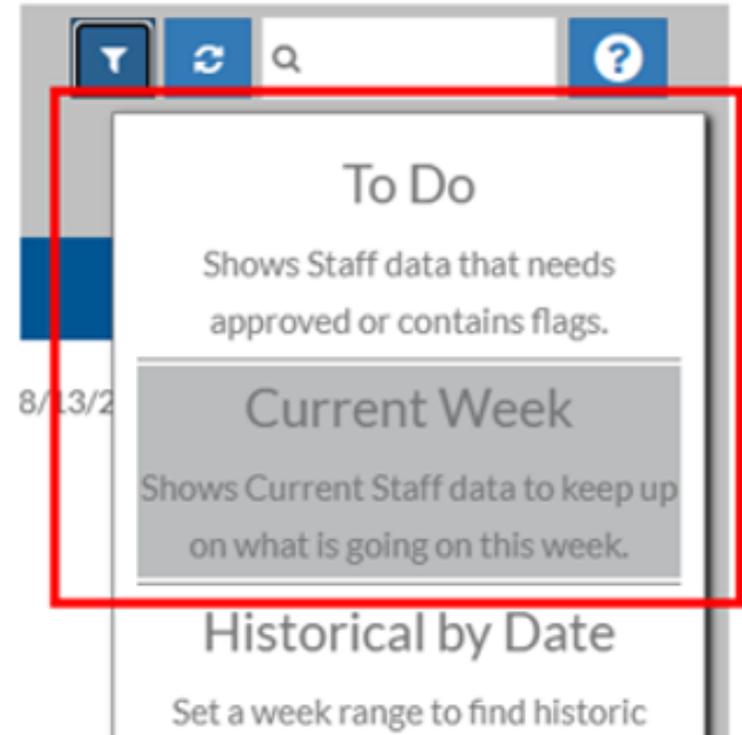
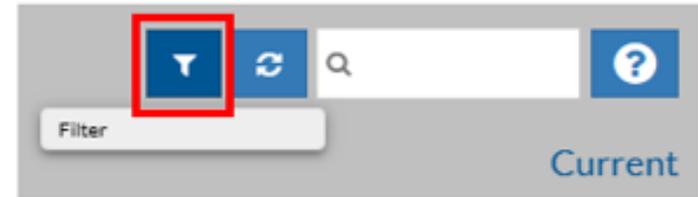


- In order to approve Staff Mileage Logs, you need to view the **Staff Log**.



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
<input type="checkbox"/>			Date	Description	Type	Vehicle	Clients	Begin	End	Miles	
<input type="checkbox"/>			8/7/2023	First Ave 3945 - Transportation Mileage	Odometer Begin/End	Personal	RYVANHUYEN	115416	115443	27	Actions
<input type="checkbox"/>			8/7/2023	First Ave 3945 - Transportation Mileage	Odometer Begin/End	Personal	RYVANHUYEN	115416	115443	27	Actions
<input type="checkbox"/>			8/8/2023	First Ave 3945 - Transportation Mileage	Odometer Begin/End	Personal	RYVANHUYEN	115459	115505	46	Actions

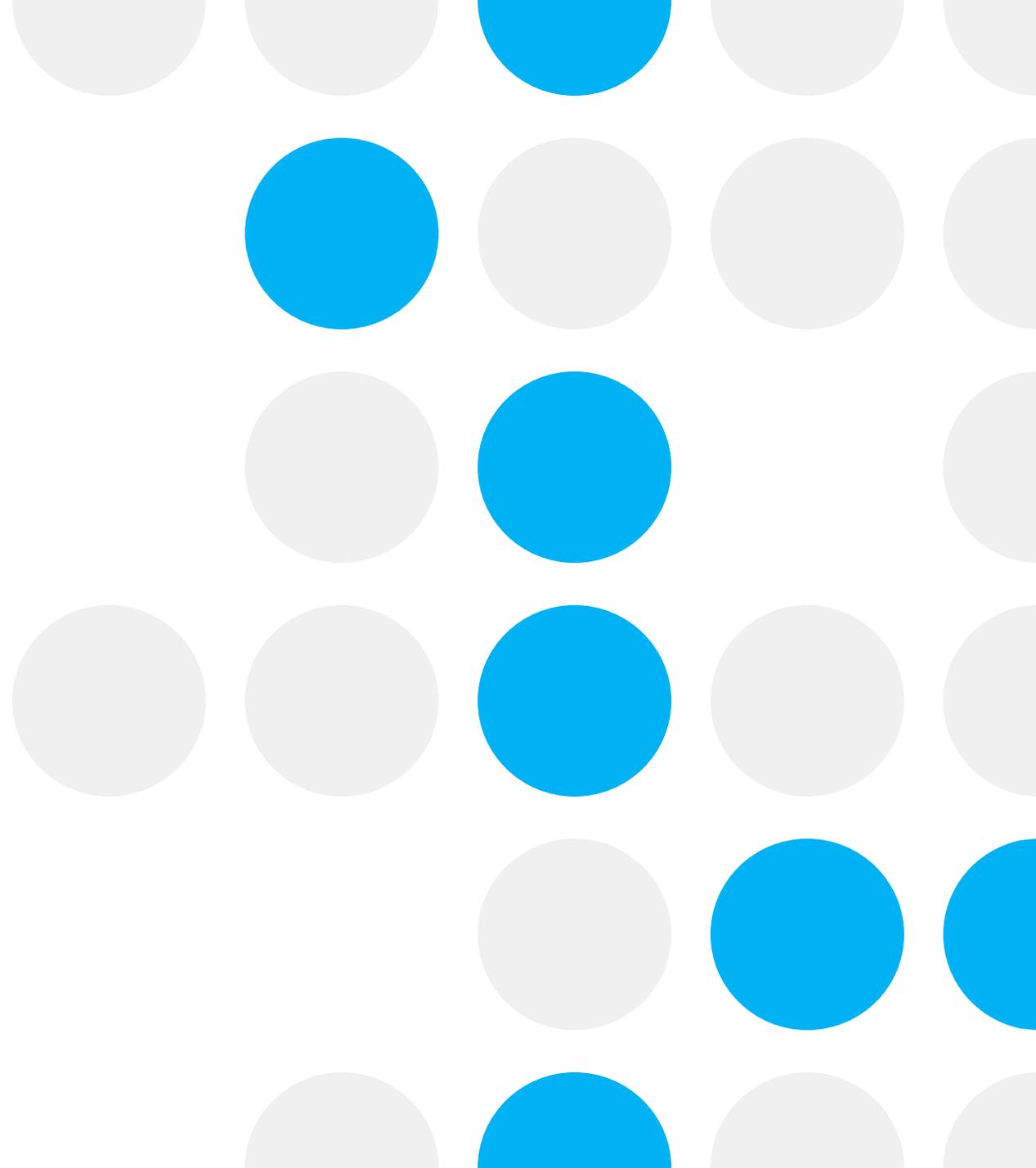
Approving Mileage Logs

- 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 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.
-

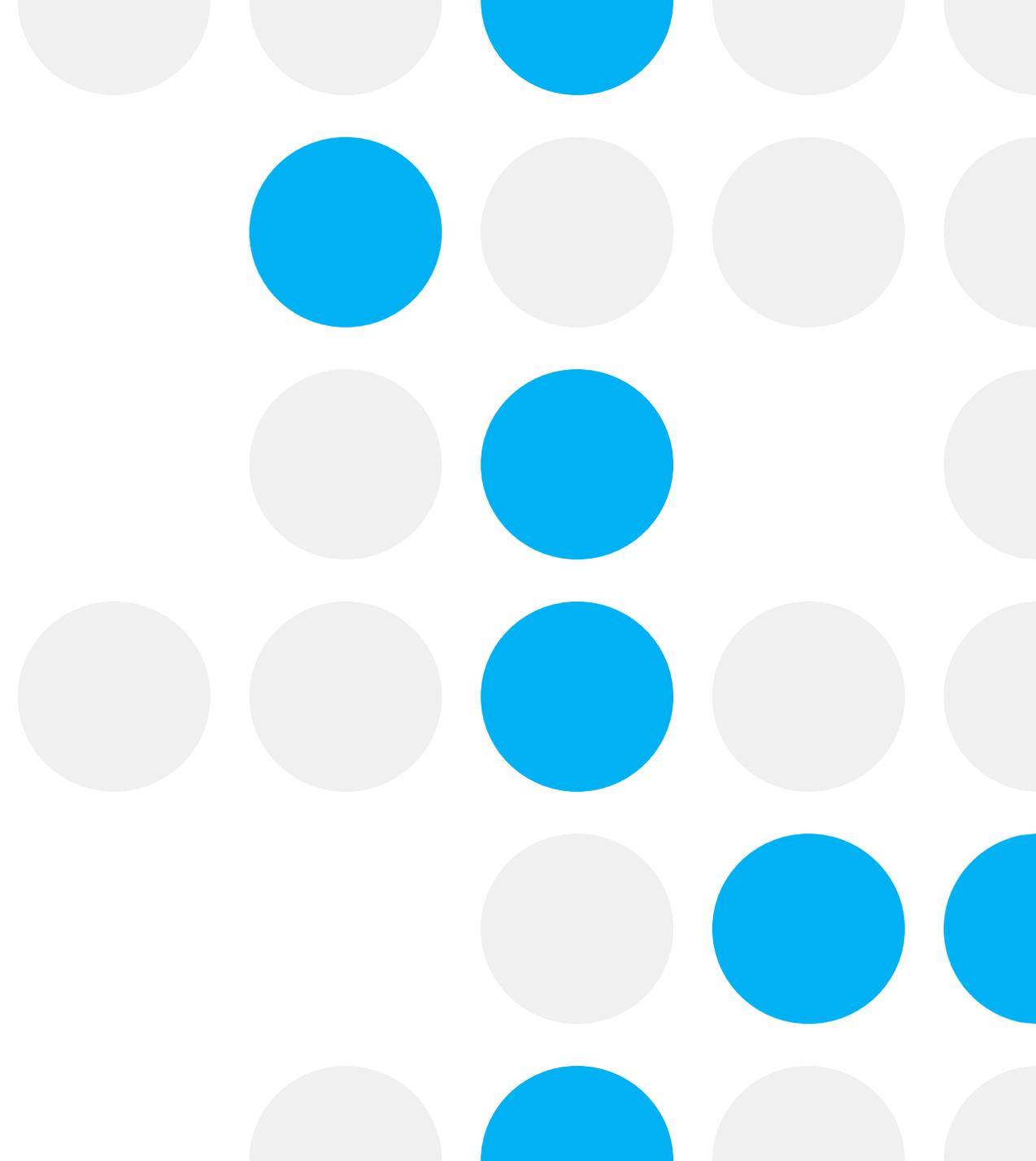
Approving PTO Process for Managers

- 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 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



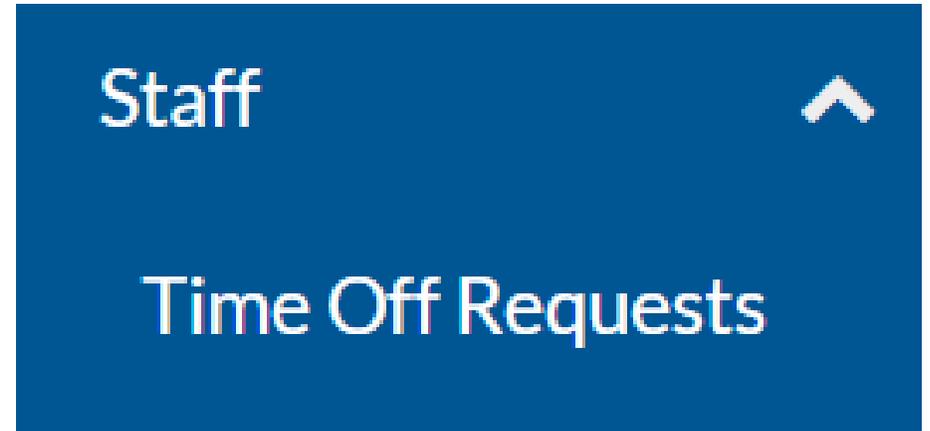
- Once you log into Sandata, you should see a box that says "Time Off Requests"

The screenshot displays the Sandata Home dashboard. On the left is a blue navigation sidebar with the following menu items: Home, My Time Off, My Log, Scheduling Locations, Schedule, Staff Log, Service Location Log, Staff, Clients, Setup, and Reports. The main content area is divided into several sections. At the top right, there are dropdown menus for 'Type' (NonDirect Care Default Cost Cente), 'Cost Center' (SLS Office Admin (530)), and 'Task' (General Manager (Regular)), with a 'Switch' button below them. Below this is a 'Change Requests' section with an 'Open' button, showing a notification that a shift has been picked up and a 'Filled Shift Slot' that needs approval. The 'Time Off Requests' section, highlighted with a red border, shows a list of requests. The first request is for Tuesday, September 20, 2022, with a reason of 'PTO' and a status of 'Pending'. It includes 'Approve' and 'Deny' buttons. A second request for Wednesday, September 21, 2022, is partially visible below it.

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.

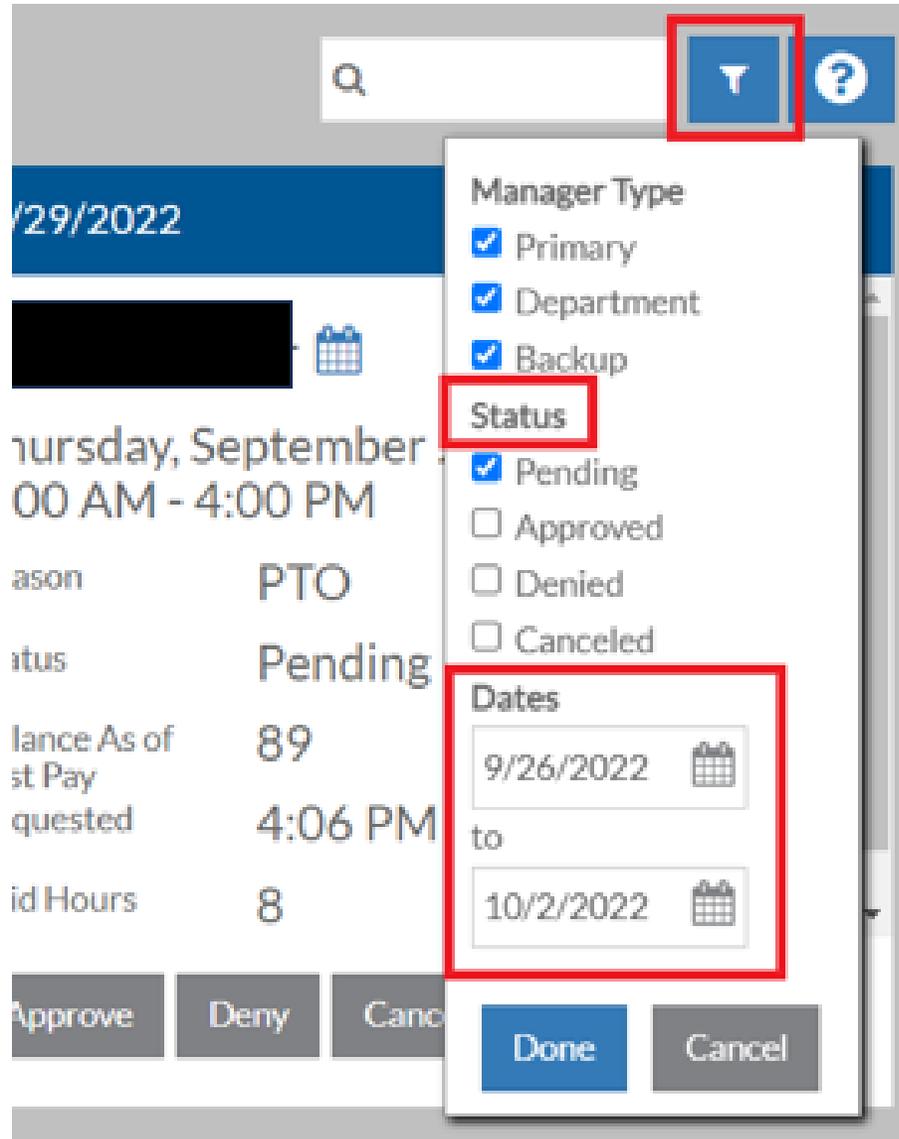
Time Off Requests

The screenshot displays a grid of six time off requests, each with a date range header, employee name, request details, and action buttons. The requests are as follows:

Date Range	Employee	Request Dates	Reason	Status	Balance As of Last Pay	Requested	Paid Hours
09/28/2022 - 09/30/2022	[Redacted]	Wednesday, September 28, 2022 through Friday, September 30, 2022	PTO	Pending	42.2	9/24/2022 9:21 PM	
09/28/2022	[Redacted]	Wednesday, September 28, 2022 8:00 AM - 4:00 PM	PTO	Pending	89	4:05 PM	8
09/29/2022	[Redacted]	Thursday, September 29, 2022 8:00 AM - 4:00 PM	PTO	Pending	89	4:06 PM	8
09/30/2022	[Redacted]	Friday, September 30, 2022 4:00 PM - 9:00 PM	PTO	Pending			
10/02/2022	[Redacted]	Sunday, October 2, 2022 8:00 AM - 4:00 PM	PTO	Pending			
10/04/2022 - 10/18/2022	[Redacted]	Tuesday, October 4, 2022 through Tuesday, October 18, 2022	PTO	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 user interface for managing PTO requests. A search bar is at the top right, with a funnel icon (highlighted in red) and a help icon. Below the search bar, a date range is displayed as "/29/2022". A dropdown menu is open, showing filter options: "Manager Type" with checkboxes for "Primary", "Department", and "Backup"; "Status" with checkboxes for "Pending", "Approved", "Denied", and "Canceled"; and "Dates" with two date pickers set to "9/26/2022" and "10/2/2022". The "Status" and "Dates" sections are highlighted with red boxes. At the bottom of the menu are "Done" and "Cancel" buttons. In the background, a table shows a PTO request for "Thursday, September 29, 2022" from "12:00 AM - 4:00 PM" with a status of "Pending" and a duration of "8" hours.

Request ID	Requester	Request Date	Request Time	Request Type	Status	Balance As of	Request Time	Requested	Request Time	Requested	Request Time	Request Hours
		Thursday, September 29, 2022	12:00 AM - 4:00 PM	PTO	Pending	89	4:06 PM	4:06 PM	4:06 PM	4:06 PM	4:06 PM	8

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

[Redacted Name] 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

[Redacted Name] 

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).

The screenshot displays a staff schedule grid for the week of September 26 to October 2. The grid has columns for each day and rows for each hour from 12am to 11pm. A blue header bar at the top contains the days: Mon 9/26, Tue 9/27, Wed 9/28, Thu 9/29, Fri 9/30, Sat 10/1, and Sun 10/2. The Mon 9/26 column is highlighted with diagonal hatching. A yellow box labeled 'PTO (Pending)' is placed in the 12:00 am slot of the Mon 9/26 column. A green box labeled 'McKnight Schedule' is placed in the 10:00 pm - 1 slot of the Sun 10/2 column. Other green boxes are visible in the Sat 10/1 and Sun 10/2 columns, representing scheduled shifts.

	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 - 8 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	<input type="text" value="10"/>
Cost Center	<input type="text" value="Afton Road (800)"/>
Task	<input type="text" value="DSP (PTO - ESST)"/>

+

Summary

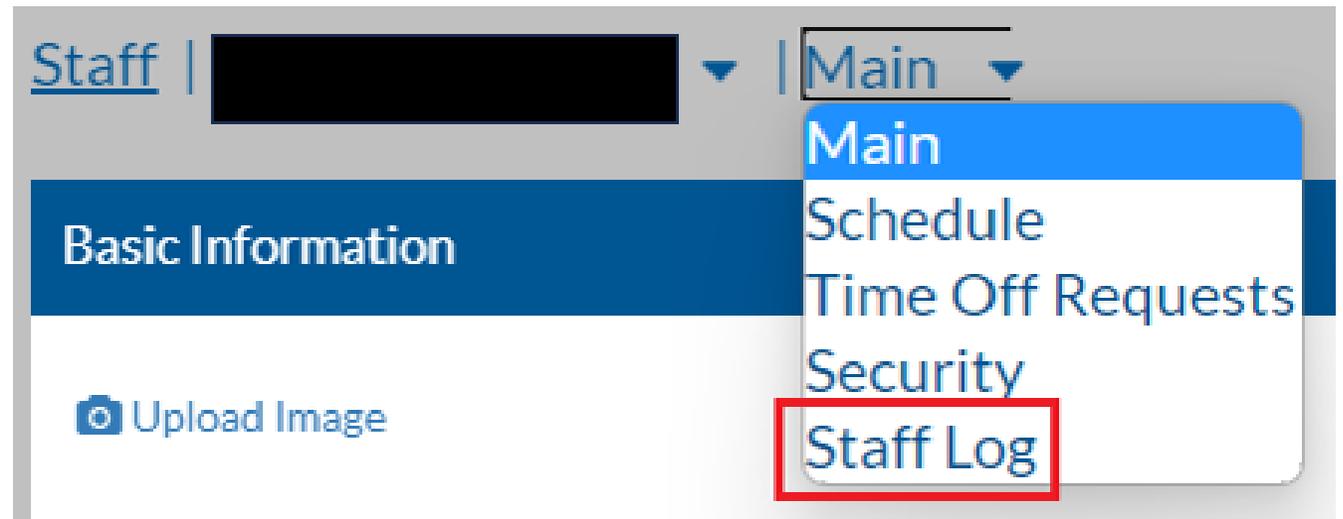
Total Hours: 10

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.

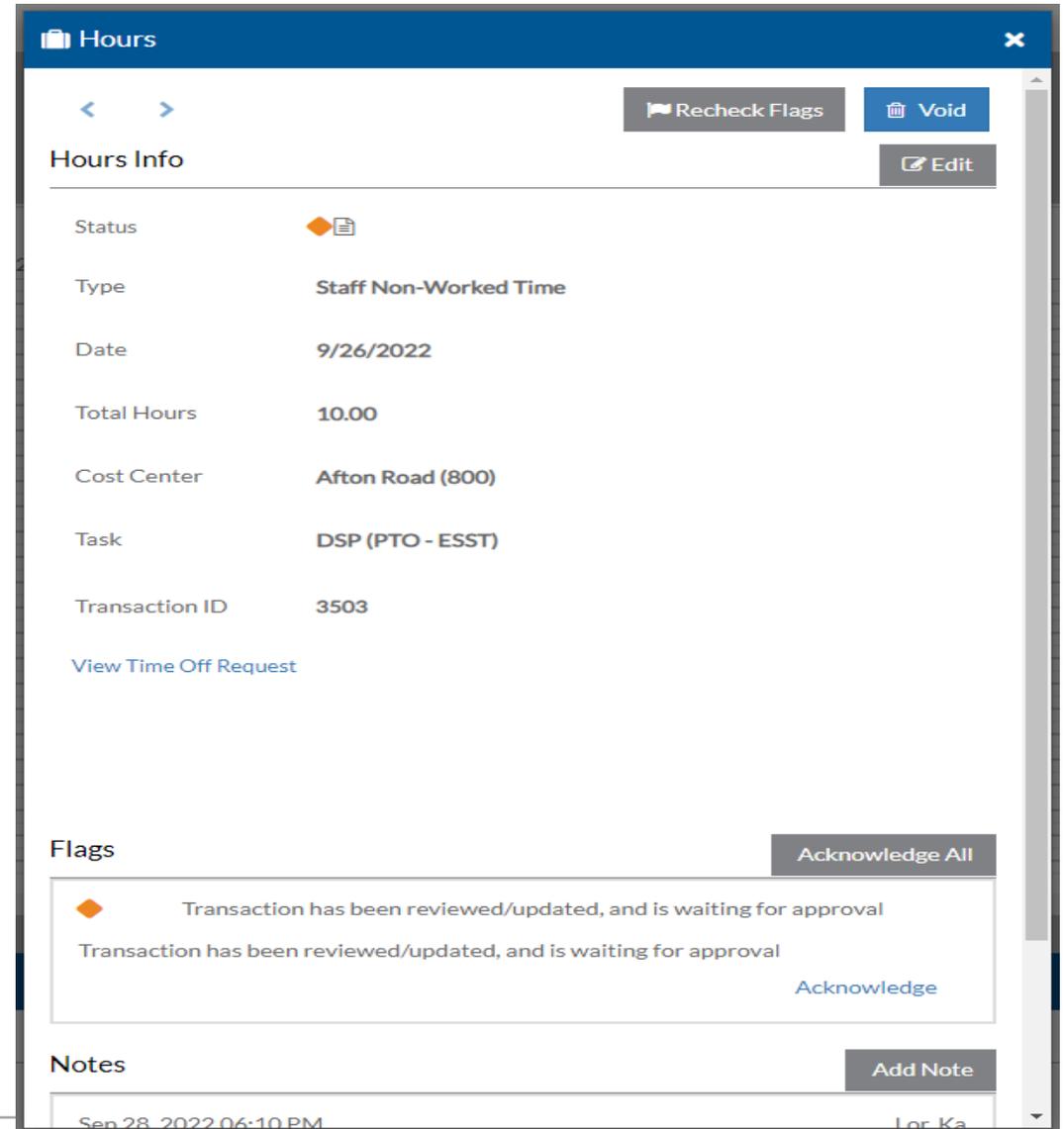
The screenshot displays a 'Staff Log' interface for the period 9/26/2022 to 10/2/2022. The main view is a calendar grid with columns for each day of the week. The grid shows time slots from 12 am to 11 pm. A yellow highlight is visible on the 4:00-5:00 slot of Wednesday, 9/28/2022.

Below the calendar is a table titled 'Other Hours/Amounts' with an 'Add' button. The table contains one entry:

	Date	Type/Task	Location/Cost Center	Clients	Hours/Amt	Actions
<input type="checkbox"/>	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.



The screenshot shows a 'Hours' popup window with a blue header and a close button. The main content area is divided into sections: 'Hours Info', 'Flags', and 'Notes'. The 'Hours Info' section contains a table of transaction details. The 'Flags' section shows a warning icon and a message about the transaction being reviewed. The 'Notes' section is currently empty.

Hours Info	
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

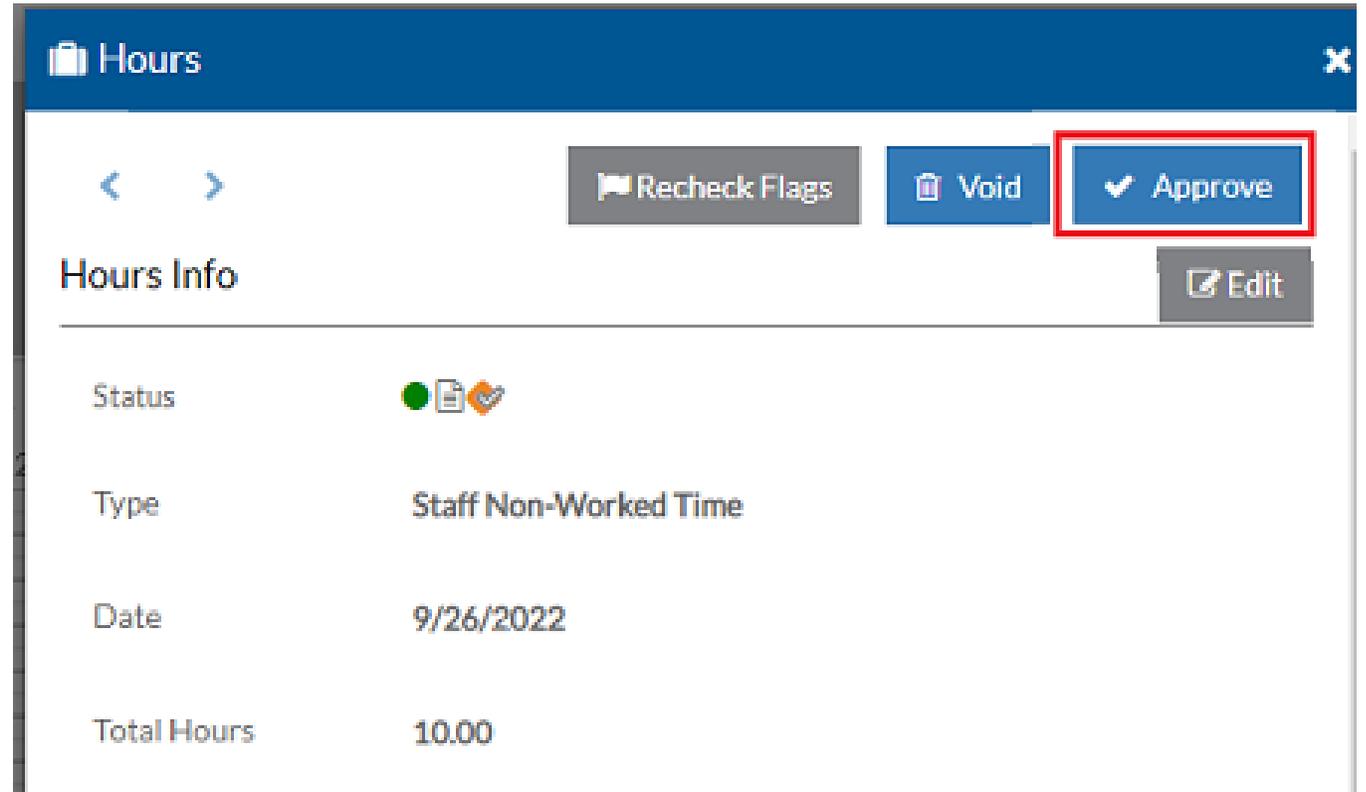


Transaction has been reviewed/updated, and is waiting for approval

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 software interface for managing hours. At the top, there is a blue header bar with the title 'Hours' and a close button. Below the header, there are three buttons: 'Recheck Flags', 'Void', and 'Approve'. The 'Approve' button is highlighted with a red rectangular box. Below the buttons, there 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

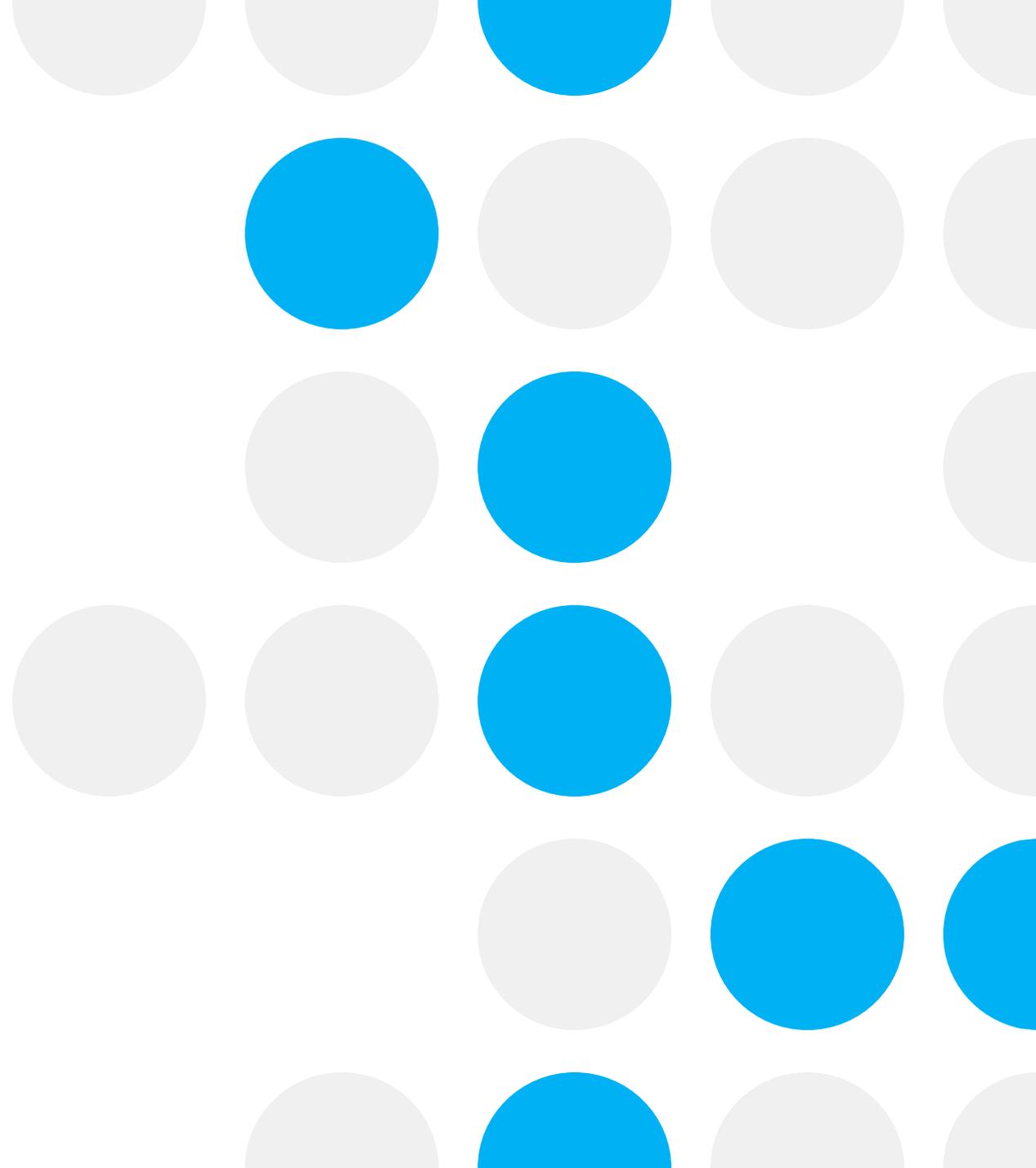
Approving PTO



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

Other Hours/Amounts								Add
<input type="checkbox"/>			Date	Type/Task	Location/...	Clients	Hours/Amt	
<input type="checkbox"/>			9/26/2022	DSP (PTO...	Afton Roa...		10.00	Actions

Creating Permanent Schedules



Creating Permanent Schedules

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

Sandata

Home

Site Search...

Home

My Time Off

My Log

Scheduling Locations

Schedule



Staff Log

Service Location Log

Staff



Time Logging

Thu
Sep
15

Type

Cost Center

Task

Creating Permanent Schedules



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

The screenshot shows a software interface for managing site information. The breadcrumb navigation at the top reads "Scheduling_Locations | Champlin 2". The interface is divided into three main sections: "Basic Information", "Other Information", and "Notes".

Basic Information (with an "Edit" link):

- Description: Champlin 2
- Active:
- Address 1: 8140 115th Lane N.
- Address 2: 0
- City: Champlin
- State: MN
- Zip Code: 55316
- Phone Number: (empty)
- Email Address: (empty)

Other Information (with an "Edit" link):

- 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 (with an "Edit" link):

Notes

Site Supervisor: 651-641-4009 Ext. 240
Manager: Ext. 507
General Manager: Ext 502

At the top right of the interface, there are four buttons: "Shift Templates" (highlighted with a red box), "Schedule", "Delete", and "Audit".

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] [Redacted]	10:00 pm - 10:00 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]	9:00 am - 2:00 pm Schedule [A, B]	10:00 am Schedule [A, B]
10:00 pm - 10:00 pm Schedule [A, B] [Redacted]	2:00 pm - 10:00 pm Schedule [A, B] [Redacted]	2:00 pm - 10:00 pm Schedule [A, B] [Redacted]	2:00 pm - 10:00 pm Schedule [A, B]	2:00 pm - 2:00 pm Schedule [A]
3:00 pm - 8:00 pm Schedule [A, B]	3:00 pm - 8:00 pm Schedule [A, B]	3:00 pm - 8:00 pm Schedule [A, B]	3:00 pm - 8:00 pm Schedule [A, B]	4:00 pm - 4:00 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 pm 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 <input checked="" type="checkbox"/> B <input checked="" type="checkbox"/>
Notes	
Mandatory Employees	1
Staff	+ Add

Delete

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 <input checked="" type="checkbox"/> B <input checked="" type="checkbox"/>
Notes	
Mandatory Employees	1
Staff	<input type="button" value="+ Add"/>
<div style="background-color: black; width: 50px; height: 20px;"></div>	Weeks: A <input checked="" type="checkbox"/> B <input type="checkbox"/> <input type="button" value="-"/>

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 Templates Schedule Delete Audit

Basic Information Edit		Other Information Edit		Notes Edit
Description	Champlin 1	Include Clients	<input type="checkbox"/>	Notes
Active	<input checked="" type="checkbox"/>	Mandatory Staff Count	1	Site Supervisor: 651-641-4009 Ext. 220
Address 1	401 Kimball Drive	Shift Swaps Require Approval	<input checked="" type="checkbox"/>	Manager: Ext. 507
Address 2	0	Disallow Posting of Shift: Hours Before Shift	0	General Manager: Ext 502
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	<input type="checkbox"/>
Mandatory Staff Count	<input type="text" value="1"/>
Shift Swaps Require Approval	<input checked="" type="checkbox"/>
Disallow Posting of Shift: Hours Before Shift	<input type="text" value="0"/>
Auto Unpost Posted Shifts: Hours Before Shift	<input type="text" value="0"/>
Scheduling Method	<input type="text" value="Schedule From Source"/>
Weeks In Cycle	<input type="text" value="1"/>
Week A Start	<input type="text" value="9/9/2019"/>
Time Zone	<input type="text" value="Central"/>

Creating Permanent Schedules



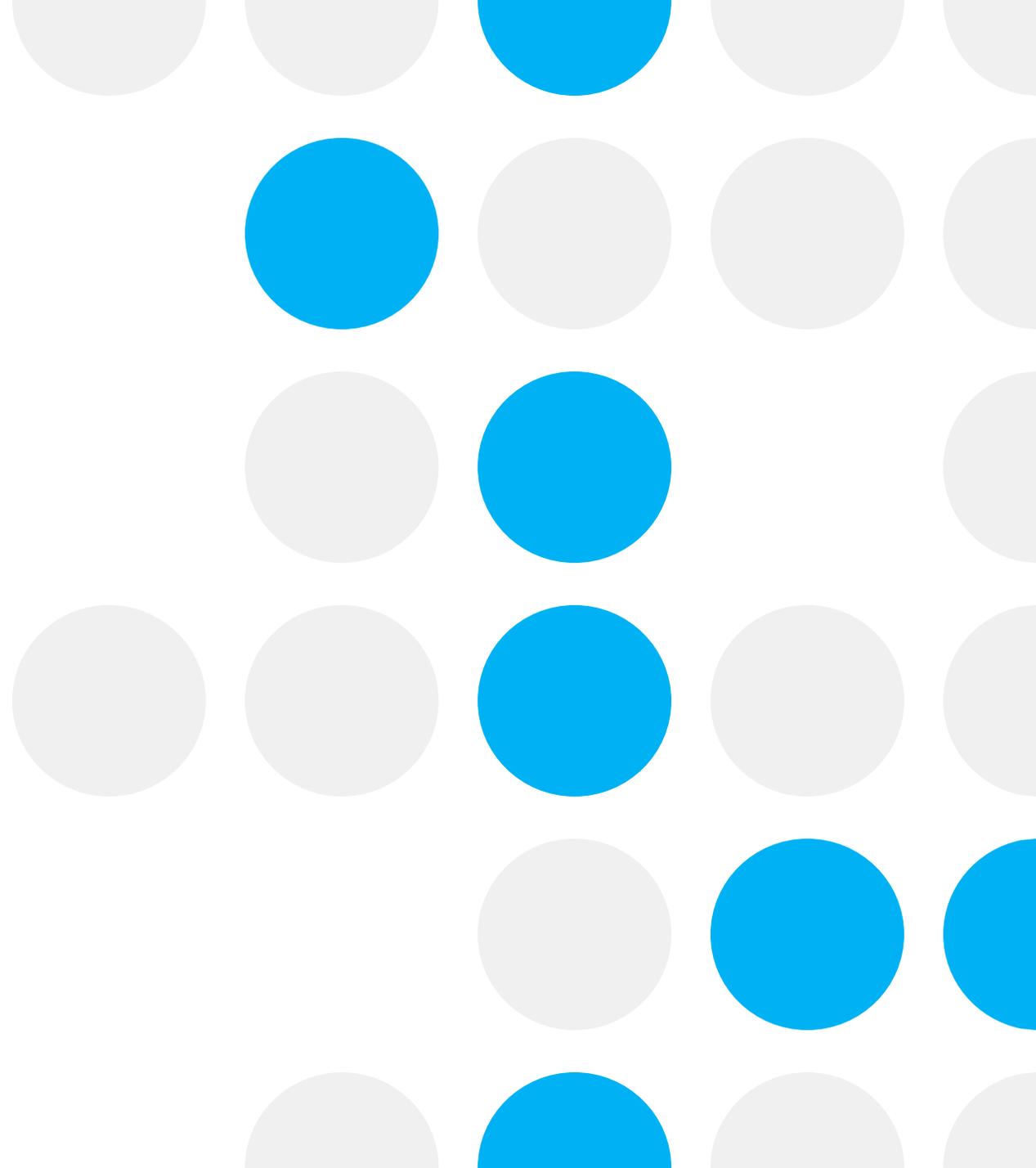
- Adding an A & B schedule means you will need to go back to the permanent schedule and make sure every shift listed has both A & B selected.

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 <input checked="" type="checkbox"/> B <input checked="" type="checkbox"/>
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.

Sandata

Home

Site Search...

Home

My Time Off

My Log

Scheduling Locations

Schedule



Staff Log

Service Location Log

Staff



Time Logging

Thu
Sep
15

Type

Cost Center

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

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

Search bar (highlighted with a red box)

Select All Clear

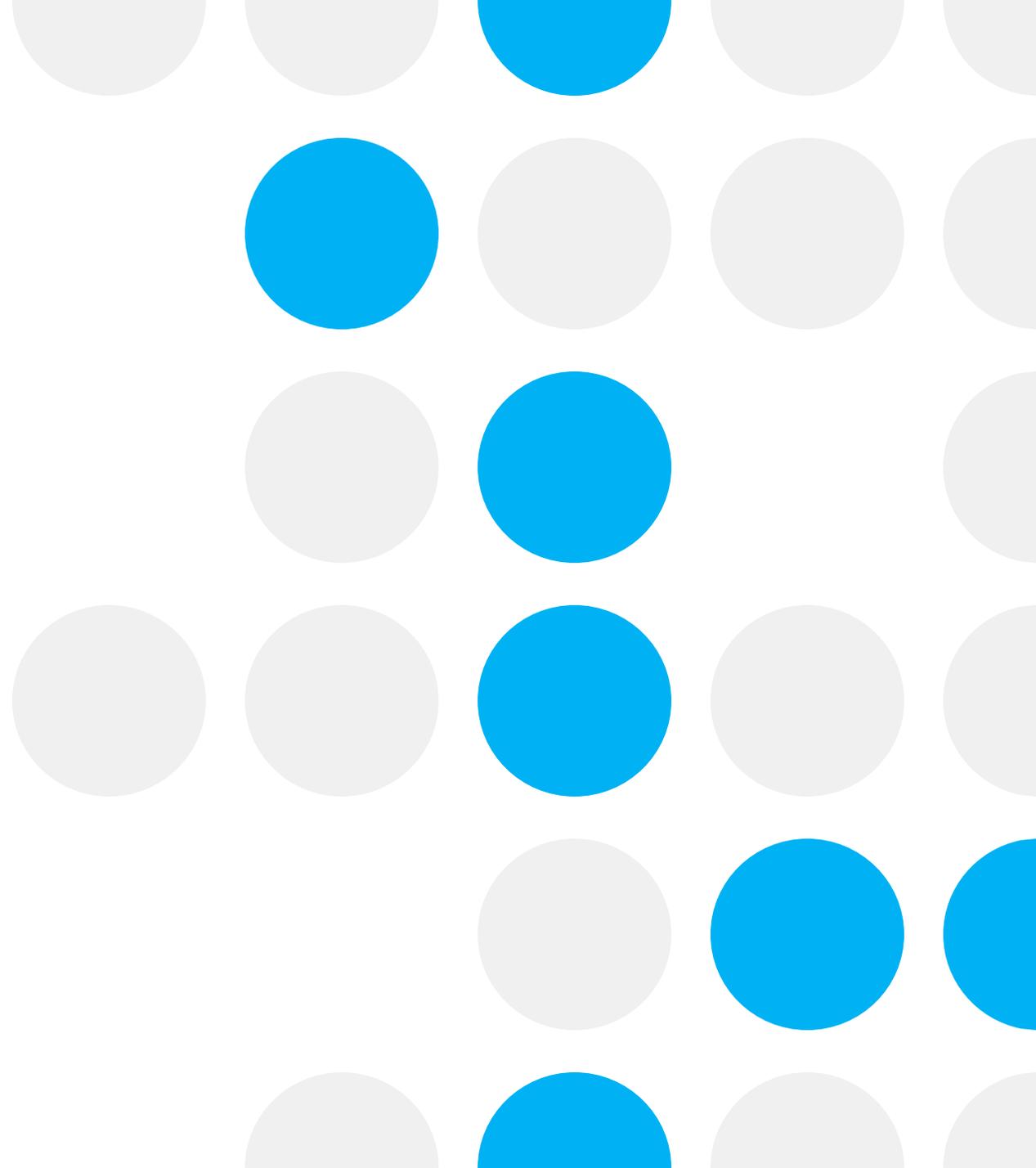
Staff list (blacked out names)

Refresh icon

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 X

Shift Template	Schedule
Begin Day	Tuesday
Begin Time	9:00 AM
End Time	2:00 PM
Service Type 2 Hours	0.00
Weeks	A <input checked="" type="checkbox"/> B <input checked="" type="checkbox"/>
Notes	
Mandatory Employees	1

Staff Add

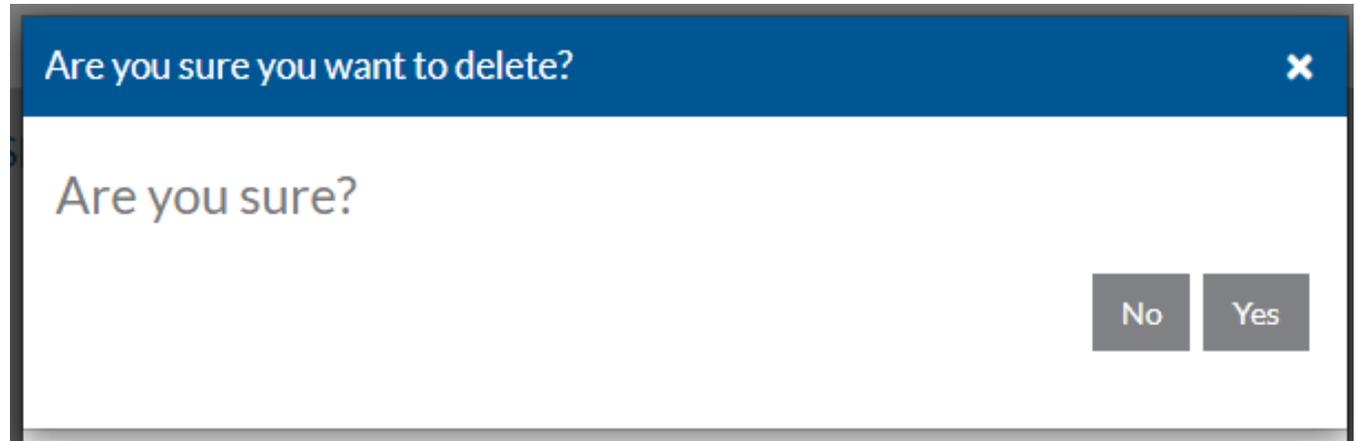
<div style="background-color: black; width: 100px; height: 15px;"></div>	Weeks: A <input checked="" type="checkbox"/> B <input type="checkbox"/> -
--	---

Delete

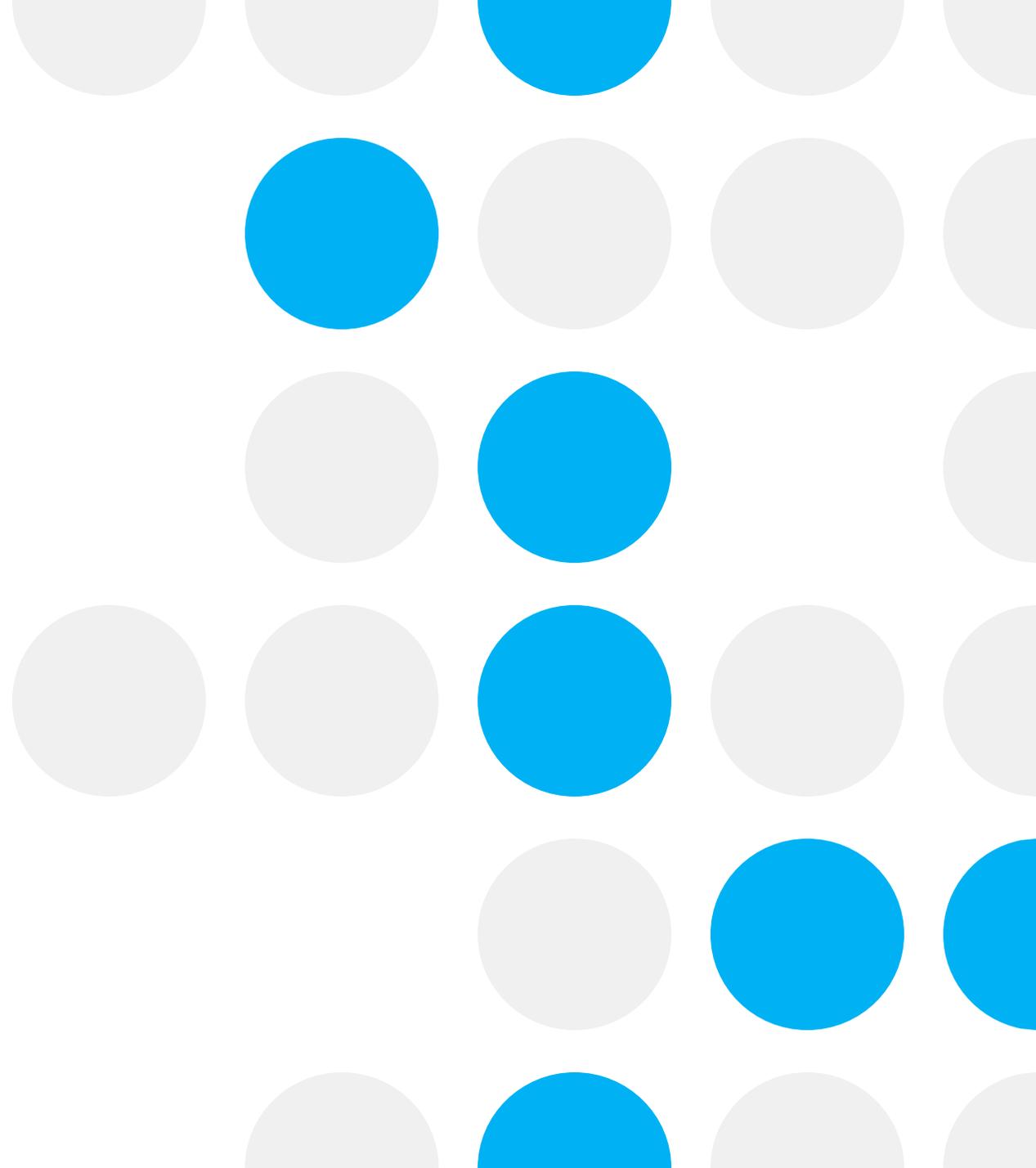
Removing a Staff from a Permanent Schedule



- 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.”

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 navigation menu with options: 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 four pending change request cards, each with a red warning triangle icon. The cards are for the following dates and times:

- Sep 9, 2023 5:00 PM (Saturday, September 9, 2023, 5:00 PM - 10:00 PM)
- Sep 16, 2023 9:00 AM (Saturday, September 16, 2023, 9:00 AM - 2:00 PM)
- Sep 9, 2023 9:00 AM (Saturday, September 9, 2023, 9:00 AM - 2:00 PM)
- Sep 3, 2023 10:00 AM (Sunday, September 3, 2023, 10:00 AM - 10:00 PM)

Each card contains the following information:

- Title: [Redacted] up this open shift.
- Status: Unfilled Shift Slot: Change request for open shift needs to be approved/denied. Unfilled Shift Slot: There is no staff scheduled.
- Description: [Redacted]
- Schedule: [Redacted]
- Location: Maple Grove
- Staff: , Open
- Clients: Soto, Blossom

Each card also features 'Approve', 'Deny', and 'Details' buttons at the bottom.

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.

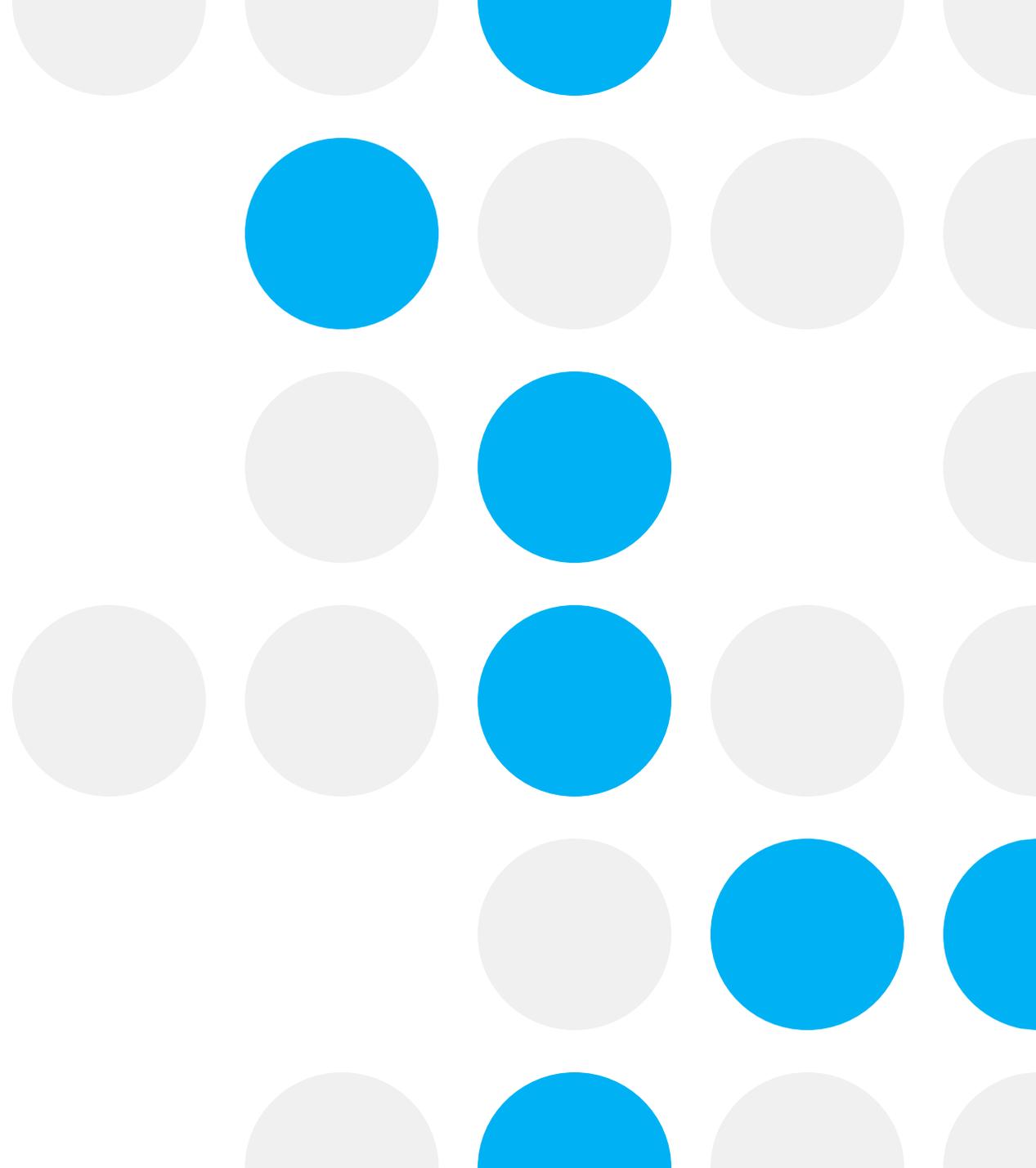
Saturday, September 9, 2023
5:00 PM - 10:00 PM

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

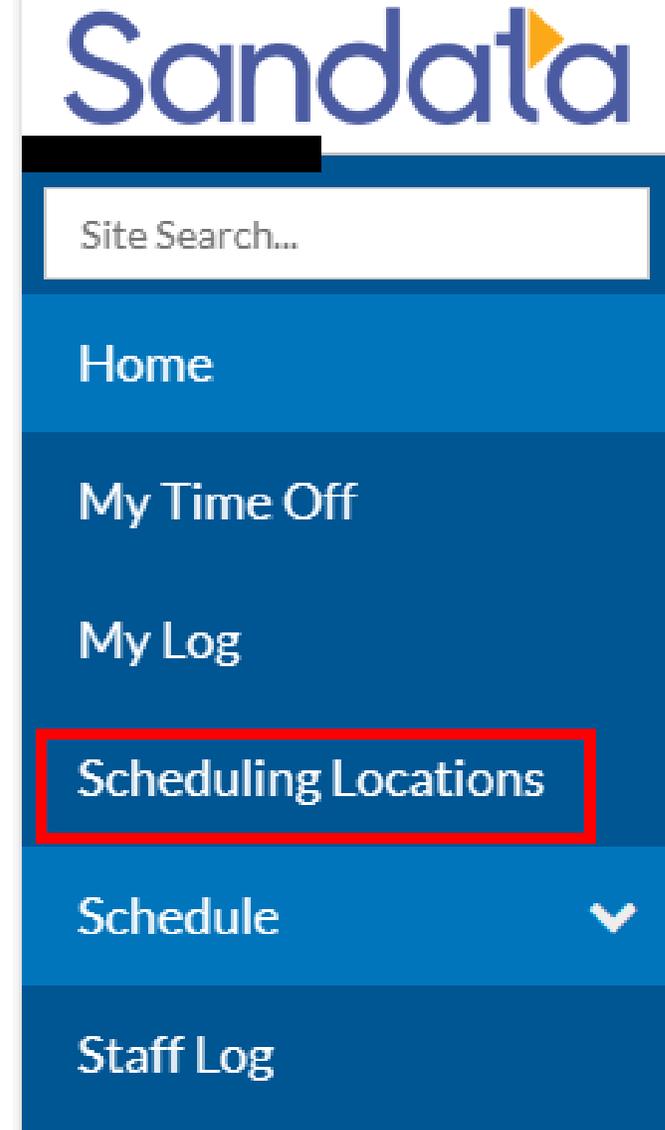
How to Manually Add a Staff to a Shift



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.”**

The screenshot shows a software interface for managing scheduling locations. At the top, there is a breadcrumb trail: "Scheduling Locations | Regency". To the right of the breadcrumb are four buttons: "Shift Templates", "Schedule", "Delete", and "Audit". The "Schedule" button is highlighted with a red rectangular box. Below the breadcrumb, there are three main sections: "Basic Information", "Other Information", and "Notes". Each section has a "Edit" link. The "Basic Information" section contains fields for Description (Regency), Active (checked), Address 1 (3521 37th Ave NE), and Address 2. The "Other Information" section contains fields for Include Clients (unchecked), Mandatory Staff Count (1), Shift Swaps Require Approval (checked), and Disallow Posting of Shift (0). The "Notes" section contains a list of notes: "Notes", "Site Supervisor: 651-641-4009 Ext. 280", "Manager: Ext. 506", and "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).



The screenshot shows a scheduling interface for September 2023. The interface includes a top navigation bar with options like 'Scheduling Locations', 'Regency', and 'Schedule'. Below this is a calendar grid with columns for each day of the week and rows for different time slots. The status of each shift is indicated by the color of the box: green for scheduled, red for open, and green with a red exclamation mark for pending approval.

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
28	29	30	31	1	2	3
6:00 am - 9:00 am [Green box with staff icon]	6:00 am - 9:00 am [Green box with staff icon]	6:00 am - 9:00 am [Green box with staff icon]	6:00 am - 9:00 am [Green box with staff icon]	6:00 am - 9:00 am [Green box with staff icon]	6:00 am - 10:00 am [Green box with staff icon]	6:00 am - 10:00 am [Green box with staff icon]
9:00 am - 2:00 pm [Green box with staff icon]	9:00 am - 2:00 pm [Green box with staff icon]	9:00 am - 2:00 pm [Green box with staff icon]	9:00 am - 2:00 pm [Green box with staff icon]	9:00 am - 2:00 pm [Green box with staff icon]	10:00 am - 10:00 pm [Green box with staff icon]	10:00 am - 10:00 pm [Green box with red exclamation mark]
2:00 pm - 10:00 pm [Green box with staff icon]	2:00 pm - 10:00 pm [Green box with staff icon]	2:00 pm - 10:00 pm [Green box with staff icon]	2:00 pm - 10:00 pm [Green box with staff icon]	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 icon]	6:00 am - 9:00 am [Green box with staff icon]	6:00 am - 9:00 am [Green box with staff icon]	6:00 am - 9:00 am [Green box with staff icon]	6:00 am - 9:00 am [Green box with staff icon]	6:00 am - 10:00 am [Green box with staff icon]	6:00 am - 10:00 am [Green box with staff icon]
9:00 am - 2:00 pm [Green box with staff icon]	9:00 am - 2:00 pm [Green box with staff icon]	9:00 am - 2:00 pm [Green box with staff icon]	9:00 am - 2:00 pm [Green box with staff icon]	9:00 am - 2:00 pm [Green box with staff icon]	10:00 am - 10:00 pm [Green box with staff icon]	10:00 am - 10:00 pm [Red box with blue 'O']
2:00 pm - 10:00 pm [Green box with staff icon]	2:00 pm - 10:00 pm [Green box with staff icon]	2:00 pm - 10:00 pm [Green box with staff icon]	2:00 pm - 10:00 pm [Green box with staff icon]	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.”**

The screenshot shows a software interface with a dark blue header bar. On the left, the word "Slot" is displayed in white. On the right, there is a white button with a plus sign and the text "Add". Below the header, there is a white area containing a blue square icon with a white circle, a red triangle with a white exclamation mark, and a comma. To the right of these icons is the word "Open" in blue. At the bottom left, there is a grey button with the text "Assign" in white, which is highlighted with a red rectangular border. To the right of the "Assign" button is another grey button with a white icon of three horizontal lines and a downward arrow.

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

Staff Name	Person Icon	Calendar Icon	Week:	Day:	24 Hr:	Score:	Dropdown
[Redacted]	👤	📅	64	8	12	100	⌵
[Redacted]	👤	📅	8	8	8	100	⌵
[Redacted]	👤	📅	41	8	8	100	⌵
[Redacted]	👤	📅	8	8	8	100	⌵
[Redacted]	👤	📅	8	8	8	100	⌵
[Redacted]	👤	📅	16	8	12	100	⌵
[Redacted]	👤	📅	8	8	8	100	⌵
[Redacted]	👤	📅	8	8	8	100	⌵
[Redacted]	👤	📅	30	16	8	100	⌵
[Redacted]	👤	📅	8	8	8	100	⌵
[Redacted]	👤	📅	104	16	24	100	⌵
[Redacted]	👤	📅	20	20	8	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	

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.

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	<input type="text"/>
Service Type 2	<input type="text"/>
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.”**

Save Cancel

Basic Information

Description	Open Shift
Begin Date	9/2/2023
Begin Time	02:00 AM
End Time	04:00 PM
Mandatory Staff	1
Service Type	<input type="text"/>
Service Type 2	<input type="text"/>
Service Type 2 Hours	<input type="text"/>
Scheduling Method	Schedule From Source
On Call	<input type="checkbox"/>

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 Open Shift

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:**”

The screenshot displays a scheduling software interface. At the top left, the text "Scheduling Locations | Regency" is visible. Below this, there is a dropdown menu labeled "Schedule" which is highlighted with a red box. To the right of the "Schedule" dropdown are four buttons: "Copy Schedule", "Generate Schedule", "Auto Schedule", and "Publish Schedule". The "Publish Schedule" button is also highlighted with a red box. Below these buttons, there are several smaller buttons: "Add", "Month", "Week", "Day", "List", and a refresh icon. At the bottom of the interface, there is a blue bar displaying the date range "Sep 4 - 10 2023" and navigation arrows.

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.
-

Publish Schedule ×

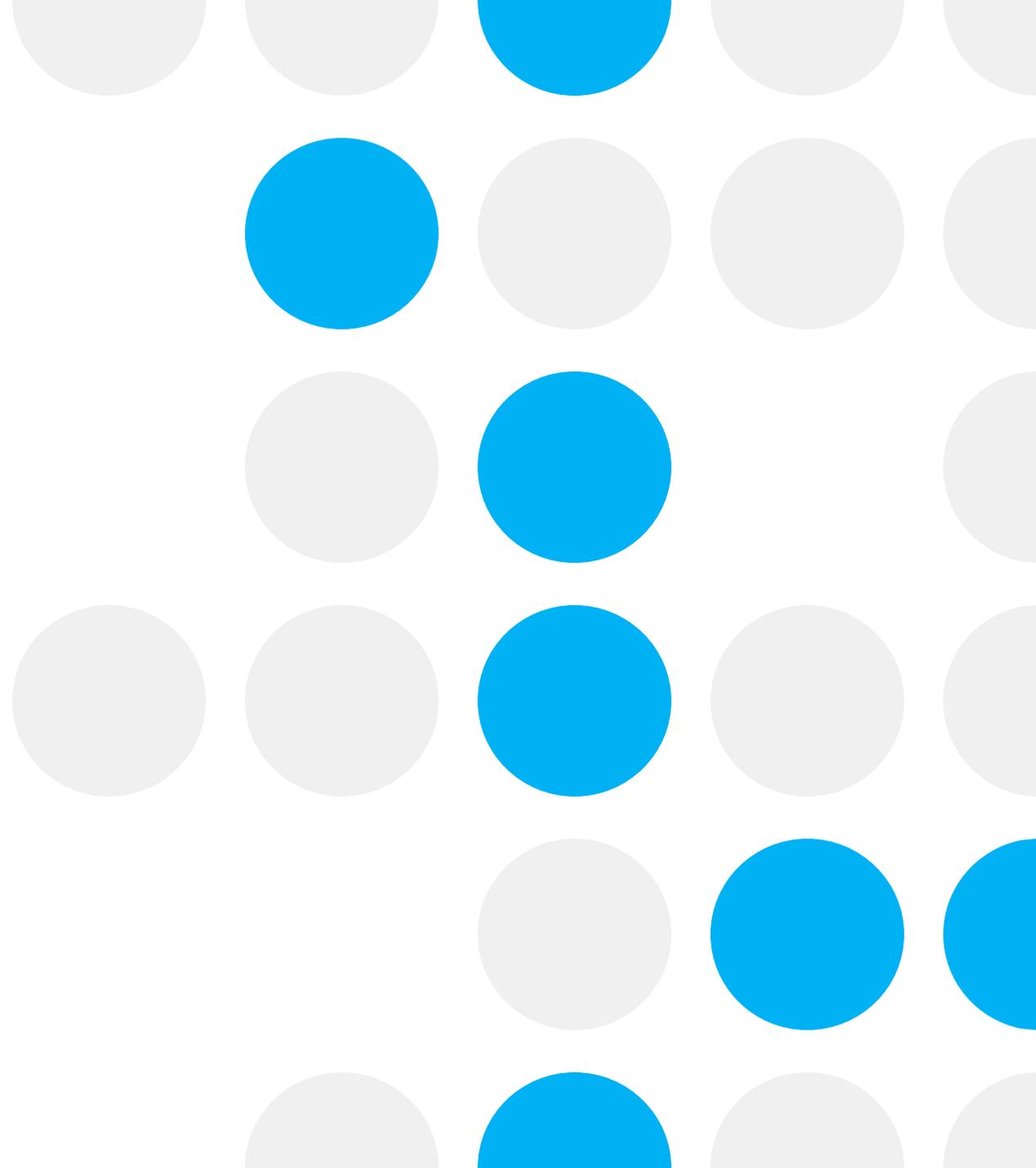
Select the week you would like to publish the schedule for.

Week	9/4/2023 to 9/10/2023 ▼
Number Of Weeks	1 - (9/4/2023 - 9/10/2023) ▼

Cancel

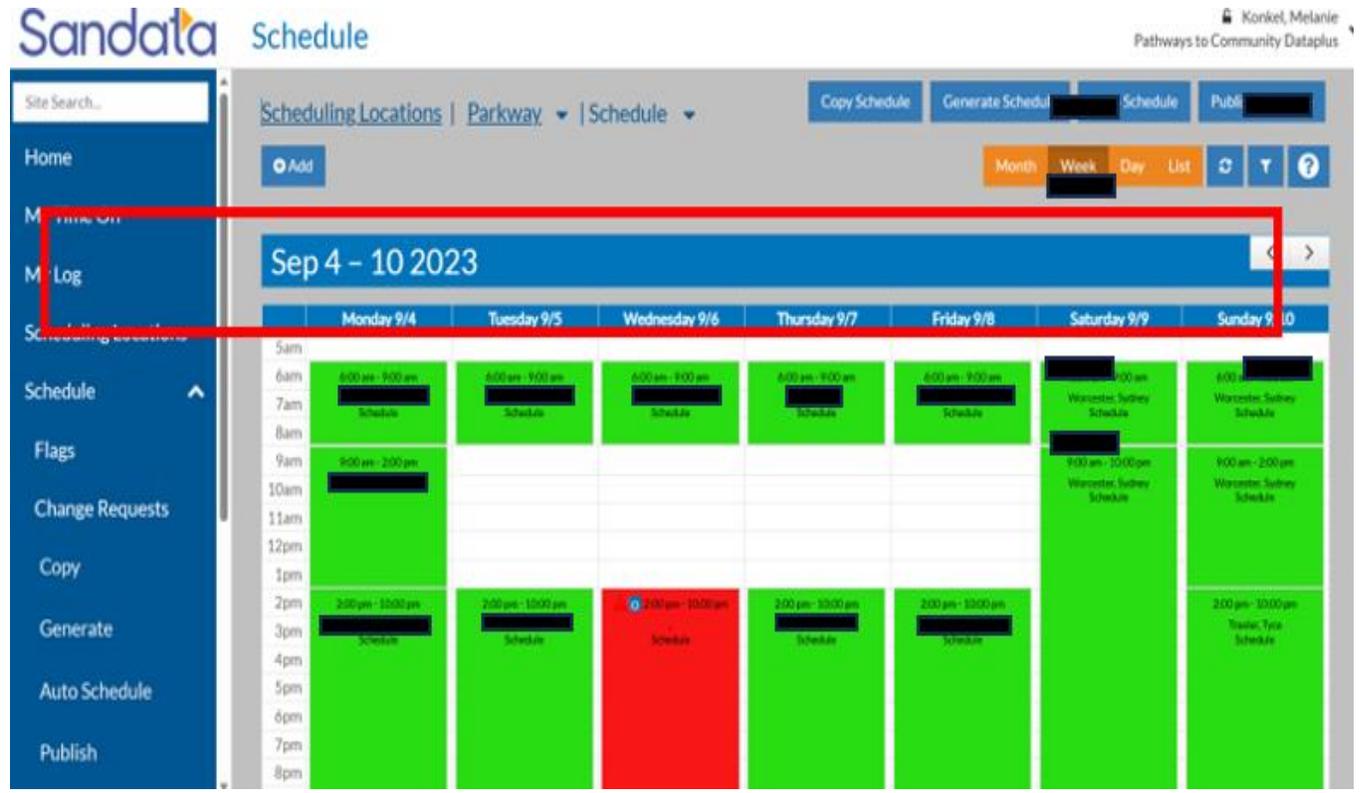
Publish

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.

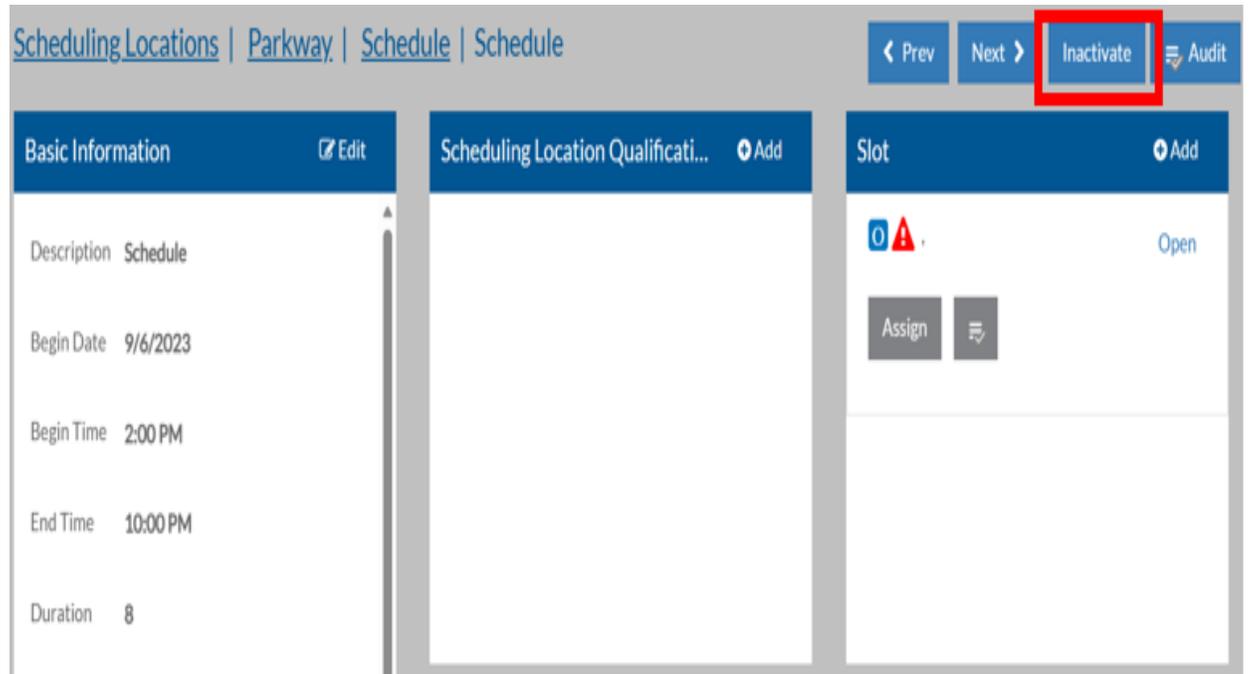


The screenshot shows the Sandata Schedule interface. The top navigation bar includes 'Sandata Schedule', 'Scheduling Locations | Parkway', and 'Schedule'. A red box highlights the 'Schedule' button in the top right and the 'Schedule' column header for Monday 9/4. The main area displays a weekly grid for Sep 4 - 10 2023, with columns for Monday 9/4, Tuesday 9/5, Wednesday 9/6, Thursday 9/7, Friday 9/8, Saturday 9/9, and Sunday 9/10. The grid shows various shifts with time ranges and status indicators.

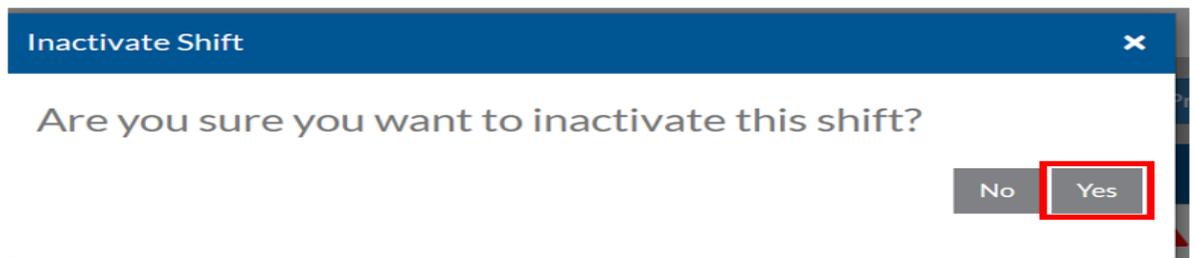
	Monday 9/4	Tuesday 9/5	Wednesday 9/6	Thursday 9/7	Friday 9/8	Saturday 9/9	Sunday 9/10
5am							
6am	6:00 am - 9:00 am Schedule	6:00 am - 9:00 am Worcester, Sydney Schedule	6:00 am - 9:00 am Worcester, Sydney Schedule				
7am							
8am							
9am	9:00 am - 2:00 pm Schedule						
10am						9:00 am - 2:00 pm Worcester, Sydney Schedule	9:00 am - 2:00 pm Worcester, Sydney Schedule
11am							
12pm							
1pm							
2pm	2:00 pm - 10:00 pm Schedule		2:00 pm - 10:00 pm Troy, Troy Schedule				
3pm							
4pm							
5pm							
6pm							
7pm							
8pm							

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 with a breadcrumb trail at the top: [Scheduling Locations](#) | [Parkway](#) | [Schedule](#) | [Schedule](#). In the top right corner, there are navigation buttons: [< Prev](#), [Next >](#), [Inactivate](#) (highlighted with a red box), and [Audit](#). The main content area is divided into three panels: 'Basic Information' (with an 'Edit' icon), 'Scheduling Location Qualificati...' (with an 'Add' icon), and 'Slot' (with an 'Add' icon). The 'Basic Information' panel displays: Description: Schedule, Begin Date: 9/6/2023, Begin Time: 2:00 PM, End Time: 10:00 PM, and Duration: 8. The 'Slot' panel shows a warning icon (a red triangle with an exclamation mark) and an 'Open' link. Below the warning icon are 'Assign' and 'Assign' buttons.



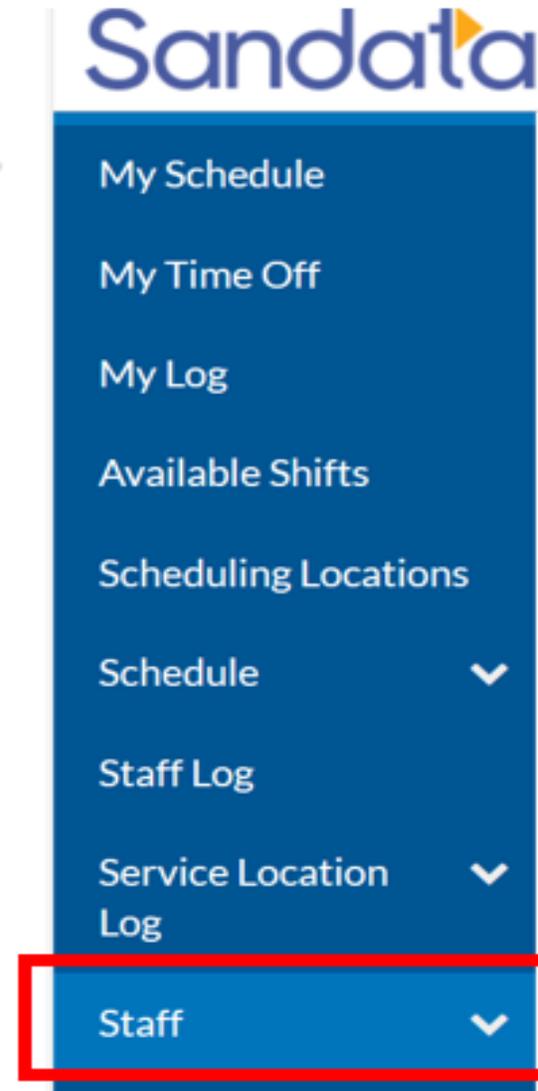
The screenshot shows a confirmation dialog box titled 'Inactivate Shift' with a close button (X) in the top right corner. The main text of the dialog is 'Are you sure you want to inactivate this shift?'. At the bottom right, there are two buttons: 'No' and 'Yes' (highlighted with a red box).

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



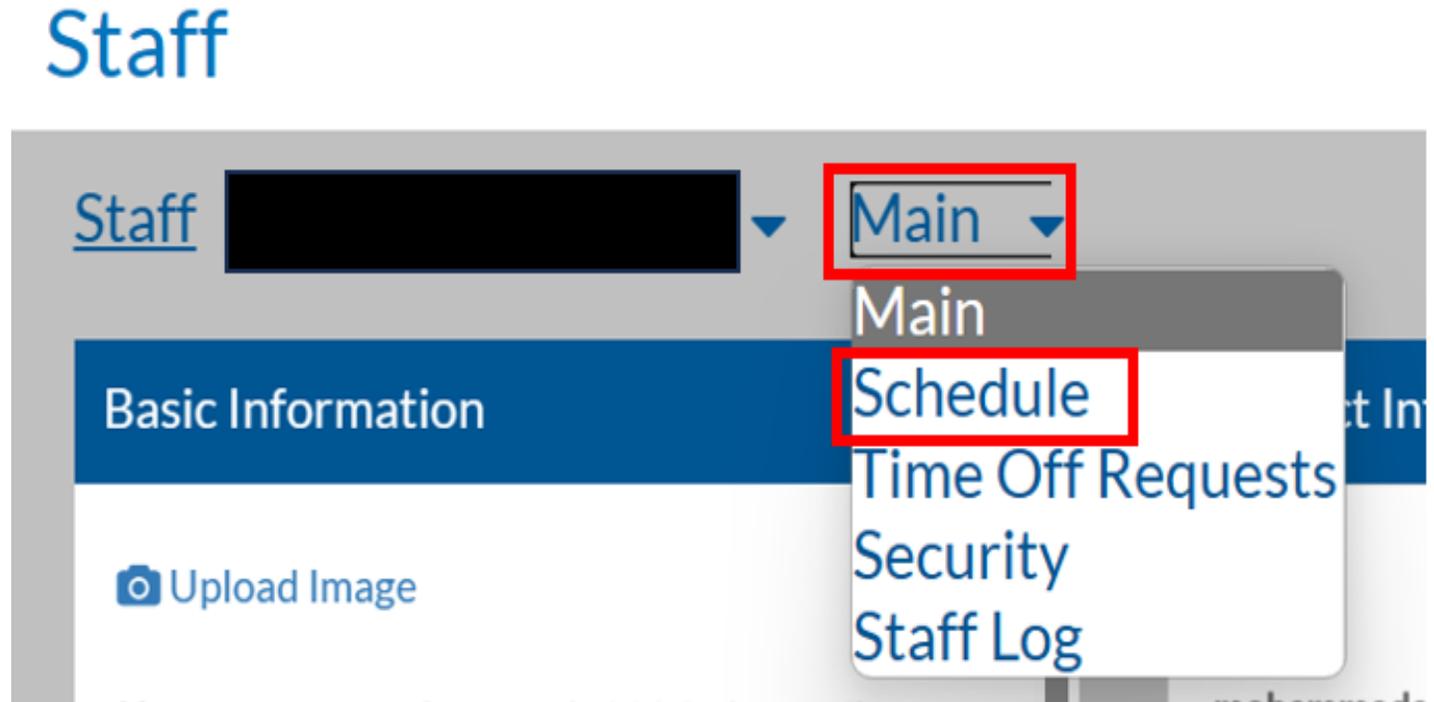
How to Remove Staff from Schedules for a Period of Time or Permanently

- 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

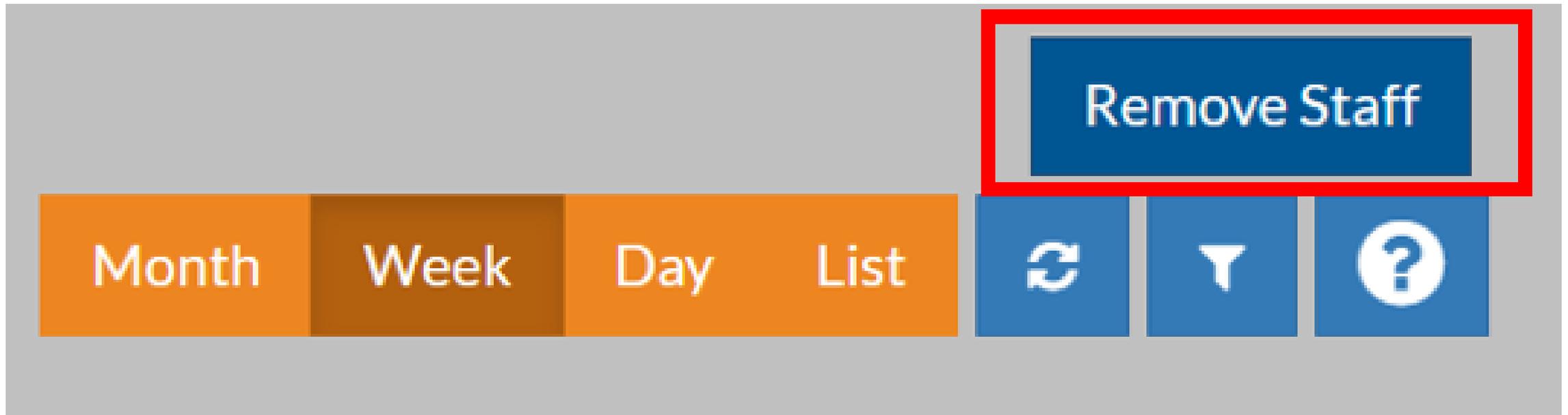
- Click on “**Main**” then “**Schedule.**”



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!** 
