

Time Sheet and Visit Note Training

The deadline for weekly shift submission is Sunday at 11:59pm

- To enter a shift or visit note, you will need to go to the staff portal and select your name (not the yellow “edit” button to the right of your name).
- Select the “Shifts” tab, all of the persons that you support as well as the services for that individual will be listed here.

Person Supported	Waiver	Service Name	Service Level	Mileage Band	Effective Date	Expiry Date	Monthly Limit	
Test, Minnie Mouse	CES	Day Respite	N/A	N/A	2/1/2021	3/31/2021	5.00 day(s)	
Test, Minnie Mouse	CES	Community Connector	N/A	N/A	2/1/2021	3/31/2021	35 hours	
Test, Minnie Mouse	CES	Homemaker Enhanced	N/A	N/A	2/1/2021	3/31/2021	40 hours	
Test, Minnie Mouse	CES	Group Respite 3	N/A	N/A	2/1/2021	3/31/2021	30 hours	
Test, Minnie Mouse	CES	Respite	N/A	N/A	2/1/2021	3/31/2021	64 hours	
Cobain, Kurt	SLS	Day Respite	N/A	N/A	2/1/2021	3/31/2021	0.00 day(s)	
Cobain, Kurt	SLS	Non- Medical Transportation Band 1	N/A	N/A	2/1/2021	3/31/2021	5.00 day(s)	
Cobain, Kurt	SLS	Supported Community Connector-Ind	N/A	N/A	2/1/2021	3/31/2021	60 hours	
Cobain, Kurt	SLS	Respite	N/A	N/A	2/1/2021	3/31/2021	50 hours	
Cobain, Kurt	SLS	Personal Care	N/A	N/A	2/1/2021	3/31/2021	15 hours	
Cobain, Kurt	SLS	Homemaker Enhanced	N/A	N/A	2/1/2021	3/31/2021	25 hours	
Lotsa Hair, Bob Ross	CHRP	Respite Day	N/A	N/A	2/1/2021	3/4/2021	6.00 day(s)	
Lotsa Hair, Bob Ross	CHRP	CHRP Host Home Lvl 3	N/A	N/A	2/1/2021	3/31/2021	4.00 day(s)	
Lotsa Hair, Bob Ross	DD	Non-Medical Transportation Band 1	N/A	N/A	2/1/2021	3/31/2021	3.00 day(s)	
Lotsa Hair, Bob Ross	DD	IRSS Host Home Lvl 1	N/A	N/A	2/1/2021	3/31/2021	10.00 day(s)	
Lotsa Hair, Bob Ross	DD	Supported Community Connection Lvl1	N/A	N/A	2/1/2021	3/31/2021	60 hours	

- To enter a shift, click the blue button with a calendar icon to the right of the name of the person that you supported that shift and the service provided.



- In this example, I will enter a Day Respite shift for Minnie Mouse. This is how the screen for entering a shift and time sheet will look.

Add Shift
×

Submitting Shift for **Day Respite - Test, Minnie Mouse**. Remaining Hours/Days for (Mar-2021): **3.00 day(s)**

In Date*	In Time (Hour)*	Minutes*	Out Date*	Out Time (Hour)*	Minutes*
mm/dd/2021	12am ▾	0 ▾	mm/dd/2021	12am ▾	0 ▾

EVV Exempt * If you exempt from EVV submission through the Sandata Mobile Application, Select 'Yes', Else Select 'No'.

Please select ▾

For Respite, Supported Community Connector Services and In-Home Supports (CHRP) activities, use "Visit Notes" section below

HomeMaker Services

EBD Services

Provider Prompted Activities

Provider Prompted Activities.

Client Did on his/her own Activities

Client Did on his/her own Activities.

Visit Notes * (Mandatory for All Services)

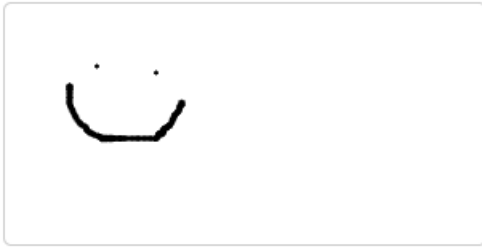
Please verify Visit Notes before submitting Shift. Visit notes cannot be changed after Shift submission.

Signature

- Please note the section at the top of the screen that says the number of hours remaining for that service, this will update automatically after you submit a shift for the respective service.
- You will need to enter the date and time that you started the shift as well as the date and time that the shift ended.
- You will also need to enter if the person that you are supporting is EVV exempt, this will vary depending on the specific person that you are supporting. You should be informed if the person that you are supporting is EVV exempt or not.
- It is MANDATORY that you enter a visit note for each shift that you submit, otherwise the timesheet for that shift will be considered invalid and will not be accepted in the system.

- There is a section at the bottom of the page that says signature, the person responsible will need to sign this, or the shift will not be approved or accepted.

Signature



Clear signature

Accept signature

Save

- After the shift is signed, select “accept signature” and “save” the shift after the signature has been accepted.
- If the person responsible is not available to sign your shift that day, select “save” without a signature. The person responsible will need to sign the shift and the signature will need to be accepted before the shift will be valid and accepted.
- If a shift has a signature and has been successfully submitted, the “notes” icon will look like this in the “submitted timesheets” section of your profile:



- If a signature has not been provided, the icon under “notes” will look like this:



In this situation, all you will need to do is select the shift, get the signature and select “accept signature” and “save”, and the icon will change to the blue checkmark.

- If you provided homemakers enhanced or homemakers’ basic services, there will be an extra step in submitting shifts. For the most part, entering the shift will be exactly the same. You will enter date and time, whether the person you are providing services to is EVV exempt and your visit note. The extra step will be listed under “Homemaker Services”. After clicking the “Homemaker Services” button, a check list will appear with all of the tasks that you may have completed during your homemaker’s shift. You will still need to submit a visit note for these shifts.

Add Shift



Submitting Shift for **Homemaker Enhanced - Cobain, Kurt** . Remaining Hours/Days for (Mar-2021): **20 hours : 42 mins**

In Date*	In Time (Hour)*	Minutes*	Out Date*	Out Time (Hour)*	Minutes*
03/22/2021	5pm <input type="text"/>	0 <input type="text"/>	03/22/2021	6pm <input type="text"/>	0 <input type="text"/>

EVV Exempt * If you exempt from EVV submission through the Sandata Mobile Application, Select 'Yes', Else Select 'No'.

No

For Respite, Supported Community Connector Services and In-Home Supports (CHRP) activities, use "Visit Notes" section below

HomeMaker Services

EBD Services

Provider Prompted Activities

Provider Prompted Activities.

Client Did on his/her own Activities

Client Did on his/her own Activities.

Visit Notes * (Mandatory for All Services)

We did a lot of cleaning and organizing! :)
(Your time sheet will need more detailed information)

Signature

Add Shift



Submitting Shift for **Homemaker Enhanced - Cobain, Kurt** . Remaining Hours/Days for (Mar-2021): **20 hours : 42 mins**

In Date*	In Time (Hour)*	Minutes*	Out Date*	Out Time (Hour)*	Minutes*
03/22/2021	5pm <input type="text"/>	0 <input type="text"/>	03/22/2021	6pm <input type="text"/>	0 <input type="text"/>

EVV Exempt * If you exempt from EVV submission through the Sandata Mobile Application, Select 'Yes', Else Select 'No'.

No

For Respite, Supported Community Connector Services and In-Home Supports (CHRP) activities, use "Visit Notes" section below

HomeMaker Services

- | | | | | |
|--|--|---|---|--|
| <input type="checkbox"/> Bathroom | <input type="checkbox"/> Bedroom | <input type="checkbox"/> Main Room | <input type="checkbox"/> Kitchen | <input type="checkbox"/> Personal Care Services |
| <input type="checkbox"/> Toilet | <input type="checkbox"/> Pick up Toys | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> Grocery Shopping |
| <input type="checkbox"/> Tub / Shower | <input type="checkbox"/> Pick Up Clothes | <input type="checkbox"/> Pick up Toys /
Electronics / Wipe
Surfaces | <input type="checkbox"/> Clean up after Meals /
Wipe Down Counters | <input type="checkbox"/> Money Management |
| <input type="checkbox"/> Sink / Mirror | <input type="checkbox"/> Made Bed | | | <input type="checkbox"/> Appointment Management |
| <input type="checkbox"/> Sweep | <input type="checkbox"/> Sweep / Vacuum | | | <input type="checkbox"/> Personal Care / Grooming |
| <input type="checkbox"/> Mop | | | | <input type="checkbox"/> Transported to Appointments |
| | | | | <input type="checkbox"/> Cooking Skills |

- All time sheets and visit notes must be submitted with an approved signature by 11:59pm on Sunday. Late submissions will be processed in the next week.
- If you add a person supported to your schedule, or stop providing services to someone, you need to let Beverly know so that we are able to update that information in DMS so that you can submit the correct shifts.
- You will still need to enter Respite, Group Respite, Homemaker Enhanced, and Homemaker Basic shifts into Sandata, or the shifts will not be approved.
- If you are providing Supported Community Connections, please track mileage to and from the house of the person supported. Submit this as a shift for “Non-Medical Transportation” if that is a service that is approved for your respective person that you are supporting.