

# Web Entry for the Consumer

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To get started go to the Web Entry website: <http://loriknapp.carvinsoftware.com>

**Enter Account #** - LKiChoice will give or has given this number to you via email per your request to start Web Entry.

**Enter Password** - LKiChoice will give or has given this password to you via email per your request when account # is sent.

Click Submit

Sign In

Please complete the following information for access to the site.

Type: Consumer

Account #:

Password:

Submit

If you have forgotten your password, please [click here](#), if you have to register please [click here](#).

By accessing this site, you are agreeing with our [Terms of Service](#).

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## **View, Edit, or Approve Hours Entered By Your Employee**

Click Timesheets tab then View Hours

What are Financial Management Services (FMS)

We provide full-service financial management services for fiscal/employer agent, third party administrator, and related support services. We help at all levels; state, county, and local implement a participant-directed service model – that allows participants to make individual choices about which services they receive, how they are delivered and by whom, within their budgets.

[Learn more >](#)

### Web Technology

Our web portal lets consumers, case managers, agencies, and employees manage budgets, reporting, time entry and more 24/7.

### Customer Service

We have a toll-free number staffed by customer service professionals that under the needs of our clients.



106 S. Beaumont Rd.  
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Fax: 844-634-7225  
Phone: 608-326-0434

# Web Entry for the Consumer

**To Edit hours:** Under the “Edit” column (far left) click the number that correlates with the line you need to edit.

**To Approve hours:** Under the “Status” column click on “Not Approved” and you will see the status change to “Approved”

View Hours

I certify, under penalty of removal from the program, prosecution, and repayment of funds, that this is an accurate record of the services this employee has provided.

Drag a column header here to group by that column

Edit	Status	Consumer	Employee	Date	Time IN	Time OUT	Hours/Miles	Code
3960	Not Approved	Test, Consumer	Test, Employee	11/17/2015	06:00 AM	07:00 AM	1.00	S5150
3959	Not Approved	Test, Consumer	Test, Employee	11/17/2015			20.00	S0215 RD
3958	Not Approved	Test, Consumer	Test, Employee	11/16/2015	08:00 AM	04:00 PM	8.00	S5150
							29.00	

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## **How to Change the Password**

Choose the “My Account” tab

Click Profile

Scroll to the bottom of the page

Delete the old password

Enter a new unique password

Click Submit

Scroll back down to the bottom of the page

In red writing it will state “Your account information was updated”

## **How to View Reports**

Choose the “My Account” tab

Click Reports

Choose from reports of:

Check Register Detail

Note Report

Account Statement

Employee Timesheet

Payroll Detail

Pending Payroll



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# Web Entry for the Consumer

Check Register Detail Report – this report will show any checks paid out for the time frame chosen, pay period dates, check date, if it was direct deposit or check form, hours on the check, net amount of check, and the mailing address of the employee

Choose a Start and End date

Choose one employee or all employees

Click Create

Lori Knapp Web Portal Home Sign Out Timesheet My Account Help

## Reports

Report: Check Register Detail

Start Date: 05/27/2017

End Date: 06/26/2017

Employee: --All--

Create

Lori Knapp Web Portal Home Sign Out Timesheet My Account Help

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## Check Register Detail

Name:  
Period Start:  
Period End:  
Check Date:  
Type:  
Hours:  
Check Number:  
Net Amount:  
Mailing To:



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# Web Entry for the Consumer

Note Report – this report will show any notes/comments that the employee may have added when entering their time. The report will show the date, employee name, time in and out, service code, description, and the note they wrote.

Choose a Start and End date

Choose one employee or All employees

Click Create

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## Reports

Report: Note Report

Start Date: 05/27/2017

End Date: 06/26/2017

Employee: --All--

Create

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## Note Report

Date:  
Employee:  
Time In:  
Time Out:  
Code:  
Description:  
Note:



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## Account Statement Report –

**Period Spending** - The user enters a start and end date when they want to generate the statement. The period spending is everything that was paid out during that date range chosen.

**Total Spending** - We use the ending date to calculate any items that have used in the authorization.

**Balance** - We use the total deposits and paid out amounts for the authorization with the ending date.

\*All this information is pulled from the system, the statement is looking at the activity for the given authorization.

Choose a Start and End date

Choose one employee or All employees

Click Create

Lori Knapp Web Portal Home Sign Out Timesheet ▾ My Account ▾ Help ▾

## Reports

**Report** Account Statement ▾

**Start Date:** 05/27/2017 ▾

**End Date:** 06/26/2017 ▾

**Employee** --All-- ▾

Create

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## Account Statement

Test, Consumer

### Account Information

Account	Total Deposits	Period Spending	Total Spending	Balance
SHC - Test ACCOUNT	\$0.00	\$0.00	\$0.00	\$1.00
	\$0.00	\$0.00	\$0.00	\$1.00

### Employee Information

Last Name	First Name	Status	Employee #	Pay Type	First Aid	CPR
Test	Employee	Active	4424	Direct Deposit		

### Code and Rate Information

Last Name	First Name	Description	Start Date	End Date	Rate
Test	Employee	Transportation-Medical-per mile	11/16/2015	11/16/2020	\$0.10
Test	Employee	Lawn Care - per 15 min	11/16/2015	11/16/2020	\$0.10
Test	Employee	Respite Care - per 15 min	11/16/2015	11/16/2020	\$1.00



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# Web Entry for the Consumer

Employee Timesheet Report – this report will show any hours entered for the employee whether they are approved or not approved by the consumer/member.

Choose a Start and End date

Choose one employee or All employees

Click Create

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## Reports

Report: Timesheet

Start Date: 05/27/2017

End Date: 06/26/2017

Employee: --All--

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### Employee Timesheet

Consumer:

Employee:

Service Date	Time IN	Time OUT	Code	Rate	Hours
					Total Hours:

I hereby certify that the above report accurately reflects the hours I have worked.

Employee Signature

Tuesday, May 09, 2017

Consumer Signature

Tuesday, May 09, 2017



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Payroll Detail Report - this report will show any shifts worked by the employee. This report will include the employee name, service code providing, consumer receiving the hours, check in and out time, date worked, check # the hours were paid on, and the total hours of the shift.

Choose a Start and End date

Choose one employee or All employees

Click Create

Lori Knapp Web Portal Home Sign Out Timesheet My Account Help

## Reports

Report: Payroll Detail

Start Date: 05/27/2017

End Date: 06/26/2017

Employee: --All--

Create

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## Payroll Detail

Code	Consumer	Check In	Check Out	Date	Check #	Hours
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Total Hours:



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# Web Entry for the Consumer

Pending Payroll Report – this report will show any time entered and approved by the employer/consumer, pulled into our payroll system but not paid out to the employee.  
Choose one employee or all employees  
Click Create

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## Reports

Report Pending Payroll

Employee --All--

Create

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## Pending Payroll

Work Date	TimeIN	TimeOUT	Hours	Rate	Description	Batch #	Check #
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Consumer Total  
Employee Total  
Report Total

**Sign Out once you are completed in the website portal**



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