

DSP Task Guide

Table of Contents

<i>Clocking In.....</i>	<i>2</i>
<i>Mileage Reimbursement.....</i>	<i>4</i>
<i>Monthly Member Success Reports.....</i>	<i>6</i>
<i>Viewing Member Support Documents</i>	<i>8</i>
<i>Tasks Due - Access</i>	<i>8</i>
<i>Progress Notes.....</i>	<i>9</i>
<i>Timesheet/Progress Note Corrections</i>	<i>10</i>
<i>Training.....</i>	<i>12</i>
<i>Requesting Time Off</i>	<i>14</i>
<i>Incident Reports</i>	<i>15</i>
<i>Updating Direct Deposit.....</i>	<i>15</i>
<i>Updating Tax Withholding</i>	<i>15</i>
<i>Fixing Location Services on Your Device.....</i>	<i>16</i>
<i>On Demand Pay.....</i>	<i>16</i>
<i>Paystubs & Tax Forms.....</i>	<i>17</i>

Clocking In

Follow the steps below to clock in and choose your location. Please Note:

- You must clock in for all training, whether in-person, in Paylocity, or assigned by Advocate Access NW with another app/provider. When doing Monthly Member Success Reports or other documentation, clock into Recordkeeping/Other.
- DSPs **rarely if ever** need to punch a **break** or **lunch**.
 - Paid breaks when you remain with the member you are supporting are built in and do not require a time clock punch. Breaks are used only when traveling directly from one member to the next for work.
 - Lunches are used when you are physically separated from the member and no longer working for a period of time. Eating while present with the member does not require a time clock punch.
- When you are leaving one member and travelling directly to the next member, you should punch **Start Break** and enter the progress note for the first member. After traveling to the next member, you will need to click **More**, choose **End Break + Transfer**. On the next screen, click **Cost Centers**. The **Location** option there will allow you to choose the location for the new member.
- For times you are finishing a shift with one member but have a period of time before your shift starts with the next member, you should clock out, entering the progress note for the first member. When your next shift begins, choose **Clock In + Transfer**. On the next screen, click **Cost Centers**. The **Location** option there will allow you to choose the location for the new member.
- If you are transferring from working from one member to the next and both members are present during the transition, **Clock Out**, entering the progress note for the first member. Next choose **Clock In + Transfer**. On the next screen, click **Cost Centers**. The **Location** option there will allow you to choose the next member.

Remember, **you must always be physically present with a member to be clocked in under their location code.**

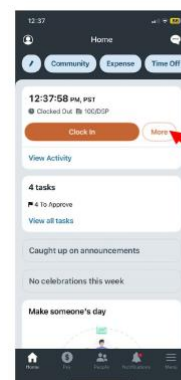
For any help with Paylocity, you can reach the Systems Team on the office cell phone, (971)203-4395, which is monitored Monday through Friday during office hours. Feel free to email onboarding@advocateaccessnw.com as well!

Punching In & Out:
How to Log and
Document Your
Services

Entering Time and
Documentation in Paylocity



From the
mobile app,
click the **More**
next to the
Clock In
button.



Choose Clock
In & Transfer.

Click Next.



Click
the Cost
Centers field.

Make sure the Location is correct, and click to change it if necessary.

Enter your location at clock in (examples: Office, Member Home, School, Store, Library). Click Submit

At the end of your shift, click the **More** option next to the Start Lunch button.



Enter your progress note in the note field.

This should only be about the member. Notes about your time sheet can be entered on the next step.

Click Yes to
certify your
timesheet is
accurate.

If your clock in or
clock out times
need any
adjustment,
enter the details
in the note field.
Click Submit.

Mileage Reimbursement

Mileage to transport adult members can be eligible for reimbursement. Follow the steps below, and feel free to reach out with any questions! Please note:

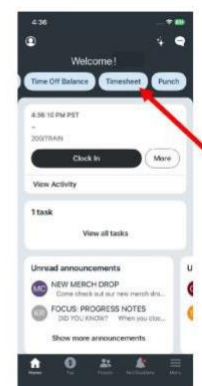
- Mileage for medical visits cannot be reimbursed as a Medicaid service. Non-emergency medical transportation (NEMT) services are a covered Medicaid benefit for OHP members. If you have no way to get a member to a covered health appointment, a rideshare program called NW Rides can get you there. Depending on your needs, you may be provided rides, get passes to ride the bus or get help paying for gas. Contact NW Rides toll-free at 888-793-0439 to talk about transportation options.
- The Office of Developmental Disabilities Services (ODDS) has determined that the cost to transport a minor is the responsibility of the parent/legal guardian. We are available to support a conversation about what that can look like.

Mileage Reimbursement

How to Track and Submit Your
Mileage in Paylocity



From the
mobile app,
choose the
Timesheet
tab.



Click the **Plus** sign to add a new expense.



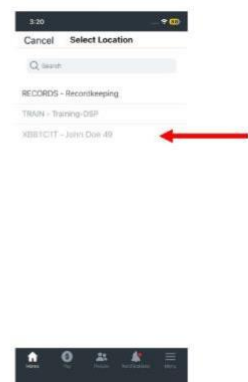
The **Pay Type** should be set to **Mileage**. Click the entry for **Cost Center**.



Click the **Location** field.



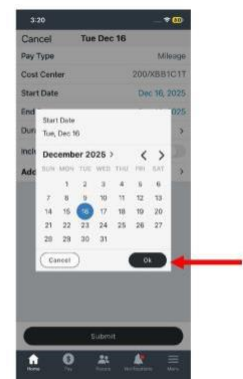
Select the **Location** for the member you drove.



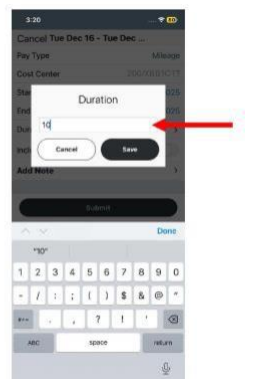
Ensure the correct member **Location** is displayed.



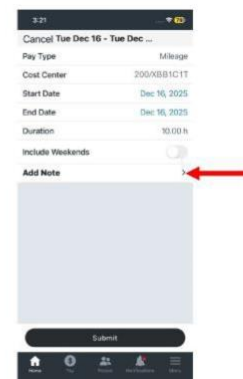
For the **Start Date**, choose the date of transportation. Click **OK**. The **End Date** should be the same.



Click the **Duration** field, enter the number of miles you drove, and click **Save**.



Toggle on the **Include Weekends** field for weekend transportation. Click **Add Note**.





Advocate Access NW
2155 Gable Road Unit B
Saint Helens, OR 97051
503-410-5116

Click into the note field to enter the location(s) of travel. Click **Done**.

Click **Submit** to complete the entry.

You will see a confirmation that your expense report is submitted.

Mileage Reimbursement

It's that easy to track your mileage in Paylocity!



Monthly Member Success Reports

You will receive a report link for each member you are connected to support. Each report should take only a minute or two to complete, and you should still clock into Recordkeeping for this task.

1. Will I receive a report even if I didn't work with the member in the last month?

Yes, you will get a report for each member you are connected with, even if you didn't work with them. When asked if you worked with that member in the last month, just click no. It's as simple as that!

2. Do I need to write information in the report?

The reports have checkboxes for each desired outcome. You should be able to just check boxes and click submit. Some goals may present a follow up question for clarification, and you can add additional information you feel is relevant.

3. How will I access the reports?

- Click **More** next to the clock-in button → **Clock In + Transfer**
- Select **Cost Centers** → **Location** → **Recordkeeping**
- After clocking in, go to **Home** to find your tasks under the punch clock. Select **View all tasks**.



Advocate Access NW
2155 Gable Road Unit B
Saint Helens, OR 97051
503-410-5116

Monthly progress reports are essential because they highlight how each member is working toward their Individual Support Plan (ISP) desired outcomes. Unlike daily shift notes, these reports focus on goal-related progress and are compiled into quarterly summaries that help case managers decide if ISP updates are needed. Your efforts to engage members meaningfully are truly valued and seen.

If you have any questions, contact onboarding@advocateaccessnw.com.

* Required question

The following **multiple-choice questions** are based on this member's ISP desired outcomes for the current year. Answers should show what has been worked on during the previous month. Please only select the desired outcomes that were worked on during your hours with the member.

Please answer as accurately as possible, this survey is intended to give us an accurate measurement of our Member's success in meeting their ISP goals. If for any reason "*none*" of the ISP desired outcomes have been worked on during the month, you will be prompted to share a reason and further information on why.
Example: "Member and I worked on ____ this month instead because ..."

* 1. Did you support **Member** in the *previous month*?

- ☐ Yes
☐ No

* 2. With support, [Member] progressed [ISP Desired Outcome] by:

- ☐ ISP Goal 1
☐ ISP Goal 2
☐ ISP Goal 3
☐ None

6. Provide feedback on the member's progress and any challenges faced. Include any recommendations for changes or additional supports needed. (Optional: Answer "N/A" if nothing to add)

Enter text

* 7. Are any of these Desired Outcomes / Goals no longer able to be met for any reason?

- ☐ No
☐ Yes

* 8. Are there any Desired Outcomes / Goals needed to be added to this member's ISP for any reason?

- ☐ No
☐ Yes

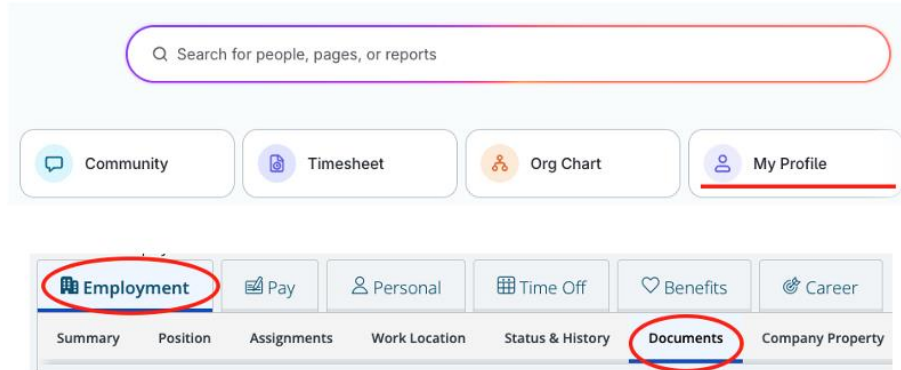
This member has a Positive Behavior Support Plan (PBSP) in place. It is essential that behavior data is recorded daily using the designated tracking system to ensure consistent implementation and support. Please reach out with any questions! *[insert link if applicable]*



Advocate Access NW
2155 Gable Road Unit B
Saint Helens, OR 97051
503-410-5116

Viewing Member Support Documents

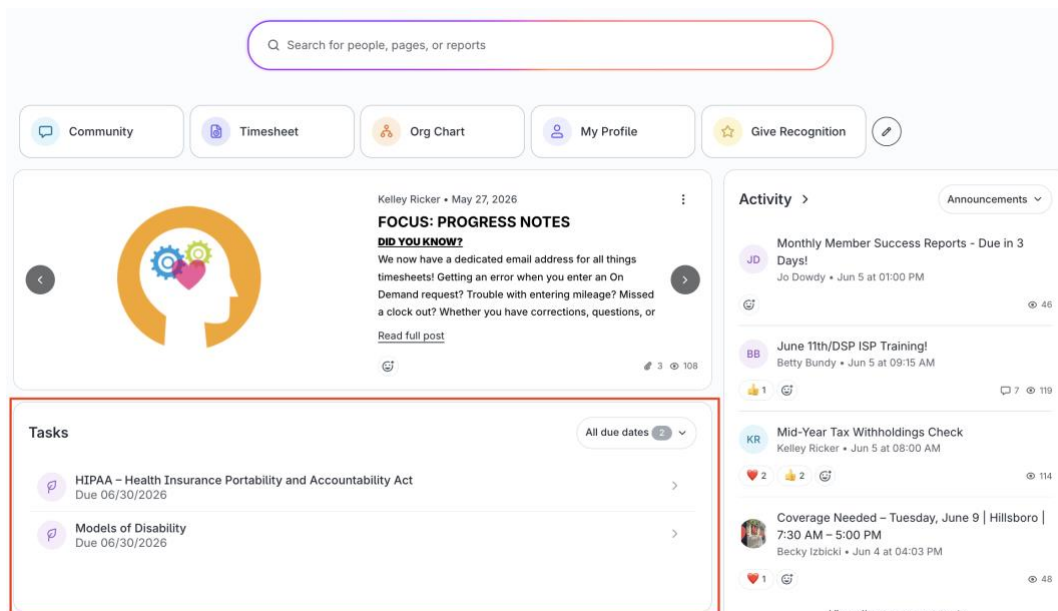
To review ISP and support documents, log into Paylocity on a computer or your phone's internet browser at <https://access.paylocity.com/>. Click on **My Profile**, and under the **Employment** tab, choose **Documents** where you'll find each member's documents.



Tasks Due - Access

To view or access your tasks due:

- Click **More** next to the clock-in button → **Clock In + Transfer**
- Select **Cost Centers** → **Location** → **Recordkeeping or Training** (based on the task due)
- After clocking in, go to **Home** to find your tasks under the punch clock. Select **View all tasks**. (On a computer, your task list will be on the **Home** page just under the company announcements.)





Progress Notes

Progress Note Examples

Each progress note must include clear, specific details about the shift. At least two sentences should describe what occurred during the shift, such as activities completed or behaviors observed. Another two or more sentences should explain how the DSP provided support - this might include assistance with Activities of Daily Living (ADLs), prompting, redirection, or supervision for health and safety. Finally, include one or more sentences describing how the member responded to the support, noting any progress, challenges, or changes in behavior. Using Medicaid-relevant terms like **personal care, community integration, skill-building, independence, and support plan goals** can help ensure compliance and clarity.

When writing a progress note, it's essential to clearly document not only what the member did during the shift but also how you actively supported them. This includes describing specific actions you took to assist, encourage, prompt, or intervene in alignment with the member's goals and support plan. For example, instead of simply stating that the member prepared a meal, the note should detail how the DSP supported that activity, such as providing verbal prompts, modeling steps, ensuring safety, or offering encouragement. These support actions demonstrate the DSP's role in facilitating independence and safety and are critical for Medicaid documentation to validate that the service is needed and effective.

Sally Jo's Desired Outcomes (Goals)

1. Create a shopping list to shop for groceries once per week.
2. Build navigation skills to increase independence when in the community.
3. Ask questions when needed throughout her day.
4. Put groceries away in their designated spots once per week for convenience when cooking.
5. Cook meals independently four times per week.
6. Clean spaces after use daily.

These goals will help guide her progress and ensure she continues to build her skills and independence.

On this day I supported Sally Jo during her weekly shopping trip. We used a shopping list that was created before we left. While I drove to the store, Sally Jo practiced her navigation skills by directing me when to turn and where to go. At the store, I supported Sally Jo in asking the Courtesy Clerks for the location of specific items, which helped her enhance her communication and social skills. Sally Jo successfully completed several Individual Support Plan (ISP) goals during this trip. Upon returning home, I stayed nearby to support Sally Jo with putting away groceries in their designated spots if needed. Following this, Sally Jo followed a recipe to prepare dinner, showing her cooking skills, and then cleaned the kitchen, ensuring it was tidy and organized. Throughout these activities, Sally Jo showed great enthusiasm and determination, successfully meeting her desired outcomes of learning how to cook and improving her navigation and communication skills. Continued support in these areas will further enhance her skills and independence.



Advocate Access NW
2155 Gable Road Unit B
Saint Helens, OR 97051
503-410-5116

Timesheet/Progress Note Corrections

When you receive a request for a timesheet or progress note correction from our office, **a response is expected within 24 hours**. Please let us know right away if a circumstance prevents immediate follow up.

Correcting a Progress Note:

- In Paylocity, go to **Menu → Punch → Activity**.
- Choose the clock out punch for the shift being corrected.
- Click the **pencil edit icon** or choose the **three dots** in the upper right corner and choose **Edit Punch**.
- Add or update the note in the **Note** field.
- For the **Request Comment**, just write “note”.

Adding a Missed Clock Out:

- In Paylocity, go to **Menu → Punch → Errors**.
- Choose the clock out time for the shift being corrected.
- Enter the progress note in the **Note** field.
- For the **Request Comment**, just write “missed punch”.

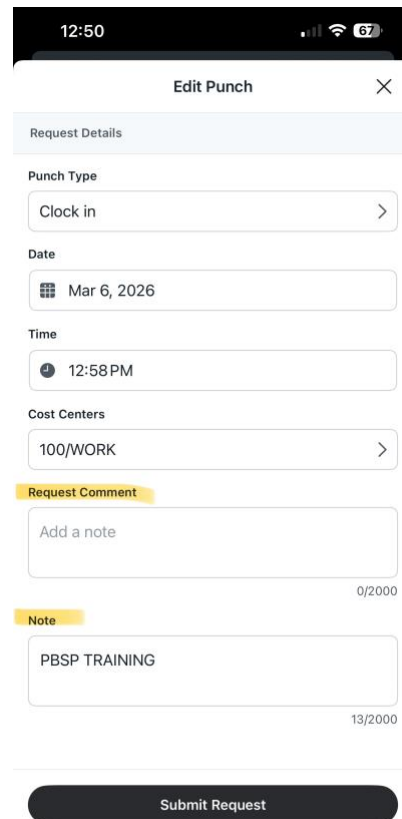
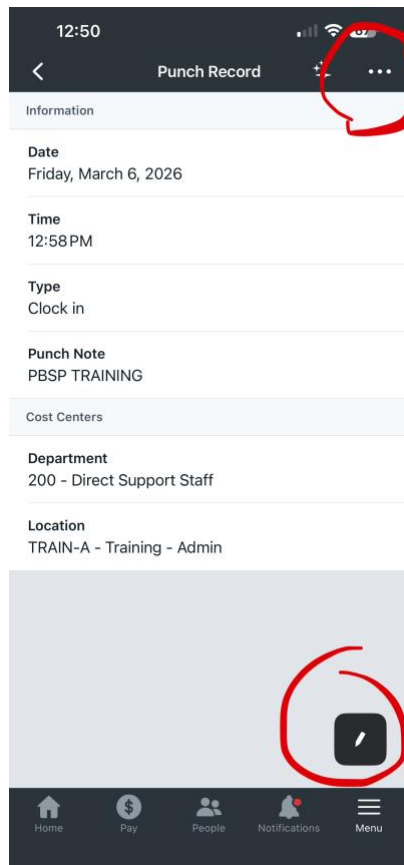
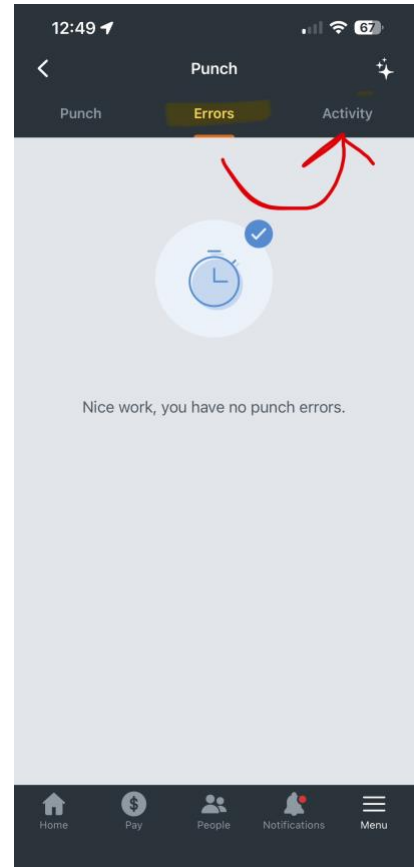
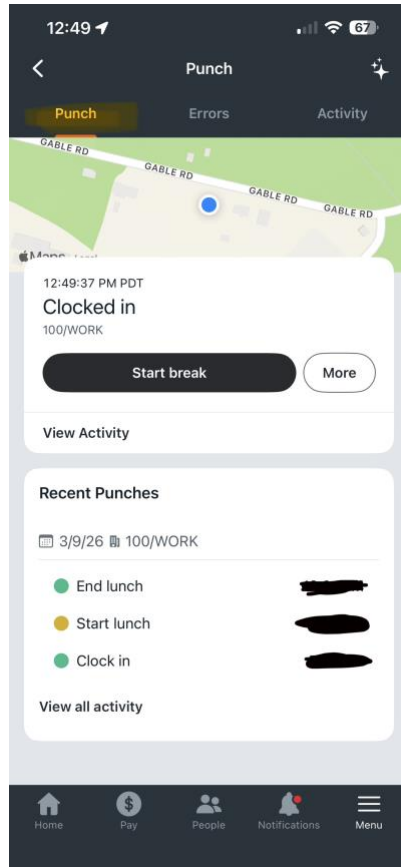
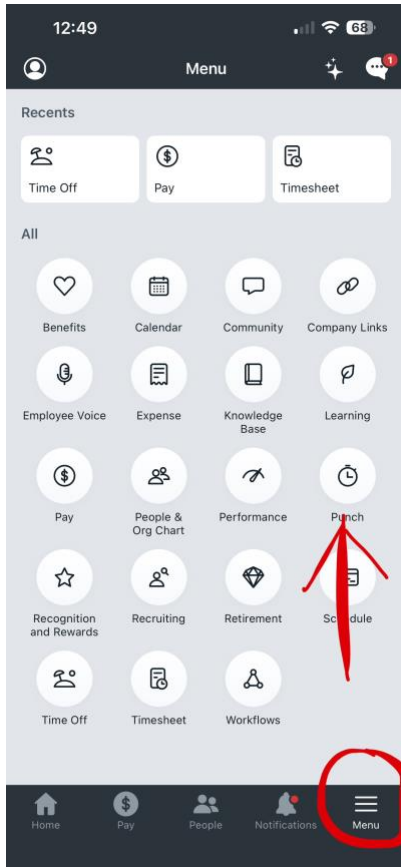
Adding a Missed Clock In:

- In Paylocity, go to **Menu → Punch → Activity**.
- Choose the **plus (+) sign** for the shift date.
- Set the punch type as **Clock In**, set the date and time, and click **Cost Centers** to update the **Location**.
- Enter the clock in location in the **Note** field.
- For the **Request Comment**, just write “missed punch”.

See visuals on the next page.



Advocate Access NW
2155 Gable Road Unit B
Saint Helens, OR 97051
503-410-5116





Advocate Access NW
2155 Gable Road Unit B
Saint Helens, OR 97051
503-410-5116

Training

Remember to clock in for all training. To view or access your assigned training:

- Click **More** next to the clock-in button → **Clock In + Transfer**
- Select **Cost Centers** → **Location** → **Training**
- After clocking in, go to **Home** to find your tasks under the punch clock. Select **View all tasks**. (On a computer, your task list will be on the **Home** page just under the company announcements.)

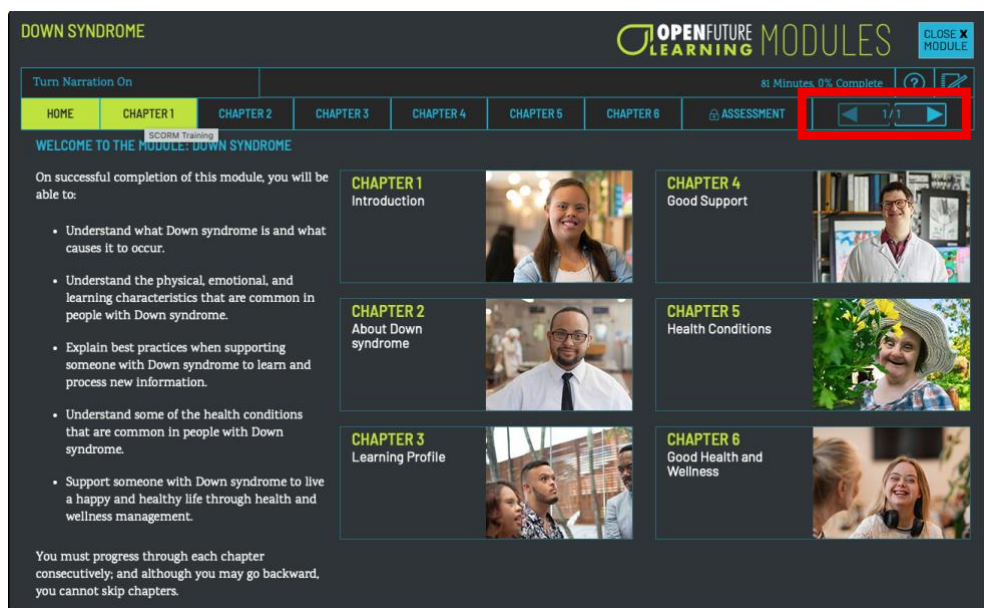
Many trainings require you to use a computer or large tablet. You'll know this is needed if you start a training, are instructed to turn your screen, and the problem is not resolved. Training computers are available at the office.

Logging in on a Computer:

- Use **Company ID** 321092.
- Your **Username** is typically your preferred first name and last name in lowercase with a period between. Example: Johnathan Doe's username is john.doe when logging in.
- Your **Password** will be the same one used in the app. If needed, admin staff can assist with a password reset.

Navigating Training:

Some training requires you to click blue arrows in the upper right corner to navigate forward through the module.





Advocate Access NW
2155 Gable Road Unit B
Saint Helens, OR 97051
503-410-5116

Error Messages:

If you get an error message when you clock in to do training, please reach out right away at onboarding@advocateaccessnw.com. We've run across a few of the errors below.

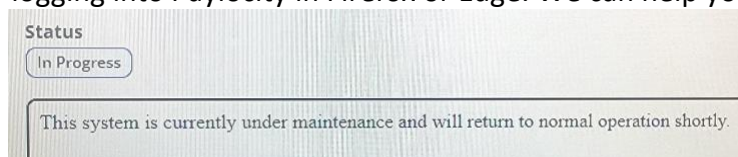
1. Course Unavailable – This error means our vendor needs to update their system so that access syncs with our new license level. Let us know when you see this so we can prompt the action.

Course is Unavailable

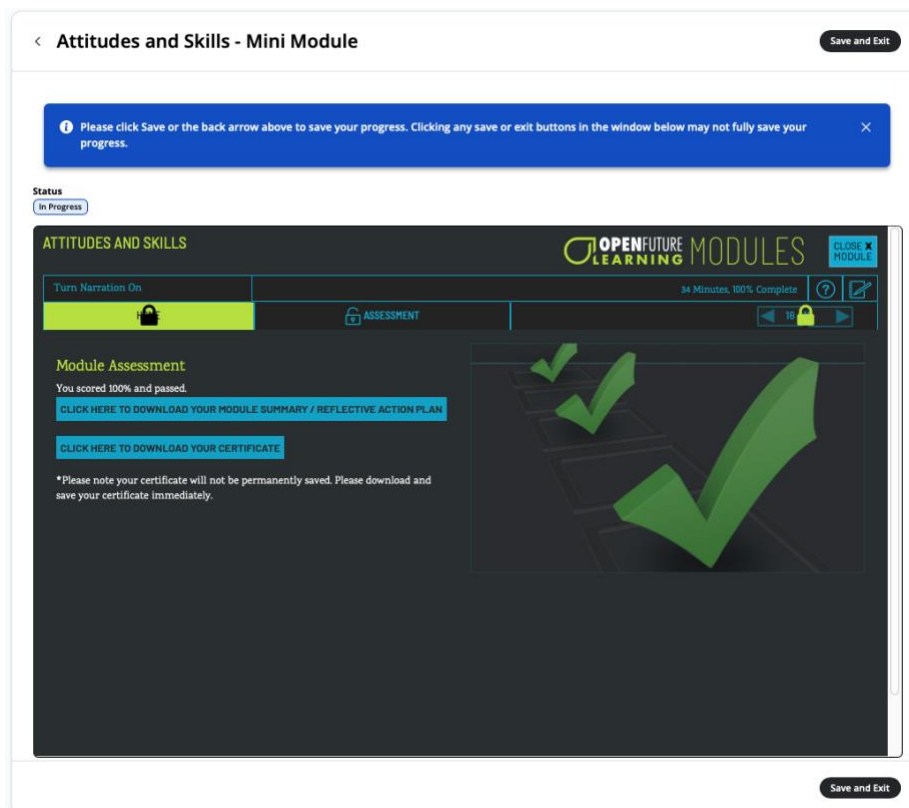
Please contact your system administrator to correct the problem.

Status Code: 400 - The active license limit has been exceeded.

2. Gray Screen with This system is currently under maintenance – This is typically resolved by trying the training with a different internet browser. For example, if you usually use Safari or Chrome to access the internet, try logging into Paylocity in Firefox or Edge. We can help you navigate this if needed.



3. Training Completed, but still shows as due – Sometimes this happens when you finish a training but click a different button than expected to exit. In the photo below, it's possible to exit with **Close Module**, the back arrow in the upper left, or **Save and Exit**. Try **Save and Exit**, and if that does not complete the module, try each of the other options. We can also help resolve this issue.



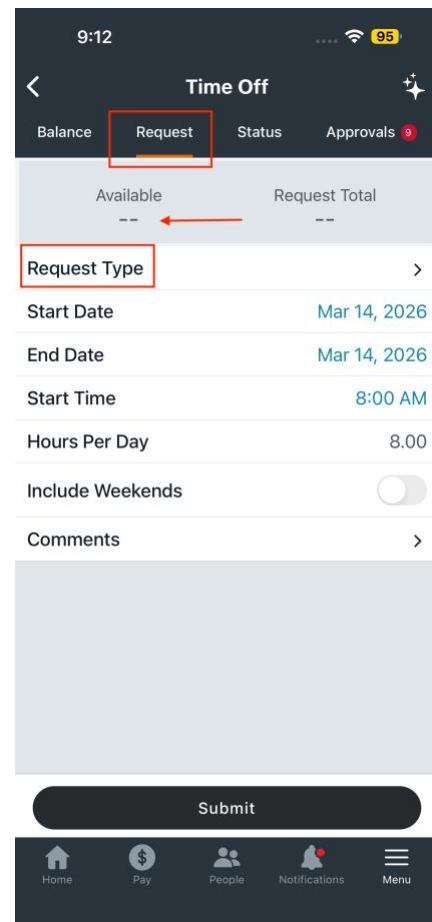
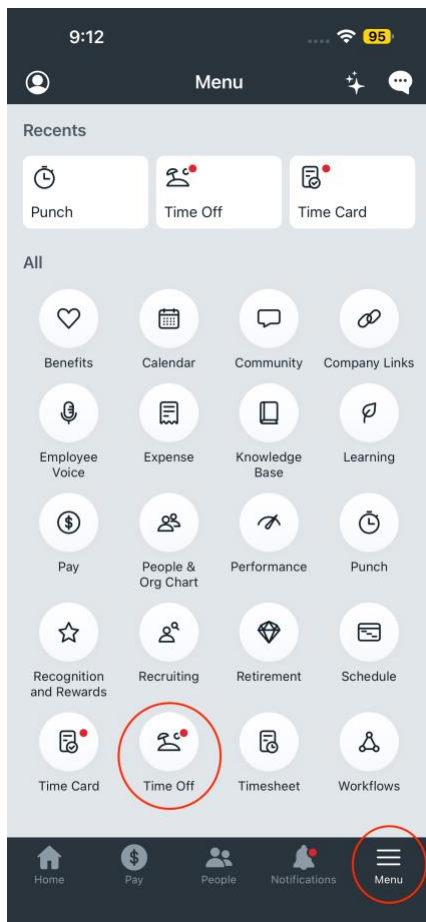


Advocate Access NW
2155 Gable Road Unit B
Saint Helens, OR 97051
503-410-5116

Requesting Time Off

You can click **Time Off** from the menu in the Paylocity app to manage your accrued leave. Please note that only unpaid leave can be used in the first 90 days of employment.

- Choose the **Request** tab. From there, you can choose the **Request Type**.
- Once a type is chosen, the available leave will display.
- Choose the leave date(s), hours per day, etc.
- Be sure to toggle on **Include Weekends** if your normal work days fall on weekends.
- Add the reason for the request in the comments field, then **Submit** it.





Advocate Access NW
2155 Gable Road Unit B
Saint Helens, OR 97051
503-410-5116

Incident Reports

When something unusual happens during your shift, you need to fill out an incident report. Incident reports are required for things like physical aggression, any urgent care or emergency services, an unplanned hospital admission, any physical restraints, if a member is missing beyond the timeframe established in their ISP, an injury to the member (including self-harm), a serious illness, a medication error, and any allegation of abuse.

You can file an incident report using either of the links below. You will include details about what happened before the incident, your description of the incident, and any actions taken during and after the incident to reduce risk. Feel free to reach out with any questions.

<https://prod.url.paylocity.com/surveys/publiclink/ax8e3q5q8dvmrr2uyln?q=950c52f68f2d4f8ab4a4fa805083931d>

<https://advocateaccessnw.com/incident-reporting>

Updating Direct Deposit

You can update your direct deposit information if you login on a computer or your phone's internet browser. From the menu (the three lines in the upper left corner) choose **HR and Payroll**. Please reach out to our office for support if you have any questions!

- Hover over **Employees** in the top left side of the screen and click **Person Record**.
- Click the **Pay** tab, then click **Direct Deposit**.
- You should be able to enter your new account information from there and submit it to us. **It's important to double check that the account number you are using is the one your financial institution uses for direct deposits.** This number can often be different than the account number you reference when you go to your financial institution.

Updating Tax Withholding

Here are the steps you can follow to update your tax withholding when needed. If you have any difficulty with these steps, please reach out to our office for support.

- Log into **Paylocity** on a computer or your phone's internet browser at <https://access.paylocity.com/>
- From the menu (the three lines in the upper left corner) choose **HR and Payroll**.
- Hover over **Employees** in the top left side of the screen and click **Person Record**.
- Click the **Pay** tab, then click **Tax Setup**.
- You can click the pencil (edit) icon to the right of **FITW – Federal Income Tax** to update your federal filing status and withholding amount. Click Save & Return.
- You can click the pencil (edit) icon to the right of **OR – Oregon SITW** to update your Oregon filing status and withholding amount. Click Save & Return.



Advocate Access NW
2155 Gable Road Unit B
Saint Helens, OR 97051
503-410-5116

Fixing Location Services on Your Device

If your location data isn't showing on your clock-ins/outs, you'll need to take some steps to fix the issue. It could be because of a change in the settings on your phone, a change in device, or something else. Since we're required by ODDS to capture that information, please check a few things to make sure you are set up correctly.

For most devices:

1. Go to **Settings**
2. Select **Privacy & Security** or search for **Location Services**
3. Select **Location Services**
4. Make sure that **Location Services** is on
5. Scroll down and find the **Paylocity** app and tap it
6. Make sure **While Using the App** is selected
7. Make sure **Precise Location** is enabled

If that is all set up correctly, Paylocity recommends exiting the Paylocity app, toggle off all location settings on the device, then toggle them back on.

If you **do NOT see Paylocity**, this usually means the app has **not yet requested location access**, or the request was denied and not saved. Try the following steps:

- **Delete and reinstall the Paylocity app**
 - After reinstalling, **open the app and attempt to clock in**. This should trigger a prompt asking for location access.
 - **Important:** When prompted, **select "Allow While Using App"** and **enable Precise Location**.
- If you **don't get the prompt**, go to:
 - **Settings > Screen Time > Content & Privacy Restrictions > Location Services**
 - Make sure **Location Services are allowed** and **not restricted** for apps.
- **Restart your phone** after reinstalling and trying the above steps.

If that still doesn't work, please contact your phone provider's support to see if they can force the Paylocity app to show in their location settings. Please reach out to the office if you have any questions.

On Demand Pay

You can use the **On Demand Pay** feature to request pay early. This feature is not always available and is disabled when an income withholding order is in place. It is offered entirely by Paylocity, and Advocate Access NW has no control over when funds are delivered.

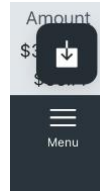
In the app, you can choose the **Pay** icon at the bottom of the screen, then click **On Demand** at the top. You'll see your options from there and can put in the request. Please reach out to the office if you have any questions or run into issues when trying to make a request.



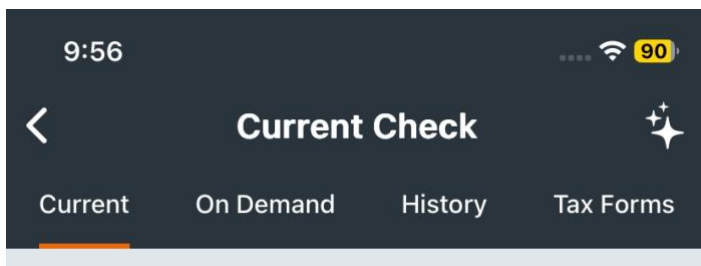
Advocate Access NW
2155 Gable Road Unit B
Saint Helens, OR 97051
503-410-5116

Paystubs & Tax Forms

You can access your paystubs by tapping the **Pay** icon in the menu. After entering your password, you'll see your **Current Check**. You can download the paystub by clicking the small download icon in the bottom right corner. You will see a preview and have the option to click **Share** and enter your email address, print, or save the document to your files.



You can choose to see past paystubs by clicking the **History** tab. W-2 forms are available under the **Tax Forms** tab.



If you need your W-2 form to be printed, please contact our office.

Access From the Paylocity Website (Paylocity.com)

Login using company ID 321092, your username, and your password. Click the **Pay** menu in the center of the screen, then click to **Show Private Date**. Click **Tax Forms**. You will be able to choose the W-2 for the correct tax year and click **Download W-2** from the top right of the page.

