DSP Task Guide

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Clocking In

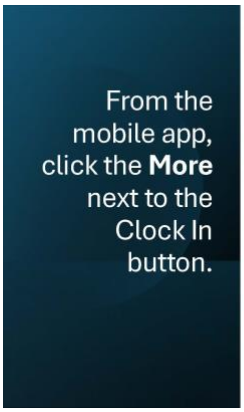
Follow the steps below to clock in and choose your location. Please Note:

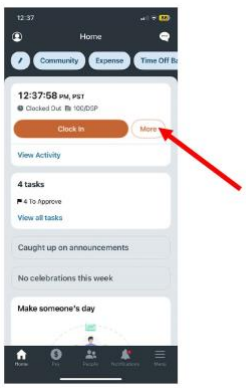
- You must clock in for all training, whether in-person, in Paylocity, or assigned by Advocate Access NW with another app/provider. When doing Monthly Member Success Reports or other documentation, clock into Recordkeeping/Other.
- DSPs **rarely if ever** need to punch a **break** or **lunch**.
    - 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.

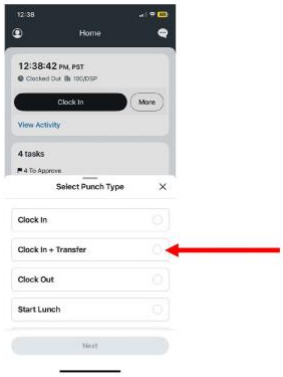
For any help with Paylocity, you can reach the Systems Team on the office cell phone, (971)203-4395, which is monitored Monday through Friday during office hours. Feel free to email onboarding@advocateaccessnw.com as well!



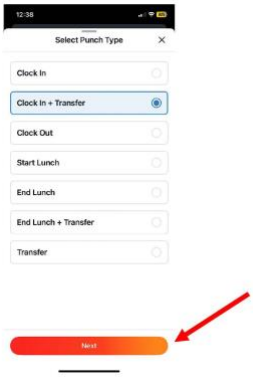




Choose Clock In & Transfer.



Click Next.



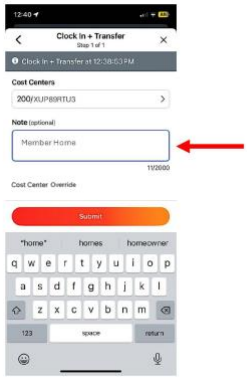
Click the Cost Centers field.



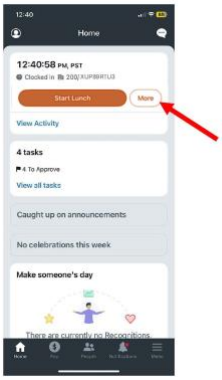
Make sure the Location is correct, and click to change it if necessary.



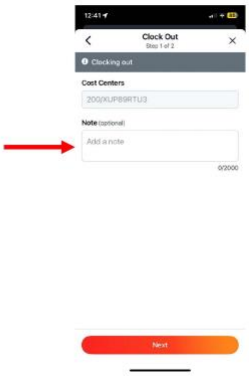
Enter your location at clock in (examples: Office, Member Home, School, Store, Library). Click Submit



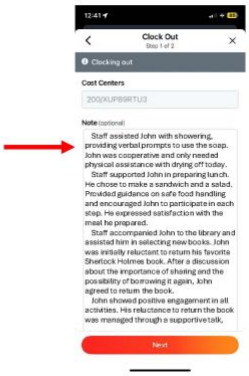
At the end of your shift, click the **More** option next to the Start Lunch button.



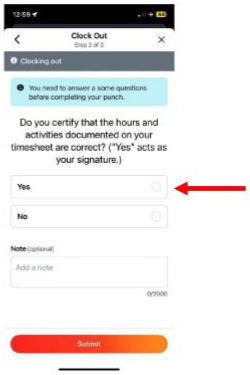
Enter your progress note in the note field.



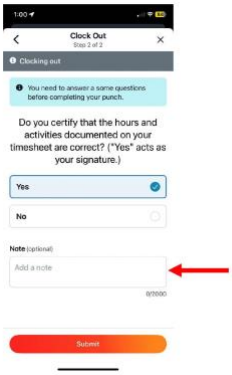
This should only be about the member. Notes about your time sheet can be entered on the next step.







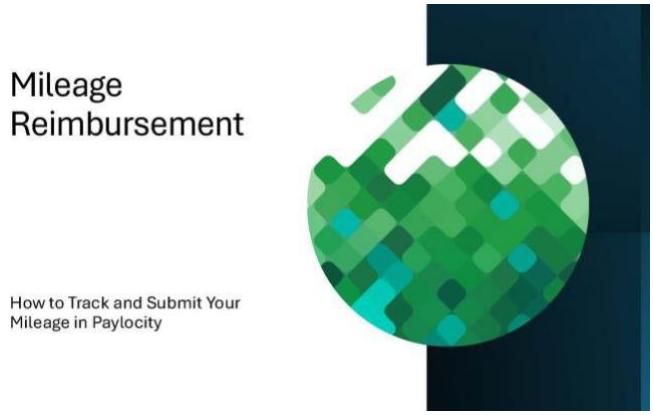


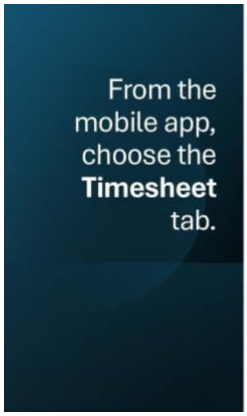


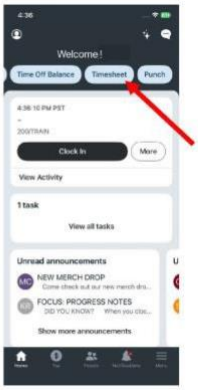
Mileage Reimbursement

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.



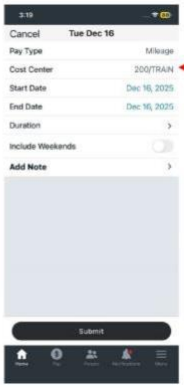




Click the **Plus** sign to add a new expense.



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



Click the **Location** field.



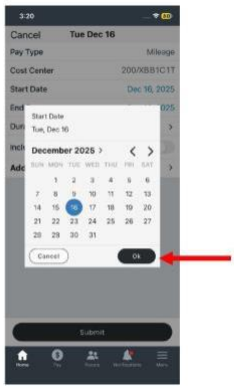
Select the **Location** for the member you drove.



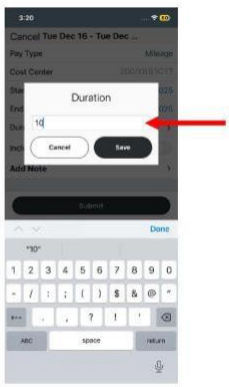
Ensure the correct member **Location** is displayed.



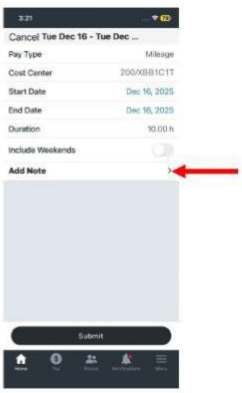
For the **Start Date**, choose the date of transportation. Click **OK**. The **End Date** should be the same.



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.**



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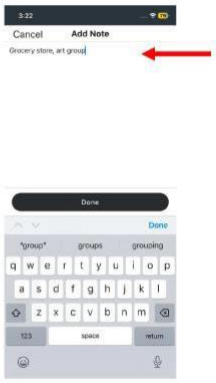

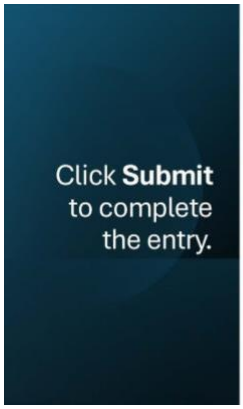

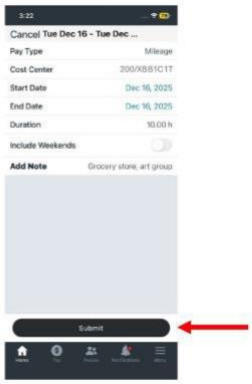

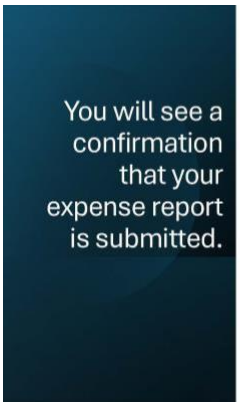







Monthly Member Success Reports

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**.

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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]*

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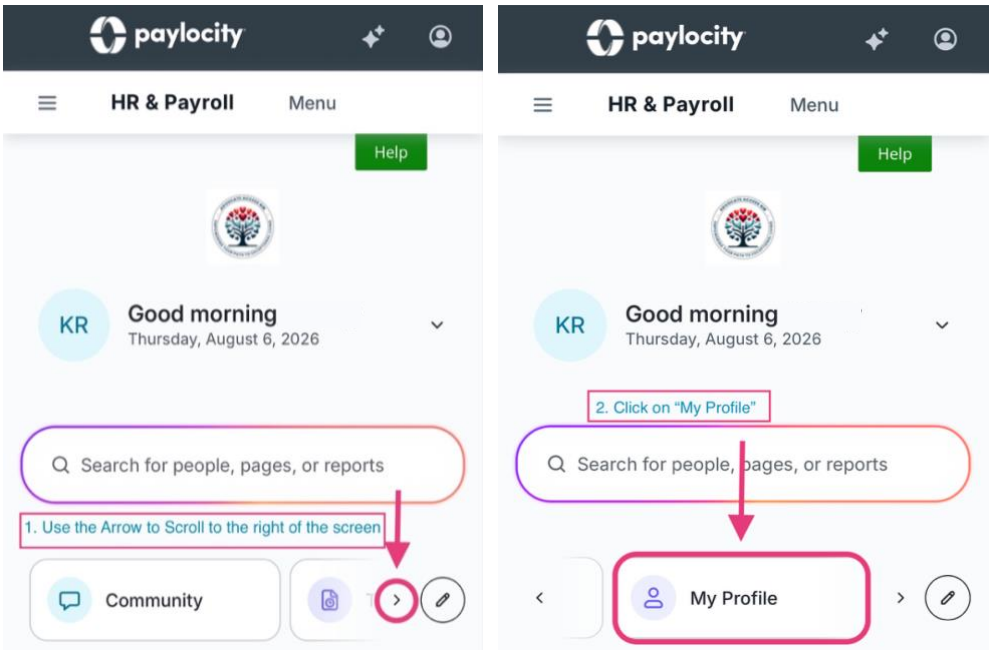
Viewing Member Support Documents

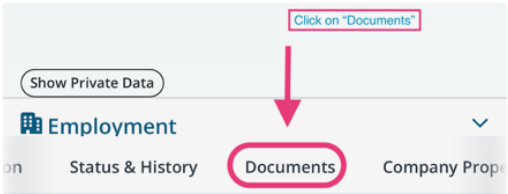
To review ISP and support documents, log into Paylocity on a computer or your phone's internet browser at https://access.paylocity.com/.

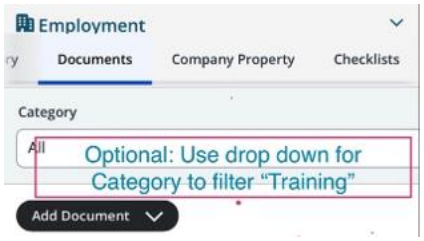
From a Phone:

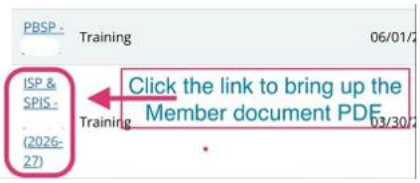
1. Access Paylocity in your preferred internet browser on your phone (NOT THE APP) & sign in using your credentials.
    - Link to Paylocity: https://go.paylocity.com
    - Company ID: 321092
    - Your Username & Password
2. Select the right-handed arrow just below the search bar to scroll to the right to see more options.
3. Select **My Profile**.



4. Under the **Employment** tab, select **Documents**. *Optional:* Use the drop-down arrow & select **Training**.
5. Select the File Name of the document you wish to access.







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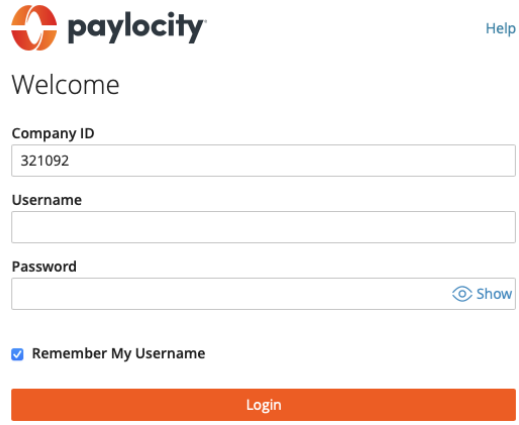
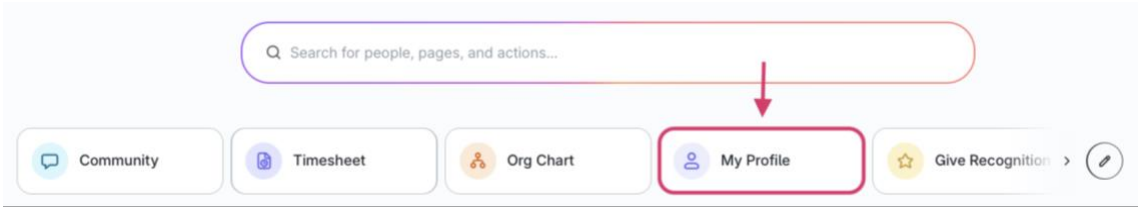
From a Computer:

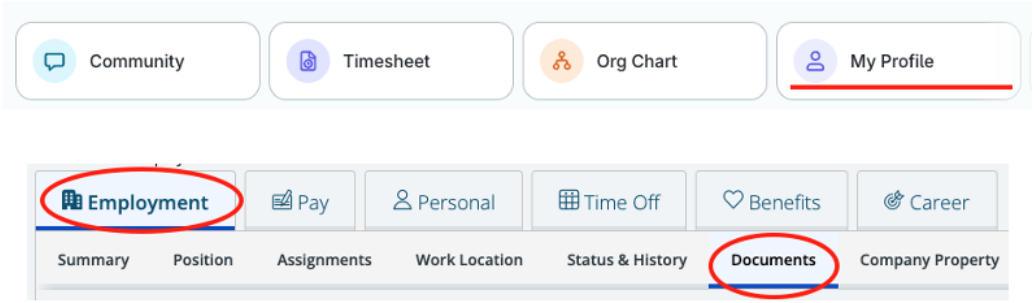
1. Access Paylocity in your preferred internet browser & sign in using your credentials.
    - Link to Paylocity: https://go.paylocity.com
    - Company ID: 321092
    - Your Username & Password

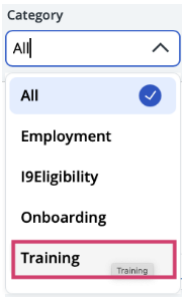


2. Select the **My Profile** option just under the search bar.



3. Under the **Employment** tab, select **Documents**. *Optional:* Use the category drop-down menu & select **Training**.





4. All your assigned Member Documents will be available here. Select the File Name of the document you wish to access.

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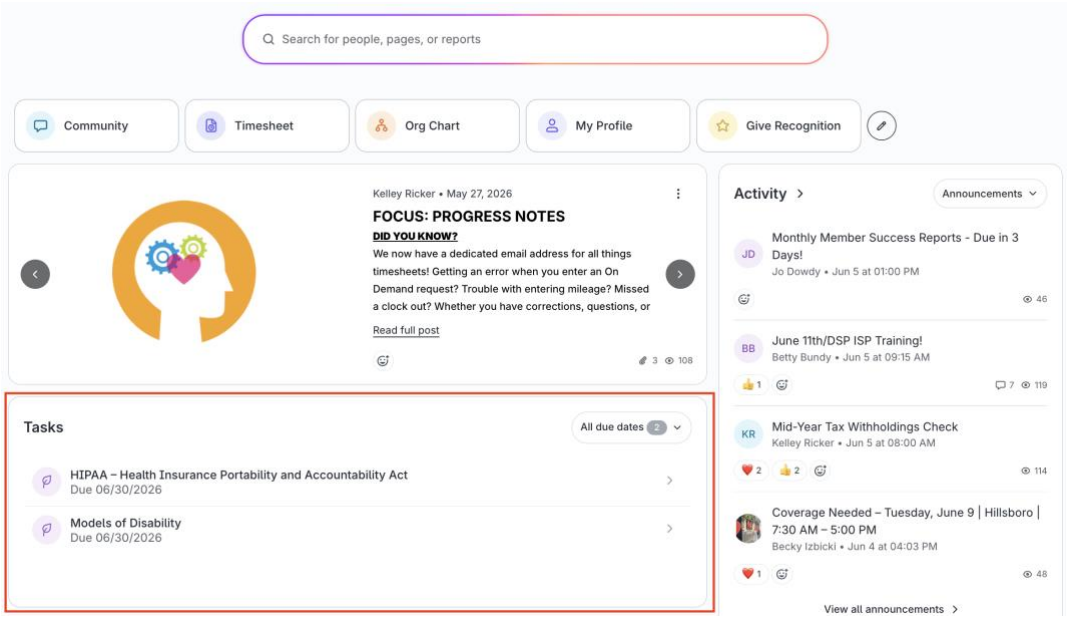
Tasks Due - Access

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.)



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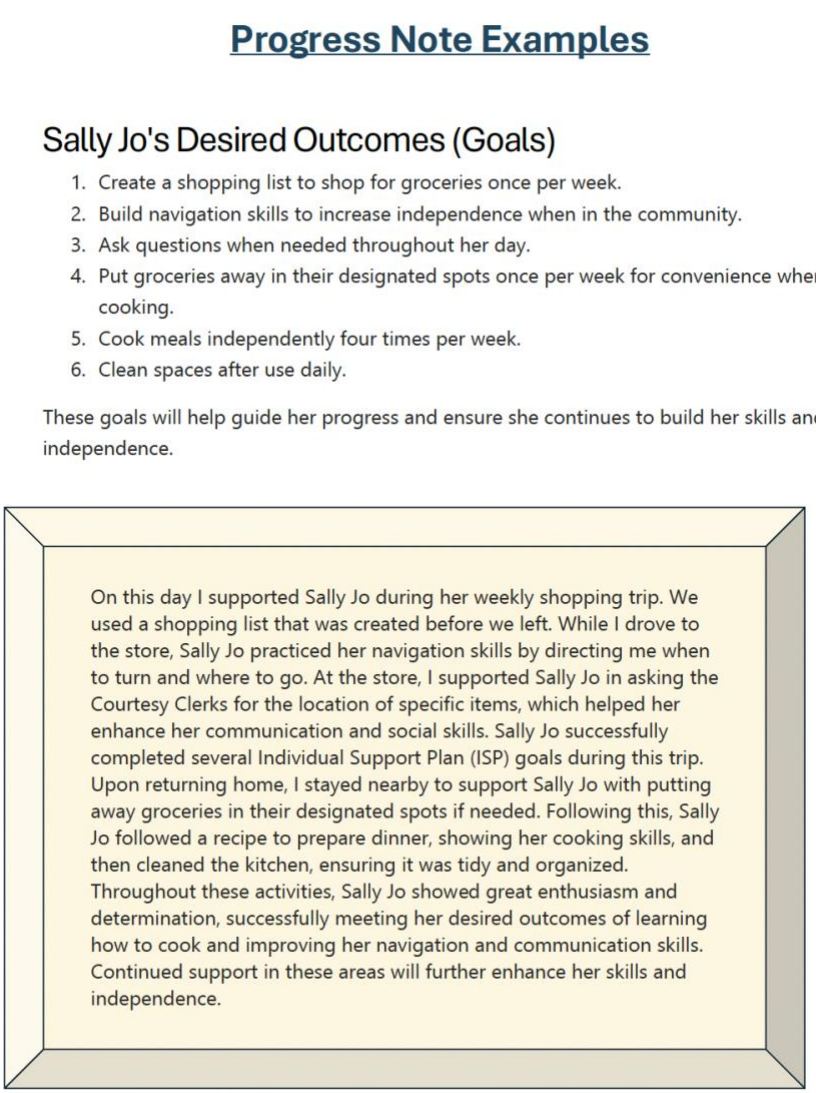
Progress Notes

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.



Progress Note Examples

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.

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.

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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.

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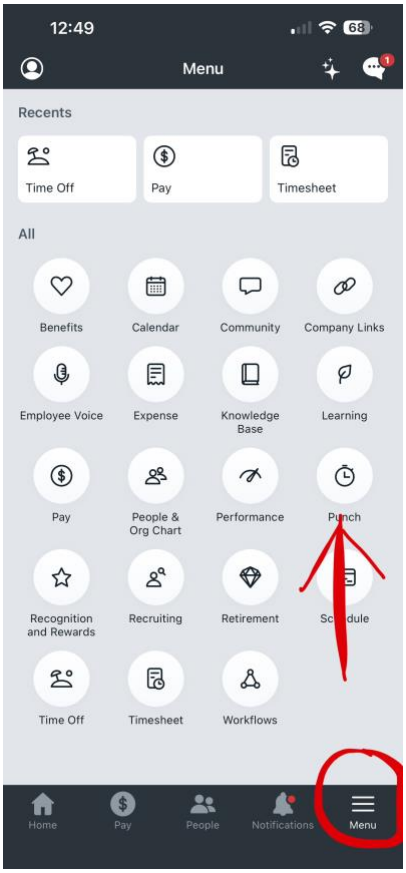

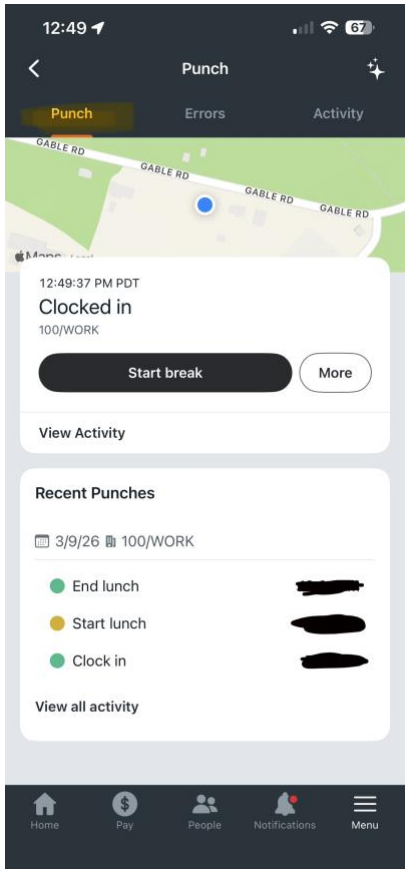

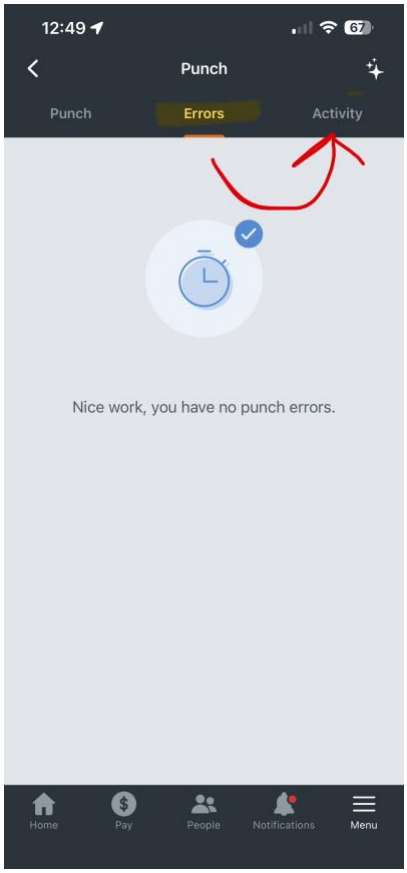

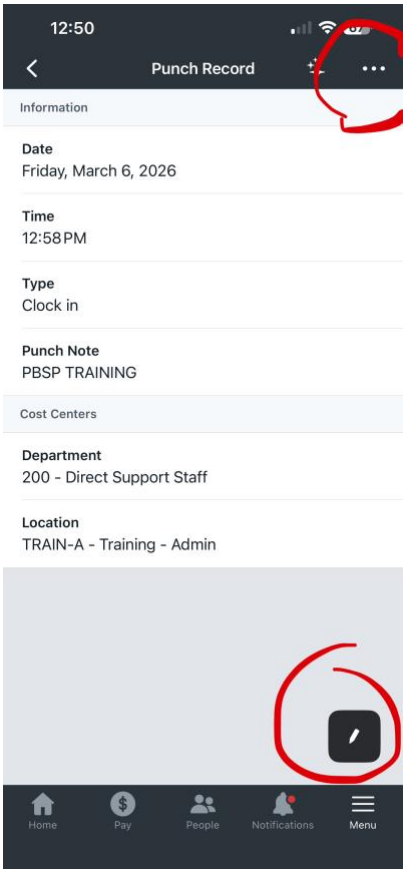

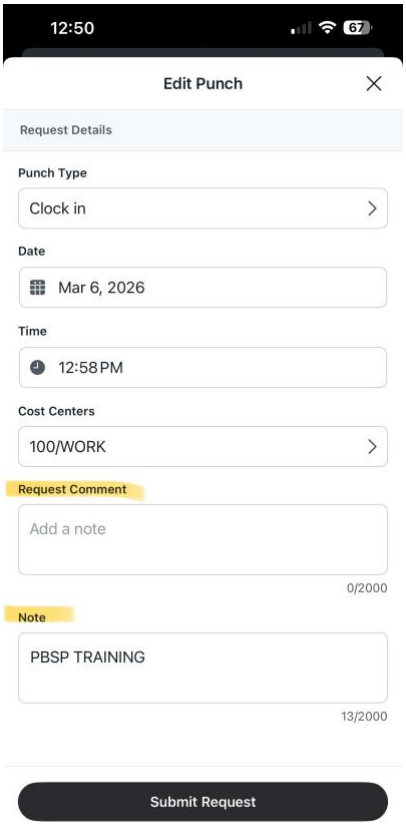

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503-410-5116

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.)

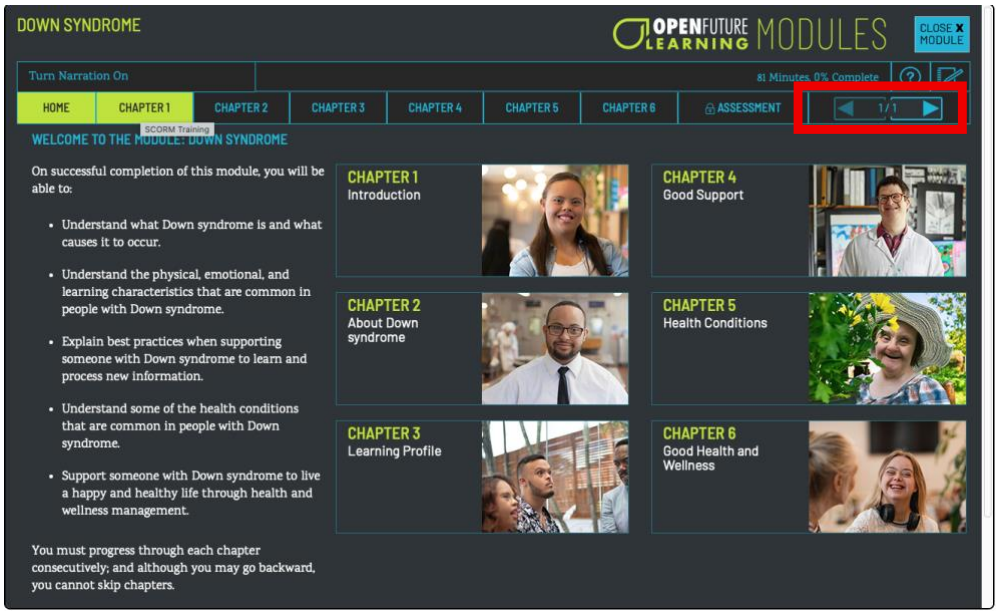
Many trainings require you to use a computer or large tablet. You'll know this is needed if you start a training, are instructed to turn your screen, and the problem is not resolved. Training computers are available at the office.

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.



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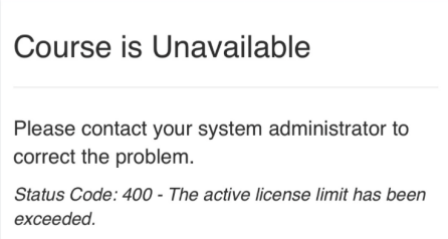
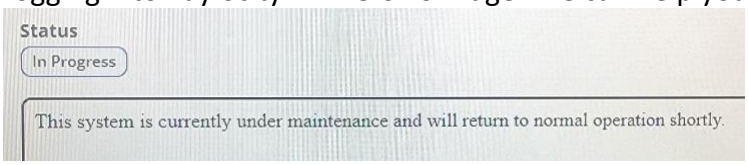
Error Messages:
If you get an error message when you clock in to do training, please reach out right away at onboarding@advocateaccessnw.com. We've run across a few of the errors below.

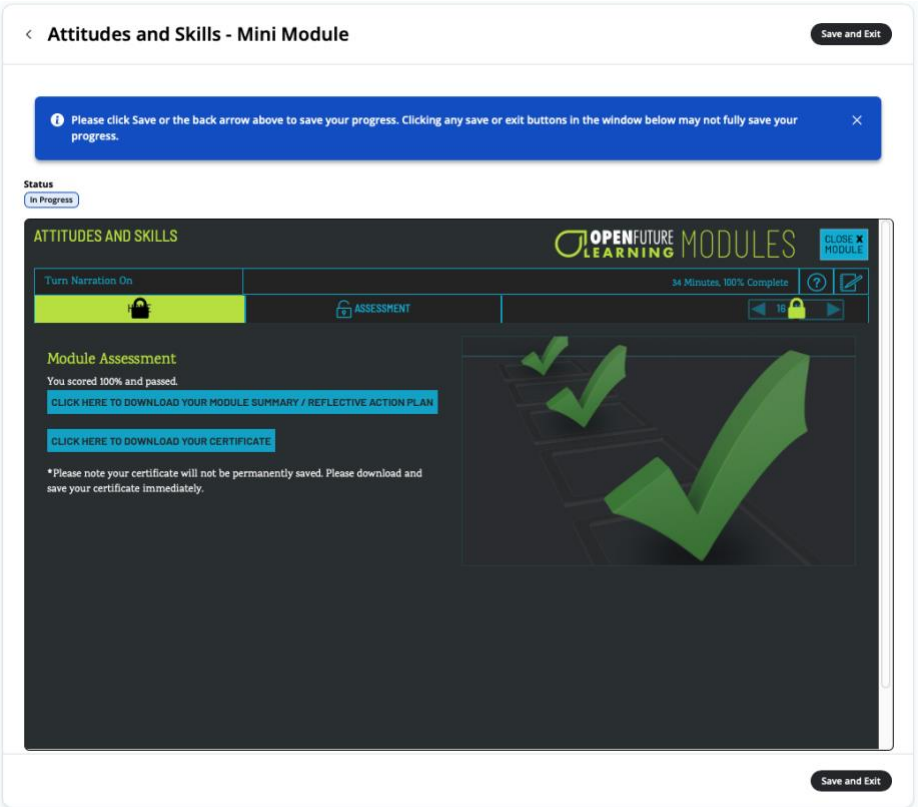
1. Course Unavailable – This error means our vendor needs to update their system so that access syncs with our new license level. Let us know when you see this so we can prompt the action.



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.



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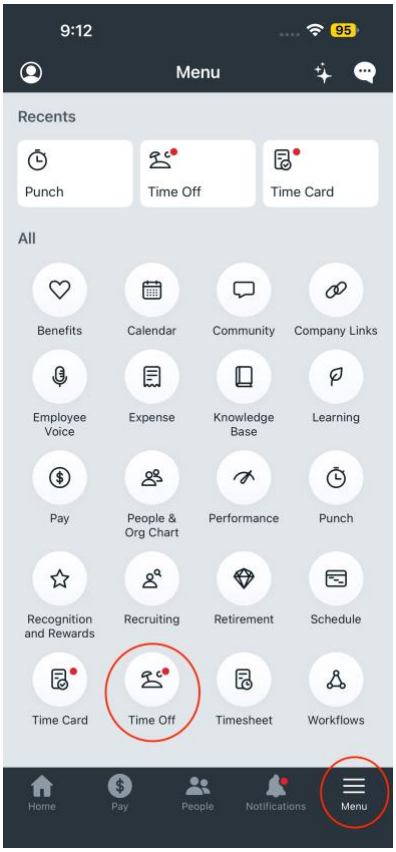
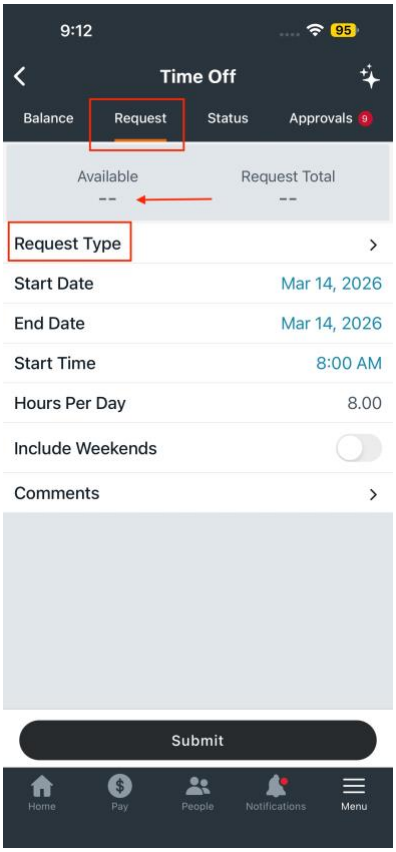
Paid Time Off & Holiday List

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.





Agency offices are closed on the following holidays. Worked holidays are paid at 1½ times pay for up to 8 hours.

New Year's Day
Memorial Day
Independence Day
Labor Day
Thanksgiving Day
Christmas Day

Any adjustments to this schedule will be communicated on a yearly basis.

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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.

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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.

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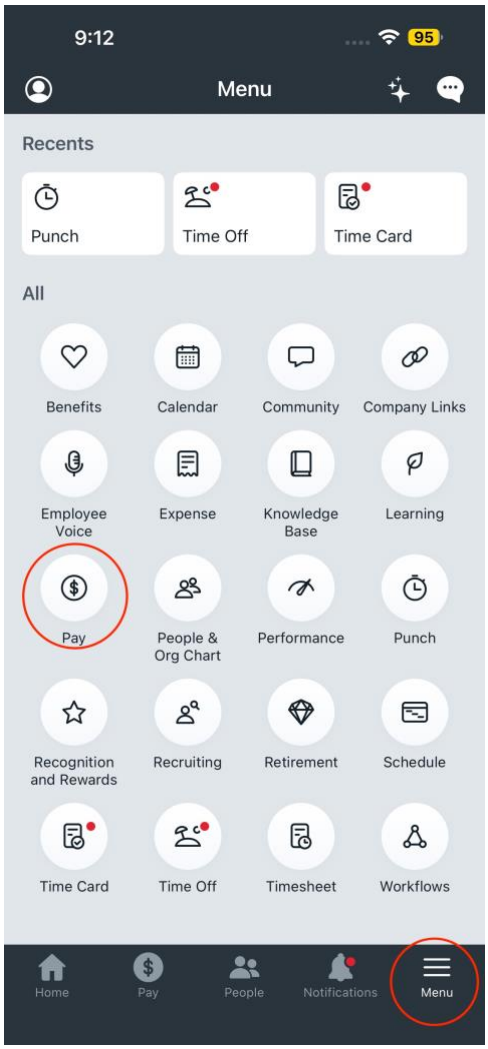
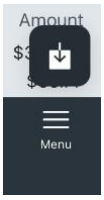
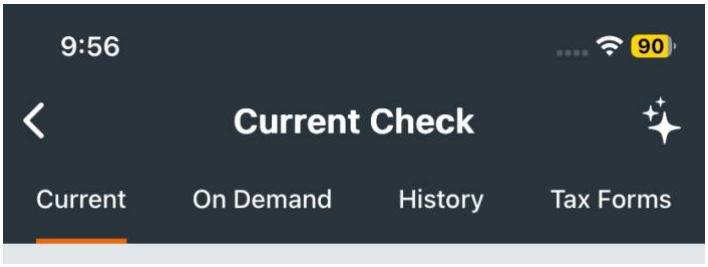
Paystubs & Tax Forms



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.

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Glossary of Terms

ABA: Applied Behavior Analysis | A systematic approach that uses observation and data to understand how a person's environment may influence behavior and to support the development of meaningful skills. ABA-based supports should be individualized, person-centered, and focused on the Member's communication, independence, goals, and quality of life. DSPs should only use strategies they have been trained to implement and that are included in the Member's approved support plan.

ABC Tracking: Antecedent, Behavior, and Consequence Tracking | A method of recording what occurred immediately before a behavior, the specific and observable behavior, and what happened immediately afterward. In this context, "consequence" simply means what followed the behavior, not a punishment. DSPs should document facts without judgment, assumptions, or interpretations so the behavior professional can identify patterns and possible support needs.

ADLs: Activities of Daily Living | These are everyday personal care and health-related tasks, such as bathing, grooming, dressing, toileting, eating, mobility, transfers, and repositioning. DSPs provide only the type and level of assistance identified in the Member's support documents while encouraging as much choice and independence as possible.

Agency Support Advocates: An Advocate Access NW team member on the Specialty Team who supports agency-wide communication, community outreach, employee engagement, events, resources, recognition efforts, and special projects.

Announcement: A post shared on Advocate Access NW's internal Paylocity bulletin. Announcements may include agency updates, reminders, deadlines, training information, community events, employee recognition, or other information DSPs need to know. DSPs should check the Community tab on Paylocity regularly to review announcements to stay up to date on all things Advocate Access NW.

Approved Driver Acknowledgement: A document confirming that Advocate Access NW has approved a DSP to transport Members after reviewing required driving documents, such as a valid driver's license, DMV record, and current auto insurance. Approved drivers must continue meeting agency requirements, maintain a first aid kit in the vehicle, and promptly report changes that may affect their driving approval.

Behavior Tracking: The process of documenting objective information about behaviors identified in a Member's Positive Behavior Support Plan (PBSP). DSPs must follow the PBSP and complete behavior Tracking as directed.

Benefits: Advocate Access NW sponsors plans designed to enhance the wellbeing of our employees. Our comprehensive benefit package includes medical, prescription drug, vision, dental, and retirement options. For additional information, review the Advocate Access NW Benefit Guide for the current year benefits.

Brokerage: A Support Services Brokerage is a type of Case Management Entity that provides case management to adults with I/DD who live in their own home or with family. Brokerages employ Personal Agents who help Members develop their ISPs, understand their service options, arrange authorized in-home supports, choose providers, and monitor their services. A Brokerage helps coordinate services but is separate from the provider agency that employs the Member's DSPs and delivers direct support.

CDDP: County Developmental Disabilities Program | A CDDP is a local case management organization that helps children and adults access Oregon I/DD services. CDDPs assist with eligibility, assessments, Individual Support Plans, service coordination, referrals, authorizations, monitoring, and other case management responsibilities. A Member receiving case management through a CDDP works with a Services Coordinator.

Change Form (CF): A document used to record an official change to a Member's current Individual Support Plan (ISP). Changes may relate to the Member's goals, services, support needs, risks, providers, or other parts

of the plan. DSPs must review and follow the updated information once the change has been approved and communicated to them.

CME: Case Management Entity | A CME is an organization authorized to provide case management services to people receiving Oregon I/DD services. CMEs include Community Developmental Disabilities Programs (CDDPs), Support Services Brokerages, Children's Intensive In-Home Services (CIIS), and the ODHS Children's Residential Program. A CME helps coordinate assessments, develop and update ISPs, authorize services, connect Members with resources and providers, and monitor whether supports are meeting each Member's needs and goals.

COMBO: A single file that combines a Member's current ISP, CF, SPIS, and PBSP, when applicable. The COMBO allows DSPs to access the Member's important support information in one place. DSPs must review all applicable sections and follow the most current version. All assigned Member Support Documents are available in Paylocity (internet browser, not app) after assignment completion.

Community: Portal within Paylocity where all announcements will be available.

Community Resources & Partners: A page on the Advocate Access NW website that connects Members, DSPs, families, and community members with local and regional services, organizations, and community partners. It includes information about available supports and how to contact each resource. DSPs may use the page to help Members explore options that align with their interests, needs, goals, and choices.

Company ID: 321092 | Advocate Access NW's unique identification number in Paylocity. DSPs must enter "321092" when signing into Paylocity through the mobile app or a web browser.

Connections: The individual working relationship established between a Member and a DSP through Advocate Access NW. A Member may have multiple Connections as part of their DSP team, and each Member-to-DSP relationship is recognized as unique and meaningful. Strong Connections are built through trust, respect, communication, consistency, and support that reflects the Member's preferences and goals.

Connections Team: The Advocate Access NW team that helps coordinate connections between Members and DSPs. The team processes referrals, gathers required information and documents, communicates next steps, and supports potential connections based on each Member's preferences, support needs, schedule, and choices. The Connections Team is made up of Operations Support Advocates & Service Support Advocates.

Cost Center: A Paylocity timekeeping category used to identify the type of work a DSP is completing when clocking in. DSPs select Cost Centers during the clock-in process and then choose the correct Location for the Member or assigned activity.

CPR: An emergency lifesaving procedure used when a person is unresponsive and not breathing normally. CPR helps maintain blood and oxygen flow through chest compressions and, when appropriate, rescue breaths. DSPs must call 911, follow their current CPR training. All DSPs are required to keep their CPR training & certificate up to date & unexpired.

Daily Progress Notes: Required shift notes that document the services and supports provided while a DSP is clocked in and working with a Member. Notes should accurately and objectively describe the Member's activities, choices, support provided, progress toward Desired Outcomes, and any relevant health or safety information. Daily Progress Notes must be person-centered, completed on time, and align with the DSP's timesheet. Any Daily Progress Note discrepancies identified will be sent back to DSP for review for accuracy.

Designated Representative (Des Rep): An adult chosen by a Member or their legal representative to assist with decisions related to the Member's ISP and the use of paid supports. A Designated Representative cannot be a paid provider for the Member. Their authority is limited to funded services and does not include medical, educational, residential, or other decisions outside the ISP unless they hold separate legal authority. The Member's preferences and direction must remain central.

Desired Outcome: A meaningful result or life goal that a Member has identified and wants to work toward. Desired Outcomes are documented in the Member's ISP and guide the supports a DSP provides. DSPs should help the Member make progress in ways that reflect their choices, strengths, interests, and preferred level of independence. Desired Outcomes will also be seen on each Member's MMSR & SPIS, & SA (if applicable).
DHS: Department of Human Services. In Oregon, the agency is formally called the Oregon Department of Human Services (ODHS). The Office of Developmental Disabilities Services (ODDS) is part of ODHS and oversees Oregon's system of services and supports for people who experience intellectual and developmental disabilities. DSPs are responsible for following applicable ODHS and ODDS requirements, the Member's ISP, and Advocate Access NW policies.
DSP Card: An Advocate Access NW-issued personal business card provided to DSPs for DSP work-related purposes. A DSP Card may be accepted by any business, at their discretion; this may include reduced entry fees or free entry to certain organizations or events outside of Advocate Access NW. It may never be used for personal purposes.
DSP Connect: Advocate Access NW's person-centered process for helping Members and their natural supports meet and identify DSPs who may be a good fit. DSP Connect offers Members & their guardian(s)/ Natural Support(s) to consider shared interests, communication styles, personalities, values, & support preferences, of DSPs who opt-in to having a DSP Connect Profile. The Member's voice and choice remain central throughout the process. All DSPs have a choice in participating in our DSP Connect process to increase visibility to those seeking DSP support.
DSP MVP: Advocate Access NW's DSP of the Month recognition program. The program celebrates DSPs who demonstrate exceptional, dependable, and person-centered support. Nominees and voting information are shared with DSPs through Paylocity & the Advocate Access NW Facebook group. All DSPs are notified when voting commences for any given month.
DSP Task Guide: An internal resource available through Paylocity that provides DSPs with general agency information, definitions, instructions, and guidance for common responsibilities and processes. The guide does not replace Member-specific support documents, required training, or direct instructions from Advocate Access NW.
Emergency Contact: The required notification process when a situation involves an emergency or requires medical or emergency services. DSPs must first ensure the Member receives immediate assistance, then follow the Immediate Contact instructions and notify Advocate Access NW. Call the office at **503-410-5116** during business hours or the urgent needs line at **971-203-4395** after hours and on weekends. The Service Support Advocate will notify the Case Management Entity as needed.
The person identified to be notified when a Member experiences an emergency or urgent situation. This may be the Member's guardian, natural support, or another authorized person listed in their support documents. DSPs must know who the Member's emergency contact is and follow the Member-specific notification instructions as identified in the Member's SPIS.
FBA: Functional Behavior Assessment | A person-centered assessment completed by a qualified behavior professional to understand the purpose or function of a Member's challenging behavior. It identifies patterns, contributing factors, and what the Member may be communicating, seeking, or avoiding. DSPs may provide observations and tracking information but do not diagnose behavior or create support strategies independently.
First Aid: Immediate care provided to someone experiencing an injury or sudden illness until the concern is resolved or professional medical help becomes available. DSPs must respond within the limits of their training, follow the Member's support documents, and complete all required notifications and documentation.

First Aid Kit: A portable collection of supplies used to provide basic care for injuries or medical concerns. All Advocate Access NW agency-approved drivers must carry a stocked first aid kit in their vehicle while transporting Members. DSPs should know where the kit is located and ensure it remains available during transportation. If a First Aid Kit is needed, please contact the Advocate Access NW office for assistance.
Good To Go: An onboarding communication confirming that an employee has completed the required onboarding steps, has been matched with a Member, and is cleared by Advocate Access NW to begin working and clocking in as a DSP. The DSP must wait for this confirmation communication before providing paid support.
Hours: The amount of time authorized for a Member to receive services and recorded by a DSP when providing approved support. Hours are based on the Member's current ISP and Service Agreement and should be scheduled according to the Member's needs, preferences, and available authorization. DSPs must record the exact time worked, remain within the approved hours, and communicate any questions or schedule changes to Advocate Access NW.
IADLs: Instrumental Activities of Daily Living. These are everyday tasks that help a Member maintain their home, access their community, and live as independently as possible. Examples include meal preparation, light housekeeping, laundry, grocery shopping, communication, and community participation. DSPs support the IADLs identified in the Member's support documents according to the Member's preferences and goals.
IBL: Individually Based Limitation | An IBL is a documented limitation placed on one or more Home and Community-Based Services (HCBS) freedoms for a specific Member when it is necessary to reduce a serious health or safety risk. The limitation must be based on the Member's individual needs, use the least restrictive approach, include informed consent, and be regularly reviewed. DSPs must follow only the current, formally authorized IBL and may never create or impose a restriction on their own.
Immediate Contact: The person identified in the Member's support documents whom the DSP must promptly notify when a known risk occurs or a significant concern or change is observed. This may be the Member's guardian, designated representative, or natural support. DSPs must follow the Member-specific notification instructions and provide clear information about what occurred.
Implementation Strategies: Written instructions that explain the steps supporters should take to help a Member work toward a Desired Outcome in their ISP. Implementation Strategies are developed in collaboration with the Member and may include an Action Plan, measurable goals, assigned responsibilities, and step-by-step support instructions. DSPs use these strategies to provide consistent, person-centered support and document the Member's progress.
Incident Report (IR): A formal document used to record an unusual, serious, or reportable event involving a Member during support. DSPs must provide objective details about what occurred before, during, and after the incident, including actions taken, notifications made, and the Member's response. The Member's assigned Service Support Advocate will follow-up on the IR within 4 days.
Incident Reporting: The process of recognizing, responding to, notifying the appropriate contacts about, and documenting a reportable incident. This may include an injury, serious illness, emergency service involvement, physical aggression, a medication error, a missing Member, a physical restraint, or an allegation of abuse. DSPs must first address immediate health and safety needs, then complete all required notifications and documentation. Submitting an Incident Report does not replace emergency, mandatory abuse, or agency notification requirements.
ISP: Individual Support Plan | A person-centered plan developed with the Services Coordinator & Member that describes what matters to them, their strengths, preferences, communication, relationships, culture, goals, Desired Outcomes, support needs, known risks, and authorized services. The ISP identifies what support

the Member wants, who will provide it, and how and when it should be provided. DSPs must review and follow the current ISP and all related support documents.

Legal Guardian / Guardian: A person legally appointed by a court to make certain decisions for a Member and help protect their rights and well-being. A guardian's authority is limited to what is granted in the court order and does not automatically include control over every part of the Member's life or finances. DSPs must continue to communicate directly with the Member, honor their preferences and autonomy, and follow the guardian's documented legal authority.

LifeVac Training: LifeVac training goes over the skills and confidence to act in a choking emergency. The demonstration will guide you through the proper use of LifeVac in addition to your First Aid/CPR training.

Location: A selection within the Paylocity Cost Center that identifies the Member a DSP is supporting or another approved work activity, such as Training or Recordkeeping. DSPs must select the correct Location when clocking in and may only clock in under a Member's Location while physically present and providing authorized support to that Member.

MAR: Medication Administration Record | An individualized record used to document medication administered to a Member, including the medication, dose, date, time, method of administration, and DSP's initials or signature. It also documents medication irregularities and the reason and outcome when an approved as-needed medication (PRN) is used. DSPs must use the current MAR, document immediately after administration, and never administer medication unless properly trained and authorized.

Medication Administration Training: Training that prepares a DSP to safely provide authorized medication support. It covers following medical orders and labels, safe administration, storage, MAR documentation, possible side effects, and responding to medication irregularities. DSPs must also receive any required Member-specific training and may only provide the level of medication support identified in the Member's current support documents.

Member: A person who has chosen to receive services and supports through Advocate Access NW. Each Member directs their own life and is at the center of their services. DSPs must honor the Member's rights, choices, preferences, communication, culture, goals, privacy, dignity, and independence while following their individualized support documents.

Member Support Documents: The current documents that explain how a Member has chosen to receive support and what a DSP needs to know to provide safe, consistent, and person-centered services. These may include the ISP, SPIS, PBSP, COMBO, medical or safety protocols, and other Member-specific instructions. DSPs must review applicable documents before providing support, follow the most current versions, and protect the Member's private information. All assigned Member Support Documents are available in Paylocity (internet browser, not app) after assignment completion.

Mileage: The number of miles driven while transporting a Member as part of their authorized services and supports. DSPs must follow the Member's ISP and Advocate Access NW procedures for when mileage is authorized, how it is recorded, and what documentation is required.

Monthly Member Success Report (MMSR): Monthly Member Success Report | A monthly report assigned to each DSP connected to a Member, even if the DSP did not provide support during that month. MMSRs focus on the Member's progress toward their ISP Desired Outcomes. They are launched on the first day of each month and must be completed by the eighth. The report is updated whenever the Member's Desired Outcomes change through an ISP renewal or Change Form.

Natural Support: A family member, friend, neighbor, or other person who voluntarily provides unpaid support to a Member. Natural Supports are chosen by the Member and may assist with daily life, decision-making, communication, relationships, or community involvement. DSPs should respect the role of Natural Supports while continuing to center the Member's voice, choices, and authorized services.

Next Steps: The upcoming actions or instructions needed to continue or complete a process. Next Steps may identify what the DSP must do, what Advocate Access NW will complete, or what must occur before services or another activity can move forward. DSPs should follow the instructions in the order provided and contact Advocate Access NW with any questions.
Non-Driver Acknowledgement: A document confirming that a DSP is not approved or authorized to transport Members in a vehicle. A non-driver may support a Member with other approved transportation options but must not personally drive a Member without Advocate Access NW's confirmed driver approval.
ODDS: Oregon Department of Disability Services **|** ODDS is part of the Oregon Department of Human Services and oversees Oregon's system of services and supports for people who experience intellectual and developmental disabilities. ODDS develops requirements, policies, and resources that guide service planning and delivery. DSPs must follow applicable ODDS requirements, the Member's ISP and support documents, and Advocate Access NW policies.
Office Number: Advocate Access NW's **main phone number**, **503-410-5116**. DSPs may call this number during regular business hours for questions, assistance, required notifications, or to connect with an agency advocate. For urgent needs outside business hours, DSPs should use the On-Call Number (see below).
OIS: Oregon Intervention Systems | An ODDS-approved, person-centered training curriculum that teaches positive behavior supports, prevention, de-escalation, protective skills, and safe responses to crisis situations. DSPs must only use skills covered by their current level of training and follow the Member's approved support plans. OIS certification does not independently authorize a DSP to use physical or restrictive interventions. Any planned safeguarding intervention must be included in the Member's PBSP, properly authorized through the IBL process, and specifically trained by a qualified behavior professional.
Onboarding Process: The steps an applicant must complete before beginning work as a DSP with Advocate Access NW. This process includes submitting an application, attending a Next Steps meeting, completing a background check and required training, providing Social Security and identification documents, completing a DMV check, verifying auto insurance, and participating in DSP Connect. The process is completed when all employment requirements are met and the DSP and a Member mutually choose to establish a Connection and work together.
On-Call Number: Advocate Access NW's **urgent needs** line for situations requiring agency support **outside regular business hours**, including evenings and weekends. DSPs should call **971-203-4395** when directed by a Member's support documents or when an urgent, work-related concern cannot wait until the office reopens. This number does not replace 911. Emergency services must be contacted first when immediate medical or safety assistance is needed.
ONA: Oregon Needs Assessment | The ONA is a standardized assessment used to identify a Member's support needs, known risks, and required level of care. The results help determine the Member's service group and the range of in-home support hours available for planning.
Operations Support Advocate: An Advocate Access NW team member on the Connections Team who coordinates operational steps related to referrals, Member and DSP connections, onboarding, records, and other internal processes. This role helps gather required information, communicate next steps, and ensure agency processes are completed accurately and consistently.
Paid Time Off (PTO): Paid time off (PTO) is provided to Advocate Access NW employees to financially assist them during periods of time off, which includes but is not limited to vacation, sick leave, and/or personal time. Contact Payroll with questions about accrued leave. For additional information, review the Advocate Access NW Benefits Guide for the most current year.

Paylocity: Advocate Access NW's secure internal system for managing employee records and sharing company-wide communications. DSPs use Paylocity to access employment-related information, documents, and review agency updates.
PBSP: Positive Behavior Support Plan | A Member-specific plan developed by a qualified behavior professional when indicated by the FBA. It outlines proactive supports, skills to teach, positive alternatives, prevention strategies, and safe responses intended to improve the Member's quality of life and reduce challenging behavior. DSPs must be trained on and follow the current PBSP as written while respecting the Member's choices, dignity, and rights.
PCI: Person Centered Information | A document used as the foundation of the ISP planning process that respectfully records the Member's perspective about their life. It may include the Member's strengths, preferences, communication, relationships, culture, routines, interests, goals, what is important to them, and how they prefer to be supported.
Personal Agent (PA): A case manager who works through a Support Services Brokerage and provides case management for adults receiving I/DD services while living in their own home or with family. The Personal Agent helps the Member assess their support needs, develop and update their ISP, arrange authorized services, find resources and providers, and monitor whether supports reflect the Member's choices, needs, and goals.
Personal Leave: An Advocate Access NW leave benefit that eligible employees may request for vacation, appointments, personal matters, or other approved time away from work. Personal Leave is based on the employee's available balance and the requirements in the current Advocate Access NW Benefits Guide. Employees must submit requests through Paylocity and follow agency scheduling and notification procedures.
Positive Behavioral Support Advocate: A qualified behavior professional on the Specialty Team who develops and maintains person-centered behavior support services. This role may complete Functional Behavior Assessments, Positive Behavior Support Plans, and Temporary Emergency Safety Plans; observe Members in their everyday environments; train designated DSPs; and review behavior tracking. DSPs should contact the assigned Positive Behavioral Support Advocate with questions about a plan or tracking process and must not change approved strategies independently.
Preliminary Hire: An applicant who has received approval to begin certain employment activities while their final background is still pending. Preliminary Hire status is not final background-check approval. The employee may work only after receiving confirmation from Advocate Access NW and must follow all assigned supervision, training, and work restrictions until final approval is received.
PRN: A medical abbreviation meaning "as needed." A PRN medication or treatment is provided only when the specific need or condition identified in the medical order is present, rather than on a routine schedule. DSPs may only provide PRN support when authorized and properly trained and must follow the current medical order and Member-specific support documents. The reason it was used, the time provided, and the Member's response must be documented on the MAR.
Progress Notes: Required documentation describing the support provided to a Member during a DSP's shift. Notes must clearly explain how the DSP supported the Member with Medicaid identified support needs outlined in the ISP, how the Member responded, and any progress, concerns, or changes observed. Progress Notes must be accurate, objective, person-centered, a length of at least 5 sentences, and completed immediately following each shift.
Protected Sick Leave: Paid, job-protected sick time provided in accordance with Oregon Sick Time law. It may be used for qualifying reasons involving an employee's or family member's health, medical care, safety, bereavement, or certain public health needs. Protected Sick Leave is separate from the Paid Leave Oregon

program. Employees should review the current Advocate Access NW Benefits Guide for eligibility, accrual, use, and request procedures.

Quarterly Training Assignments: Groups of required training courses assigned to DSPs through Paylocity during each quarter. These assignments help DSPs maintain required knowledge, competencies, and annual training requirements throughout the year. DSPs should regularly review their Paylocity Tasks and complete each course by its assigned due date.

Recordkeeping: A Paylocity work category DSPs use when clocking in to complete required documentation outside a direct support shift. This may include Incident Reports, Quarterly Reports, and other assigned Member-related records. DSPs should clock into Recordkeeping before beginning the task and clock out once the documentation is complete.

Relief Care: Agency provided care hours for Members approved for 24-hour Attendant Care. These hours provide temporary coverage when a regularly scheduled caregiver or DSP needs time away or is unavailable. Relief Care must be scheduled and provided according to the Member's authorized services, support needs, and preferences.

Reporting Support Advocate: An Advocate Access NW team member who reviews and supports the completion of service documentation and required reports. This may include monitoring Daily Progress Notes, Incident Reports, and other service-related documentation for accuracy, completeness, and timely submission. The Reporting Support Advocate may contact DSPs when clarification or corrections are needed.

Representative Payee (Rep Payee): A person or organization appointed by the Social Security Administration to receive and manage a Member's Social Security or Supplemental Security Income benefits. The Rep Payee must use the benefits to meet the Member's needs, save remaining funds for future needs, and maintain financial records. Being a Rep Payee does not automatically give someone authority to make medical, service, or other personal decisions for the Member. A Rep Payee IS NOT a legal guardian.

Resource Parent: An ODHS-certified caregiver who provides a safe and supportive home for a child or young adult in foster care. Resource Parents support the individual's well-being, development, community involvement, culture, and continued connections with family and other important people. A Resource Parent is not automatically the child's legal guardian, so DSPs must follow the authority and responsibilities documented in the individual's support documents.

Risk Mitigation Strategies: Person-centered plans, safeguards, or actions used to reduce the likelihood or impact of a known risk while respecting the Member's rights, choices, dignity, and independence. These strategies may describe how to prevent, monitor, recognize, and respond to a risk. DSPs must follow the strategies identified in the Member's ISP, SPIS, and other applicable support documents.

RIT: Risk Identification Tool | A planning tool used to help the Member and their chosen team identify known, serious risks that may affect the Member's health or safety. Information from the RIT helps determine which risks must be addressed in the ISP and related support documents. DSPs must follow the Member's current risk-mitigation instructions and report new or changing concerns to Advocate Access NW.

ROI: Release of Information | A signed authorization that allows specific confidential information about a Member to be shared with identified people or organizations for an approved purpose. The ROI identifies what information may be shared and may include an expiration date. DSPs must protect the Member's privacy and only share information as authorized and necessary.

Service Agreement (SA): Service Agreement | A document completed by a Services Coordinator or Personal Agent that identifies the services a provider is authorized to deliver for a Member. It outlines the approved services and provides information needed for the provider to deliver them safely and appropriately. DSPs may provide and document only the services authorized for the Member and must follow the current Service Agreement, ISP, and related support documents.

Safety Committee: An Advocate Access NW committee focused on reviewing workplace safety topics, identifying concerns, and discussing ways to promote a safer environment for Members and employees. All employees are welcome to participate on scheduled meeting days, either in person or virtually through Microsoft Teams. All Safety Committee meeting links will be posted to Paylocity on the morning of the upcoming meeting.
Schedule: A Paylocity feature used to display a DSP's scheduled shifts with connected Members. This tool is primarily intended to help larger DSP teams coordinate staffing and coverage, so not all DSPs will use the scheduling portal. DSPs assigned to use this feature should review their schedule regularly and promptly communicate any questions, conflicts, or needed changes through the appropriate agency process.
Service Support Advocate: An Advocate Access NW team member, on the Connections Team, who helps coordinate and monitor a Member's services. This role communicates with Members, families, representatives, DSPs, and Case Management Entities; assists with support documents and service changes; and responds to questions, concerns, or urgent needs. The Service Support Advocate helps ensure services remain person-centered and consistent with the Member's approved plans.
Service Support Director: The leadership team member responsible for overseeing Member services and the delivery of person-centered supports. The Service Support Director works with Members, families, representatives, DSPs, agency advocates, and Case Management Entities to address service needs, guide decisions, and ensure supports align with each Member's approved plans, preferences, and goals.
Services Coordinator (SC): A case manager who works through a Community Developmental Disabilities Program (CDDP) or ODHS. The Services Coordinator works with a Member and their chosen planning team to assess support needs, develop and update the ISP, authorize and coordinate services, connect the Member with resources, and monitor whether services are meeting the Member's needs and goals. Services Coordinators provide case management for children and may also support adults.
Sleep Agreement: Agency provided documentation for Members approved for 24-hour Attendant Care when not using relief care. It outlines the expectations for overnight support, the DSP's sleep period, how interruptions should be handled, and how time worked during overnight hours must be documented. DSPs assigned to applicable overnight shifts must review and follow the current Sleep Agreement.
Safety Plan Implementation Strategies (SPIS): A Member-specific document that identifies known risks and gives DSPs clear instructions for reducing those risks, responding when a risk presents itself, completing required notifications, and documenting what occurred. DSPs must review and follow the Member's current SPIS whenever they provide support.
Substitute Care: Temporary support provided by an approved DSP when a Member's regularly scheduled DSP is unavailable or coverage is otherwise needed. Substitute care must be coordinated through Advocate Access NW and respect the Member's choice regarding who provides their support. The substitute DSP must review and follow the Member's ISP, safety plan, preferences, routines, and documentation requirements.
Systems Support Advocate: An Advocate Access NW team member who supports specific internal systems and administrative processes. Individual responsibilities vary, but may include assisting DSPs with system access, employment records, required documentation, timekeeping, training requirements, or other areas.
Systems Support Director: The leadership team member responsible for overseeing Advocate Access NW's internal systems, administrative processes, and systems-related support. This role helps ensure employee records, documentation, technology, reporting, billing, and other agency systems operate accurately and effectively. The Systems Support Director also provides guidance when DSPs or agency advocates need assistance with these systems.
Talent Recruitment Advocate: An Advocate Access NW team member on the Specialty Team who supports the recruitment of qualified DSP applicants. This role may communicate with potential applicants, promote

employment opportunities, assist with hiring events, answer application questions, and help applicants move through the recruitment process. Talent Recruitment Advocates help identify DSP candidates whose availability and preferences may align with the needs and choices of Members seeking support.
Tasks: Assignments added to a DSPs Task List in Paylocity. Tasks may include renewing or updating employment information, completing annual training, or submitting monthly reports. DSPs should review their Paylocity tasks regularly, follow the provided instructions, and complete each task by its due date.
Technology Support Advocate: An Advocate Access NW team member who supports the agency's technology, electronic platforms, digital forms, and system access. This role helps troubleshoot technical concerns, provides guidance on using agency systems, and supports secure and effective technology use.
TESP: Temporary Emergency Safety Plan | A brief, time-limited plan used when an acute behavioral challenge creates an immediate risk to the health or safety of the Member or others while the FBA and PBSP are being completed. It provides trained supporters with specific instructions for responding safely during an emergency. DSPs must be trained on and follow the current TESP exactly as written and may not use unapproved interventions.
Timesheet: The official record of a DSP's hours worked directly with an Advocate Access NW Member. DSPs must enter accurate start and end times, record only hours worked directly with a member, and submit their timesheets through Paylocity by the required deadline. Timesheet entries should align with the DSP's service documentation. For any timesheet discrepancies, email timesheets@advocateaccessnw.com.
Training: Learning assigned or approved by Advocate Access NW to help DSPs develop and maintain the knowledge and skills required for their role. Training may be general, annual, quarterly, safety-related, or specific to a Member's support needs. DSPs must complete assigned training by the due date and clock into the Training Location in Paylocity for the time spent completing it. Many assignments must be completed on a computer or tablet. Training computers are available for use at the agency office. DSPs must NOT be actively working with a Member while clocked in for training and must clock out when the training activity is complete.
Transportation Hold Harmless and Waiver of Liability Agreement: A document explaining specific responsibilities and risks associated with Non-Service Related Transportation by authorized employee drivers. This document is accepted by the person signing it and the circumstances in which they agree to release or protect Advocate Access NW from certain liability. Signing the agreement does not remove the responsibility to follow agency policies, safety requirements, Member support documents, or applicable laws.
Unpaid Time Off: The Unpaid Time Off balance is a feature intended only for employees whose schedules are managed by our administrative scheduling team and posted in Paylocity. If you arrange your own schedule directly with the member you support and/or their family, you do not need to enter every planned absence using Unpaid Time Off unless you've been directed to do so.
Urgent Support Needed: An indicator identifying a Member who is seeking DSP support as soon as possible. The need may involve a one-time shift, temporary coverage, or an ongoing connection. Any potential connection must still align with the Member's preferences and support needs and the DSP's availability. Urgent Support Needed notifications will be available on Paylocity, in the Community portal.