

Quick Start Guide


For Creating a PTO Shift

To create a PTO shift, please follow these steps:

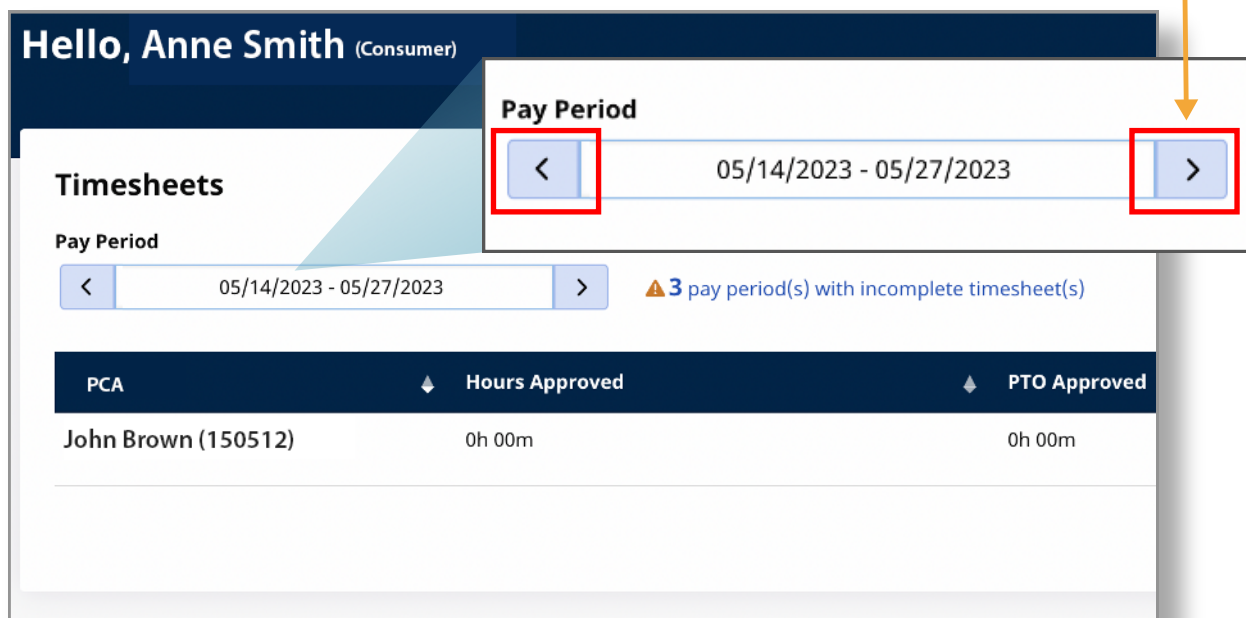
1 Step 1 - Find the Shift to Adjust

Find the timesheet you want to adjust:
Use the arrows next to select the Pay Period.

OR:

1. Click in the Pay Period window to access the calendar view.
2. Click the **Done** button on the calendar view.
3. Click the **Edit Icon**  under the **Action** column.
4. View the days within the selected pay period.

If you need detailed help, see the
“Quick Start Guide” at TempusUnlimited.org/EVV-support



Hello, Anne Smith (Consumer)

Timesheets

Pay Period

< 05/14/2023 - 05/27/2023 >

⚠ 3 pay period(s) with incomplete timesheet(s)

PCA	Hours Approved	PTO Approved
John Brown (150512)	0h 00m	0h 00m

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Step 2 - Add Shift

In the upper right corner of the screen, click the **Add Shift** button.

IMPORTANT:

Before creating a PTO shift, you must check the PCA's PTO balance. **The EVV Portal will NOT tell you if a PCA has enough PTO to cover the shift;** this information is kept in a different system.

Timesheet for John Brown (PCA# 150512)

Consumer (ID) Anne Smith (11K043) Consumer Enrollment mass_health - ffs Timesheet ID 11486029

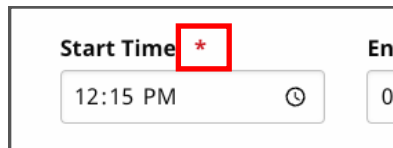
Pay Period: 06/04/2023 - 06/17/2023

Date	Start Time	End Time	PTO	Location	Shift Status	Action
Sun, 06/04/2023						
Mon, 06/05/2023						
Tue, 06/06/2023	11:00 AM	11:59 PM		Start: Community End: Community		Approve All Shifts Add Shift
Wed, 06/07/2023	11:36 AM	02:51 PM		Start: Community End: Community		Approve All Shifts Add Shift
Thu, 06/08/2023						
Fri, 06/09/2023	12:00 PM	05:00 PM	PTO	regular	5h 00m	Approved
Sat, 06/10/2023	04:00 PM	11:59 PM		Start: Home End: Home	8h 00m	Approved
Sun, 06/11/2023						
Mon, 06/12/2023						
Tue, 06/13/2023						
Wed, 06/14/2023						

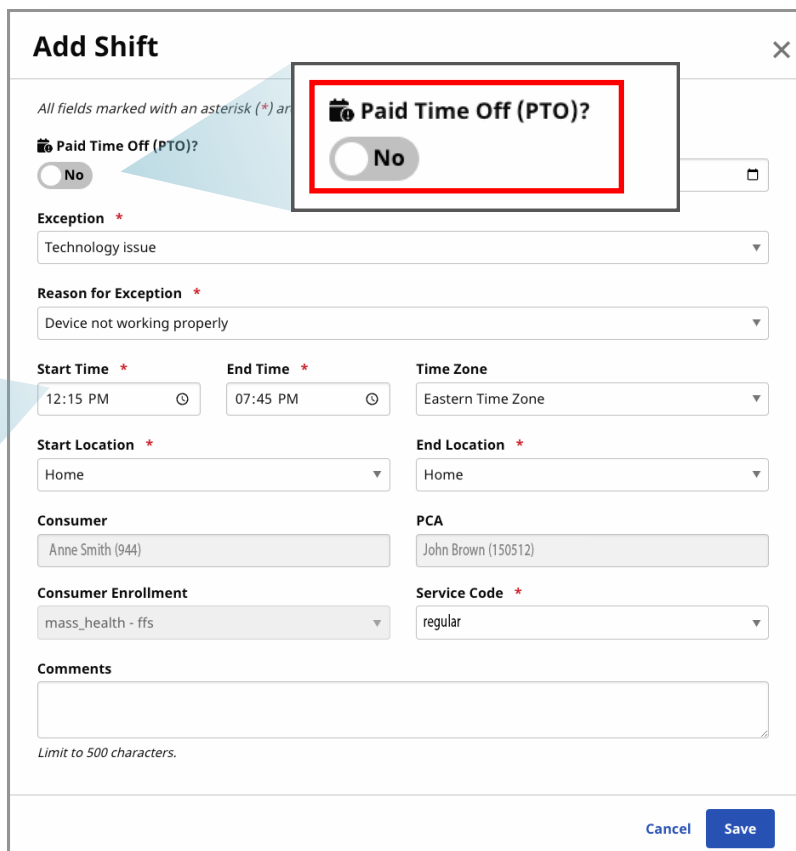
3 Step 3 - Click PTO Switch

Click the Paid Time Off (PTO) switch so that it shows **Yes**.

Note: Required fields have a red asterisk next to them



A close-up of the 'Start Time' field in the 'Add Shift' form. The text 'Start Time' is followed by a red asterisk, indicating it is a required field. Below the text is a time selection dropdown showing '12:15 PM'.

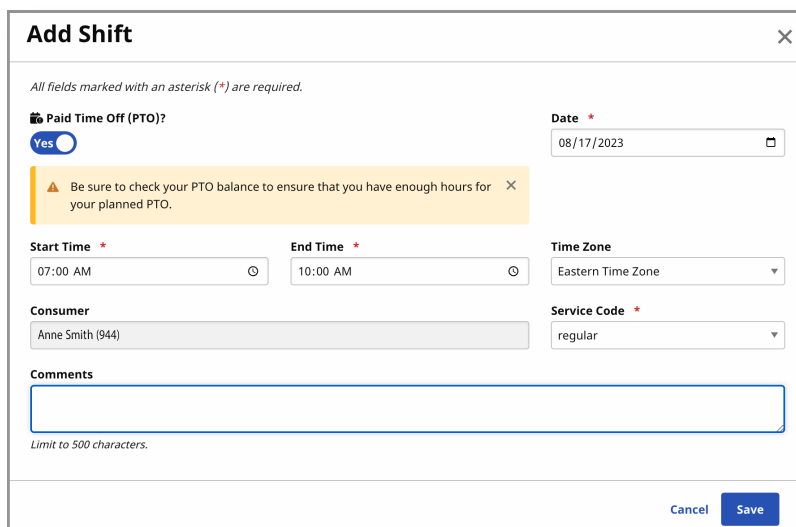


The 'Add Shift' form is shown with various fields. A red box highlights the 'Paid Time Off (PTO)?' toggle switch, which is currently set to 'No'. A blue arrow points from the text 'Click the Paid Time Off (PTO) switch' to this toggle. Other fields include 'Exception' (Technology issue), 'Reason for Exception' (Device not working properly), 'Start Time' (12:15 PM), 'End Time' (07:45 PM), 'Time Zone' (Eastern Time Zone), 'Start Location' (Home), 'End Location' (Home), 'Consumer' (Anne Smith (944)), 'PCA' (John Brown (150512)), 'Consumer Enrollment' (mass_health - ffs), and 'Service Code' (regular). The form also has a 'Comments' section and 'Cancel' and 'Save' buttons at the bottom.

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Step 4 - Fill Out Required Fields

Select or fill in all of the necessary information on the required fields.



Add Shift

All fields marked with an asterisk (*) are required.

Paid Time Off (PTO)?
☒ Yes

Date *
 08/17/2023

Start Time *
 07:00 AM

End Time *
 10:00 AM

Time Zone
 Eastern Time Zone

Consumer
 Anne Smith (944)

Service Code *
 regular

Comments
 Limit to 500 characters.

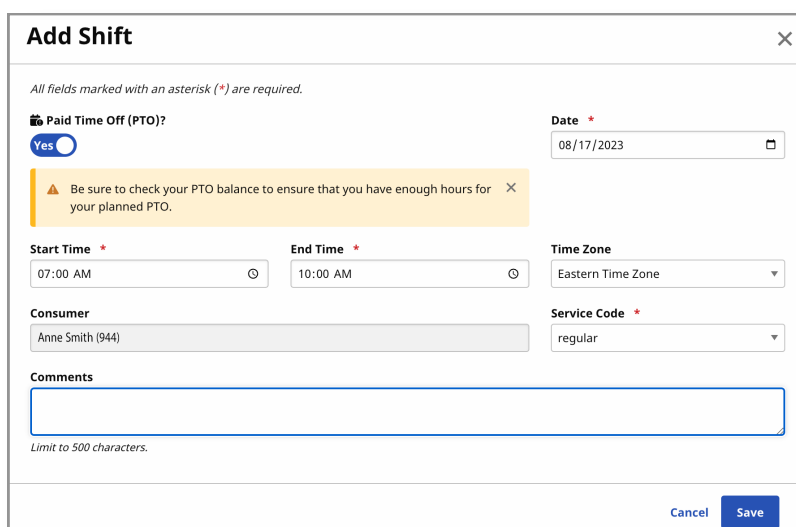
Cancel Save

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Step 5 - Click Save

When you have completed filling in the required fields, select **Save**.

Note: You must create a PTO shift for each day a PCA is taking PTO. For instance, if a PCA is taking five days off, you need to create five PTO shifts.



Add Shift

All fields marked with an asterisk (*) are required.

Paid Time Off (PTO)?
☒ Yes

Date *
 08/17/2023

Start Time *
 07:00 AM

End Time *
 10:00 AM

Time Zone
 Eastern Time Zone

Consumer
 Anne Smith (944)

Service Code *
 regular

Comments
 Limit to 500 characters.

Cancel Save

You can now create a PTO shift using the EVV Portal.