

Quick Start Guide

For Creating a PTO Shift

To create a PTO shift, please follow these steps:

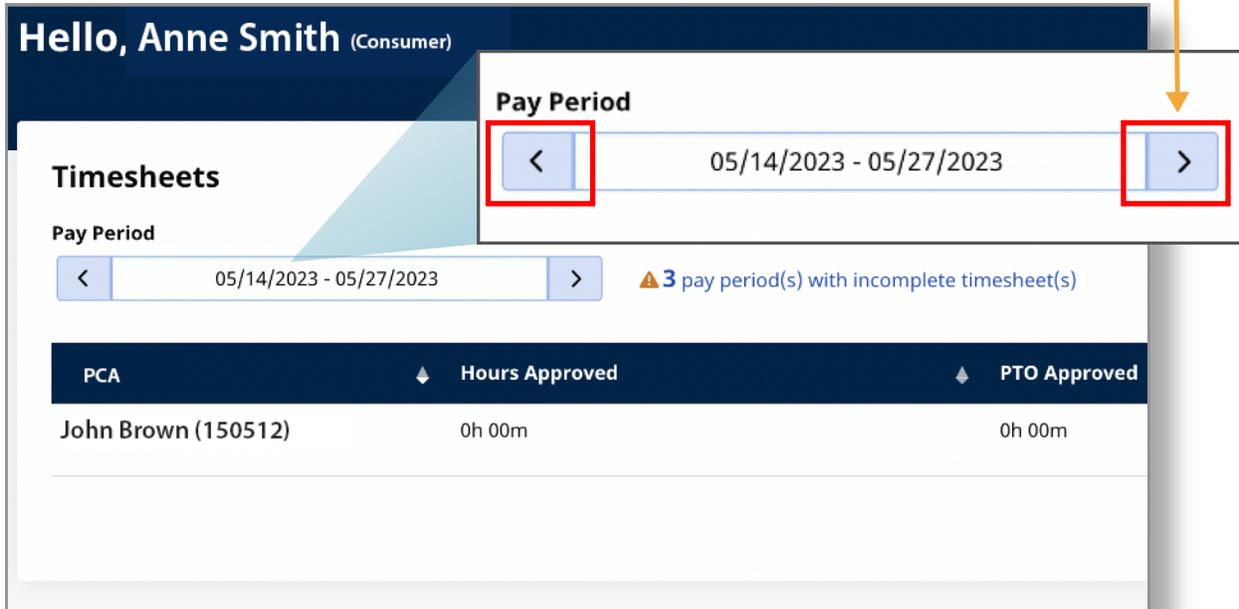
1 Step 1 - Find the Shift to Adjust

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)

Pay Period

05/14/2023 - 05/27/2023

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

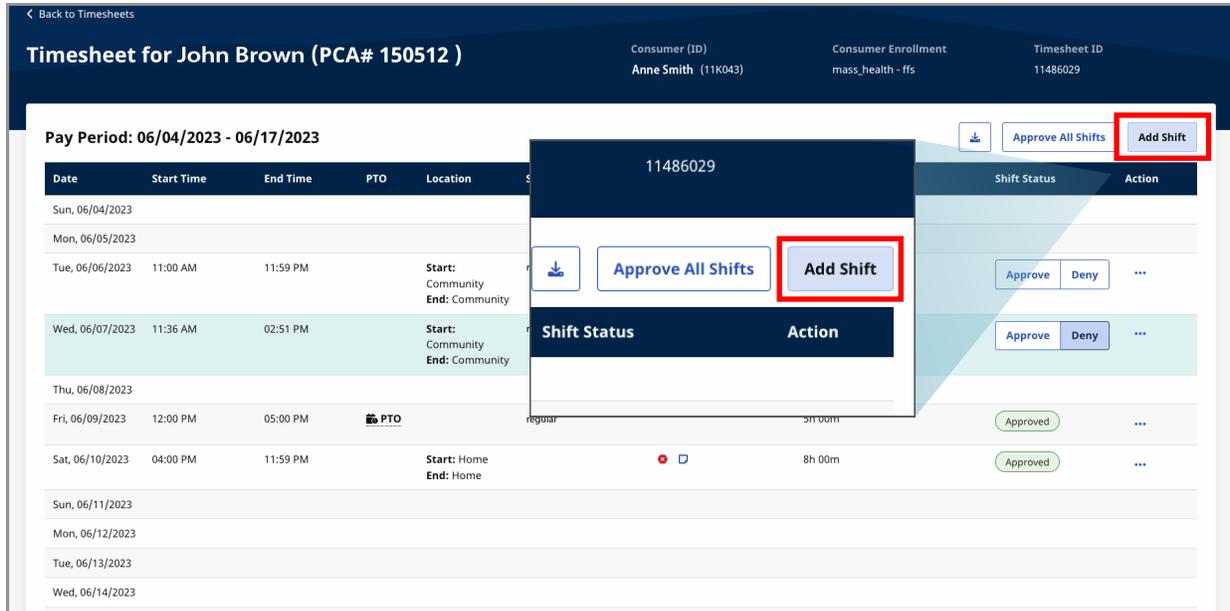
2

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.



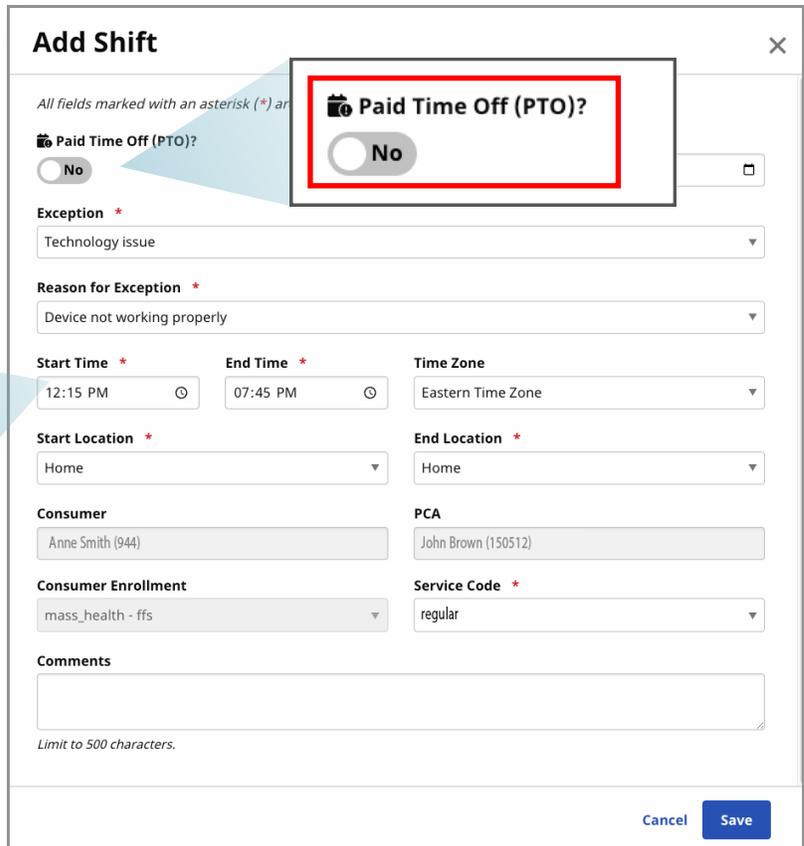
3 Step 3 - Click PTO Switch

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

Note: Required fields have a red asterisk next to them



Start Time *
12:15 PM



Add Shift

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

Paid Time Off (PTO)?
 No

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 **Service Code *** regular

Comments
Limit to 500 characters.

Cancel Save

4

Step 4 - Fill Out Required Fields

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

The screenshot shows the 'Add Shift' form with the following fields filled out: 'Paid Time Off (PTO)?' is set to 'Yes'; 'Date' is '08/17/2023'; 'Start Time' is '07:00 AM'; 'End Time' is '10:00 AM'; 'Time Zone' is 'Eastern Time Zone'; 'Consumer' is 'Anne Smith (944)'; and 'Service Code' is 'regular'. A yellow warning box is present with the text: 'Be sure to check your PTO balance to ensure that you have enough hours for your planned PTO.' The 'Comments' field is empty. The form has 'Cancel' and 'Save' buttons at the bottom right.

5

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.

This screenshot is identical to the one in Step 4, showing the 'Add Shift' form with all fields filled out. The 'Save' button at the bottom right is highlighted in a darker blue, indicating it is the next step in the process.

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