# **Quick Start Guide**

# For Creating a PTO Shift

1

To create a PTO shift, please follow these steps:

### Step 1 - Find the Correct Pay Period

The timesheet page display starts on the current pay period. If you need to see a different period, you can find the timesheet that you want by following the instructions below:

1. Click on the dates in the pay period box to see a calendar and find the period you want.

Hello, Anne Smith (Consum	Pay P	eriod	
	<	05/14/2023 - 05/27/2023	>
Timesheets			
Pay Period			
< 05/14/2023 - 05/27/2023	3	> A 3 pay period(s) with incomplete timesheet(s)	

2. When the calendar displays, select the **date** of the pay period you are looking for.

Pay Po	riod S	tart D	ate											
05/14	4/2023	1												
			May	2023						Jun	2023			>
s	м	т	w	т	F	s		s	м	т	w	т	F	s
	1	2	3	4	5	6						1	2	3
								4	5	6	7	8	9	10
<u>14</u>	15	16	17	18	19	20		<u>11</u>	12	13	14	15	16	17
21	22	23	24	25	26	27		18	19	20	21	22	23	24
<u>28</u>	29	30	31											
Legend	: 🗌 In 🔲 To	comple day	te Time:	sheet St	tart Date		Sel Sel	lected p lected p	ay peri ay peri	od start od	date		D	one

**Note:** The "Legend" at the bottom of the box tells you what each colored date means.

- 3. Click the **Done** button at the bottom of the calendar.
- 4. Click the Edit **C** icon under the Action column.
- 5. You can then view the days within the selected pay period.

If you need detailed help, visit <u>TempusUnlimited.org/EVV-support</u> and see the "Viewing a Timesheet" Quick Start Guide.

# Step 2 - Add Shift

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

#### **IMPORTANT:**

2

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.

nesheet	for John	Brown (PC	CA# 150	512 )	Consumer (ID) Anne Smith (11K043)	Consumer Enrol mass_health - ffs	llment Time 1148	sheet ID 5029
ay Period: (	06/04/2023 -	06/17/2023			11/06020		Approve	All Shifts Add Shift
Date	Start Time	End Time	РТО	Location	11460029		Shift Status	Action
iun, 06/04/2023								
/lon, 06/05/2023								
Tue, 06/06/2023	11:00 AM	11:59 PM		Start: Community End: Community	Approve All Shifts	Add Shift	Approve	Deny ···
Wed, 06/07/2023	11:36 AM	02:51 PM		Start: Community End: Community	Shift Status	Action	Approve	Deny ····
Thu, 06/08/2023								
ri, 06/09/2023	12:00 PM	05:00 PM	💼 РТО		regular	snoom	Approved	
5at, 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								
Ned, 06/14/2023								

# **3** Step 3 - Click PTO Switch

Click the Paid Time Off (PTO) switch so that it shows Yes.	Add Shift All fields marked with an asterisk (*) ar Paid Time Off (PTO)? No	🛱 Paid Time Off (PTO)?	×
Note: Required fields have	Exception *		
a red asterisk next to them	Technology issue		•
	Reason for Exception *		
	Device not working properly		•
	Start Time * End Time *	Time Zone	
Start Time * En	12:15 PM O 07:45 PM	S Eastern Time Zone	•
12:15 PM 0	Start Location *	End Location *	
	Home	▼ Home	▼
	Consumer	РСА	
	Anne Smith (944)	John Brown (150512)	
	Consumer Enrollment	Service Code *	
	mass_health - ffs	<b>▼</b> regular	▼
	Comments		
	<i>Limit to 500 characters.</i>		
			Cancel Save
			_

# **4** Step 4 - Fill Out Required Fields

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

Paid Time Off (PTO)?       Date *         es O       08/17/2023         A Be sure to check your PTO balance to ensure that you have enough hours for xyour planned PTO.       X         start Time *       End Time *       Time Zone         07:00 AM       I0:00 AM       Eastern Time Zone         onsumer       Service Code *	ïelds marked with an asterisk (*) are r	equired.			
O8/17/2023      O8/17/2023      O8/17/2023      O8/17/2023      Time 2006      Time 2006      Time 2006      O      O      O      Service Code *	aid Time Off (PTO)?			Date *	
Be sure to check your PTO balance to ensure that you have enough hours for xyour planned PTO.      End Time *     End Time *     Time Zone     Tor:00 AM     O     10:00 AM     O     Service Code *	D			08/17/2023	
Cart Time *     End Time *     Time Zone       07:00 AM     ©     Eastern Time Zone       onsumer     Service Code *	Be sure to check your PTO balance your planned PTO.	to ensure that you have enough hours for	×		
OD7:00 AM         O         10:00 AM         O         Eastern Time Zone         N           onsumer         Service Code *         Service Co	rt Time 🔺	End Time *		Time Zone	
onsumer Service Code *	:00 AM ©	10:00 AM	0	Eastern Time Zone	•
	sumer			Service Code *	
Anne Smith (944) regular	ne Smith (944)			regular	
mments mit to 500 characters.	iments				

# **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.

Add Shift			×
All fields marked with an asterisk (*) are required.			
🚡 Paid Time Off (PTO)?		Date *	
Yes		08/17/2023	
Be sure to check your PTO balance to ensure that you have enough hours for your planned PTO.	×		
Start Time * End Time *		Time Zone	
07:00 AM © 10:00 AM	G	Eastern Time Zone	•
Consumer		Service Code *	
Anne Smith (944)		regular	•
Comments			
Limit to 500 characters.			
		Cancel Save	•

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