

Quick Start Guide

For Adjusting a Shift

“Adjusting” a shift means changing it to fix a problem or mistake.

For instance, you would adjust a shift if your PCA accidentally clocked out two hours after they stopped working.

Consumers and PCAs can both adjust shifts in the EVV Portal. However, if the Consumer has approved a shift that needs to be adjusted, a PCA should ask the Consumer to approve or deny the shift.

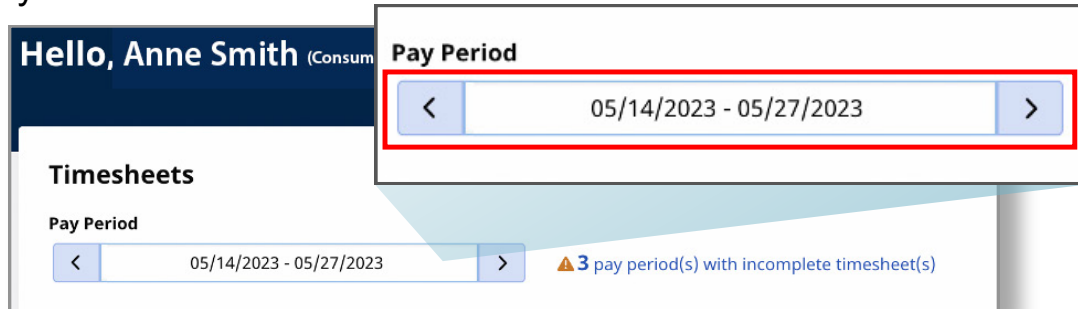
The three dots will display to allow the PCA, Surrogate or Consumer to adjust the shift. After the shift is adjusted, the Consumer will need to re-approve the shift.

After a shift has been submitted, contact Tempus FI to make any adjustments. Please note that adjusting a shift should not happen often. Consumers who make two or more adjustments per Pay Period will be offered additional skills training from their Personal Care Management (PCM) Agency.

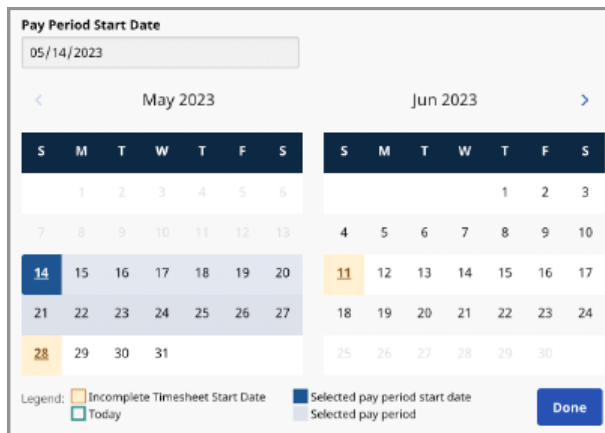
1 Step 1 - Find the Shift to Adjust

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.



2. When the calendar displays, select the **date** of the Pay Period you are looking for.



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**  icon under the Action column.
5. You can then view the days within the selected Pay Period.

If you need detailed help, visit TempusUnlimited.org/EVV-support and see the “Viewing a Timesheet” Quick Start Guide.

2 Step 2 - Click the Three Dots

To adjust a shift, click the **three dots** in the Action column, next to the shift you want to adjust.

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 Deny ...	Approve Deny ...
Wed, 06/07/2023	11:36 AM	02:51 PM		Start: Community End: Community	Approve Deny ...	Approve Deny ...
Thu, 06/08/2023						
Fri, 06/09/2023	12:00 PM	05:00 PM	PTO	day	Approved	...
Sat, 06/10/2023	04:00 PM	11:59 PM		Start: Home End: Home	Approved	...
Sun, 06/11/2023						
Mon, 06/12/2023						
Tue, 06/13/2023						
Wed, 06/14/2023						

3 Step 3 - Adjust Shift

Click **Adjust Shift**.

Services Portal Timesheets

Timesheet for John Brown (PCA# 150512)

Consumer (ID) Anne Smith (944) 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	11:11 AM	11:59 PM			Approve Deny ...	Approve Deny ...
Wed, 06/07/2023	12:00 PM	09:00 PM			Approved	...
Thu, 06/08/2023						
Fri, 06/09/2023	12:00 PM	05:00 PM	PTO		Approved	...
Sat, 06/10/2023	04:00 PM	11:59 PM		Start: Home End: Home	Approved	...
Sun, 06/11/2023						
Mon, 06/12/2023						
Tue, 06/13/2023						
Wed, 06/14/2023						

4 Step 4 - Select an Exception

On the **Adjust Shift** pop-up, select both an **Exception** and a **Reason for Exception**.

The Exception explains why an adjustment is being made.

Note: Required fields have a red asterisk next to them.

Add Shift

⚠ • Shifts taking place between the hours of 12:00 AM and 6:00 AM cannot be entered. ✕

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

Paid Time Off (PTO)?
 No

Date *
12/14/2023

Start Time * 12:30 PM **End Time *** 12:30 PM **Time Zone**
Eastern Time Zone

Start Location * Select... **End Location *** Select...

Consumer
Sarah Consumer (452287) **PCA**
Rachel Assistant (390011)

Consumer Enrollment Select... **Service Code** Select...

Exception *
✓ Select...
Missed or incorrect check in/check out
Other modification required
Technology issue

Comments

Cancel Save

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Step 5 - Select a Reason

On the pop-up, select both an **Exception** and a **Reason for Exception**.

The Reason explains why the Exception happened.

Add Shift ✕

⚠ • Shifts taking place between the hours of 12:00 AM and 6:00 AM cannot be entered. ✕

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

🕒 Paid Time Off (PTO)? No **Date ***

Start Time * **End Time *** **Time Zone**

Start Location * **End Location ***

Consumer **PCA**

Consumer Enrollment **Service Code**

Exception *

Reason for Exception *

- ✓ Select...
- Checked in/out by accident
- Emergency
- Forgot to check in/out
- New employee
- Other

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Step 6 - Fix the Error

Fix whatever is wrong with the shift. For example, you can change the **start** or **end time**. You can also include a comment about why you adjusted the shift.

Note: Your comment will be visible to your PCA and Tempus FI.

The screenshot shows a web form for adjusting a shift. The form includes the following fields and options:

- Paid Time Off (PTO)?**: Radio button set to "No".
- Start Date**: 11-20-2023
- End Date**: 11-20-2023
- Start Time**: 05:32 AM (highlighted with a red box)
- End Time**: 05:45 AM (highlighted with a red box)
- Time Zone**: Eastern Time Zone
- Start Location**: Community
- End Location**: Community
- Consumer**: Sarah Consumer (147386)
- Consumer Enrollment**: mass_health - ffs
- Service Code**: regular, with an "Add Shift" button.
- Exception**: Technology Issue
- Reason for Exception**: Device died or turned off during visit
- Comments**: A text area (highlighted with a red box) for entering a comment.
- Buttons**: "Cancel" and "Save".

7 Step 7 - Save Your Changes

After you have made the necessary changes, click **Save** at the bottom of the window.

The screenshot shows a web form for adding a shift. The form is titled "Paid Time Off (PTO)?" and has a "No" radio button selected. The "Start Date" and "End Date" are both set to "11-20-2023". The "Start Time" is "05:32 AM" and the "End Time" is "05:45 AM". The "Time Zone" is "Eastern Time Zone". The "Start Location" and "End Location" are both "Community". The "Consumer" is "Sarah Consumer (147386)" and the "Consumer Enrollment" is "mass_health - ffs". The "Service Code" is "regular" and there is an "Add Shift" button next to it. The "Exception" is "Technology Issue" and the "Reason for Exception" is "Device died or turned off during visit". There is a "Comments" text area at the bottom. At the bottom right, there are "Cancel" and "Save" buttons, with the "Save" button highlighted by a red box.

You can now adjust a shift using the EVV Portal.