

Pace User Interface Timesheet Documentation

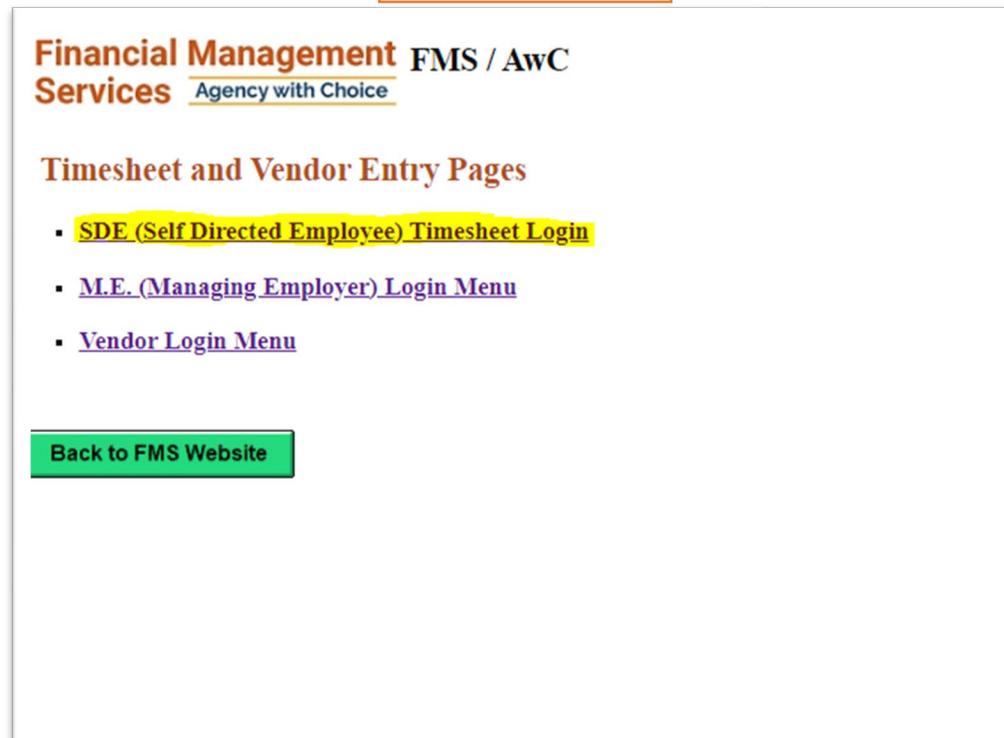
NOTE: This is the training manual for Self-Directed Employees for entering and submitting timesheets. If you are also a Managing Employer, please refer to the Managing Employer training manual. ME and SDEs are separate roles with separate logins and tasks

Here is the YouTube Link for this training: <https://www.youtube.com/watch?v=yxE9WqrtJU>

Please open the page by clicking on the link <https://time.financialmanagementservices.org/>

Click on the link highlighted in yellow.

Screen A



Financial Management Services FMS / AwC
Agency with Choice

Timesheet and Vendor Entry Pages

- **SDE (Self Directed Employee) Timesheet Login**
- [M.E. \(Managing Employer\) Login Menu](#)
- [Vendor Login Menu](#)

[Back to FMS Website](#)

Please login to the screen below with your Username and Password and the starting **Saturday** date for your payroll week. There is a calendar on the page for your convenience. Once filled in, press the "Submit" button.

Screen B

Financial Management Services Agency with Choice **SDE Timesheet Entry**

SDE Timesheet Login

| | |
|--|--|
| SDE Web Login Username..... | <input type="text" value="johnsmith"/> |
| Password..... | <input type="password" value="*****"/> |
| Starting Saturday in a Sat-Fri Payroll Week (mm/dd/yy).. | <input type="text" value="4/1/2023"/> |

[Return to Previous Page](#) [Submit](#)

All of your plans are on this screen. Please pick the plan by clicking on “Pick This Plan” button where you need to enter your timesheet from the screen below.

Screen C



FMS-AwC Timesheets

SDE's Available Timesheets. JOHN SMITH (888999)

Authorized Outcome/SVC Plans For Payroll's Sat-Fri Week: 04/01/2023 - 4/7/2023

| Dept String Plan | ConsumerName | Managing Employee | Outcome | SVC | Auth Hrs/Wk | Has Hours | Auth From Date | Auth To Date | ProcCode | ProcDesc | Action Button |
|------------------|--------------|-------------------|---------|-----|-------------|-----------|----------------|--------------|-----------|---------------------|------------------|
| 07-777002-0421-4 | JANET WIN | NANCYDOE | 5 | 6 | 22 | 14 | 03/01/23 | 11/30/23 | H2016HIU8 | INDIVIDUAL SUPPORTS | < Pick This Plan |
| 07-777888-0123-2 | JANE DOE | NANCYDOE | 3 | 4 | 18.75 | 16 | 02/01/23 | 10/31/23 | H2016HIU8 | INDIVIDUAL SUPPORTS | < Pick This Plan |
| 07-777888-0321-1 | JANE DOE | NANCYDOE | 2 | 7 | 21.5 | 9.25 | 01/01/23 | 06/30/23 | H2016HIU8 | INDIVIDUAL SUPPORTS | < Pick This Plan |



Back to Login

Back to FMS Website

Enter the new shift details like Date, Time (must add AM or PM), Strategy Code, Time Off Code, and Location. Then press the “Add” button by **red arrow**. Also, a note from the ME may have been added if the timesheet was rejected, this is by the **blue arrow**

Note: Hours field is a calculated field.

Screen D

Financial Management Services
Agency with Choice

FMS-AwC Timesheet SDE: JOHNSMITH

SDE: Add/Edit/Save Shifts with NOTES

| | | |
|------------------------|------------------|--|
| SDE Employee | 888999 | JOHN SMITH |
| Managing Employer Name | NANCYDOE | NANCY DOE |
| Consumer# | 777888 | JANE DOE H2016HIU8 INDIVIDUAL SUPPORTS |
| Dept CostCenter | 07-777888-0321-1 | Outcome / Service 2 / 7 |
| Authorized Hours | 21.5 | Authorized Date Range 01/01/23 to 06/30/23 |

Note from M.E. => mm 33

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Timesheet's Status, SDE: **(UNSUBMITTED)** Date Range: Saturday [04/01/2023] thru Friday [4/7/2023]

Info: If there are any errors then SDE can not submit to M.E. (including Case Notes Errors)

| Date | IN | OUT | Hours | SVC Strategy Code | Time Off Code | Location | Re-Edit | Clear/Delete | Add NOTES | NOTES Information |
|--------------|----------|----------|-------|-------------------|---------------|----------|---------|--------------|-----------|--------------------|
| 04/01/23 SAT | 10:00 AM | 11:30 AM | 1.5 | ADL | | C | < Edit | < Clear | < NOTES | Case Notes Needed |
| 04/05/23 WED | 8 AM | 11:15 AM | 3.25 | II | J | | < Edit | < Clear | < NOTES | None: Has Time Off |
| 04/06/23 THU | 8 AM | 9:30 AM | 1.5 | ADL | | L | < Edit | < Clear | < NOTES | Notes OK |
| 04/07/23 FRI | 11:00 AM | 02:00 PM | 3 | ADL | P | | < Edit | < Clear | < NOTES | None: Has Time Off |

Total Hours = 9.25 Authorized Hours are: 21.5

[SDE] JOHN SMITH
Timesheet Not Complete
Back to Timesheet List
Re-Login for Next Timesheet
Back to FMS Website

Actions ==>

Save For Later

Back To List

Back to Login

Back to FMS Website

Please add below the date and times worked. You must add AM or PM to the Time In and Time Out Note: Noon is 12 PM and Midnight is 12 AM

| Date | IN | OUT | Hours (AutoCalc) | SVC Strategy Code | Time Off Code | Location | Add Action Button |
|----------|----------|----------|------------------|--|---------------|-------------|----------------------|
| 4/3/2023 | 10:00 am | 12:00 pm | | ICP Increasing Community Participation | n/a | C Community | < Add This Shift Row |

Code No. : 8 8 8 9 9 9
For Subordinate Use Only

Role:
(Type or signature)

Individual/Managing Employer
 Managing Employer Backup
 Self-Directed Employee

Print Name: **John Smith**
Date: 4/25/2023

Signature: *John Smith*
Date: 4/25/2023

< Add This Shift Row

↘

4

Next you must put in a note next to the time entry. There are four different scenarios for notes entry.

1. "Notes OK" is when notes are entered correctly. You do not need to make any changes
2. "None: Has Time Off" is displayed if the person is on PTO or has Jury Duty. Here also you do not need to do anything
3. "Please Enter at least One Activity" means there are no activities selected
4. "Case Notes Needed" is displayed if notes are not entered or are not long enough (10 character minimum)

To enter notes, please select the blue button next to the time entry, noted in the red box below

Screen D

Financial Management
 Agency with Choice

FMS-AwC Timesheet SDE: JOHNSMITH

SDE: Add/Edit/Save Shifts with NOTES

| | | |
|------------------------|------------------|--|
| SDE Employee | 888999 | JOHN SMITH |
| Managing Employer Name | NANCYDOE | NANCYDOE |
| Consumer# | 777888 | JANE DOE H2016HIU8 INDIVIDUAL SUPPORTS |
| Dept CostCenter | 07-777888-0321-1 | Outcome / Service 2 / 7 |
| Authorized Hours | 21.5 | Authorized Date Range 01/01/23 to 06/30/23 |

Note from M.E. => Test Case Notes Needed

Timesheet's Status, SDE: (UNSUBMITTED) Date Range: Saturday [04/01/2023] thru Friday [4/7/2023]

Info: If there are any errors then SDE can not submit to M.E. (including Case Notes Errors)

| Date | IN | OUT | Hours | SVC Strategy Code | Time Off Code | Location | Re-Edit | Clear/Delete | Add NOTES | NOTES Information |
|--------------|----------|----------|-------|-------------------|---------------|----------|---------|--------------|-----------|------------------------------------|
| 04/03/23 MON | 09:00 AM | 11:00 AM | 2 | ICP | | C | < Edit | < Clear | < NOTES | Notes OK |
| 04/04/23 TUE | 09:00 PM | 11:00 PM | 2 | ICP | P | | < Edit | < Clear | < NOTES | None: Has Time Off |
| 04/01/23 SAT | 09:00 AM | 11:00 AM | 2 | ICP | | C | < Edit | < Clear | < NOTES | Please Enter at Least One Activity |
| 04/05/23 WED | 09:00 PM | 11:00 PM | 2 | ICP | | C | < Edit | < Clear | < NOTES | Case Notes Needed |

Total Hours = 8 Authorized Hours are: 21.5

[SDE] JOHN SMITH Timesheet Not Complete
Back to Timesheet List Re-Login for Next Timesheet Back to FMS Website

Actions ==>

Save For Later
Back To List
Back to Login
Back to FMS Website

Please add below the date and times worked. You must add AM or PM to the Time In and Time Out Note: Noon is 12 PM and Midnight is 12 AM

| Date | IN | OUT | Hours (AutoCalc) | SVC Strategy Code | Time Off Code | Location | Add Action Button |
|------|----|-----|------------------|------------------------------|---------------|----------|----------------------|
| | | | | ADL Activity of Daily Living | n/a | L Liveln | < Add This Shift Row |

- 1
- 2
- 3
- 4

5

The notes have more options than you may be accustomed to. This is to fulfill compliance rules and to make the notes more detailed. Please enter click on at least one activity in the highlighted in yellow, and then you can click on subcategories. You can select multiple activities, and you can also notate whether support was needed or if there was progress on the outcome. If you click “other” (orange box) you will be required to enter details

Screen E

Financial Management Services Agency with Choice **Timesheet NOTES (Outcome Activity Log)**
For Timesheet's Date of: 04/03/23

H2016HIUS INDIVIDUAL SUPPORTS (Status: UNSUBMITTED) SDE: JOHN SMITH Location: C-Community

Assistance with Activities of Daily Living (Check All Completed)
 Eating Getting Dressed Grooming Personal Hygiene Toileting Transferring or Ambulating Other
Please describe this Other Activity=>
 Instructions were provided Physical support needed Independent (assistance not necessary)
 Yes Progress on Outcome No Progress on Outcome

Assistance with Increasing Community Participation: (Check All Completed)
 Daily Errands Attending Events Purchasing Items Restaurant Travel Training Other
Please describe this Other Activity=>
 Not interested in participating in outing Willing and excited to participate in outing
 Yes Progress on Outcome No Progress on Outcome

Assistance with Increasing Independence: (Check All Completed)
 Cleaning Cooking Dressing Grocery Laundry Purchasing Shopping Other
Please describe this Other Activity=>
 Instructions were provided Physical support needed Independent (assistance not necessary)
 Yes Progress on Outcome No Progress on Outcome

Assistance with On the Job Support: (Check All Completed)
 Safety Awareness Personal Hygiene Using the Restroom Attending to a Task Lunch/Breaks Other
Please describe this Other Activity=>
 Instructions were provided Physical support needed Independent (assistance not necessary)
 Yes Progress on Outcome No Progress on Outcome

Assistance with Learning Activities: (Check All Completed)
 Math Skills Money Skills Writing Skills Support Attending Classes Virtual Experiences Using Technology Problem Solving Decision Making Other
Please describe this Other Activity=>
 Instructions were provided Physical support needed Independent (assistance not necessary)
 Yes Progress on Outcome No Progress on Outcome

CASE NOTES: In a few sentences, please describe how today's activities will help the individual reach their outcome *

Save your notes by clicking the "Save and Exit" option by the blue arrow above. If you don't want to save, you can click next to the red arrow. If there are any note errors as described on page 5, you will need to go back into the notes again to fix them.

If you are providing notes for transportation, those notes are different and they look like this. Please enter the driving start and end time (the minutes will automatically calculate). Also please fill out the address for both the starting and ending location and notate whether the location is home or other.

Financial Management Services
Agency with Choice

SDE Transportation NOTES

For Timesheet's Date of: 04/01/23

Vehicle's Trip Leg (Start to End Location)

A0090HI52 TRANSPORTATION (Status: UNSUBMITTED) SDE: HELEN MITCHELL Location: C-Community

Time Driving

| | |
|------------------------|---------------------------------------|
| Starting Time | <input type="text" value="09:00 AM"/> |
| Ending Time | <input type="text" value="11:00 AM"/> |
| Minutes Driving (calc) | <input type="text" value="120"/> |

Starting Location

Home Other

Name

Address 1

Address 2

City

State

Zip

Ending Location

Home Other

Name

Address 1

Address 2

City

State

Zip

Save and Exit

Exit without Saving

Once you are back in the timesheets, there are other options. You can edit an existing row by clicking “Edit” on the row you wish to edit (blue arrow). This will pop the time entry back to the yellow area below where you can edit it. You can also delete an existing time entry by clicking on the “Clear” button (red arrow). This removes it entirely.

| | | | |
|------------------|------------------|-----------------------|----------------------|
| Dept CostCenter | 07-777888-0321-1 | Outcome / Service | 2 / 7 |
| Authorized Hours | 21.5 | Authorized Date Range | 01/01/23 to 06/30/23 |

Note from M.E. =>

Timesheet's Status, SDE: (UNSUBMITTED) Date Range: Saturday [04/01/2023] thru Friday [4/7/2023]

Info: If there are any errors then SDE can not submit to M.E. (includes Case Notes Errors)

| Date | IN | OUT | Hours | SVC Strategy Code | Time Off Code | Location | Re | Clear/ | Add NOTES | NOTES Information |
|--------------|----------|----------|-------|-------------------|---------------|----------|--------|---------|-----------|--------------------|
| 04/01/23 SAT | 10:00 AM | 11:30 AM | 1.5 | ADL | | C | < Edit | < Clear | < NOTES | Notes OK |
| 04/05/23 WED | 8 AM | 11:15 AM | 3.25 | II | J | | < Edit | < Clear | < NOTES | None: Has Time Off |
| 04/06/23 THU | 8 AM | 9:30 AM | 1.5 | ADL | | L | < Edit | < Clear | < NOTES | Notes OK |
| 04/07/23 FRI | 11:00 AM | 02:00 PM | 3 | ADL | P | | < Edit | < Clear | < NOTES | None: Has Time Off |
| 04/03/23 MON | 10:00 AM | 12:00 PM | 2 | ICP | | C | < Edit | < Clear | < NOTES | Notes OK |

Total Hours = 11.25 Authorized Hours are: 21.5

[SDE] JOHN SMITH Timesheet Not Complete Timesheet Complete. Back to Timesheet List Re-Login for Next Timesheet Back to FMS Website

Actions ==> Save For Later Submit to M.E. Back To List Back to Login Back to FMS Website

Please add below the date and times worked. You must add AM or PM to the Time In and Time Out Note: Noon is 12 PM and Midnight is 12 AM

| Date | IN | OUT | Hours (AutoCalc) | SVC Strategy Code | Time Off Code | Location | Add Action Button |
|------|----|-----|------------------|------------------------------|---------------|----------|----------------------|
| | | | | ADL Activity of Daily Living | n/a | L LiveIn | < Add This Shift Row |

Code No. :

Once you are finished with all the shifts for the week, you can submit your timesheet by clicking “Submit to M.E.” which is option 2 below. ***If there is no “Submit” button, it means there is an error in the timesheet and it needs to be corrected before submitting.***

Note: once you submit the timesheet you will not be able to make any changes.

If you do not wish to submit your timesheet yet, click on option 1 below. You can also select buttons 3 – 5, which take you back to previous screens. *Please note that option 4, "Back to Login," logs you out of the system.*

Screen D

Timesheet Status, SDE: (UNSUBMITTED) Date Range: Saturday [04/01/2023] thru Friday [04/07/2023]

Info: If there are any errors then SDE can not submit to M.E. (including Case Notes Errors)

| Date | IN | OUT | Hours | SVC Strategy Code | Time Off Code | Location | Re-Edit | Clear/Delete | Add NOTES | NOTES Information |
|--------------|----------|----------|-------|-------------------|---------------|----------|---------|--------------|-----------|--------------------|
| 04/01/23 SAT | 10:00 AM | 11:30 AM | 1.5 | ADL | | C | < Edit | < Clear | < NOTES | Notes OK |
| 04/05/23 WED | 8 AM | 11:15 AM | 3.25 | II | J | | < Edit | < Clear | < NOTES | None: Has Time Off |
| 04/06/23 THU | 8 AM | 9:30 AM | 1.5 | ADL | | L | < Edit | < Clear | < NOTES | Notes OK |
| 04/07/23 FRI | 11:00 AM | 02:00 PM | 3 | ADL | P | | < Edit | < Clear | < NOTES | None: Has Time Off |
| 04/03/23 MON | 10:00 AM | 12:00 PM | 2 | ICP | | C | < Edit | < Clear | < NOTES | Notes OK |

Total Hours = 11.25 Authorized Hours are: 21.5

[SDE] JOHN SMITH Timesheet **1** complete Timesheet **2** complete Back to **3** sheet List Re-Login **4** next Timesheet Back **5** FMS Website

Actions ==> Save For Later Submit to M.E. Back To List Back to Login Back to FMS Website

Please add below the date and times worked. You must add AM or PM to the Time In and Time Out Note: Noon is 12 PM and Midnight is 12 AM

| Date | IN | OUT | Hours (AutoCalc) | SVC Strategy Code | Time Off Code | Location | Add Action Button |
|------|----|-----|------------------|------------------------------|---------------|----------|----------------------|
| | | | | ADL Activity of Daily Living | n/a | L Liveln | < Add This Shift Row |

This will be what your timesheet looks like after you have submitted it.

1. If you need to go to the list of all the plans, then use this option. This will take you to screen C.
2. This will take you back to screen A.
3. It will take you back to the FMS Website.

Screen E

SDE: Add/Edit/Save Shifts with NOTES

| | | | |
|------------------------|------------------|-----------------------|-------------------------------|
| SDE Employee | 888999 | JOHN SMITH | |
| Managing Employer Name | NANCYDOE | NANCY DOE | |
| Consumer# | 777888 | JANE DOE | H2016HIU8 INDIVIDUAL SUPPORTS |
| Dept CostCenter | 07-777888-0321-1 | Outcome / Service | 2 / 7 |
| Authorized Hours | 21.5 | Authorized Date Range | 01/01/23 to 06/30/23 |

Note from M.E. => mm 33

Timesheet's Status, SDE: (SUBMITTED to M.E.) Date Range: Saturday [04/01/2023] thru Friday [4/7/2023]

Info: If there are any errors then SDE can not submit to M.E. (including Case Notes Errors)

| Date | IN | OUT | Hours | SVC Strategy Code | Time Off Code | Location | Add NOTES | NOTES Information |
|--------------|----------|----------|-------|-------------------|---------------|----------|-----------|--------------------|
| 04/01/23 SAT | 10:00 AM | 11:30 AM | 1.5 | ADL | | C | < NOTES | Notes OK |
| 04/05/23 WED | 8 AM | 11:15 AM | 3.25 | II | J | | < NOTES | None: Has Time Off |
| 04/06/23 THU | 8 AM | 9:30 AM | 1.5 | ADL | | L | < NOTES | Notes OK |
| 04/07/23 FRI | 11:00 AM | 02:00 PM | 3 | ADL | P | | < NOTES | None: Has Time Off |
| 04/03/23 MON | 10:00 AM | 12:00 PM | 2 | ICP | | C | < NOTES | Notes OK |

Total Hours = 11.25 Authorized Hours are: 21.5

[Back to 1 Timesheet List](#)
 [Re-Login for 2 Timesheet](#)
 [Back to FMS 3 Website](#)

Back To List
 Back to Login
 Back to FMS Website

| | |
|----------------------------|---|
| Code No. : | 8 8 8 9 9 9 |
| For Subcontractor Use only | |
| Role (Type of Signature) | <input type="radio"/> Individual/Managing Employer <input type="radio"/> Managing Employer Backup <input checked="" type="radio"/> Self-Directed Employee |
| Print Name: | John Smith |
| Signature: | <i>John Smith</i> |
| Date: | 9/25/2024 |
| Date: | 9/25/2024 |

Possible Status values explained below:

Web-EMP – this status indicates that the SDE is currently entering information onto the timesheet and completing the appropriate service documentation. In this status the SDE can make changes to the timesheet, update items and save it for later.

NOTICE: a timesheet can be placed in this status post ME approval if: the timesheets has errors which the SDE must fix. A message in the comment section will appear with dialog such as please elaborate on case notes, wrong location code, missing location code, etc..

WEB-ME— this status indicates that the SDE has completed their timesheet, including service documentation, and sent it to the ME for review and approval.

NOTICE: When the timesheet is in this status the SDE cannot make changes unless the ME “Rejects” the timesheet and sends it back to the SDE.

NOTICE: The ME cannot make any changes to the timesheet on the SDEs behalf. The ME is only able to review, approve or reject the timesheet.

Web-ME-OK – this status indicates that the ME has reviewed and approved the SDEs timesheet and sent it over to the AwC team for further review.

Web-Verified (AwC Internal Status) – this status indicates that the AwC verification team have reviewed the service documentation of the SDEs timesheet. Once the timesheet is in this status the AwC payroll team will review in/out hours etc., and make sure the timesheet is correct.

NOTICE: The SDE and ME are not able to make changes to the timesheets while in this status.

Edited-OK – this status indicates that the timesheet has been completely reviewed by the AwC team and will move forward with issuing payment.

NOTICE: An **exception** with the Edited OK status is when two or more SDEs who work for the same consumer overlap time entries. There is a possibility that an SDE(s) timesheet is in the EDITED-OK status at the beginning of the week, but an overlap is identified later in the week the AwC team will act. When an **overlap** between multiple SDEs timesheets occurs, the AwC team must reject the timesheet, returning it to the WEB-EMP status, for the SDE(s) to make corrections. Once the corrections have been made the SDE(s) will re-submit their timesheet to the ME. Once the ME has reviewed the timesheet(s) they will approve it and send it over the AwC team.