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Partners in Community Supports

PICS PORTAL

Training Manual

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Partners in
Community Supports

Contents

LET'S GET STARTED!

Let's Get Started

HOW TO LOGIN

The Representative (you) will receive a portal login email that includes a link to the portal, training manual and your username and password once service starts.

You can reset the password to your preference just by clicking on **Reset Password**. Forgot your password? No worries! There is a **Forgot Password** link at the bottom of the login screen to help you create a new password.

Representatives (you) are responsible for ensuring the accuracy of the hours reported on timecards and submitting timecards according to the PICS payroll schedule. The Worker and Representative must accept the timecard before processing. The Worker and Representative must also retain a copy of timecards submitted to PICS or on the PICSPortal for record keeping and audit purposes.

HOME PAGE

The homepage will display all of your current account information. Representatives can navigate from this page to enter or edit account-specific information regarding:

1. Timecards
2. Expenses
3. Mileage
4. Reports

DEADLINES

Payroll

- **Manual Timecards**:
  Due by noon every other Monday

- **Portal Timecards**:
  Due by noon every other Wednesday

Expenses: Due by noon every Tuesday

Mileage: Due by noon every Tuesday

PAY DAY

Payroll is paid every other Wednesday.
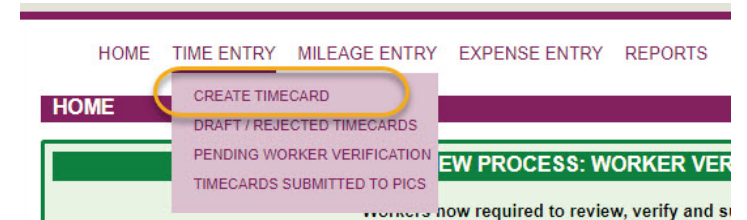Expenses and Mileage are reimbursed every Friday.

LATE SUBMISSION

Late timecards are processed the following week and are paid the Friday following payday. Please refer to the deadlines on the payroll schedule to ensure on-time payment.

Payroll

HOW TO CREATE TIMECARDS

All workers must have timecards to receive pay.

1. Click **Create Time Sheet** tab
2. Select **Participant**
3. Select **Service Agreement**
4. Select **Worker**
5. Select **Pay Period**
6. Click **Save** and start to enter hours

Note: You may go back only two pay periods, with one timecard per pay period. You will need to submit manual timecards for previous reporting periods or to make changes to previously submitted timecards. Don't have a manual timecard handy? No worries. Find a copy in Worker Forms on **www.picsmn.org**.

Note: Worker must have an email address. If they don't have one on file, a manual timecard will need to be submitted until the Worker provides an email address.

HOW TO ENTER TIME

The timecard lists the fourteen days for the selected pay period. Enter the start time and end time for each shift worked, on each date worked.

HH = Hour

MM = Minutes (15–minute increments).

Staffing Type = Fills in as Staffing Standard, but can be changed as needed.

Total hours for the shift, pay rate and earnings are calculated automatically.

Reference Number:	10376158		Participant:	Lee, Bob
Worker:	Lee, Amy		Origination:	Portal
Service Agreement:	Lee, Bob - 01/01/2021 - 12/31/2021		Pay Period Dates:	1/31/2021 - 2/13/2021
Total Hours:	0.00		Total Earnings:	$0.00
Previously Rejected Reason:	No hours entered		Portal Status:	Draft

SPLIT SHIFT	DAY WORKED	START TIME		END TIME		HOURS	STAFFING TYPE	RATE	EARNINGS AMOUNT
	Sun 01/31/2021	HHMM ▾	⦿ AM ◯ PM	HHMM ▾	⦿ AM ◯ PM		Staffing-Standard ▾		
	Mon 02/01/2021	HHMM ▾	⦿ AM ◯ PM	HHMM ▾	⦿ AM ◯ PM		Staffing-Standard ▾		
	Tue 02/02/2021	HHMM ▾	⦿ AM ◯ PM	HHMM ▾	⦿ AM ◯ PM		Staffing-Standard ▾		
	Wed 02/03/2021	HHMM ▾	⦿ AM ◯ PM	HHMM ▾	⦿ AM ◯ PM		Staffing-Standard ▾		
	Thu 02/04/2021	HHMM ▾	⦿ AM ◯ PM	HHMM ▾	⦿ AM ◯ PM		Staffing-Standard ▾		
	Fri 02/05/2021	HHMM ▾	⦿ AM ◯ PM	HHMM ▾	⦿ AM ◯ PM		Staffing-Standard ▾		
	Sat 02/06/2021	HHMM ▾	⦿ AM ◯ PM	HHMM ▾	⦿ AM ◯ PM		Staffing-Standard ▾		
	Sun 02/07/2021	HHMM ▾	⦿ AM ◯ PM	HHMM ▾	⦿ AM ◯ PM		Staffing-Standard ▾		
	Mon 02/08/2021	HHMM ▾	⦿ AM ◯ PM	HHMM ▾	⦿ AM ◯ PM		Staffing-Standard ▾		
	Tue 02/09/2021	HHMM ▾	⦿ AM ◯ PM	HHMM ▾	⦿ AM ◯ PM		Staffing-Standard ▾		
	Wed 02/10/2021	HHMM ▾	⦿ AM ◯ PM	HHMM ▾	⦿ AM ◯ PM		Staffing-Standard ▾		
	Thu 02/11/2021	HHMM ▾	⦿ AM ◯ PM	HHMM ▾	⦿ AM ◯ PM		Staffing-Standard ▾		
	Fri 02/12/2021	HHMM ▾	⦿ AM ◯ PM	HHMM ▾	⦿ AM ◯ PM		Staffing-Standard ▾		
	Sat 02/13/2021	HHMM ▾	⦿ AM ◯ PM	HHMM ▾	⦿ AM ◯ PM		Staffing-Standard ▾		
					WEEK 1:	0.00			$0.00
					WEEK 2:	0.00			$0.00
					PAY PERIOD:	0.00			$0.00

Save   Delete   **Send Timecard to Worker**

Hours cannot be submitted while the Participant is admitted to a hospital, nursing home, long-term care, or residential facility.

HOW TO SUBMIT TIMECARDS

Click Save on the bottom right after you have entered all shifts for the pay period. **NOTE: THIS WILL NOT SUBMIT YOUR TIMECARD FOR PAYMENT.**

Click **Send Timecard to Worker** when the timecard is accurate and complete. An email will be sent to Worker to accept / reject their timecard to complete the timecard submission process.

Worker Accept / Reject Timecard
Workers are required to accept their timecard before PICS can process.

2 Easy Steps:

1. Worker receives an email to review their timecard. There is a 48 hours limit link for Worker to accept / reject their timecard.

2. Worker selects Accept or Reject.
   If Accepted
   • Representative receives an email containing acceptance status & timecard details.
   • Timecard will be submitted to be process.

Timecard

Carefully review the timecard information below ensuring that it accurately reflects your hours worked in this pay period.

Your final acceptance is due no later than 12:00 noon on the Wednesday after the last day of the pay period. If submitted after this deadline, the timecard will be processed at a later date.

TIMECARD:	10376115	WORKER:	
PAY PERIOD:	12/6/2020 - 12/19/2020	PARTICIPANT:	
STATUS:	Pending Worker Approval	REPRESENTATIVE:	

Timecard Detail:

DAY WORKED	START TIME	END TIME	STAFFING TYPE	HOURS
Sun 12/06/2020	01:00 AM	09:00 AM	Staffing-Child 2	8.00
Mon 12/07/2020	01:00 AM	09:00 AM	Staffing-Child 2	8.00
Tue 12/08/2020	01:00 AM	09:00 AM	Staffing-Child 2	8.00
Wed 12/09/2020	01:00 AM	09:00 AM	Staffing-Child 2	8.00
Thu 12/10/2020	01:00 AM	09:00 AM	Staffing-Child 2	8.00
			WEEK 1:	40.00
			WEEK 2:	0.00
			PAY PERIOD :	40.00

Select ACCEPT verifying that this timecard accurately and completely reflects all time worked during this pay period and that all time worked was within the scope of the Participant's program rules.

Select REJECT if incomplete or not accurate indicating that this timecard does not accurately and completely reflect all time worked during this pay period. The timecard will be returned to the Representative for their consideration.

Accept   Reject

These buttons will be active for 48 hours. If this time has expired and you still need to take action, click here to request a new email to be sent.
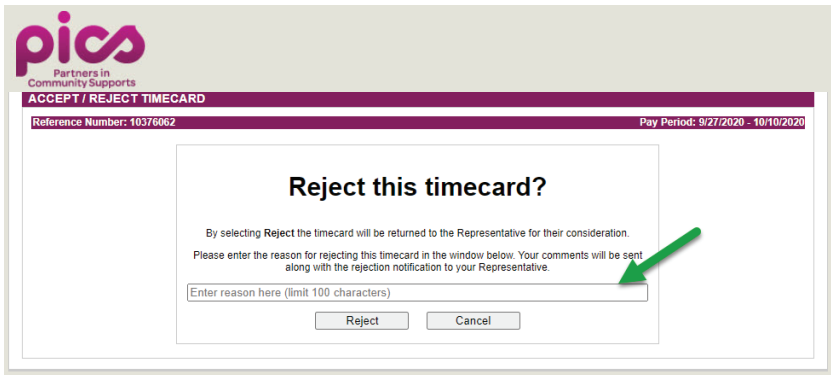
If Rejected

- Representative receives an email containing rejection status & rejection reason.

- Timecard is put in Pending status with red font to be corrected.

- Representative can edit and resubmit the timecard.

- Worker will receive another email to accept / reject the resubmit timecard.

- Once accepted by Worker, timecard will be submitted to be process.
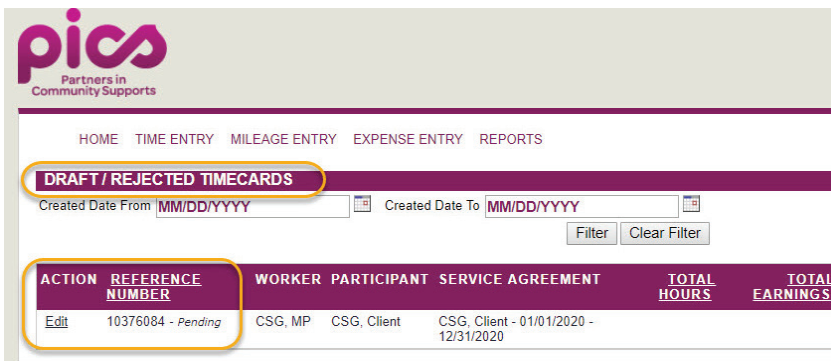
Timecards Awaiting Acceptance

Representative can view awaiting timecard under the Time Entry tab. These timecards are waiting to be accepted by the Worker and have NOT been submitted to be process.
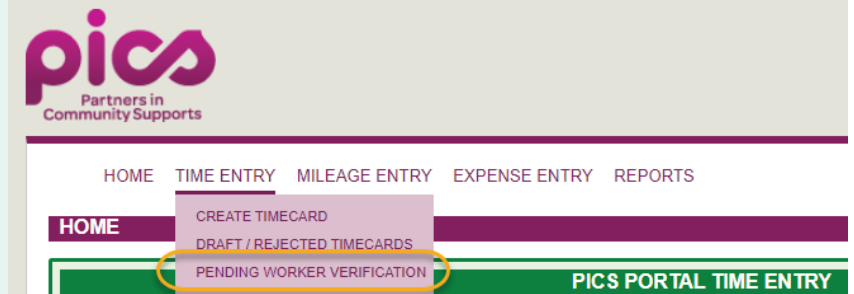
Expired Timecard Email Link

If a Worker missed the 48 hours limit to accept their timecard, they will need to contact the Representative to resend the email. The Representative can resend the link by going under the Time Entry tab and select Timecards Pending Worker Verification. A list of timecards will show up and the Representative will click on the "Resend" option locate next to the timecard to resend the link. The Worker will receive a different email with the new timecard link to accept / reject.

HOW TO ENTER 24-HOUR SHIFTS

To enter a 24-hour shift, such as the full day, enter 12:00 AM for both the start and end time for the date. This will calculate as 24 hours.

SPLIT SHIFTS

If your worker has a split shift – or a gap in time within one day in which they were not working – simply click on the green + symbol for that date. This will generate a new line for the same date, and you can add the hours as in the example below.

SPLIT SHIFT	DAY WORKED	START TIME	END TIME	HOURS	STAFFING TYPE	RATE	EARNINGS AMOUNT
✕➕	Sun 01/31/2021	0200 ⃝AM ⦿PM	0800 ⃝AM ⦿PM	6.00	Staffing-Standard	$17.26	$103.56
✕➕	Mon 02/01/2021	0800 ⦿AM ⃝PM	0400 ⃝AM ⦿PM	8.00	Staffing-Standard	$17.26	$138.08
✕➕	Tue 02/02/2021	0800 ⦿AM ⃝PM	0430 ⃝AM ⦿PM	8.50	Staffing-Standard	$17.26	$146.71
✕➕	Wed 02/03/2021	0830 ⦿AM ⃝PM	0430 ⃝AM ⦿PM	8.00	Staffing-Standard	$17.26	$138.08
✕➕	Thu 02/04/2021	0830 ⦿AM ⃝PM	0300 ⃝AM ⦿PM	6.50	Staffing-Standard	$17.26	$112.19
✕➕	Fri 02/05/2021	1200 ⃝AM ⦿PM	0200 ⃝AM ⦿PM	2.00	Staffing-Standard	$17.26	$34.52
	Sat 02/06/2021	HHMM ⦿AM ⃝PM	HHMM ⦿AM ⃝PM		Staffing-Standard		

OVERTIME

In general, the programs that fund services for PICS' Participants prohibit the use of funds for overtime pay unless it is accepted in the Participant's support. However, if and when the submitted timecard for a worker shows total hours exceeding 40 for either of the two work weeks (Sunday through Saturday), **the law requires** that the worker be paid overtime.

SPLIT SHIFT	DAY WORKED	START TIME	END TIME	HOURS	STAFFING TYPE	RATE	EARNINGS AMOUNT
✕➕	Sun 01/31/2021	0200 ⃝AM ⦿PM	0800 ⃝AM ⦿PM	6.00	Staffing-Standard	$17.26	$103.56
✕➕	Mon 02/01/2021	0800 ⦿AM ⃝PM	0400 ⃝AM ⦿PM	8.00	Staffing-Standard	$17.26	$138.08
✕➕	Tue 02/02/2021	0800 ⦿AM ⃝PM	0430 ⃝AM ⦿PM	8.50	Staffing-Standard	$17.26	$146.71
✕➕	Wed 02/03/2021	0830 ⦿AM ⃝PM	0430 ⃝AM ⦿PM	8.00	Staffing-Standard	$17.26	$138.08
✕➕	Thu 02/04/2021	0830 ⦿AM ⃝PM	0300 ⃝AM ⦿PM	6.50	Staffing-Standard	$17.26	$112.19
✕➕	Fri 02/05/2021	1200 ⃝AM ⦿PM	0400 ⃝AM ⦿PM	4.00	Staffing-Standard	$17.26	$69.04
	Fri 02/05/2021	0300 PM	0400 PM	1.00	Staffing-Standard	$8.63	$8.63 OT
	Sat 02/06/2021	HHMM ⦿AM ⃝PM	HHMM ⦿AM ⃝PM		Staffing-Standard		
✕➕	Sun 02/07/2021	0800 ⦿AM ⃝PM	0300 ⃝AM ⦿PM	7.00	Staffing-Standard	$17.26	$120.82

Note: The portal will warn the user if shifts entered total more than 40 for a week. The warning will appear in a bright highlighted area marked with **OT** (see above)

Note: The portal will allow a timecard showing overtime to be saved and submitted; however, the timecard will not be processed for payment until the assigned Service Coordinator reviews and accepts the timecard.

Calculating wages for overtime pay:
In the example above, the overtime rate (.5 of the person's wage) is $5.63. They worked a total of 46.75 hours, so they are paid 46.75 hours at their regular rate, and 6.75 hours at their half rate.

DRAFT / REJECTED TIMECARDS

You can create your timecard as hours are worked throughout the work week, or create it at the end of the pay period. The option is yours. You will find timecards that have already been created in the **Draft / Rejected Timecard** tab. Remember to enter your hours, save and submit the timecard by the deadline to ensure it is processed on time.

TIMECARD SUBMITTED TO PICS

Under this tab you will find the most current submitted timecard for your record.

TIMECARD BOUNCE BACK

Timecards that do not meet the criteria to be paid will not be processed. **Reasons include:**

- Over-Budget Hours

- Over-Time Hours

- Overlapping Hours

- Shared Services Hours

- SA on Hold

- Late Timecard

- Zero Hours

- Timecard in Draft Status

Your Service Coordinator will contact you by email or phone to make necessary corrections and resubmit if needed. Please note that the pay period due date still applies to these timecards.

Expenses

HOW TO CREATE AN EXPENSE ENTRY

1. Click on **Expense Entry** at the top of the screen

2. Select the **Participant** and **Service Agreement** period in which the expense occurred.

   Note: There is currently no option to change the **Pay To** person to anyone other than the Representative. If an expense is to be paid to another vendor / person, please contact your Service Coordinator.

3. Click on **Create Expense Batch.**

4. Enter the **Expense Date** (the date on which the expense occurred, not the date you submitted).

5. Give a brief description of the expense.

6. Enter the **category** on your plan out of which the expense is being paid.

7. **Select** the **quantity and amount** of the expense.

8. **Upload** your receipt by clicking **browse to attach file**.

9. Click **Submit Expense.**

DATE OF EXPENSE	DESCRIPTION (MAX. 100)	BUDGET CATEGORY	RECEIPT	EXPENSE AMOUNT	TOTAL AMOUNT
⊖ 11/01/2018	Gluten Free Diet	Doe, Cindy - Special Diets	Upload Receipt	$ 26.25	$26.25
			TOTALS:		$26.25
⊕					

Delete | Submit Expense

TIP: You can add additional expenses by clicking on the green + symbol.

HOW TO FAX OR MAIL RECEIPTS

If you choose to fax or mail your receipts, printing a Fax cover sheet will make tracking the receipts much simpler.

1. Click **Print Fax Cover Sheet:** a Fax cover sheet will be created that has all of the necessary information for the Expense entry.

2. Fax it to **651.967.5061**

PICS will not process any expense submitted without a receipt or invoice. If you have questions about what is considered a receipt, or if you have misplaced a receipt, please contact your Service Coordinator.

Mileage

HOW TO SUBMIT MILEAGE

1. Click on the **Mileage Entry** menu

2. Select **Create Mileage Entry.**

3. Select the **Participant** and **Service Agreement** Dates.

4. Select the **worker**. **NOTE:** by clicking on the magnifying glass next to the **Pay To** box, a list of workers will appear with the mileage rate.

5. Select the **dates** of the mileage expense, the number of miles and any parking expenses.

6. Enter a **brief description** of the reason or destination for each entry.

7. Once complete, either **Save** the entry to submit later or click **Submit Expense** to send it in for reimbursement.

DELETE	DATE OF EXPENSE	DESTINATION/ REASON (MAX. 100)	NUMBER OF MILES	RATE	TOTAL MILEAGE
⊖	05/31/2018	Como Park	35.00	$0.5350	$18.73
⊖	05/30/2018	Doctor Appointment	25.00	$0.5350	$13.38
⊖	05/29/2018	Grocery Shopping	40	$0.5350	$21.40
			TOTALS: 100.00		$53.50

⊕

Save Delete Submit Expense

Reports

HOW TO VIEW SPENDING SUMMARY REPORTS

View a spending summary at any time to review the current status of your spending. The spending summary report simply lists each budget line, including the total budget, how much has been spent and the dollar amount remaining.

The summary is updated in real time once you enter a timecard, expense and / or mileage, even if it has not yet been processed.

1. Click on **Report** menu option

2. Choose from the different report options

3. Select the **Participant** and **Service Agreement Dates**

4. Click **Run Report**

The spending summary will pop-up as a PDF that you can save or print for your own records.

Lutheran Social Service of Minnesota