

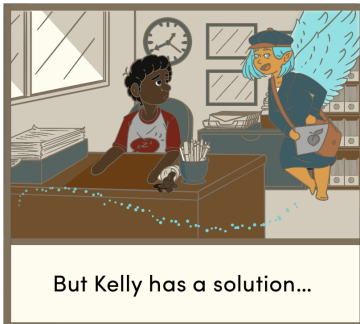
Staff Action Plans: Timesheet Generation Guide

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Staff Action Plans: Timesheet Generation Guide

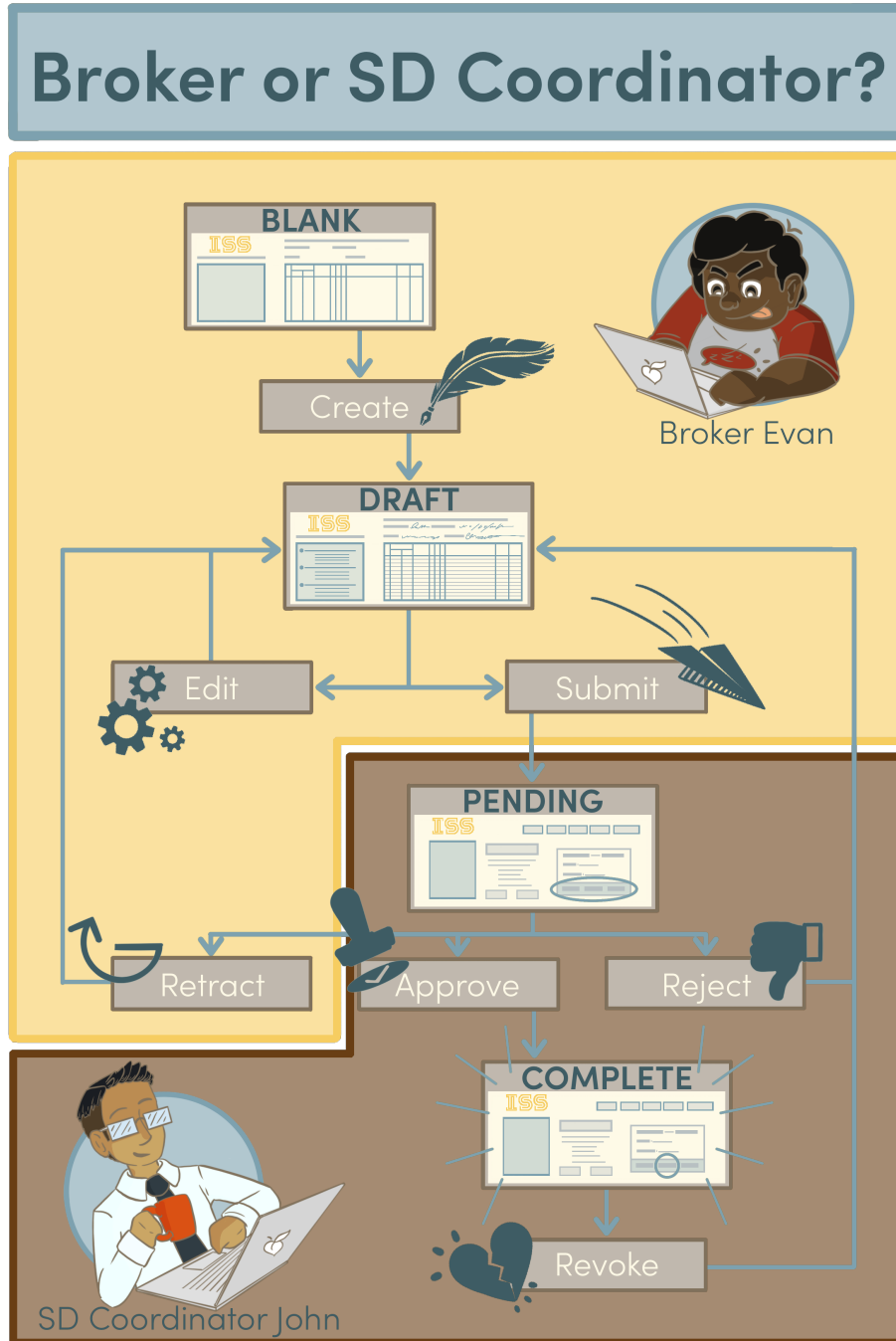
The waiting is over. The new timesheets have arrived.



Staff Action Plans: Timesheet Generation Guide

Part 1: Generation Basics

The infographic below outlines the workflow by which timesheets are now created and approved.



Staff Action Plans: Timesheet Generation Guide

First, to navigate to the timesheets section of the portal:



- (1) Click the **Staff Action Plan** tab.



- (2) Click **View Timesheets**.

Current Staff Action Plan For Mary Maryson DEMO Current Plan Create New

This is the current Staff Action Plan and is not editable.

Participant Name Mary Maryson DEMO	 OUTCOMES COMPLETED CLICK TO VIEW	
Medicaid CIN MM00000M		
Care Coordination Organization Care Design NY		
Dates 09/04/2019 Review Date	09/11/2019 Distribution Date	 PLAN SAFEGUARDS COMPLETED CLICK TO VIEW
View Timesheets	Download PDF to Sign Upload Signed Plan	

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CREATE (BROKER)

Timesheets can only be created for service types that are in a participant's budget. If an outcome exists in the Staff Action Plan for a service type not in the budget, the timesheet will have a status of "Not In Budget" and no action can be taken against it.

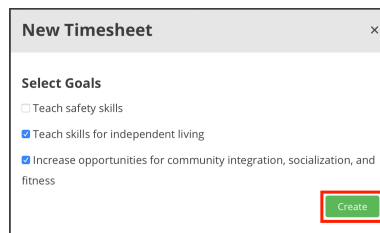
If a Respite outcome exists in the Staff Action Plan and Respite is in the budget, the Respite timesheet will be created automatically and cannot be edited. It will, however, still need to be approved before it can be used.

- (1) To create a timesheet, begin with a finalized and approved Staff Action Plan and navigate to the timesheets section.
- (2) Click **Create** on the timesheet tile you would like to create¹.

Create Timesheets For Mary Maryson DEMO



- (3) Select the goals/outcomes to be included on the timesheet.
- (4) Click **Create**.



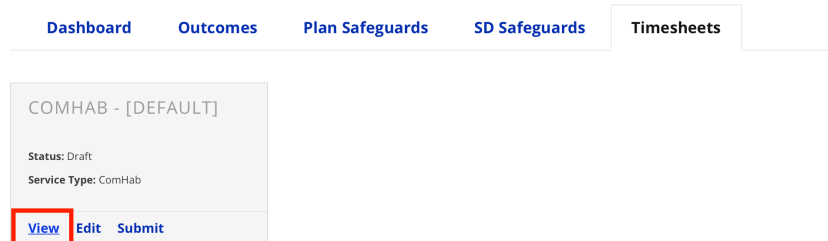
¹ If the timesheet you want is not listed, see the section "Special Cases: Outcome Types & Timesheets."

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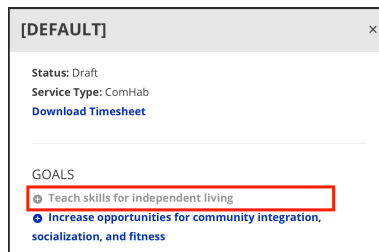
VIEW

- (1) From the timesheets section, click **View** on the tile of the timesheet you wish to view.

Create Timesheets For Mary Maryson DEMO



- (2) Click the entries in the **Goals** section to expand and view the actions associated with each valued outcome.



- (3) Close the card window when done.

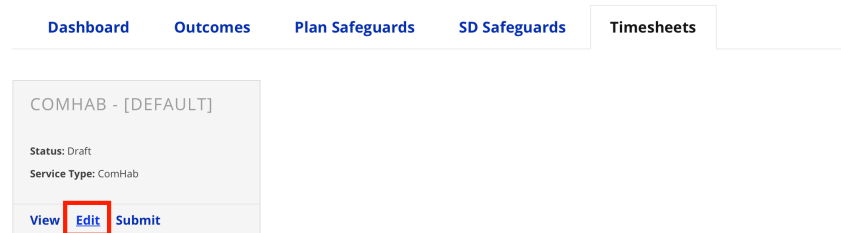
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EDIT (BROKER)

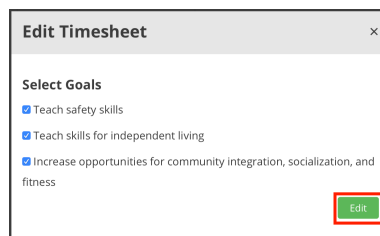
Only Draft timesheets can be edited. To edit a timesheet, follow the steps below.

- (1) From the timesheets section, click **Edit** on the tile of the timesheet you wish to edit.

Create Timesheets For Mary Maryson DEMO



- (2) Modify the checkbox selections if necessary to change which goals/outcomes are included on the timesheet.
- (3) Click **Edit**.



- (4) Expand the attached outcomes to edit the text of the Actions as needed.
- (5) Click **Save** when done.
- (6) To navigate back to all timesheets, click **Back to All Timesheets**.

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SUBMIT (BROKER)

After the broker has finished creating/editing a timesheet, it must be submitted to the SD Coordinator for approval.

- (1) From the timesheets section, click **Submit** on the tile of the timesheet you wish to submit.

Create Timesheets For Mary Maryson DEMO



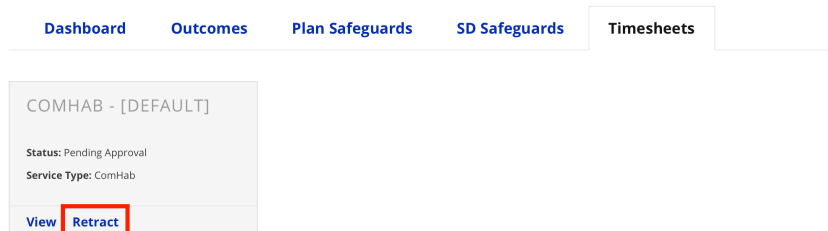
- (2) The SD Coordinator will receive an email notification to review the submitted timesheet.

RETRACT (BROKER)

To retract a submitted timesheet, do the following.

- (1) From the timesheet section, click **Retract** on the tile of the timesheet you wish to retract.

Create Timesheets For Mary Maryson DEMO



- (2) The SD Coordinator will receive an email notification that the timesheet has been retracted. No action needs to be taken by the SD Coordinator.

You can now edit and/or resubmit the timesheet.

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DOWNLOAD

A timesheet can be downloaded anytime after it is created. However, by default, it will be marked with a “Draft” watermark and is not authorized for use. Once a timesheet is approved and has a status of Complete, the watermark is removed and the timesheet is ready to use.

There are three ways to download a timesheet:

- The Edit Timesheet page (Draft timesheets only)
- The View Timesheet window (all statuses)
- Download button (Complete timesheets only)

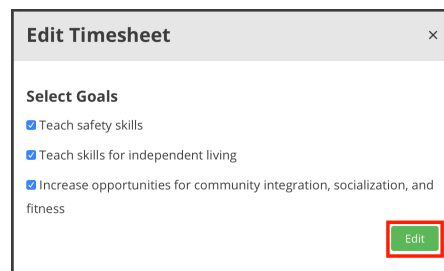
Edit Timesheet Page (Draft timesheets only)

- (1) From the timesheet section, click **Edit** on the tile of the timesheet you wish to download.

Create Timesheets For Mary Maryson DEMO



- (2) Click **Edit**.



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Download button (Completed timesheets only)

- (1) From the timesheet section, click **Download**.

Create Timesheets For Mary Maryson DEMO



APPROVE (SD COORDINATOR)

Approving a timesheet sets the status to Complete and removes the watermark, thus authorizing it for use.

To review a timesheet, refer to the VIEW and DOWNLOAD sections of this guide.

The following set of actions must be performed in Harmonix.

- (1) To begin, navigate to the Participant Detail layout of the participant in question and select the **Plans** tab.
- (2) From the timesheet section, click **Approve** on the file of the timesheet you wish to approve.

Create Timesheets For Mary Maryson DEMO



- (3) The broker will receive an email notification that the timesheet has been approved and is ready to use.

Staff Action Plans: Timesheet Generation Guide

REJECT (SD COORDINATOR)

Rejecting a timesheet sets the status back to Draft. The broker can then edit the timesheet, make any necessary changes, and resubmit the timesheet.

To review a timesheet, refer to the VIEW and DOWNLOAD sections of this guide.

The following set of actions must be performed in Harmonix.

- (1) To begin, navigate to the Participant Detail layout of the participant in question and select the **Plans** tab.
- (2) From the timesheet section, click **Reject** on the tile of the timesheet you wish to decline.

Create Timesheets For Mary Maryson DEMO



- (3) The broker will receive an email notification that the timesheet has been rejected. Contact the SD Coordinator for information on why the timesheet was rejected and what needs to change.

Staff Action Plans: Timesheet Generation Guide

REVOKE (SD COORDINATOR)

Revoking a timesheet changes the status from Complete to Draft, allowing the broker to make changes and resubmit.

The following set of actions must be performed in Harmonix.

- (1) To begin, navigate to the Participant Detail layout of the participant in question and select the **Plans** tab.
- (2) From the timesheet section, click **Revoke** on the tile of the timesheet you wish to revoke.

Create Timesheets For Mary Maryson DEMO



- (3) The broker will receive an email notification that the timesheet has been revoked. The timesheet is no longer valid to use. Contact the SD Coordinator for information on why the timesheet was revoked.

Staff Action Plans: Timesheet Generation Guide

Part 2: The Details

OUTCOME COMBINATIONS

There are three Service Types (ComHab, Respite, and SEMP) and three Outcome Types (Goal, Support, and Task), for a total of nine different combinations.

TIMESHEET STATUSES

There are five (5) timesheets statuses:

- **Blank** - Status after the Staff Action Plan is approved and the timesheet's Service Type is in the participant's budget, but before the timesheet is created
- **Not In Budget** - Status if the timesheet's Service Type is NOT in the participant's budget
- **Draft** - Status after the timesheet is created, but before it has been submitted for approval
- **Pending Approval** - Status once the timesheet has been submitted for approval
- **Complete** - Status after the timesheet has been approved

THE FIVE POSSIBLE TIMESHEET TYPES

There are five (5) timesheet types. Every staff position must be on one of these five.

- ComHab - [Default]
- ComHab - {Special}²
- SEMP - Job Coach
- SEMP - Job Developer
- Respite

Hourly Rates

Hourly rates are NOT associated with individual timesheets. Two staff persons can use the same timesheet and be paid at different rates. It is therefore not necessary to have separate timesheets for different rates for the same position.

² See the "ComHab - {Special}" section of this guide for details.

Staff Action Plans: Timesheet Generation Guide

ComHab - [Default] vs. ComHab - {Special}

ComHab - [Default] (CH) is the most common type of ComHab, and for most participants is the only type of ComHab in the budget. In some cases, a broker may submit a ComHab position in the budget whose role is functionally different than CH. In these cases, ComHab - {Special} (CHS) is used. See the "ComHab - {Special}" section below for more information on CHS timesheets.

Respite Timesheets

For scenarios in which Respite timesheets are allowed (namely, when Respite is in the participant's budget and at least one non-Task outcome has been created for Respite), the Respite timesheet is automatically created and submitted for approval, and will therefore have a status of Pending Approval. Respite timesheets cannot be edited.

Staff Action Plans: Timesheet Generation Guide

What is ComHab - {Special} (CHS)?

While reviewing an approved budget, an SD Coordinator may determine that a functionally different ComHab position was submitted by the broker. In this case, the SD Coordinator will create a job code for "ComHab - {Special}" (CHS). The most common type of CHS is "ComHab - Overnight". While still ComHab, the job itself is functionally different than ComHab - [Default].

What do I do if I have a CHS timesheet but only need ComHab - [Default]?

If a CHS tile appears, but you believe only ComHab - [Default] is needed, contact the SD Coordinator to adjust the job codes accordingly and remove the CHS timesheet.

What do I do if I need to create a CHS timesheet but only have ComHab - [Default]?

If a CHS tile does NOT appear (only ComHab - [Default] appears), but you believe a CHS is needed, contact the SD Coordinator to adjust the job codes accordingly and add a CHS timesheet.

What do I do if I need more than one CHS timesheet?

Only one CHS timesheet is allowed. In the event that there are more than one supplementary ComHab positions (ex. "ComHab - [Default]" AND "ComHab - Overnight" AND an additional CHS), create one CHS timesheet and include the outcomes and support actions for both CHS positions on the single timesheet. The Support Staff using the CHS timesheet will record on the timesheet which of the included outcomes and support actions they complete.

OUTCOME TYPES & TIMESHEETS

When creating or editing a timesheet, only goals/outcomes for the Service Type of the selected timesheet appear. Additionally, outcomes of type "Task" do not appear. Only outcomes of type "Goal" and "Support" can be added to a timesheet.

Staff Action Plans: Timesheet Generation Guide

FAQ

Why isn't the timesheet tile I want showing up?

There are two reasons why a timesheet tile does not show up:

- (1) An outcome for that Service Type does not exist in the Staff Action Plan, or
- (2) All outcomes for that Service Type in the Staff Action Plan are of type "Task", and tasks cannot be attached to a timesheet.

Why doesn't the Timesheet tab appear? Why is the timesheet button is grayed out?

Possible reasons for this are:

- The Staff Action Plan has not been signed and approved.
- There are no Goal or Support outcomes listed on the Staff Action Plan. Therefore, there are no outcomes to attach to any timesheets.

Can I have the same outcome on multiple timesheets?

Yes. Any outcome can be on any number of different timesheets.