

## Status Cheat Sheet v1.1

<b>Employment Status</b>			
<b>Purpose:</b> Identifies the employment status of the user			
<b>Edit:</b> Employee Details->Actions->Edit Employee->Employee Information			
<b>Status</b>	<b>Description</b>	<b>Employee Actions</b>	<b>Supervisor Actions</b>
Registered	A profile has been created, but the user has not yet confirmed the activation email.	The employee must confirm registration using the email link before being able to log in	No new service accounts or entries can be created for the employee until status is changed to Active
Pending	The user has activated their profile using the email link and is ready to be changed to Active.	<ul style="list-style-type: none"> <li>● Log in</li> <li>● Create entries for training punches</li> <li>● Change Password/Pin/ Security Question/ Email</li> </ul>	<ul style="list-style-type: none"> <li>● Edit employee</li> <li>● Manage employee roles and permissions</li> </ul> <p><i>No new service accounts can be created for the employee until status is changed to Active</i></p>
Active	The user can log in and perform all actions per the assigned roles and permissions	All employee actions (view entries/accounts, create entries, change password/pin/security question/email)	All supervisor actions (manage service accounts, add entries, manage roles and permissions, review pending punches, etc.)
Suspended	The user is suspended and the profile cannot be logged into (authentication status has been disabled).	None	<ul style="list-style-type: none"> <li>● Supervisors can perform all supervisor actions for this user</li> <li>● Entries can still be processed for payroll</li> </ul>
Terminated	The user is no longer an employee and the profile cannot be logged into (authentication status has been disabled).	None	<ul style="list-style-type: none"> <li>● Supervisors can perform all supervisor actions for this user</li> <li>● Entries can still be processed for payroll</li> </ul>

### Status Cheat Sheet v1.1

Extended Leave	The user is on a leave of absence. Users are still able to log in, if authentication status remains active, but status will read as Extended Leave.	Dependent on authentication status	Dependent on authentication status
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<b>Authentication Status</b>			
<b>Purpose:</b> Identifies the user's ability to log into the profile			
<b>Edit:</b> Employee Details->Actions->Edit Employee-> Authentication Information			
Status	Description	Automatic Status For:	Optional Status For:
Active	User can log in	None	<ul style="list-style-type: none"> <li>● Pending</li> <li>● Active</li> <li>● Extended Leave</li> </ul>
Disabled	User cannot log in	<ul style="list-style-type: none"> <li>● Registered</li> <li>● Suspended</li> <li>● Terminated</li> </ul>	<ul style="list-style-type: none"> <li>● Pending</li> <li>● Active</li> <li>● Extended Leave</li> </ul>
Locked	User cannot log in until the profile is unlocked by a supervisor or other administrator	When user has 3 failed login attempts	<ul style="list-style-type: none"> <li>● Pending</li> <li>● Active</li> <li>● Extended Leave</li> </ul>

<b>Client Status</b>	
<b>Purpose:</b> Identifies the status of the client All system tasks can be done for the client regardless of client status. However, no new entries can be entered past the specified discharge date.	
<b>Edit:</b> Client Details->Actions->Edit Client->Client Information	
Status	Description
Active	The client is actively receiving services
Deceased	The client has passed away and no longer receives services
Inactive	The client is not actively receiving services
Discharged	The client has exited the agency and will no longer receive any services
Suspended	The client has temporarily ended services, but plans to resume, i.e. hospitalizations

<b>Authentication Status</b>		
<b>Purpose:</b> Identifies the client's ability to log into a client profile to complete Client Sign-Off		
<b>Edit:</b> Client Details->Actions->Edit Client->Authentication Information		
Status	Description	Status For:

### Status Cheat Sheet v1.1

Active	Client can log in	Optional status if Enable Client Login is checked Yes
Disabled	Client cannot log in	Automatic status if Enable Client Login is checked Yes
Locked	Client cannot log in until the profile is unlocked by a supervisor or other administrator	<ul style="list-style-type: none"> <li>• Automatic status when user has 3 failed login attempts</li> <li>• Optional status if Enable Client Login is checked Yes</li> </ul>

### Status of Punch Entries

The following outlines the actions that can be taken when an entry is in each status by an employee (E) and by a user with Supervisor role for the Cost Center that the entry was made in (S).

Entries		Actions							
Status	Description	View		Edit*		Cancel*		Reject	
		E	S	E	S	E	S	E	S
<b>Pending</b>	Entry has been saved and is awaiting review by supervisor	X	X	X*				X	X
<b>Open</b>	True clock in/out entry that has started, but has not been clocked out of	X	X						X
<b>Approved</b>	Pending entry has been reviewed and approved by supervisor and is ready for billing/payroll	X	X		X		X		
<b>Canceled</b>	An approved entry has been canceled by supervisor	X	X						
<b>Rejected</b>	Pending entry has been reviewed and rejected by supervisor and is not eligible for billing/payroll	X	X						

### Status Cheat Sheet v1.1

<b>Unverified</b>	Entry was made/edited on behalf of an employee and must be verified by the employee before further action can be taken. Only applicable to Punch Entries.	X	X						
<b>Batched</b>	Approved entry has been included in a pending payroll batch	X	X		X		X		
<b>Processed</b>	Approved entry has been processed in a payroll batch	X	X		X		X		
<b>Paid</b>	Approved entry has been paid out (salaried punches that have been processed automatically show status of Paid; all other entries change to Paid 3 days after payroll was transmitted)	X	X		X		X		
<b>Write Off</b>	Approved entry was not billable and has been written off by processing in a Write Off batch	X	X						

**\*Additional Notes**

- Pending residential and day program entries *cannot* be edited by the employee. All other types of entries can be edited by the employee while in pending status.
- When an entry is edited, two new entries are created that need to be approved
  - One entry for a negative amount that zeroes out the original entry
  - One entry for a positive amount that reflects the correct shift
- When an entry is canceled, a new entry for a negative amount that zeroes out the original entry is created and needs to be approved.
- When an entry that spans 2 days (crosses midnight) is approved the following occurs:
  - The original entries is canceled
  - Two new entries are created in Approved status
    - One entry for the first date, ending midnight
    - One entry for the second date, starting at midnight

### Status of Attendance/Absence Entries

## Status Cheat Sheet v1.1

The following outlines the actions that can be taken when an attendance/absence entry is in each status.

Entries		Actions				
Status	Description	View	Edit*	Cancel*	Reject	Approve
<b>Pending</b>	Entry has been saved and is awaiting review by supervisor	X			X	X
<b>Approved</b>	Pending entry has been reviewed and approved by supervisor and is ready for billing/payroll	X	X*	X		
<b>Canceled</b>	An approved entry has been canceled by supervisor	X				
<b>Rejected</b>	Pending entry has been reviewed and rejected by supervisor and is not eligible for billing/payroll	X				
<b>Batched</b>	Approved entry has been included in a pending billing batch	X				
<b>Processed</b>	Approved entry has been processed in a billing batch	X				
<b>Paid</b>	Approved entry has been paid (non-billable entries that have been processed automatically show status of Paid; all other entries change to Paid after billing batch is reconciled)	X				
<b>Write Off</b>	Approved entry was not billable and has been written off by processing in a Write Off batch	X				

### \*Additional Notes

- Approved residential and parenting program entries *cannot* be edited, but they can be canceled. Day program attendance/absence entries can be edited.
- When an entry is edited, two new entries are created that need to be approved
  - One entry for a negative amount that zeroes out the original entry
  - One entry for a positive amount that reflects the correct shift
- When an entry is canceled, a new entry for a negative amount that zeroes out the original entry is created and needs to be approved.

## Status Cheat Sheet v1.1

### Payroll and Billing Entries

Payroll and Billing Entries are created when a batch is processed based on the punch entries in the batch.

Status	Description	Batch Status	Actions
Pending	Entries have been created and are awaiting review prior to being approved	InProcess or Processed	Edit entries using Payroll or Billing overrides as needed
Approved	Entries have been reviewed and approved for transmitting	Approved or Transmitted	<ul style="list-style-type: none"><li>▪ No changes can be made to approved payroll entries.</li><li>▪ Billing comment can be added to entry using “Edit Entry”</li><li>▪ Original punch can be edited (ref entry on punch entry referenced on payroll/billing entry)</li></ul>
Paid	Entries are non-payable or non-billable, have been paid (status changes from Approved to Paid 3 days after payroll batch is transmitted or when billing batch is reconciled)	Approved or Transmitted	<ul style="list-style-type: none"><li>▪ No changes can be made to paid payroll entries.</li><li>▪ Billing comment can be added to entry using “Edit Entry”</li><li>▪ Original punch can be edited (ref entry on punch entry referenced on payroll/billing entry).</li></ul>

## Status Cheat Sheet v1.1

### Billing and Payroll Batches

<b>Status</b>	<b>Description</b>	<b>Punch Status</b>	<b>Billing/Payroll Entry Status</b>	<b>Actions</b>
Pending	Batch has been created	Batched	N/A	Add/remove punch entries Process Batch
Canceled	All entries have been removed from a pending batch	N/A	N/A	None
InProcess	Batch is in process. This step can take anywhere from a few minutes to a few hours to complete	Batched/ Processed	Pending	None. Users can perform other tasks in the system while this step finishes.
Processed	Batch has been processed and payroll/billing entries are ready for review.	Processed	Pending	Edit Billing/Payroll Entries Approve Batch
Approve InProcess	Approval is in process. This step can take anywhere from a few minutes to a few hours to complete	Processed	Pending/ Approved	None. Users can perform other tasks in the system while this step finishes.
Approved	Batch has been reviewed, approved, and is ready to be transmitted to payroll/billing	Processed/ Paid	Approved	Transmit Batch
Transmitted	Batch has been approved and transmit files have been generated	Processed/ Paid	Approved	Download Files Reconcile Batch
Reconciled	Billing/Payroll Entries in batch have been paid.	Paid	Paid	Edit Billing/Payroll Entries