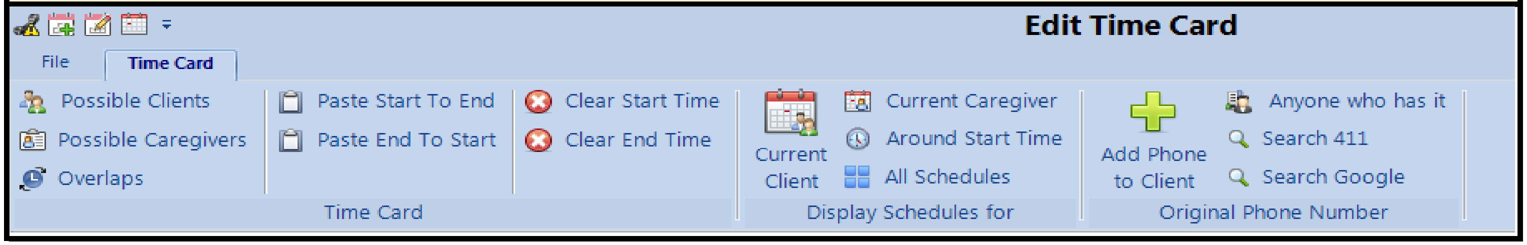
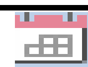
You can access the 'Edit Time Card' screen by selecting call in the grid, then clicking Edit (the pencil) on tool bar



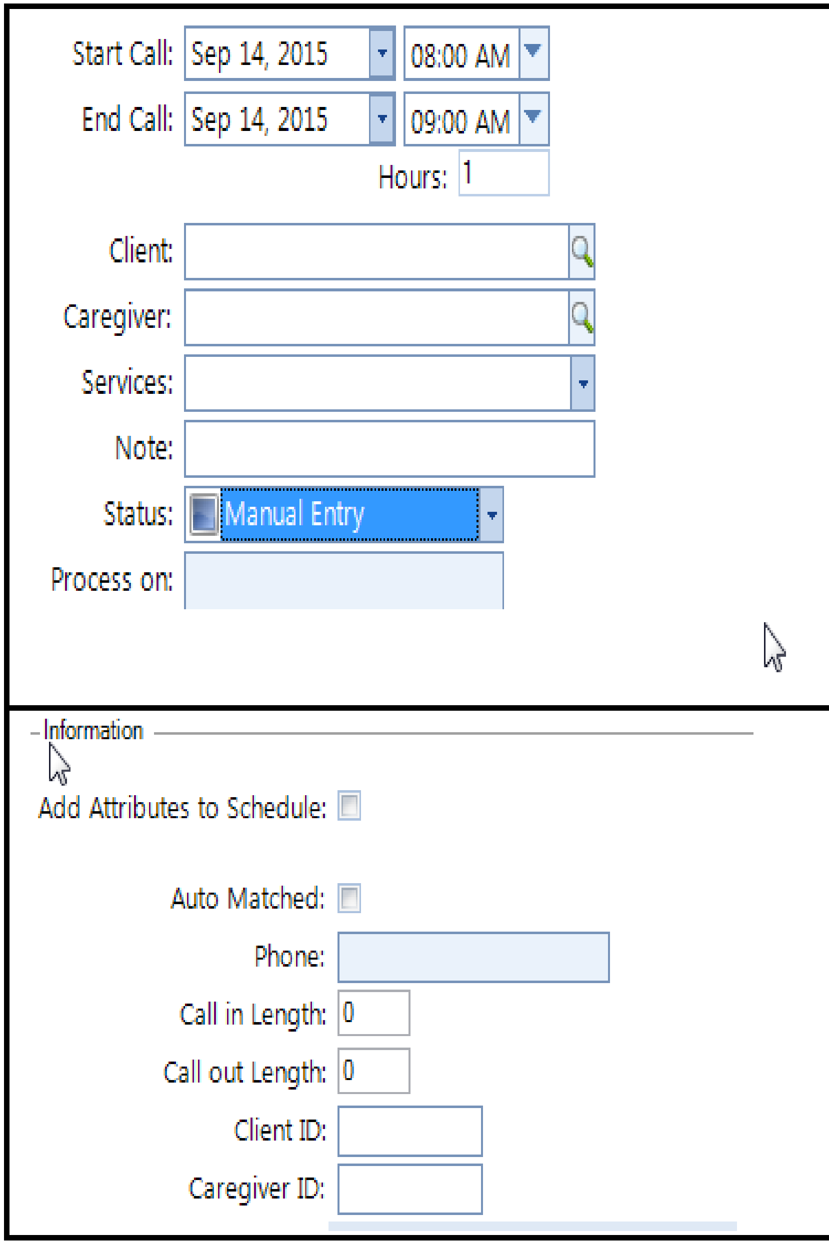
TIME CARD TOOLS:	
Possible Clients:	Any Client scheduled within 12 hours of Start or End time; Or any client with that phone # Or clients in an Org. with that #
Possible Caregivers:	Any Caregiver scheduled within 12 hours of the Start or End time; Or any Caregiver with similar ID code
Overlaps:	Displays any E-TimeCards that overlap the current one you are looking at
Paste Start To End:	Paste Start of Call to End of Call
Paste End To Start:	Paste End of Call to Start of Call
Clear Start Time:	Clears Start Date & Time
Clear End Time:	Clears End Date & Time

DISPLAY SCHEDULES FOR:	
Current Client:	Views all schedules for the current client that begin 12 hours before/after start time
Current Caregiver:	Shows all schedules for this Caregiver that begin 12 hours before/after the start time
Around Start Time:	Shows all schedules that start 30 minutes before or after the start time
All Schedules:	Views all schedules that start 12 hours before or after the start time

ORIGINAL PHONE NUMBER:	
Add Phone to Client:	Add the phone number Caregiver clocked in with to the Client's communication records
Anyone Who Has It:	Lists anyone in Companion that has the phone number the Caregiver clocked in with
Search 411	Searches phone number Caregiver clocked in with on 411.com Whitepages
Search Google:	Searches phone number Caregiver clocked in with using Google

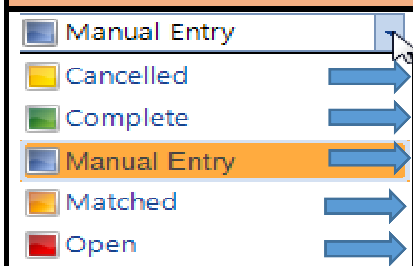
TOP LEFT ICONS:					
	**Create New Schedule Based on this E-TimeCard**		**Update the Schedule Matched to this E-TimeCard**		**Open the Schedule Matched to this E-TimeCard**

TELEPHONY ADD/EDIT TIME CARD SCREEN - LEFT PANEL



Start Call:	Time/Date Caregiver Clocked In
End Call:	Time/Date Caregiver Clocked Out
Client:	Name of Client Receiving Service
Caregiver:	Name of Caregiver Providing Service
Services:	Service Provided (only filled if Caregivers enter in service type when clocking out)
Process On:	Date/Time Record processed on

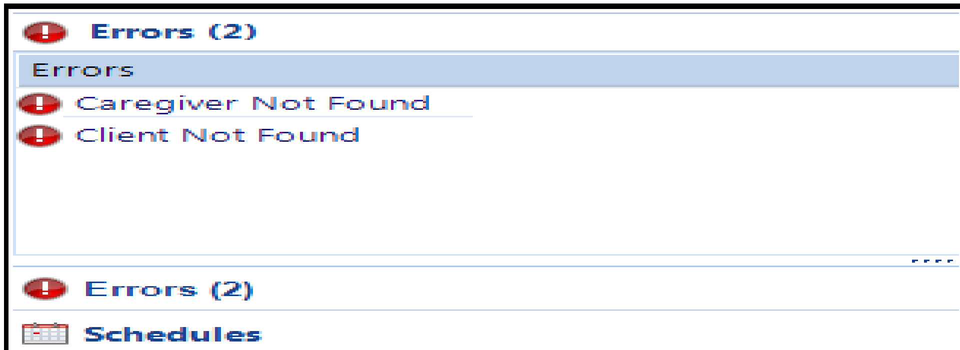
Call Status:



Cancelled	Decided not to use. Cancelling = Deleting
Complete	Clock In/Outs matched up; Actual Hours in
Manual Entry	TimeCard entered manually; no calls in
Matched	Start/End of calls matched up in system
Open	Only have either a clock in or clock out

Information:	
Add Attributes to Schedule:	Check if you want an Attribute attached to a schedule; Default Attribute setup in **Agency Office**, **Telephony**. Call Support to setup
Auto Matched:	This will be checked when 2 raw calls are matched together automatically by Companion.
Call In Length:	Length of Clock In call
Call Out Length:	Length of Clock Out call
Client ID:	ID assigned to Client
Caregiver ID:	ID assigned to Caregiver

TELEPHONY ADD/EDIT TIMECARD SCREEN - RIGHT PANEL

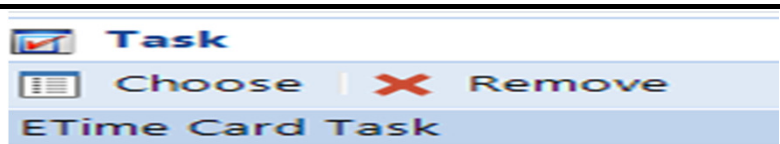


Errors:

Lists what needs to be fixed on this Open E-TimeCard

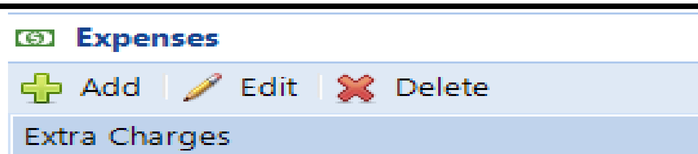
Schedules:

Clicking here will generate list of possible schedules that could be matched to this Open E-TimeCard



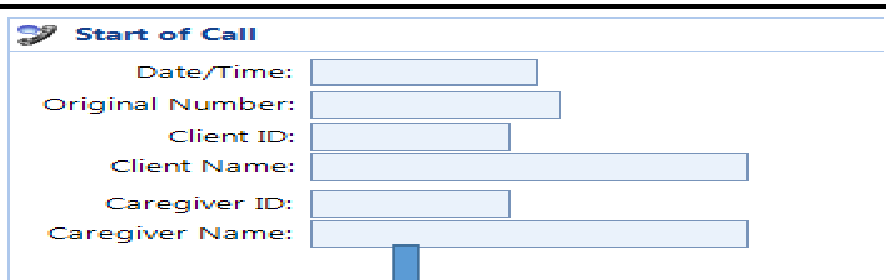
Task:

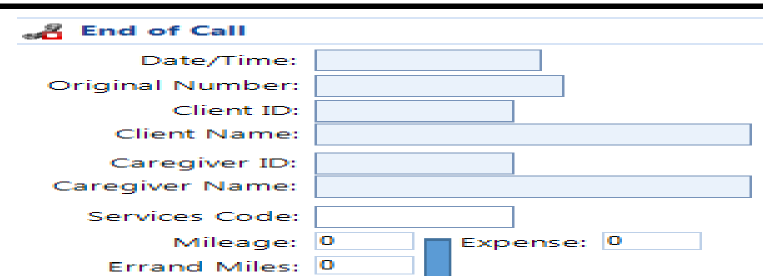
You can update the Tasks by clicking on '***Choose***' and adding the appropriate duties. Save. If there were any incorrect codes input by the Caregiver, you can remove from the tasks list and Save.



Expenses:

If the Caregiver did not add their expenses when clocking out, you can add them to the e-TimeCard. Click Save and record is updated.





Start Of Call Information (Clock In details)	End Of Call Information (Clock Out details)
Provides the Raw call details for this Clock In (Date/Time, Phone Number Called From, Client ID/Name, Caregiver ID/Name)	Shows Raw details of his Clock Out (Date/Time, Phone Number Called From, Client ID/Name, Caregiver ID/Name, Service Code, Expenses)

SCHEDULE REVIEW

Clients and Office - Missing Actual Hours

Data Loaded | Layout | Export | Suggestion

Drag a column header here to group by that column.

Client	Caregiver	Services	Schedule Date	Schedule Time	Schedule Hours	Actual Date	Actual Time	Actual Hours	Payroll Hours	Billing Hours	Schedule Status	Hrs Diff	Hrs Over	Hrs Under
Doo, Scooby	Burgler, Ham	Registered Nurse	Sep 15, 2015	08:00 AM	5.00				0.00	0.00	No Actual	0.00		
Foolery, Tom	Hilfiger, Tommy	Registered Nurse	Sep 15, 2015	09:00 AM	8.00				0.00	0.00	No Actual	0.00		
Kreuger, Fred	Rogers, Norville '...	Registered Nurse	Sep 15, 2015	07:00 AM	12.00				0.00	0.00	No Actual	0.00		
Horton, Tim	Mumby, Patrick	Insurance	Sep 15, 2015	09:00 AM	7.00				0.00	0.00	No Actual	0.00		
Ient, Pat	Hatchett, Nurse	Caregiver	Sep 15, 2015	10:00 AM	3.00				0.00	0.00	No Actual	0.00		
Strauss, Levi	Harding, Tonya	Caregiver	Sep 15, 2015	09:00 AM	8.00				0.00	0.00	No Actual	0.00		

This is an example of a scenario within the **Schedule Review Module** (Schedules Missing Actual Hours) you should be accessing daily to see which schedules are missing actual Clock In and Clock Out history.

BEST PRACTICES:

1. We recommend checking ***Telephony Open E-TimeCards*** on a daily basis. You are always going to be working on fixing yesterday's calls! Deal with today's call tomorrow!

2. Go through each of the Steps to Fix E-TimeCards in consecutive order, fixing only what's required in that step. Once these steps are completed, actual hours will then show against that schedule in the Schedule Review Module.

3. When in the Schedule Review Module, change your date range to reflect yesterday's date. Using the ***Scenarios*** drop down menu, select "*Missing Actual Hours*". This will generate a list of schedule on that date that require follow up or a time sheet confirming hours worked. We recommend putting an **Attribute** of ***Needs Paperwork*** as a reminder to touch base with the Client or Caregiver to get further information.

4. Using these best practices will save you time and simplify the Billing and Payroll process as you're only looking at a day's worth of information as opposed to 1-2 weeks!