MYDIRECTCARE.COM INSTRUCTIONS

OVERVIEW

MyDirectCare is a website for individuals who self-direct their services through Consumer Direct. Our goal is to provide tools and resources that empower you to choose and direct your care, enabling you to live independently in your home and community.

MyDirectCare is one of these tools. Through this secure site, you will receive a username and password which enables you to enter your time online, view online spending summaries, and access the online job board.

- Online time entry and approval provides an efficient and error minimizing way to enter time into the Consumer Direct payroll system. The electronic timecard also provides information on the status of all time and payroll entries.

- Online Spending Summaries provide up to date budget and spending information. Both summary and detailed information is available regarding staff gross wages, employer related taxes, and vendor payments.

- The online Job Board is a tool for individual employers and managing employers to post job openings they may have and for job seekers to respond.

Note: Due to significant differences between programs and regions, the terms Employee and Client will be used for the purposes of this document.

INSTRUCTIONS

1. Log Into the Web Portal

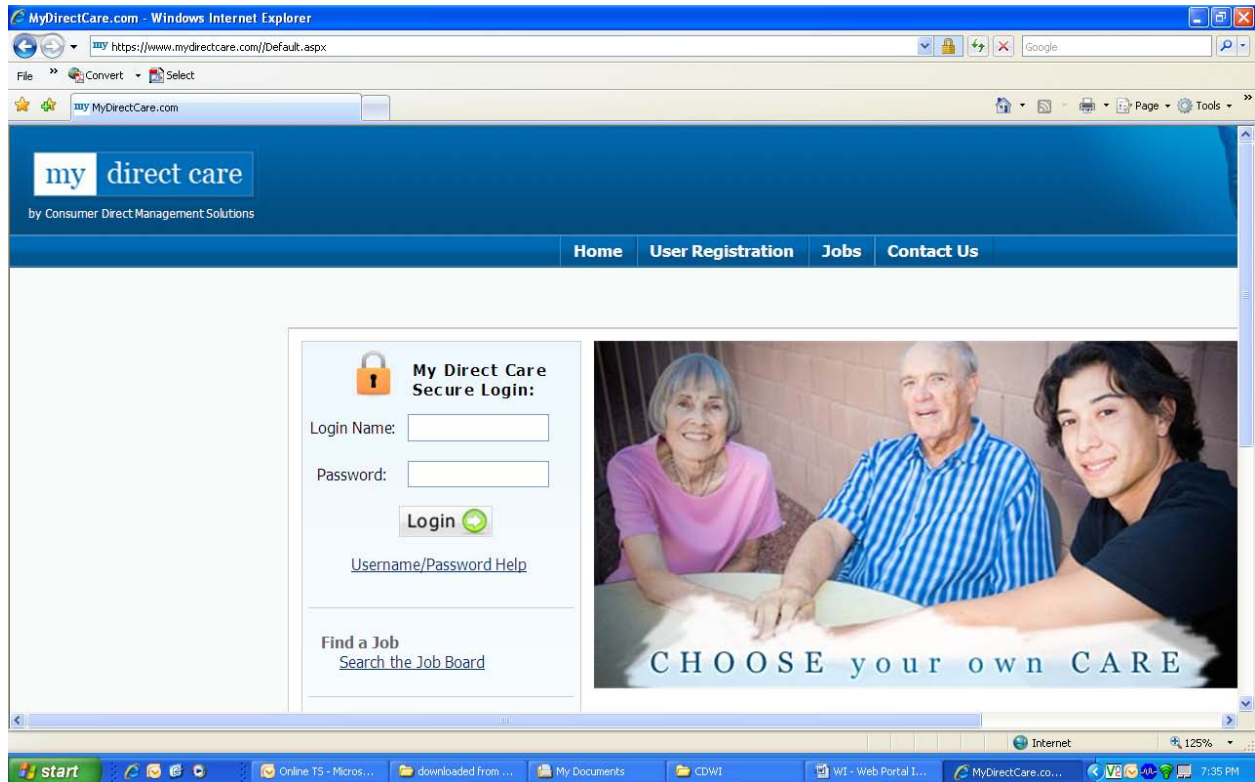1.1. Open up a browser window and go to www.MyDirectCare.com. This should take you to the web site shown in Figure 1.

Figure 1: My Direct Care Home Page

1.2. Click on the **User Login** link

1.3. From the Login page, see Figure 1:
- Enter the **Login Name**
- Enter the **Password** provided by CDWI
- Hit **Login**

1.4. The First Time You Log Into the System
   1.4.1. When logging into the Web Portal for the first time, you will see a popup window similar to Figure 2. Hit **OK** and enter the information requested on the following **User Information** screen. This information will subsequently be used for communication and verification of identity.
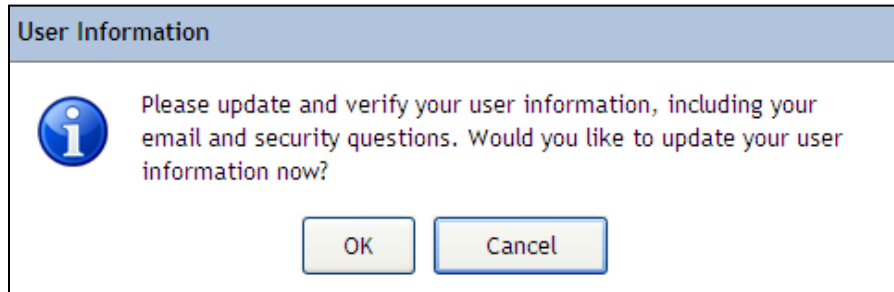
Figure 2:   Fist Time Login Pop-Up

   1.4.2. This information can be updated at any time by selecting **Settings** and **Update Your Online Information** from the Home Page
   1.4.3. You can change your password at any time by selecting **Settings** and **Update Password** from the Home Page

General Overview of the Time Entry and Approval Process

1. The Employee will log into the Web Portal and enter their time. Time entry will include selection of the Service Date, Client, and the appropriate Service Code.
2. At the end of the payroll period when timesheets would normally be due, the Client will log into the Web Portal, review, and approve the Employee's time.
3. Once the time has been approved by the Client, the entries can be processed and paid by Consumer Direct.

2. Employees
2.1. Timesheet Entry
   2.1.1. Click on the **Timecard** link at the top of the page. This will take you to an options page similar to Figure 3.

Use **Option A** to View your time entries and their status.

Use **Option B** to Create a New Time Entry.

Figure 3: Timesheet Entry Options

2.1.2. Timecard View

The Timecard View page (an example is shown in Figure 4) provides a view similar to a paper timesheet which includes details about the employee's time and the status of the individual entries. Each line on the Timecard View is equivalent to one line on a paper timesheet but provides information on the Service Date, Client, Service Code, Pay Rate, Start Time, End Time, Hours, Status, History, and whether the entry can be Edited.

ID	Date	Client	Service	Rate	Start Time	End Time	Hours	Status	History	Edit
107006	09/09/2009	Client, Joe	T1019 - Personal Care Worker (PCW)	$9.00 / Unit	09:00 AM	01:00 PM	4.00	$	🕐	⊖
107007	09/10/2009	Client, Joe	T1019 - Personal Care Worker (PCW)	$9.00 / Unit	09:00 AM	01:00 PM	4.00	$	🕐	⊖
107008	09/11/2009	Client, Joe	T1019 - Personal Care Worker (PCW)	$9.00 / Unit	09:00 AM	01:00 PM	4.00	$	🕐	⊖
107009	09/12/2009	Client, Joe	T1019 - Personal Care Worker (PCW)	$9.00 / Unit	09:00 AM	01:00 PM	4.00	$	🕐	⊖
110960	09/13/2009	Client, Joe	T1019 - Personal Care Worker (PCW)	$9.00 / Unit	09:00 AM	01:00 PM	4.00	I	🕐	⊖
110961	09/14/2009	Client, Joe	T1019 - Personal Care Worker (PCW)	$9.00 / Unit	09:00 AM	01:00 PM	4.00	I	🕐	⊖
110962	09/15/2009	Client, Joe	T1019 - Personal Care Worker (PCW)	$9.00 / Unit	09:00 AM	01:00 PM	4.00	I	🕐	⊖
110963	09/16/2009	Client, Joe	T1019 - Personal Care Worker (PCW)	$9.00 / Unit	09:00 AM	01:00 PM	4.00	I	🕐	⊖
110964	09/17/2009	Client, Joe	T1019 - Personal Care Worker (PCW)	$9.00 / Unit	09:00 AM	01:00 PM	4.00	I	🕐	⊖
110965	09/18/2009	Client, Joe	T1019 - Personal Care Worker (PCW)	$9.00 / Unit	09:00 AM	01:00 PM	4.00	I	🕐	⊖
110966	09/19/2009	Client, Joe	T1019 - Personal Care Worker (PCW)	$9.00 / Unit	09:00 AM	01:00 PM	4.00	I	🕐	⊖
116222	10/20/2009	Client, Joe	T1019 - Personal Care Worker (PCW)	$9.00 / Unit	08:00 AM	11:30 AM	3.50	✖	🕐	⊖
116223	10/20/2009	Client, Joe	T1019 - Personal Care Worker (PCW)	$9.00 / Unit	02:00 AM	04:00 AM	2.00	E	🕐	📝
116224	10/20/2009	Client, Joe	T1019 - Personal Care Worker (PCW)	$9.00 / Unit	06:00 PM	12:00 AM	6.00	E	🕐	📝
116225	10/21/2009	Client, Joe	T1019 - Personal Care Worker (PCW)	$9.00 / Unit	12:00 AM	04:00 AM	4.00	E	🕐	📝
						Total	59.50			

Time card for employee Jane Smith [ID: 1000XXX]
Showing 15 service entries from 09/09/2009 thru 10/24/2009 for a total of 59.50-hours
Show entries between: 09/09/2009 and 10/24/2009 -- OR -- Choose entry period: -- Select a period --
With status: Any status   Update View
Create New Time Entry

Figure 4: Employee Timecard View

The Status, History, and Edit fields contain graphical symbols indicating the current status of the entry:

$ Entry Paid
I Internally Approved
C Client Entered/Approved
E Employee Entered/Approved
✖ Entry Deleted
🕐 Entry History
⊖ Entry Cannot be Edited
📝 Edit Entry
H Entry Held
O Over Budget

The Timecard View can be sorted in various ways be clicking on the heading at the top of the desired column. In addition, the page can be filtered by a specific status, or by changing the dates shown, the employee can select and display only the specific time frame of interest.

When the Edit Entry icon ✏️ shows in the Edit column, the employee can click on the icon and will be able to edit or correct the entry prior to approval by the Client. In addition to editing the entry, while the Edit Entry icon still shows, the entry can be deleted entirely by the Employee.

2.1.3. Create New Time Entry
To create a new time entry, click on the ***Create New Time Entry*** button at the bottom of the Timesheet View page (Figure 5) or in the Option B section of the first timesheet page as shown in Figure 3. This button goes to a timesheet entry page as shown in Figure 6 below.

Service Date	This is the date on which the service was performed. It can be entered directly or via the popup calendar.
Client	Click on the Client drop down box to select the appropriate client for the time entry. If an employee works for more than one client, they must be sure to select the appropriate client for the time being entered.
Service Code	Click on the drop down menu to select the appropriate Service Code for the time being entered. The service code selected should reflect the activity performed.
Service Start Time	Enter the Start Time using the format shown below the box, hh:mm, then select AM or PM.
Service End Time	Enter the End Time using the format shown below the box, hh:mm, then select AM or PM.
Service Duration	This field shows the total number of hours represented by the Start and End times entered. Verify that this field shows the number of hours expected before creating the time entry. If not or if there is no time showing, double check the Start and End times.
Create Time Entry	The Create Time Entry button creates a timesheet entry based on the information shown in the Time Entry form.
Reset Steps	The Reset Steps button will clear the form without creating a timesheet entry. Although the form is cleared, the screen remains on the Create New Time Entry form.
Cancel	The process of creating a new time entry can be cancelled without creating a timesheet entry by hitting the Cancel button. When an entry is cancelled, the user is taken to the Time Card View page.

2.2. Reports
With the exception of the Timecard View which provides a report of time entry and payroll status, there are currently no reports available to Employees.

Figure 5: Create New Time Entry

3. Clients

For Clients, the online timesheet process is similar to the paper timesheet process in that both systems require the Review and Approval of Employee timesheets. The main differences are that the online timesheet system minimizes data entry errors and provides the Client with far more information regarding the exact status of their budget, payroll, and employee hours.

3.1. Timesheets

When a Client selects the **Timecard** link at the top of the web page, an options page very similar to that shown in Figure 5 above opens in exactly the same manner as for employees. Use **Option A** to View and Approve the employee's timesheets. Use **Option B** to Create a New Time Entry for an employee.

3.1.1. Timesheet Review and Approval

Select Option A to Review and Approve employee timesheets. This button takes the Client to a Timecard View page very similar to that shown for Employees (Figure 5). The only significant differences between the Client and Employee Timecard View page are that the Client page has the following changes:

Check Boxes	The left hand column contains a series of check boxes which are used to select which time entries to approve.
Employee vs. Client	The Client sees an "Employee" column rather than a "Client" column as viewed by the Employee.
"Select All" Button	The "Select All" button at the bottom of the page allows the Client to select all the Approval Check Boxes showing on the screen at once.

"Deselect All" Button   This button will uncheck all the check boxes
"Approve Selected"   This button will approve all selected timesheet entries

The remaining Timecard View fields are identical to those shown for the Employees and are discussed in detail in Section 2.1.2 above.

When a Client has reviewed the employee time entries and is satisfied with their accuracy, the appropriate check boxes should be selected and the "Approve Selected" button pushed. This will change the Status field from 🅔, Employee Approved, to 🅖, Client Approved, and flags the entry as ready for internal Consumer Direct review and payment. Once the entry has been approved it can still be edited or deleted by the Client, but it can no longer be edited by the Employee. The Client Approved status will remain until the entry has been reviewed and approved by internal Consumer Direct payroll auditors at which point no further changes are allowed.

3.1.2. Create a New Time Entry
The Client may occasionally need to make a time entry for one of their employees. This is done by selecting Option B or Create New Time Entry. The instructions for creating a time entry for an employee are essentially identical to those for an employee creating their own entry and are presented in detail in Section 2.1.3 above. The one difference is that when an entry is made by the Client on behalf of the Employee, it is both created and approved simultaneously and does not need to go through an additional Review and Approval process.

3.2. Reports
The My Direct Care Web Portal provides access to custom budget and spending reports which are available to both Clients and the External Case Managers. Although these reports display some slight variations between programs that reflect the individual needs of the various programs, they fall into two primary report categories: a Spending Summary Report and a Spending Detail Report.

3.2.1. Spending Summary – The Spending Summary is a report summarizing the Client's year-to-date spending against their Approved Plan. The report indicates the approved service codes, the amount spent per code and the elapsed time for the authorization period.   This report provides a concise status of spending and the remaining budget, both overall and per service code. The report can be generated and reviewed at any time by either the Client or External Case Manager via the Web Portal.

Figure 6: Spending Summary

3.2.2. **Spending Detail Report** – This report details the Client's spending between the dates selected for the report range. The report shows all spending and is broken down by employee and vendor. The Spending Detail Report provides highly detailed spending data to support and provide enhanced clarity to the information in the Spending Summary. Note, the format of this report is program dependent.

Figure 7: Spending Detail, Example #1

Figure 8: Spending Detail, Example #2

4. Caregiver Job Board

The Caregiver Job Board is a tool that provides another means for recruiting new or additional assistance. The Caregiver Job Board also provides a method for Job Seekers to find individuals who need assistance. When an individual posts a job (Job Poster), the posting will remain active for 30 days and allows the Job Poster to include as much detail as desired, including notes and requirements. Job Seekers can review the postings and submit an emailed application to the Job Poster via the Job Board. Following the 30 day active period, the posts are archived. Archived posts can be edited, deleted, or reposted as needed. The Job Poster's name, address, email and other contact information remains confidential throughout the process.

4.1. Job Poster

4.1.1. When a Job Poster selects the **View Current Job Openings** link (see Figure 9) there are several submenus available, including:
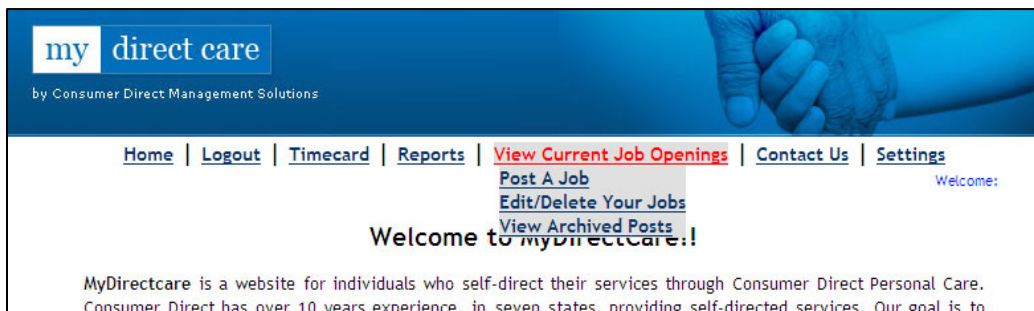
Figure 9: Current Job Openings Submenu

4.1.1.1. <u>View Current Job Openings:</u> The main job posting board

Figure 10: Current Job Openings

4.1.1.2. <u>Post a Job:</u> The form for entering the job description to be posted is shown in Figure 11.

Figure 11: New Job Posting Form

4.1.1.3. Edit/Delete Your Jobs: Current postings with Edit/Delete/Archive options

Figure 12: Participant's Current Postings

4.1.1.4. View Archived Posts: Postings that have expired or been manually archived

Figure 13: Archived Posts

4.1.2. When a Job Seeker submits a resume via the Caregiver Job Board, an email is generated that transmits their application information to the Job Poster for review. The Job Seeker's email address is included to facilitate direct communication between the Job Poster and the Job Seeker.

4.2. Job Seeker

4.2.1. When a Job Seeker selects the **View Current Job Openings** link they are taken directly to the main job posting board where they can <u>View</u> and <u>Apply</u> to Current Job Openings.
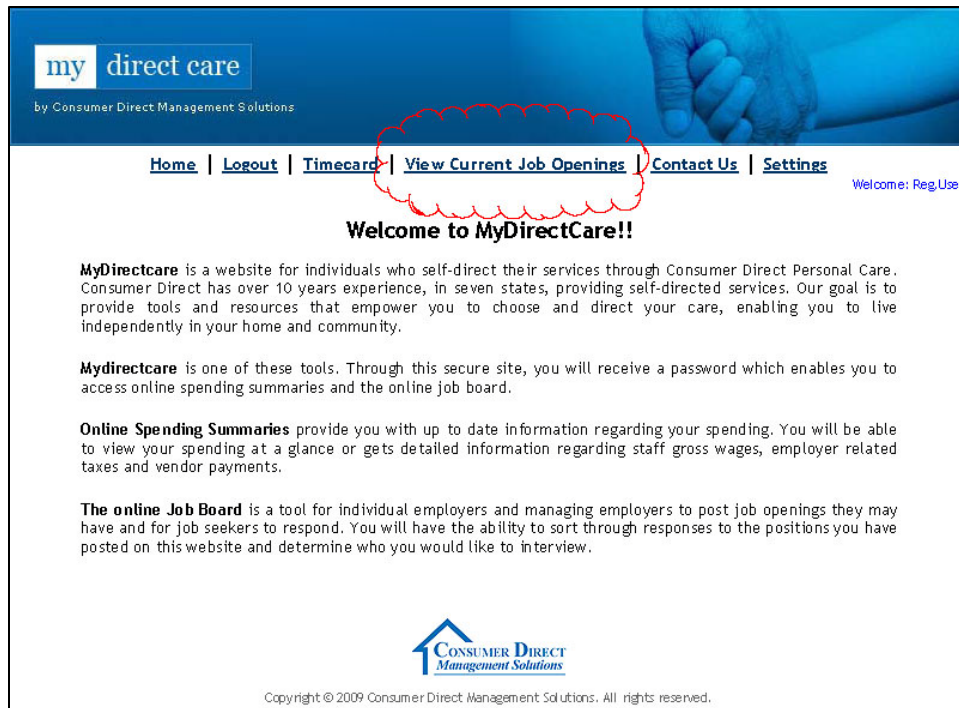
Figure 14: View Current Job Openings - Registered User
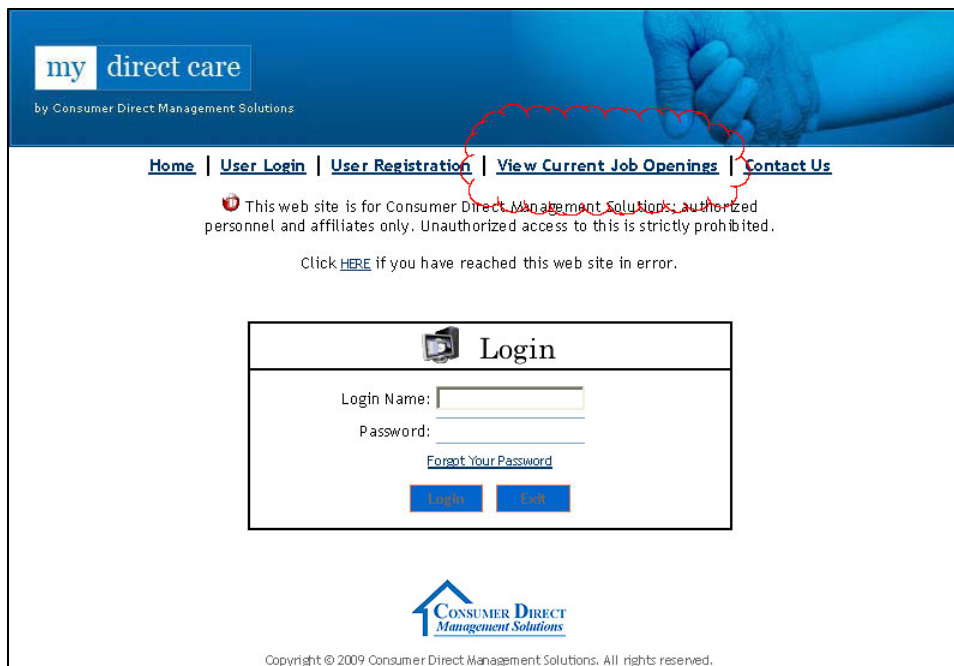
Figure 15: View Current Openings - New User

Figure 16: Current Job Openings

Figure 17: View Position Details

Figure 18: Job Application Form

4.2.2. When a Job Seeker is interested in a position, they will need to register as a user.

Figure 19: Job Seeker Registration

Figure 20: Job Seeker Registration Form

4.2.3. When a Job Seeker is interested in a position and submits an application via the Caregiver Job Board, an email is generated that transmits their application to the Job Poster for review. A confirmation email is also sent to the Job Seeker to verify that the email was transmitted.

4.2.4. The Job Seeker's email address is included with their application email to facilitate direct communication between the Job Poster and the Job Seeker.