

Enter a Punch - Web Portal

Description: In this topic, the user will learn how to enter a punch in the web portal after the shift has been completed (historical entry). Web portal punch entries are not EVV compliant with the exception of the FOB punch entries. Organizations may choose to not allow historical entries (web portal punch entries). Only punch entry types for vacation, sick and PTO can be entered in the future and the entry types availability are based on the organization.

*Please note: Residential and Day program punch entries must be entered through the program profile on the shared device for the location.

Role Required: Employee (base user)

Enter a Punch on the Web Portal

1. Log in to personal profile
2. Click the blue **Add Entry** button on the dashboard
3. Complete the **Add New Entry** form wizard
 - a. Entry Type - Punch is the Default. Other options may be available.
 - b. Employee Name - Auto-populates the name of the employee logged in
 - c. Account Type - Available options depend on authorizations
 - d. Client - Type and select the client name from list
 - e. Service Code - The service code(s) authorized for the client. Select the one that is most appropriate for the service rendered.
 - f. Service Date - The date the service took place. Please ensure that it is within the acceptable date range of the organization.
 - g. Remaining Balance - This is specific to the client and appears after the name is selected. Shows how many hours or units are remaining on the authorization. Some organizations do not display Remaining Balance.
 - h. Check In/Check Out - Enter the clock in/clock out times. Both fields are required. Clicking in the field displays a time drop-down in half hour increments. Specific time can be entered directly into the field.
 - i. EVV Method - For web portal time punches, the option will be **Portal Signoff**. The only exception is if FOB is enabled for the organization.
 - j. Clock in EVV Location - Where the service was performed. There may be one or more options available depending on the client. This field will not be visible if EVV locations have not been defined for the client.
 - k. Clock out EVV Location - See above. This should remain the same as the Clock in location unless the service ended in a different location. There may be one or more options available depending on the client. This field will not be visible if EVV locations have not been defined for the client.
 - l. Check Out Date - The checkout date will be automatically generated based on the check in day and cannot be edited
 - m. Add Reason Codes - The organization may require a reason code when entering a punch, explaining why a non-EVV-compliant method of time entry has been

added. Select a reason code from the **Add Reason Codes** drop-down. **Please note:** Multiple reason codes may be selected simultaneously.

- n. Add Reason Code Note - Some Reason Codes require an additional field called Add Reason Code Note to be completed. Enter a free form note to support the chosen reason code(s). **Please note:** The added reason code note will be saved with all selected reason codes that require a free text note.
 - o. Diagnosis Code (optional) - Enter ICD-10 code
 - p. Notes (optional) - Enter notes per organizational requirements
 - q. Attachment (optional) - Click the blue Add Attachment hyperlink to add an attachment. Examples include receipts, photos, etc.
 - r. Statements/Tasks - Visible only if required by your program. The entry cannot be saved without selecting one or more.
4. Click **Save** and **Yes** to confirm