

PCG Claiming System™ State Administrator User Guide for School Based ACCESS Program

August 2014





Table of Contents

I. Introduction..... 3

II. Accessing the PCG Claiming System..... 4

III. Updating Users 7

IV. Creating & Updating the Staff Pool List (SPL) 9

 a. Adding a New Job Position 10

 b. Adding a New Vacancy 12

 c. Filling a New Position with an Existing Staff Member 13

 d. Inactivating a Staff Person and a Position 16

 e. Reactivating a Job Position..... 16

 f. Replacing a Staff Person 17

 g. Long-Term Subs 19

 h. Editing a Staff Person 20

 i. Exporting & Importing the Staff Pool List 21

V. Certifying the Staff Pool List..... 22

VI. Calendar Completion 23

VII. Entering Shifts 25

I. Introduction

How this Manual Works

This manual helps LEA administrators who oversee the PCG Claiming System™ site. The guide walks administrators through step-by-step procedures and tasks of the Random Moment Time Study as experienced by participants and LEA users.

Process Cycle

The process cycle for each quarterly claim continues for almost a year.

1. Collect Staff Pool Lists and school calendars
2. Participate in the Random Moment Time Study
3. Report allowable expenditures
4. Medicaid Administrative Claim certified and submitted



PCG CLAIMING SYSTEM

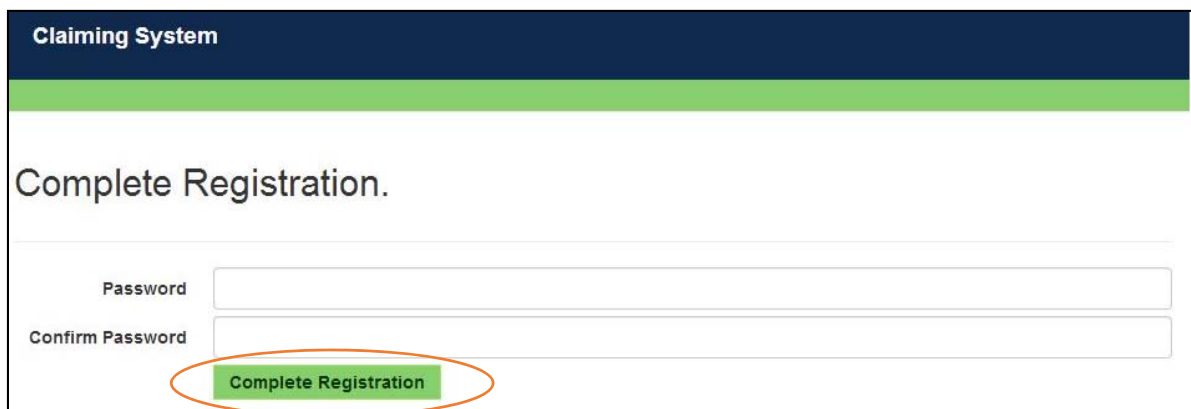
II. Accessing the PCG Claiming System™

First Time Registration

Once new users are added to the RMTS, system they will receive an email with the subject ‘New Account Registration’ from a ‘do not reply’ email address.

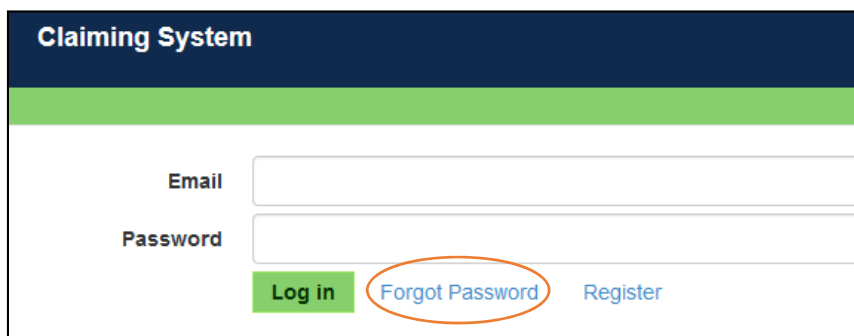
First time users need to click the web link in the email and will then be brought to the page below to enter their password in the ‘Password’ and ‘Confirm Password’ fields.

Users then click the ‘Complete Registration’ button and they will be brought back to the main page to enter the email and new password to log into the site.

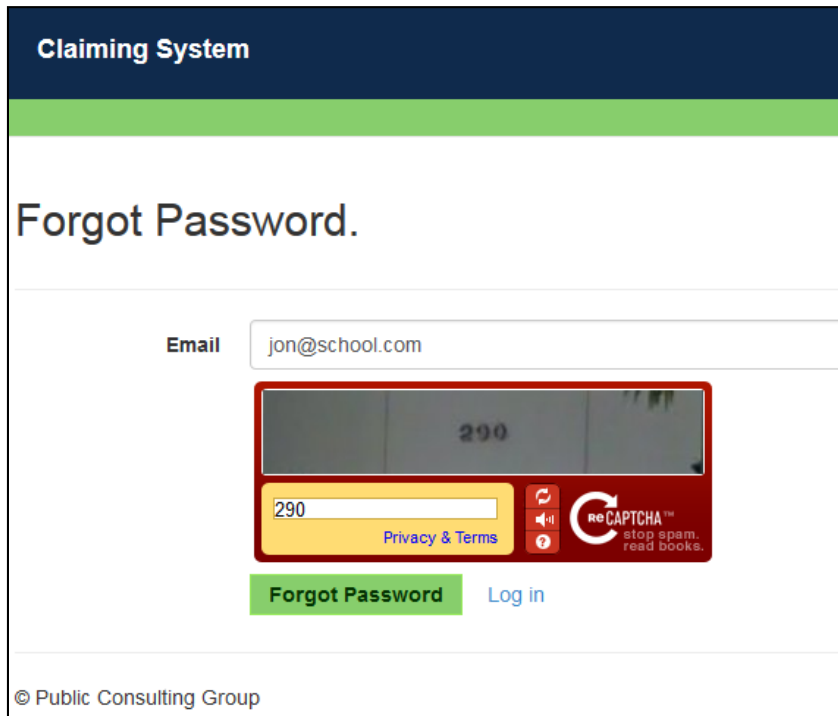


Resetting Passwords

User passwords will never expire but they can be reset as needed. If a coordinator needs a new password, or has forgotten his/her login information, he/she may click on the ‘Forgot Password’ link located next to ‘Log in.’ The coordinator may also contact SBAPsupport@pcgus.com or call 866-912-2976 for assistance.



The user will then be sent to the screen below and will need to enter their email address that is associated with the system along with the text that is displayed in the image field and then click the ‘Forgot Password’ button.



Claiming System

Forgot Password.

Email

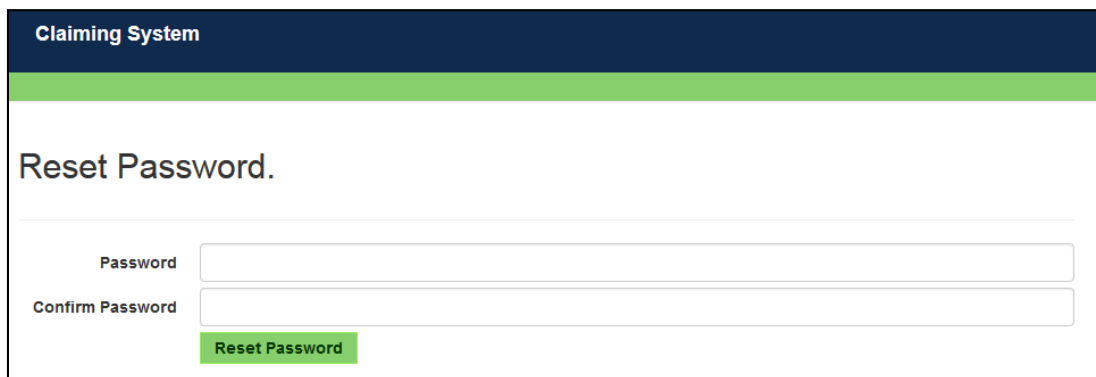
290

290 [Privacy & Terms](#)

Forgot Password [Log in](#)

© Public Consulting Group

The user will then be sent an email with the subject 'Reset Password Request' from a 'do not reply' email address. The email will contain a link to the page below for users to reset their password.



Claiming System

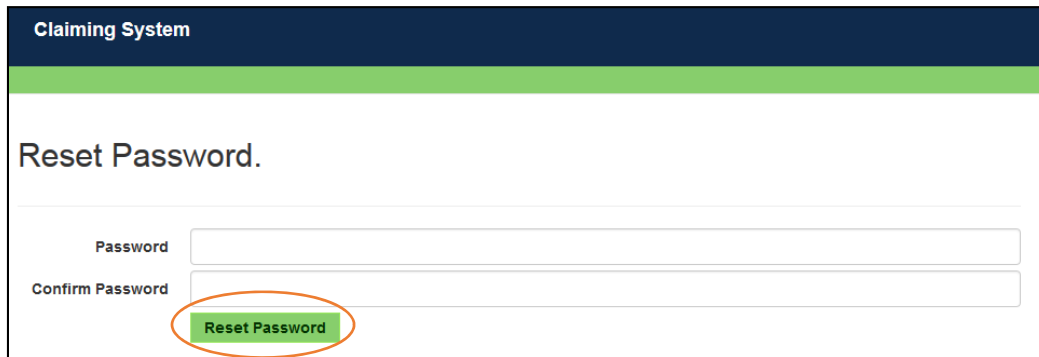
Reset Password.

Password

Confirm Password

Reset Password

Enter the new password in the 'Password' and 'Confirm Password' fields and click the 'Reset Password' button.



Claiming System

Reset Password.

Password

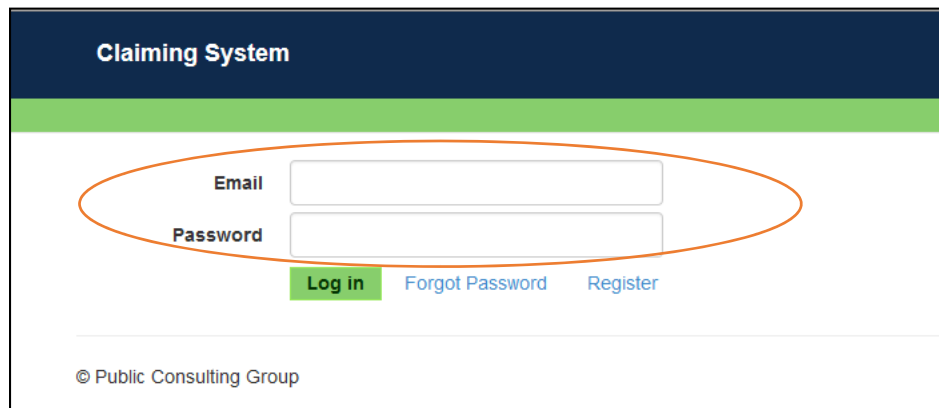
Confirm Password

[Reset Password](#)

Users will then be brought back to the main page to enter the email and new password and log into the site.

Registered User Login

1. To enter the PCG Claiming System website after registering, a coordinator will open an internet browser and enter: <https://claimingsystem.pcgus.com/pa>
2. Enter email and password. Be sure to enter password exactly as created, using appropriate letter cases and symbols.



Claiming System

Claiming System

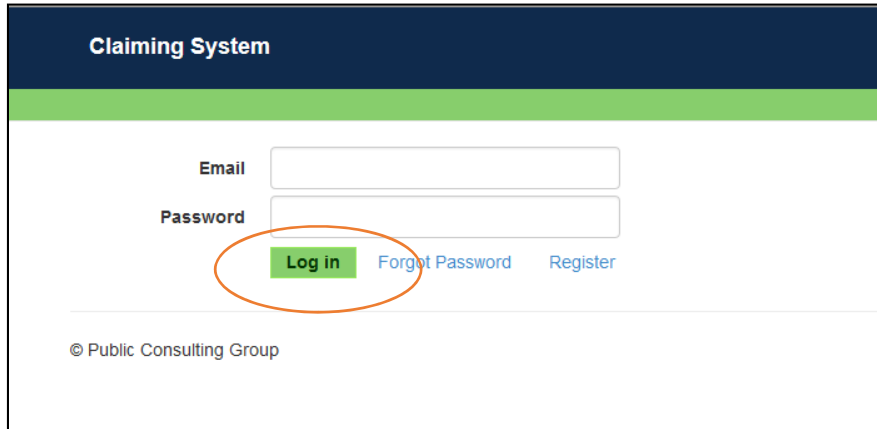
Email

Password

[Log in](#) [Forgot Password](#) [Register](#)

© Public Consulting Group

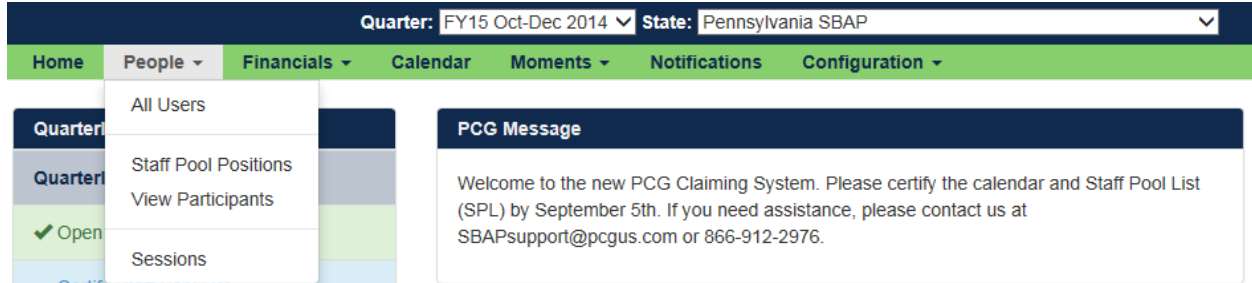
3. Click the 'Log in' button after entering the email and password.



The screenshot shows the 'Claiming System' login interface. It features a dark blue header with the title 'Claiming System'. Below the header is a green horizontal bar. The main content area contains two input fields: 'Email' and 'Password'. Below the 'Password' field, there are three buttons: 'Log in' (highlighted with a red circle), 'Forgot Password', and 'Register'. At the bottom of the page, there is a copyright notice: '© Public Consulting Group'.

IV. Updating Contacts

The 'People' dropdown is where Coordinators can add users. Coordinators will be able to edit the staff pool list by selecting 'Staff Pool Positions' from the dropdown menu. Coordinators can view the staff pool list for the selected quarter by clicking 'View Participants.'




The screenshot shows the navigation menu of the PCG Claiming System. The top bar includes 'Quarter: FY15 Oct-Dec 2014' and 'State: Pennsylvania SBAP'. The main navigation bar has tabs for 'Home', 'People', 'Financials', 'Calendar', 'Moments', 'Notifications', and 'Configuration'. The 'People' dropdown menu is open, showing options: 'All Users', 'Staff Pool Positions', 'View Participants', and 'Sessions'. A 'PCG Message' box is visible on the right, containing a welcome message and contact information for SBAP support.

The LEA coordinators now have access to manage their contacts within the site. To add users, click on 'People' and then either 'LEA Users.' Select the green button 'Add New User' and a fill in screen will appear to add the user's information.

Home People Financials Calendar Mome

Add New User

Available Filters

| | Name ^ | Email | User Type | |
|---|-------------|-------------|-----------|----------|
|  | Adkins, Kim | 68@test.com | None (1) | Resa 2/V |

Create New User

Email: (Required)

First Name: (Required)

Middle Name:

Last Name: (Required)

Suffix:

Phone:

| Accounts | | | | |
|----------------------|----------------------|--------------------------|--------------------------|--------------------------|
| Location | User Type | Is Contact | Is CC | Delete |
| <input type="text"/> | <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Add Another?

© Public Consulting Group

Cancel Create New User (No changes yet)

Enter in all of the required information (in red), the location the contact will have access to (only locations the user has access to will appear), and user type. Then select the check box for 'Is Contact' if the user should receive program and system information and 'Is CC' if the user should receive RMTS late notifications for participants at the assigned location. Once all of the information has been entered click 'Create New User' to save the information in the site. The site will then send the user an email with instructions to access the system.

V. Creating/Updating the Staff Pool List

The foundation of the Pennsylvania School Based ACCESS Program is the Staff Pool List (SPL). LEAs are given the opportunity to update their SPL during the following 3 quarters of each year: October – December, January – March and April – June. Having a compliant SPL directly affects the reimbursement received by participating LEAs. An accurate, up to date SPL allows the LEA to claim a portion of salary and benefits costs for each person during the quarterly financial reporting period.

Staff Pool List

To view, create, and/or update the SPL, click on the ‘People’ link on the home screen and select ‘Staff Pool Positions.’ On the right corner, choose the appropriate district to add staff pool. The two main components of the ‘Staff Pool’ page are the ‘Add New Job Position’ and ‘Certify Staff Pool’ buttons. The ‘Add New Job Position’ button is how users can add new job positions to their staff pool list. The ‘Certify Staff Pool’ button is the button that users click to certify and lock their staff pool in the PCG Claiming System.



Quarter: FY15 Jul-Sep 2014 District: Resa 1/Mcdowell County

Home People Calendar Moments Configuration

Add New Job Position Certify Staff Pool Export Import Ready for certification

Available Filters

Staff at District: Resa 1/Mcdowell County

| Cost Pool | Name ^ | Job Category | Job Title | Email | Inactivate |
|--------------------------|-----------------|--------------|--------------|---------------|------------|
| Targeted Case Management | Addair, Larry | Case Manager | Case Manager | 2672@test.com | ✘ |
| Targeted Case Management | Addair, Marlene | Case Manager | Case Manager | 3277@test.com | ✘ |

© Public Consulting Group

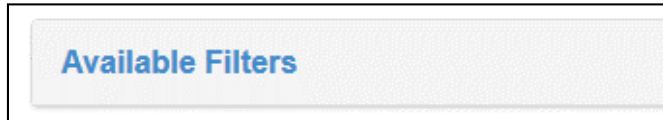
On the following page is the screen that will appear after clicking on the ‘Staff Pool Positions’ link on the ‘People’ dropdown. All current active job positions included in the staff pool will appear with the following information:

- Agency (the LEA)
- Cost Pool (Direct Service, Admin)
- Job Category
- Job Title
- Full Name
- Email

- Indication of Inactive Status (A red X in the 'inactivate column means that the positions are active and can be inactivated by clicking the red X.

Filtering the Staff Pool List

It is possible to filter the SPL by clicking 'Available Filters.'



Select the desired cost pool, job category, email, first name, or last name, either individually or in combination with each other. Once the desired criteria has been selected, click "Filter" to display the results for all participants. To review the SPL in its entirety, leave all the search fields blank and select "Filter". The staff that match the search criteria will display.

The staff members that meet the search criteria selected will be displayed.

Adding a New Job Position

1. From the 'Staff Pool Positions' screen, click on the 'Add New Job Position' button located on the upper left of the screen to add a new Job Position. The job position is created first and then a staff person assigned to it.
2. The required fields below will appear:
 - Cost Pool: A drop down menu with the cost pools allowed.
 - Job Category: A drop down menu with job categories allowed in that cost pool.
 - Shift Type: A drop down menu with all shifts listed created by the LEA.
 - Employment Type: A drop down menu to select Salaried or Contracted.
 - Job Title: Job title used by the district to describe the position.

Create New Job Position

Cost Pool: ▼
(Required)

Job Category: ▼
(Required)

Shift Type: ▼
(Required)

Employment Type: ▼
(Required)

Job Title:

3. Enter the required information and then select the action. When adding a new staff person, select the action, 'Fill With New' from the drop down.

Action:

Fill With Existing

Fill With New

Create as Vacancy

4. Complete the new staff person information by entering:
- Start Date (will default to the first day of the quarter): Enter the employment start date.
 - Email address
 - First Name
 - Middle Name (optional)
 - Last Name
 - Suffix (optional)
 - Phone (optional but recommended)
 - Email CC person: select from the dropdown the contact that will receive this participant's RMTS late notifications

Create new staff:

Start Date:

Email:
(Required)

No Email

Employee ID:

First Name:
(Required)

Middle Name:

Last Name:
(Required)

Suffix:

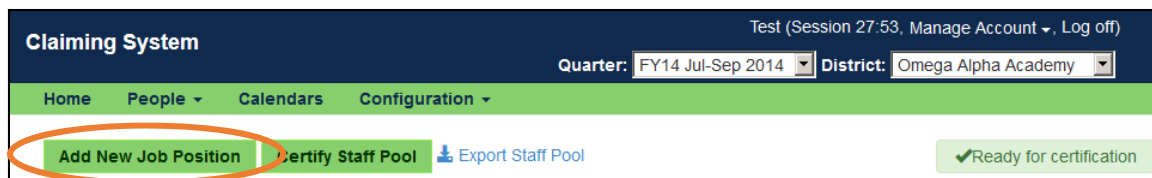
Phone:

Email CC Person:

- Click 'Create New Job Position' or cancel to abort new job position and return to the SPL.

Adding a New Vacancy Position

- From the 'Staff Pool Positions' screen, click on the 'Add New Job Position' button located on the upper left of the screen to add a new Job Position. The job position is created first and then a staff person assigned to it.



- The required fields below will appear:
 - Cost Pool: A drop down menu with the cost pools allowed.
 - Job Category: A drop down menu with job categories allowed in that cost pool.
 - Shift Type: A drop down menu with all shifts listed created by the LEA.

- Employment Type: A drop down menu to select Salaried or Contracted.
- Job Title: Job title used by the district to describe the position. Note: This field can be used to enter further identifying information such as school building, room number, etc.

Create New Job Position

Cost Pool: (Required)

Job Category: (Required)

Shift Type: (Required)

Employment Type: (Required)

Job Title:

3. Enter the required information and then select the action. When adding a vacancy, select the action, 'Create as Vacancy' from the drop down.

Action:

Fill With Existing

Fill With New

Create as Vacancy

4. Click 'Create New Job Position' or cancel to abort new job position and return to the SPL.

Cancel

Create New Job Position

Filling a New Position with an Existing Staff

1. From the 'Staff Pool Positions' screen, click on the 'Add New Job Position' button located on the upper left of the screen to add a new Job Position. The job position is created first and then a staff person assigned to it.

Test (Session 27:53, Manage Account ▾, Log off)

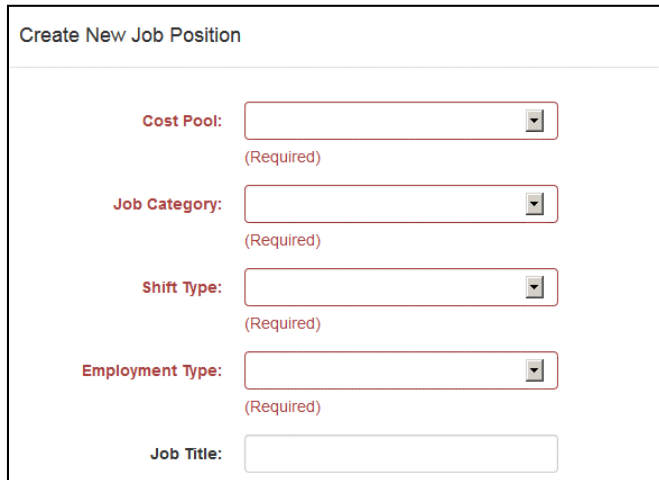
Quarter: FY14 Jul-Sep 2014 ▾ District: Omega Alpha Academy ▾

Home People ▾ Calendars Configuration ▾

Add New Job Position
Certify Staff Pool
Export Staff Pool
✓ Ready for certification

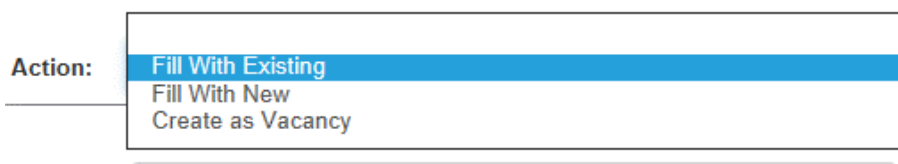
2. The required fields below will appear:

- Cost Pool: A drop down menu with the cost pools allowed.
- Job Category: A drop down menu with job categories allowed in that cost pool.
- Shift Type: A drop down menu with all shifts listed created by the LEA.
- Employment Type: A drop down menu to select Salaried or Contracted.
- Job Title: Job title used by the district to describe the position.



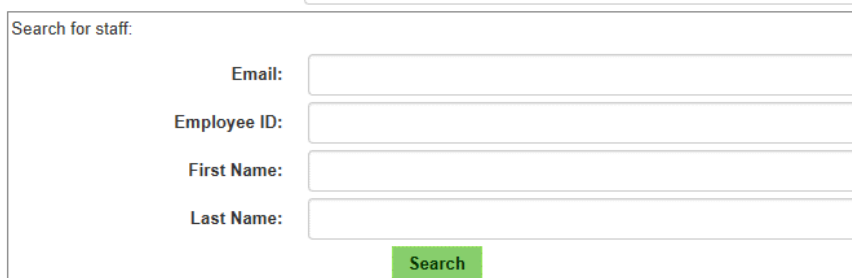
The screenshot shows a form titled "Create New Job Position". It contains five fields: "Cost Pool", "Job Category", "Shift Type", "Employment Type", and "Job Title". Each of the first four fields is a dropdown menu with a red border and a small downward arrow icon. Below each dropdown menu is the text "(Required)". The "Job Title" field is a standard text input box.

3. Enter the required information and then select the action. When selecting an existing staff, select the action 'Fill With Existing.' Note: Only staff that are inactive and not assigned to another position can be selected to fill a position. If changing a staff person from one cost pool to another, delete the position in the current cost pool, then add a position in the correct cost pool and select 'Fill With Existing' to choose the existing staff person.



The screenshot shows a dropdown menu labeled "Action:". The menu is open, showing three options: "Fill With Existing" (highlighted in blue), "Fill With New", and "Create as Vacancy".

4. Search for the staff person by entering specific criteria in the search fields



The screenshot shows a form titled "Search for staff:". It contains four text input fields: "Email:", "Employee ID:", "First Name:", and "Last Name:". Below the fields is a green "Search" button.

All staff, both inactive and active, will appear in the search results based on the criteria selected. ‘Yes’ under the column header ‘inactive’ means the participant is inactive and can be selected to fill the position. ‘No’ in the ‘inactive’ column means the staff is active in the district. Only a participant that is not assigned to a current position (having a yes in the column, ‘inactive’) can be selected. Select the Back button to redo search criteria or to return to the adding participant screen.

Search results:

| Location | Email | Employee ID | Name | Inactive | Fill |
|----------|-------------------------|-------------|-----------------|----------|------|
| Demo LEA | lskywalker@123pcgus.com | | Skywalker, Luke | No | Fill |
| Demo LEA | | krogers99 | Rogers, Kenny | No | Fill |
| Demo LEA | ndrew@123pcgus.com | | Drew, Nancy | No | Fill |
| Demo LEA | plong@123pcgus.com | | Long, Pippi | No | Fill |
| | dkellog@123pcgus.com | | Kellog, Denny | Yes | Fill |

Back

- Click the ‘Fill’ button once the desired staff is located to populate the job position. Enter the start date that the existing staff person is beginning the new position. The system will default to the first day of the quarter.
- Then select ‘Create New Job Position’ to save it.

Fill with staff:

Start Date: 10/01/2014

Email dkellog@123pcgus.com

Employee ID

Name Kellog, Denny

Email CC Person (none)

Add Another?

Cancel **Create New Job Position**

Deleting a Staff Person and a Position

1. Select the red X next to the staff person and position to delete.

Staff at LEA: Demo LEA

| Cost Pool | Name ^ | Job Category | Job Title | Email | Inactivate |
|----------------|-----------------|---------------------------------|-------------|-------------------------|------------|
| AOP | Drew, Nancy | Administrator | | ndrew@123pcgus.com | ✘ |
| Direct Service | Kellog, Denny | Licensed Clinical Social Worker | | dkellog@123pcgus.com | ✘ |
| AOP | Long, Pippi | Counselor | Counselor_s | plong@123pcgus.com | ✘ |
| Personal Care | Rogers, Kenny | Personal Care Services Provider | | | ✘ |
| AOP | Skywalker, Luke | Counselor | | lskywalker@123pcgus.com | ✘ |

(5 Job Positions)

2. Enter the date the staff person left the position and select 'Delete Job Position.'

Delete Job Position

Please enter an end date for the following Job Span:

| Employee ID | Email | Name | Begin Date |
|-------------|--------------------|-------------|------------|
| | plong@123pcgus.com | Long, Pippi | 09/01/2014 |

End Date: ✘

Reactivating a Job Position

If a job position returns to the district that was at one time inactive, the Coordinator will need to create a new job position and fill it with a participant that is active. This is the same process as the 'Adding a New Job Position' process that was described earlier in this guide. For example, in one quarter there were three Speech Therapists and then the following quarter only two, in order to add one back this quarter, a new position must be created.

Allowable Actions during a Quarter

Once the quarter has begun, the 'Action' menu allows users to make the position a vacancy (if the participant has left the position), or replace the participant with another staff (existing or new) during the quarter. This will allow users to track specific dates that participants were in the position for financial claiming and allow new participants to be notified of moments that occurred while they are in the position.

Replacing a Staff Person

1. Select the link on the name of the staff person to replace.
2. Scroll to the Action Dropdown box to make a selection:
 - a. Vacate
 - b. Replace with Existing
 - c. Replace with New

Action:

Vacate

Replace With Existing

Replace With New

Edit

a. Vacate

Use this if a staff person has left a position and there is no replacement staff. This feature can be used during the quarter as well as at the beginning. Enter the date the staff person vacated the position. Enter any other identifying information about the position in the job title field such as school building, room number, etc. Click the check box indicating assurance of creating a vacancy and select 'Save Changes.'

Action: Vacate

End Date:

Are you sure you want to create a vacancy for this position?

b. Replace with Existing

Search for the staff person by entering specific criteria in the search fields

Search for staff:

Email:

Employee ID:

First Name:

Last Name:

All staff, both inactive and active, will appear in the search results based on the criteria selected. 'Yes' under the column header 'inactive' means the participant is inactive and can be selected to fill the position. 'No' in the 'inactive' column means the staff is active in the district. Only a participant that is not assigned to a current position (having a yes in the column 'inactive') can be selected. Select the Back button to redo search criteria or to return to the adding participant screen.

Search results:

| Location | Email | Employee ID | Name | Inactive | Fill |
|----------|-------------------------|-------------|-----------------|----------|----------------------|
| Demo LEA | lskywalker@123pcgus.com | | Skywalker, Luke | No | Fill |
| Demo LEA | | krogers99 | Rogers, Kenny | No | Fill |
| Demo LEA | ndrew@123pcgus.com | | Drew, Nancy | No | Fill |
| Demo LEA | plong@123pcgus.com | | Long, Pippl | No | Fill |
| | dkellog@123pcgus.com | | Kellog, Denny | Yes | Fill |

© Public Consulting Group

[Back](#)

Click the 'Fill' button once the desired staff is located to populate the job position. Enter the start date that the existing staff person is beginning the new position. The system will default to the first day of the quarter. Then select 'Create New Job Position' to save it.

Fill with staff:

Start Date:

Email dkellog@123pcgus.com

Employee ID

Name Kellog, Denny

Email CC Person (none)

Add Another?

[Cancel](#)

[Create New Job Position](#)

c. Replace with New

Complete the new staff person information by entering:

- Start Date (will default to the first day of the quarter): Enter the employment start date.
- Email address
- First Name
- Middle Name (optional)
- Last Name
- Suffix (optional)
- Phone (optional but recommended)
- Email CC person: select from the dropdown the contact that will receive this participant's RMTS late notifications

Create new staff:

| | |
|------------------|---|
| Start Date: | <input type="text" value="10/01/2014"/> |
| Email: | <input type="text"/> |
| | (Required) |
| | <input type="checkbox"/> No Email |
| Employee ID: | <input type="text"/> |
| First Name: | <input type="text"/> |
| | (Required) |
| Middle Name: | <input type="text"/> |
| Last Name: | <input type="text"/> |
| | (Required) |
| Suffix: | <input type="text"/> |
| Phone: | <input type="text"/> |
| Email CC Person: | <input type="text"/> <input type="button" value="v"/> |

Click 'Create New Job Position' or cancel to abort new job position and return to the SPL

Long-Term Subs

A long-term sub must meet the long-term sub criteria. The sub must have at minimum, the same qualifications/licenses that the staff person has and be in the position for at least 30 days during the quarter. All moments that occur during the quarter when the sub is in the position, will be sent to the sub. There is no need to further contact PCG via email unless there are questions.

1. Select the link of the name of the participant that is on leave.
2. Update the following fields:
 - a. Email address: enter the sub's email address
 - b. First name: enter the sub's first name in parenthesis
 - c. Last name: enter the sub's last name in parenthesis

Action:

Edit staff:

Email:

No Email

Employee ID:

First Name:

Middle Name:

Last Name:

Suffix:

Phone:

Email CC Person:

Edit Another?

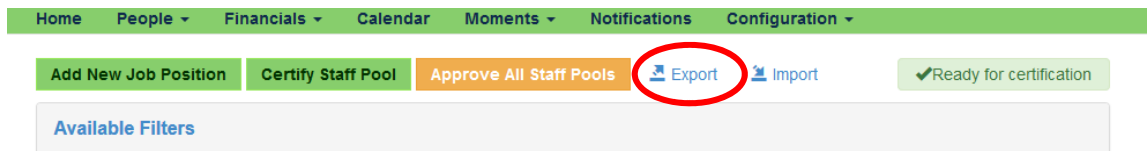
Editing a Staff Person

If information needs to be updated for a staff person, such as email address, name, or job title, follow the following steps:

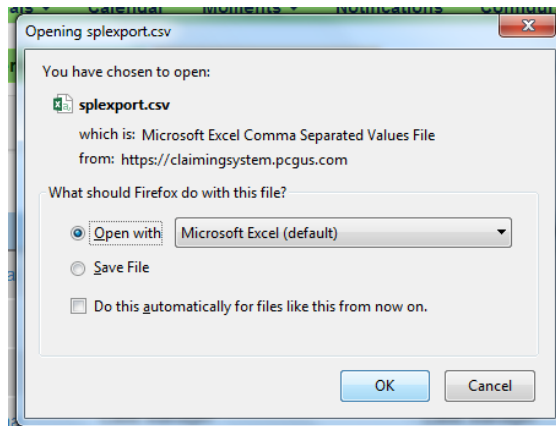
1. From the 'Staff Pool screen,' job position information may be edited by selecting the link on the desired participant's name.
2. The selected participant position's information will appear and can be edited.
3. Make all necessary modifications to the individual job position's screen by clicking in the text boxes or by using the drop down menus. Users are able to make updates to the job position's Job Category, Shift Type, Employment Type, Job Title, email address, employee ID, name and CC person in this section.
4. Once all the necessary changes have been made, click the 'Save Changes' button at the bottom of the screen to save the updated information.

Exporting and importing the SPL

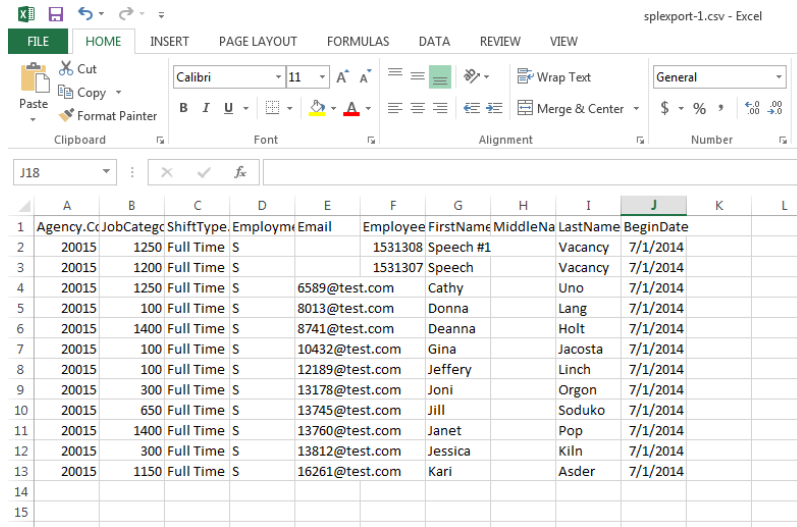
As an additional option, staff can export the SPL, make updates and then import the file into the site. To export the file go to the 'People' tab and choose 'Staff Pool Positions,' you will see 'Export' on the top of the screen.



A pop up box will appear, click 'OK.'

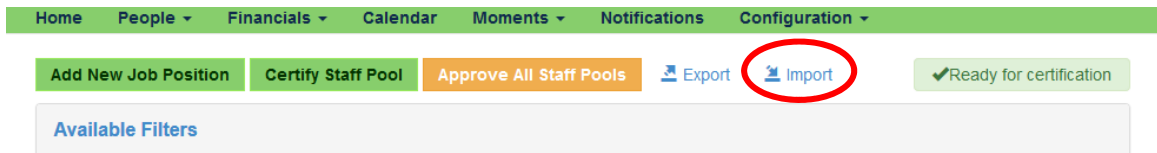


This will allow the file to open, it will open in a .CSV file but it is important to note that you will need to save this file in Excel format.



| Agency | Job Category | Shift Type | Employment | Email | Employee First Name | Middle Name | Last Name | Begin Date |
|--------|--------------|------------|------------|----------------|---------------------|-------------|-----------|------------|
| 20015 | 1250 | Full Time | S | | 1531308 | Speech #1 | Vacancy | 7/1/2014 |
| 20015 | 1200 | Full Time | S | | 1531307 | Speech | Vacancy | 7/1/2014 |
| 20015 | 1250 | Full Time | S | 6589@test.com | Cathy | Uno | | 7/1/2014 |
| 20015 | 100 | Full Time | S | 8013@test.com | Donna | Lang | | 7/1/2014 |
| 20015 | 1400 | Full Time | S | 8741@test.com | Deanna | Holt | | 7/1/2014 |
| 20015 | 100 | Full Time | S | 10432@test.com | Gina | Jacosta | | 7/1/2014 |
| 20015 | 100 | Full Time | S | 12189@test.com | Jeffery | Linch | | 7/1/2014 |
| 20015 | 300 | Full Time | S | 13178@test.com | Joni | Orgon | | 7/1/2014 |
| 20015 | 650 | Full Time | S | 13745@test.com | Jill | Soduko | | 7/1/2014 |
| 20015 | 1400 | Full Time | S | 13760@test.com | Janet | Pop | | 7/1/2014 |
| 20015 | 300 | Full Time | S | 13812@test.com | Jessica | Kiln | | 7/1/2014 |
| 20015 | 1150 | Full Time | S | 16261@test.com | Kari | Asder | | 7/1/2014 |

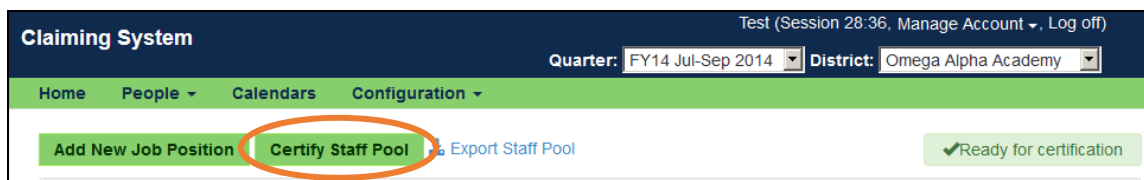
Edits and vacancies must be completed in the system and cannot be completed through the import. If updating via import is preferred, please contact PCG to assist you with matching all required fields.



VI. Certifying the Staff Pool List

After all updates have been completed, the LEA must certify the Staff Pool List. Before certifying the SPL, please be sure the list is accurate and complete. **Please note that each LEA must be certified in order for the staff pool list to be included in the time study for the quarter. A State User certifying just the State and not each LEA will exclude LEAs not certified.**

1. Click on the 'Staff Pool Positions' link from the 'People' dropdown on the 'Home' screen.
2. The staff pool will display. Select the 'Certify Staff Pool' box to certify the staff pool.



The system will display the message that the list has been certified successfully. The final step is for the State to review the SPLs of all the LEAs and click Certify Staff Pool List.

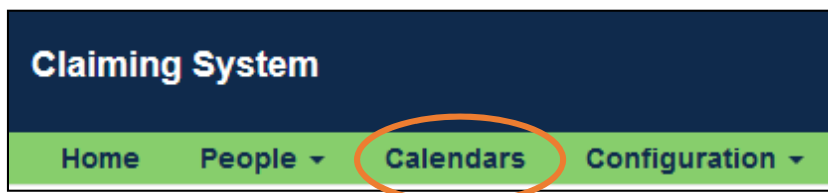
VII. Calendar Completion

Staff included on the SPL are eligible to receive Random Moment Time Study (RMTS) surveys throughout each quarter. Because each LEA has a different schedule, we need a way to ensure that staff members have a high likelihood of receiving a moment during work hours. To do this, we collect calendar information for each participating LEA. In August, LEAs are notified that their SPL is open to be updated for the October-December quarter. Roughly one month before each quarter begins, non-work days must be selected on the calendar (e.g. enter non-work days in December for January – March quarter) and the calendar must be certified. The RMTS system uses this information when assigning moments to ensure they are distributed during working hours. This is important because for a sample to be valid, a certain number of working moments need to be returned.

LEAs enter their non-work days directly into the PCG Claiming system to prevent staff from being selected for a moment on days that they do not work.

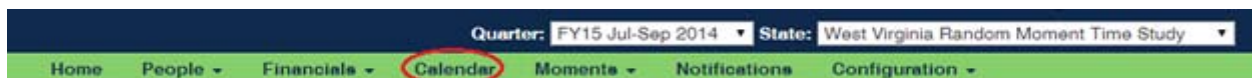
Each LEA must certify the calendar before each quarter in order for the non-working days to be excluded from being selected for moments.

The ‘Calendar’ dropdown is where Coordinators update their calendar information.



To enter staff days off:

1. Click the ‘Calendars’ link at the top of the home page.



2. Holiday/Non-Work Day is the only selection that indicates non work days for staff. The Teacher In-service Work Day and Early Release Day-Optional selections can both be used if the LEA wishes to indicate them on the calendar, but they will not be days that are removed from the time study. Select Holiday/Non-Work Day and then click on the days on the calendar that correspond to the days off for the district. If a day is selected in error, simply click it again to refresh.

Warning: The calendar is ready to be certified. Please make sure all holidays for the quarter have been indicated, saved, and certified.

Show Certified Calendar?
 Show Moments?

Holiday/Non-Work Day
 Teacher Inservice Work Day
 Early Release Day-Optional

October 2014

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|-----|-----|-----|-----|-----|-----|-----|
| | | | 1 | 2 | 3 | 4 |
| 5 | 6 | 7 | 8 | 9 | 10 | 11 |
| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | 31 | |

November 2014

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|-----|-----|-----|-----|-----|-----|-----|
| | | | | | | 1 |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 9 | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 | 24 | 25 | 26 | 27 | 28 | 29 |
| 30 | | | | | | |

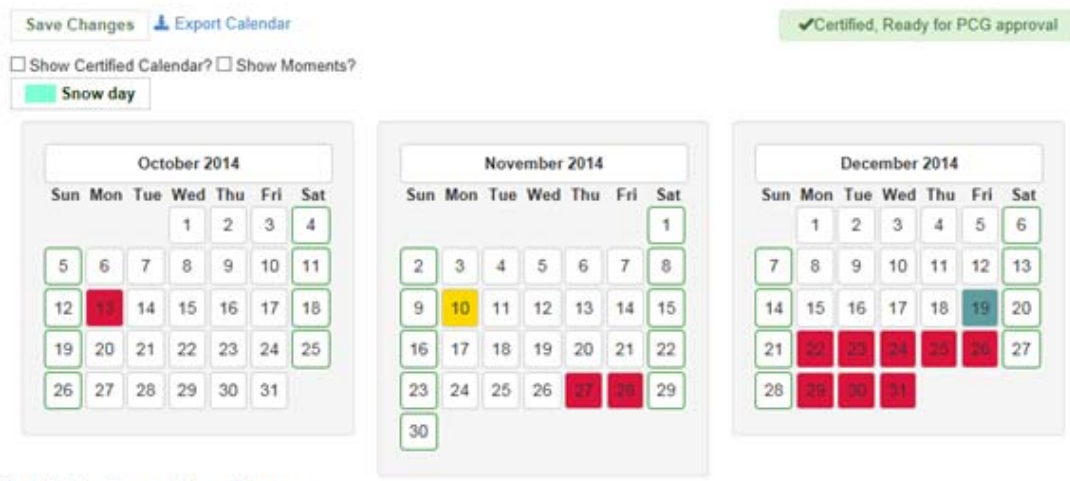
December 2014

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|-----|-----|-----|-----|-----|-----|-----|
| | 1 | 2 | 3 | 4 | 5 | 6 |
| 7 | 8 | 9 | 10 | 11 | 12 | 13 |
| 14 | 15 | 16 | 17 | 18 | 19 | 20 |
| 21 | 22 | 23 | 24 | 25 | 26 | 27 |
| 28 | 29 | 30 | 31 | | | |

© Public Consulting Group

- Click 'Save Changes' to lock in the non-work days and then click 'certify calendar.' Contact PCG to make changes to the calendar if certification is selected prematurely. Only PCG can unlock a district calendar.

Once a calendar is certified, it locks and the snow day selection is displayed. Use this throughout the quarter to identify any days off that the district has to schedule unexpectedly. PCG will use this information to assist in completing moments.



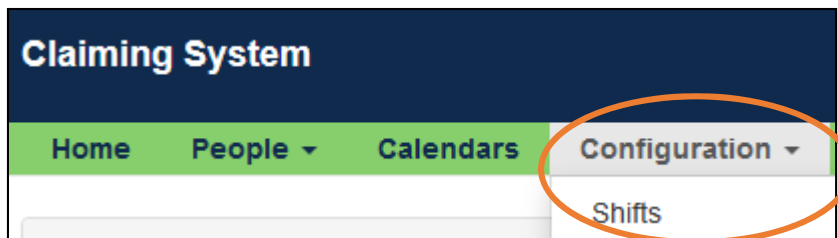
© Public Consulting Group

VIII. Entering Shifts

PCG recognizes that not every LEA or school on the staff pool list begins and ends their work day at the same time. The creation of shifts in the new system allows for differences in schedules per LEA or school to be created within each LEA to capture the truest working time for each participant. An LEA can create multiple shifts for staff that have set schedules. If an LEA has a part time staff person, but their schedule is flexible, that participant must be assigned the full time shift. At a minimum, an LEA must have a full time shift that encompasses the contracted work time. Other examples of shifts the LEA may set are:

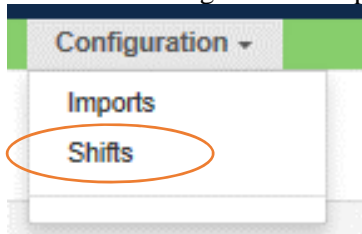
- Shift for high schools
- Shift for elementary schools
- Shift for administrators contract time
- Shift for a part time staff that have a set schedule (M-F 8-12, etc.).

The 'Configuration' dropdown is where Coordinators update their shifts.



To enter shifts:

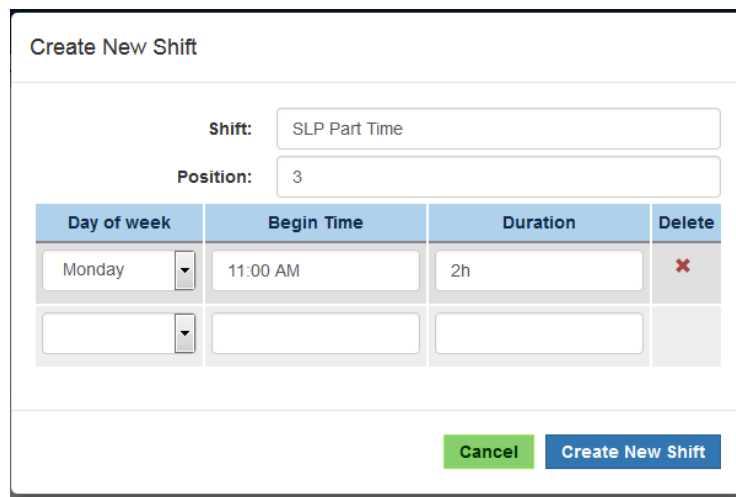
1. Go to the 'Configuration' drop down on the home screen and select 'Shift.'



2. Click on 'Add New Shift.'



3. Type in a Name for the shift being created. Naming conventions should be easy to identify so that a correct shift can be selected for a staff person. Naming convention examples:
 - M-F 8-12
 - T, W, TH 8-3
 - Full Time HS 8-3:30
 - Full Time Toyon Elementary School



The image shows a form titled 'Create New Shift'. It has two input fields: 'Shift:' with the value 'SLP Part Time' and 'Position:' with the value '3'. Below these is a table with four columns: 'Day of week', 'Begin Time', 'Duration', and 'Delete'. The first row shows 'Monday', '11:00 AM', '2h', and a red 'X' icon. The second row is empty. At the bottom of the form are two buttons: 'Cancel' (green) and 'Create New Shift' (blue).

| Day of week | Begin Time | Duration | Delete |
|-------------|------------|----------|--------|
| Monday | 11:00 AM | 2h | X |
| | | | |

4. The Position is there to indicate the order you want your shifts to appear in the drop down for your staff pool (Positions).
5. Choose the day of the week for your shift from the drop down. Each day must be added to the shift separately. If the shift is 2 or more days, steps 5-7 will be repeated until the full shift has been identified.
6. Enter the starting time in the following format 8:00 AM/PM or military time (13:00 = 1:00 PM). Note: LEAs will not enter the end time.



7. Enter the duration of the shift in the following format #h #m (substituting # for the actual duration of hours and minutes) – This is not the ending time, but instead is the length of the shift. The system will determine the ending time based on the start time entered in step 6 and the duration of the shift entered in this step.
8. Repeat steps 5 – 7 for each of the days which are associated with this shift and click ‘Create New Shift’ to save it in the system.
9. The shift will then be saved in the system and can be assigned to job positions.

