

This document reviews the use of the Timesheet module in Wellness Manager. The Timesheet module allows you to enter time worked, mileage, and reimbursable expenses for payroll.

Overview

For each added entry, time, mileage, and reimbursable dollars are summed up by day, week, pay period, and total. By default, the Timesheet module shows records for the current day when you log in. You can update the display to show the date range using the “View Options” button (on mobile, this is at the top, the eye icon).

Examples

The following GIF files show examples of how to use the Timesheet module.

Logging in and office work:

- [Logging in](#)
- [Adding office work with a break](#)

Adding event work and travel:

- [Adding one event with a rental car and driving the night before](#)
- [Adding a third shift event](#)
- [Adding two events, where you travel from one to the next](#)

Visits, charting work, and reimbursable receipts:

- [Adding visit/charting work](#)
- [Adding a reimbursable receipt](#)

Submitting Timesheet module entries:

- [Submitting your entries](#)

Accessing the Timesheet Module

1. Go to <https://portal.triadcare.com/fmi/webd> (or use the FileMaker Pro application)
2. Log in using your provided credentials
3. Select Wellness Manager
4. Log in using your provided credentials
5. Select the Timesheet module
 - a. Desktop: Timesheet button in the left navigation
 - b. Mobile: left-most button in the bottom navigation

Adding Worked Time and Travel

1. Click on the Plus button (“Work & Travel” on Desktop)
 - a. On Mobile, this will move to a new screen with a form
 - b. On Desktop, this will open a popover window with a form
2. Select the activity type
 - a. If adding time for “Event” or “Visit/Charting,” the event or service is required
 - i. You should set the “Event Date” as the date of the event or visits you worked, which will allow you to select the specific event or service (i.e. visit) you worked that day
3. Set the Work Date
 - a. If you are changing the date for an “Event” entry, the date will be updated to match the date on file. In some cases, you may have worked a different date, in the instance of travel or charting.

Adding Worked Time and Travel, Continued

4. Enter the start and end time
 - a. If you took a break, add time separately for before and after the break (example listed above)
5. Enter details or notes on the work performed
 - a. Please note, for “Office Work,” details on the work performed is required and should list all activities completed
6. Enable/Disable the checkboxes for traveling before and/or after the work time if needed
 - a. Selecting “Events” automatically enables them
7. Enter travel times before work and after work
8. Enter your mileage
 - a. The “Departing from home” checkbox reduces the before and after times and mileage by commute values
 - i. Click on the question mark icon for an explanation
 - ii. Disable this if you have already accounted for commute values in the time and miles entered
 - iii. The duration/miles are displayed for easy verification of hours and mileage
 1. These values update based on the Departing from home checkbox
9. Click on Save Entry

Adding a Reimbursable Items

1. Click on the Dollar button (“Reimbursable” on Desktop)
2. Select the appropriate category
3. If the purchase was made during or for an event or service, set the date and the event/service it was purchased for
4. Set the “Receipt Date” (date of purchase) and the “Dollars” (reimbursable amount) fields
5. Click on “Upload File” and add the photo/scan/file of the receipt
 - a. On mobile, you can insert from camera and take a photo
6. Enter any details or notes on the purchase
7. Click on Save Entry