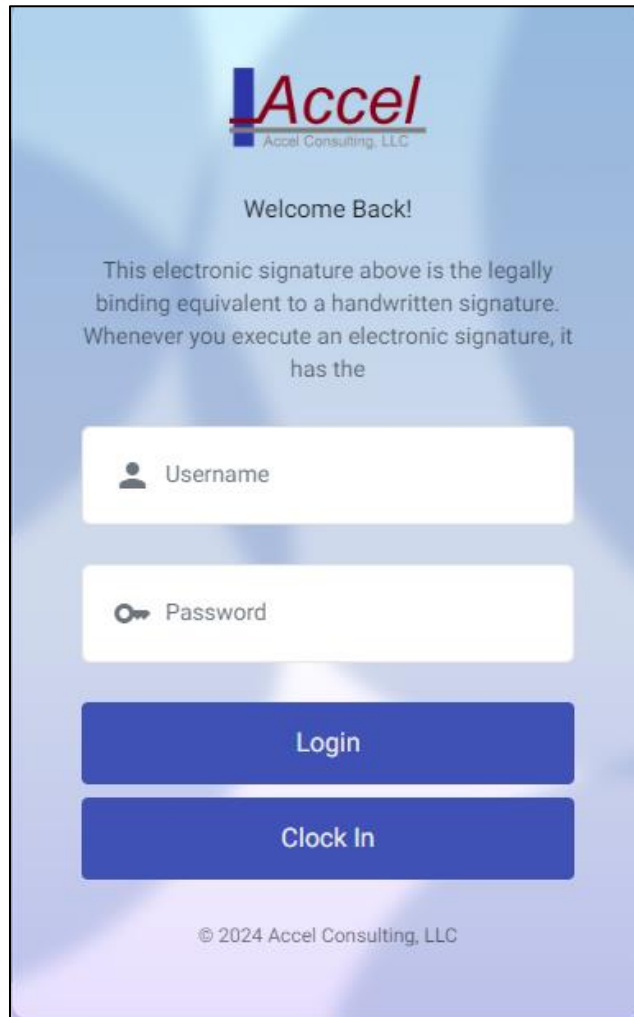


## Reporting Work in AccelTrax V5

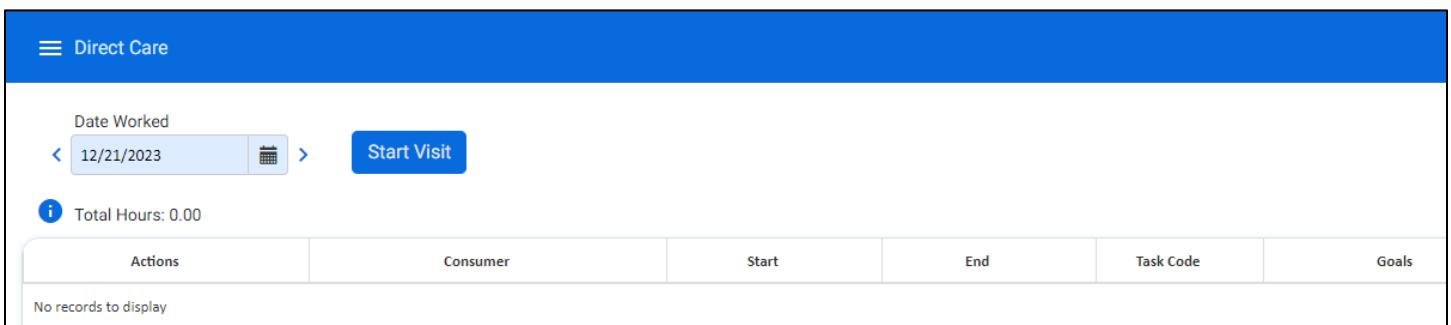
**PLEASE NOTE: You have 40 hours past the end of your shift to submit your work. If you do not get it submitted within that time frame, you will need to contact your supervisor to be unlocked.**

To log into AccelTrax, enter your Username and Password.



The login screen features the Accel Consulting, LLC logo at the top. Below the logo, it says "Welcome Back!". A legal disclaimer follows: "This electronic signature above is the legally binding equivalent to a handwritten signature. Whenever you execute an electronic signature, it has the". There are two input fields: "Username" with a person icon and "Password" with a key icon. Below these are two buttons: "Login" and "Clock In". At the bottom, it says "© 2024 Accel Consulting, LLC".

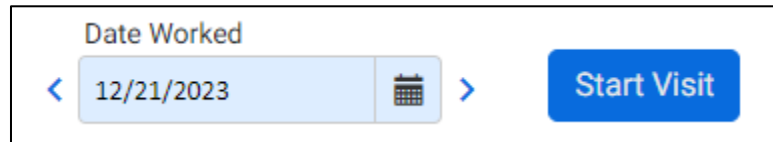
Upon logging into AccelTrax, you will be taken directly to the report work screen.



The report work screen has a blue header with a menu icon and "Direct Care". Below the header, there is a "Date Worked" section with a date picker set to "12/21/2023" and a "Start Visit" button. Below that, it shows "Total Hours: 0.00". At the bottom, there is a table with columns: "Actions", "Consumer", "Start", "End", "Task Code", and "Goals". The table currently displays "No records to display".

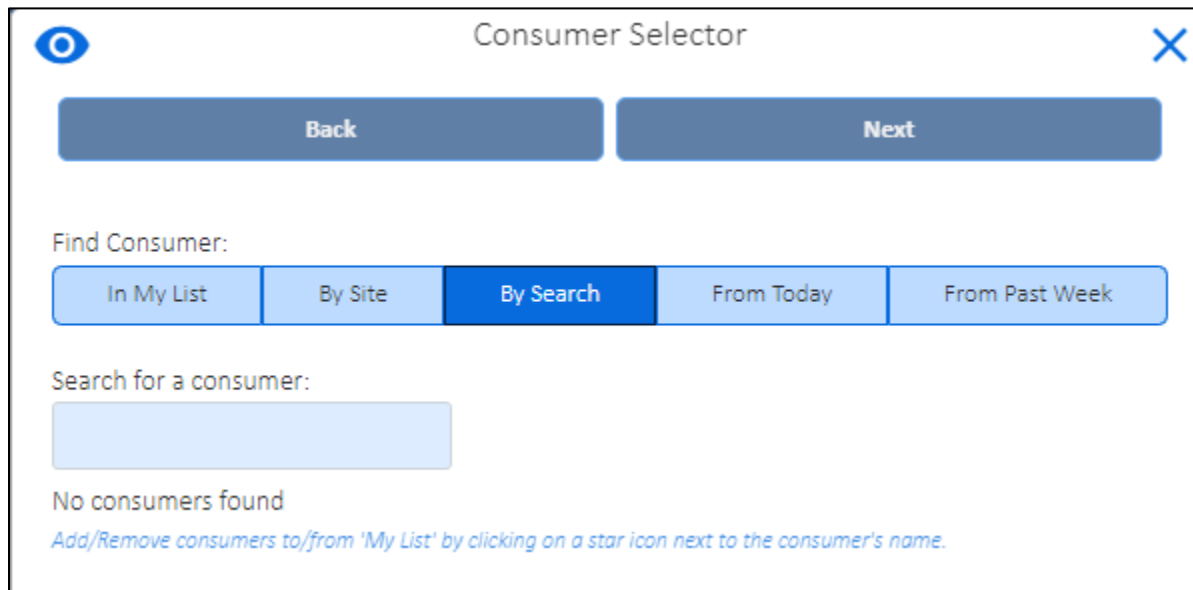
| Actions               | Consumer | Start | End | Task Code | Goals |
|-----------------------|----------|-------|-----|-----------|-------|
| No records to display |          |       |     |           |       |

1. Select the **Date Worked** at the top of the screen. This will default to the current date. You are able to change it by clicking on the calendar icon.



The screenshot shows a 'Date Worked' field with a calendar icon and a 'Start Visit' button. The date displayed is 12/21/2023.

2. Click the **Start Visit** button.







The screenshot shows the 'Consumer Selector' window. It has a 'Back' button and a 'Next' button. Below these are search options: 'In My List', 'By Site', 'By Search', 'From Today', and 'From Past Week'. The 'By Search' option is selected. Below the search options is a search box with the text 'Search for a consumer:'. Below the search box is the text 'No consumers found' and a note: 'Add/Remove consumers to/from 'My List' by clicking on a star icon next to the consumer's name.'

3. In the Consumer Selector, click on the name of the consumer(s) that you are working with. You may select by your User List, By Site, by Search, by people that you have worked with Today, or people that you have worked with in the past week.
  - a. **In My List** is a list of consumers that you work with on a regular basis. To add consumers to My List, click on the **Search** option. Enter the first three letters of the consumer's last name, or the Consumer Number to populate the consumers who fit that criterion. Once you have found your client, click on their name and then, where they are listed at the bottom of the screen, click on the star to the right of their name. They will then appear under In My List. *Note: you are only able to add clients to My List from the Search tab.*
  - b. **By Site** – Use the drop-downs to select the Site Type and Site Name. This will populate a list of consumers within the chosen site.
  - c. **Search** – Enter the consumer's last name or Consumer Number, then click **Search**. The consumers that match your information will be listed below the Search box.
  - d. **Today** – This displays the consumers that you have worked with on the current date.
  - e. **Past Week** – This displays a list of the consumers that you have worked with in the past week.
4. The consumers that you have chosen will appear in the Already Selected list at the bottom of the window.
5. Once you have selected your consumer(s), click **Next** at the top of the window.

- Select the **Task Code** of the service that you are providing. Click on the **h**, **mm**, and **AM** to select the Time Started.
- You may enter the Time Ended and/or Note.

- Once you have your default information entered, click **Next** at the top of the window. This will take you back to the Report Work screen where you will see a work record for each of the consumers selected.

| Total Hours: 2.25 (2 hours and 15.00 minutes)   |           |          |          |           |  |                          |
|---|-----------|----------|----------|-----------|--|--------------------------|
| Actions   | Consumer  | Start    | End      | Task Code | Goals  | Note                     |
|   | Solo, Han | 08:00 AM | 10:15 AM | 5002      | 1 Selected  | <a href="#">Add Note</a> |

- Click on the pencil icon  to the left of the work segment, or double click on the record, to edit, add, or change information in the work record.
- If any red **X**'s or red boxes appear, this is required information that you must enter before submitting your work.

Eye icon Edit visit for Solo, Han X icon

*This consumer has no goals assigned for the selected task code.*

Segment Information Service Note

Time Started: 7 : 00 AM

Time Ended: h : mm AM

Task Codes

6001 - Fac Hab Individual ▼


11. You may navigate through the work record from Segment Information to Service Note to Goal by clicking **Next** or **Back** at the bottom of the screen.
12. Enter the Service Note, or the detailed information on what happened during this time, by clicking on the **Service Note** tab at the top of the window.
13. Make sure to add the **Service Note** as this is a required field.









Eye icon Edit visit for Solo, Han X icon

Segment Information Service Note Goals

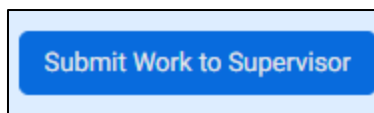
Service Note:

[Empty text area for Service Note]

14. Once you have created a work record, you are able to **Copy** it rather than going through the process of selecting a new consumer, task, etc. To do this, click on the paper icon  to the left of the work line in the Actions column. This will create a new work record with the same consumer and task. The ending time of the previous work record will be the start time of the new one.

| Total Hours: 2.25 (2 hours and 15.00 minutes)   |           |          |          |           |  |                          |
|---|-----------|----------|----------|-----------|--|--------------------------|
| Actions   | Consumer  | Start    | End      | Task Code | Goals  | Note                     |
|    | Solo, Han | 08:00 AM | 10:15 AM | 5002      | 1 Selected  | test note                |
|    | Solo, Han | 10:15 AM |          | 5002      | 0 Selected  | <a href="#">Add Note</a> |

15. Once you have all of your work records for the day entered, click **Submit Work to Supervisor** in the bottom left corner of the screen.



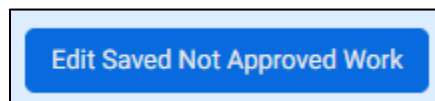
You will be directed to the Mileage screen.

| Add Reimbursable Miles |          |          |                |              |             |         |
|------------------------|----------|----------|----------------|--------------|-------------|---------|
| Consumer Shares        | Start    | End      | Odometer Start | Odometer End | Staff Miles | Comment |
| Solo, Han              | 08:00 AM | 10:15 AM | 0              | 0            | 0           |         |


- 16. If you have any mileage to report, enter the **Odometer Start** and **Odometer End**. The number of miles will calculate automatically.
- 17. Once you have entered your mileage, or if you have no mileage to report, click on the **Continue Submit Work to Supervisor** button at the bottom left of the screen.
- 18. You will get a notification that your work has been submitted successfully and the work record will be blue.

### Editing Unapproved Saved Time

If you need to edit work once it has been saved and before it has been approved, click on **Edit Saved Not Approved Work** in the bottom left of the screen.



**Make sure to Submit your work again so that your supervisor has access to it for approval.**

You can tell if a work record has been approved by hovering over the  icon to the left of the line or if the line is green.