

How to Export Timesheet Files for Advisor

Connect a Voice
1060 Kingsmill Pkwy,
Columbus, OH 43229



Overview

Timesheets can be exported out of Connect a Voice and imported into Advisor's Single-Entry billing system with just a few clicks. This guide is made to walk you through each step of the process.

In order to import Timesheets into Advisor, you will need to have the following information inputted into Connect a Voice:

- Staff ID
- Consumer ID (also called "Consumer Provider ID" or the "Billing Number")
- Location ID (also called the "GL Code")
- Engagement Levels (also called "Word Codes")

The above information only needs to be entered once and can be entered retroactively. These records must match what you have entered into Advisor.

You can contact Connect a Voice at support@connectavoice.com for more information.

Step 1: Collect Time Records

Allow your staff to work as usual. Time records are recorded into Connect a Voice in real time so that you have instant access to billing information.

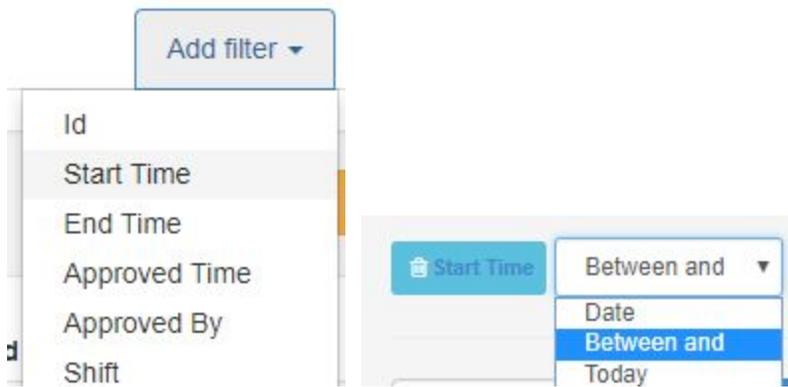
Step 2: Filter Timesheets

To find Timesheets, navigate to the Timesheets section in the Admin Portal.

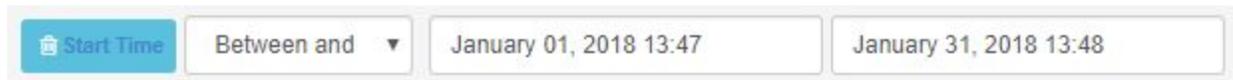


Once in the Timesheets section, you can apply filters to find exactly what you're looking for. First, filter by Start Time to show only the period of time which you want to see.

You can modify the filter to "between and" to view a range of dates rather than just one date.

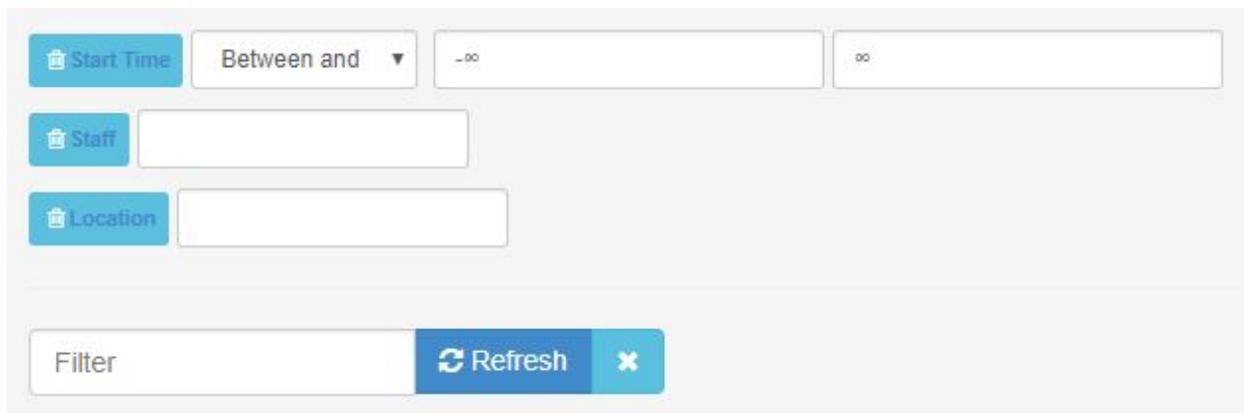


You can use the calendar picker to pick the dates you want to view. For example, if you wanted to see all Timesheets from January 1st to January 31st, you would pick “January 1st” for the first box and “January 31st” for the second box.



Don't worry about the times on the end. They will not affect your filter. The filter will pick up all start times from the *date* you chose.

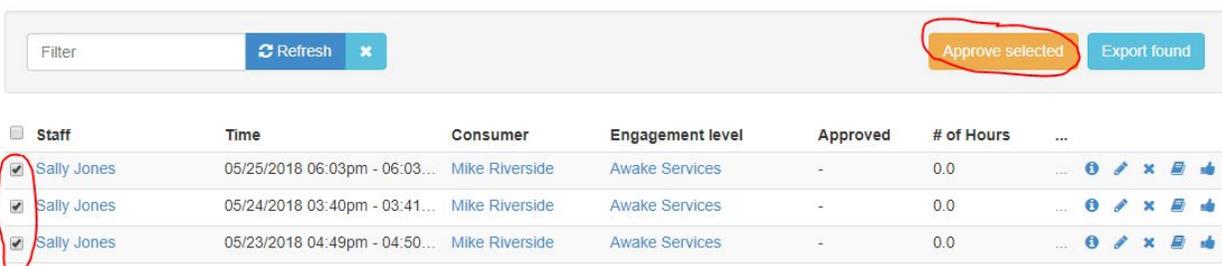
You can also filter a specific Location, Consumer, and Staff Member. You can have multiple filters at once to see more specific results. Just apply the filters and click “Refresh.”



Step 3: Review & Approve Timesheets

We recommend checking timesheets every day to make sure staff are logging their correct time at the correct locations. We find that the earlier you can catch errors in Timesheets, the easier it is to correct them.

When reviewing, confirm the timesheet is correct. If not, you can make proper edits by clicking the Edit button . If the Timesheet is correct, you can approve it by either clicking the Approve button,  or by selecting multiple Timesheets and clicking the “Approve Selected” button.



Staff	Time	Consumer	Engagement level	Approved	# of Hours	...
<input checked="" type="checkbox"/> Sally Jones	05/25/2018 06:03pm - 06:03...	Mike Riverside	Awake Services	-	0.0	...     
<input checked="" type="checkbox"/> Sally Jones	05/24/2018 03:40pm - 03:41...	Mike Riverside	Awake Services	-	0.0	...     
<input checked="" type="checkbox"/> Sally Jones	05/23/2018 04:49pm - 04:50...	Mike Riverside	Awake Services	-	0.0	...     

Important: Timesheets cannot be imported into Advisor if they are not approved.

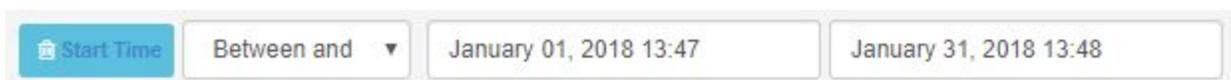
To see if there are any timesheets that have not been approved, you can add the filter “Approved Time” and switch it to “Is blank” and click “Refresh.” This will show only timesheets that have not been approved by admins.



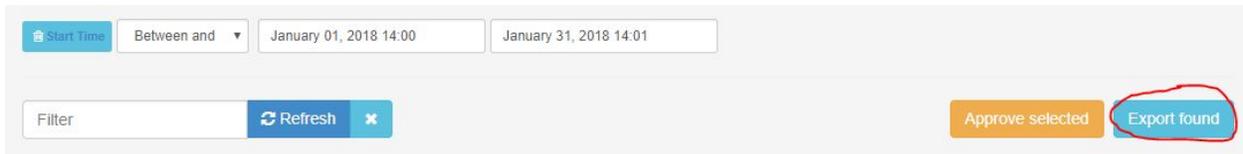
Step 4: Export Your Filtered Results

After you have reviewed and approved all your Timesheets, you can export them to your Advisor file.

To do so, you can apply your filter for the period you want to export. For example if I wanted to export only the Timesheets from January 1st to January 31st, I would simply apply the filter just like the previous steps.

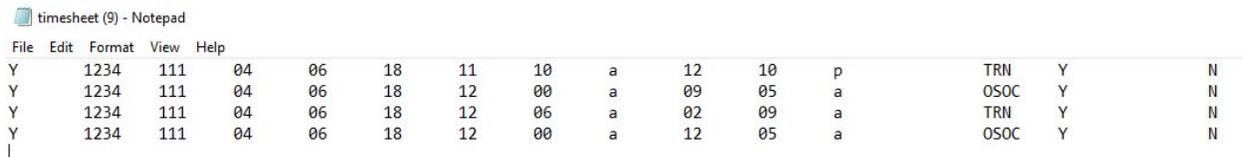


Once I have my proper filters, click the “Export Found” button. This will export all the Timesheets that fit your filters.



Your browser will download a file called “timesheet.txt” but it can be renamed to whatever works best for you. Make sure you save it to a location that is easy to find again such as the Downloads folder or the Desktop.

If you open the file, it may look like nonsense. That’s okay. The file is supposed to be read by a computer and not a human. The file should look something like this:



Step 5: Import the File into Advisor’s Single-Entry

Open up Advisor and navigate to their Single-Entry Import section.

Select the billing period for which you want to submit and select “File” where it asks for Import Type. Once you select File from the dropdown, it should ask you select your file. Select the file you downloaded and it will import into Advisor.

If there are no errors, Advisor will ask if you would like to send to Single-Entry. Click yes.

If there are errors, correct them and re-upload. Advisor should tell you where the errors occur. Common errors include:

- Incorrect Billing Period
 - This typically happens when you try to import Timesheets that are outside of the billing period you selected.
 - Simply correct the billing period in Advisor or re-filter the Timesheets in Connect a Voice to the correct dates and re-download.
- Missing Staff ID

- This happens when a Timesheet is imported from a Staff Member that doesn't have a Staff ID in Connect a Voice or does not match what is in Advisor.
- Simply double check the Staff ID in Advisor and go back into Connect a Voice, find the Staff Member, update their Staff ID, and re-download the file.
- Missing Consumer ID
 - This happens when a Timesheet is imported from a Consumer that doesn't have a Consumer ID in Connect a Voice or does not match what is in Advisor.
 - Simply double check the Consumer ID in Advisor and go back into Connect a Voice, find the Consumer, update their Consumer Provider ID Number, and re-download the file.
- Missing Location ID
 - This happens when a Timesheet is imported from a Location that doesn't have a Location ID in Connect a Voice or does not match what is in Advisor.
 - Simply double check the Location ID or GL Code in Advisor and go back into Connect a Voice, find the Location, update its Location ID, and re-download the file.

Step 6: Confirm with Advisor that the Timesheets were accepted correctly

Keep an eye on Advisor to make sure times were correctly billed and paid for the first few times you run the import. We want to ensure you are billing and paying for correct times. If you experience any issues, please let us know by contacting support@connectavoice.com