

Staff – Entry Status Quick Reference Guide



Purpose: This Quick Reference Guide covers the different time and mileage statuses an entry can have in OR PTC DCI, and what actions a staff member or provider can take for each status.

Outcome: Staff are aware of the entry statuses and what actions are available.

Entries		Available Actions	
Status	Description	Providers can do the following: (Employee)	Staff can do the following: (Supervisor Role)
Open	An active entry (clock in has occurred but not clock out).	<ul style="list-style-type: none"> View 	<ul style="list-style-type: none"> View Reject
Unverified	An entry that was created or edited while in a pending status by a staff member on behalf of a provider. <div style="border: 2px solid orange; padding: 5px; margin-top: 10px;"> <p>Note: These entries <u>must</u> be verified by the provider or <u>another</u> staff member to initiate the approval process.</p> </div>	<ul style="list-style-type: none"> View Verify Reject 	<ul style="list-style-type: none"> View Verify* Reject <p><i>*If they did not create/edit the entry</i></p>
Pending	An entry that has been successfully saved and is waiting for review (through the automated approval process).	<ul style="list-style-type: none"> View Edit Reject 	<ul style="list-style-type: none"> View Approve Edit Reject
Approved	An entry that has been approved by either auto-approval or manually by a staff member.	<ul style="list-style-type: none"> View 	<ul style="list-style-type: none"> View Edit Cancel
Batched	An approved entry that was pulled in a pending payroll batch.	<ul style="list-style-type: none"> View 	<ul style="list-style-type: none"> View Edit Cancel
Processed	An approved entry that was pulled into a processed payroll batch.	<ul style="list-style-type: none"> View 	<ul style="list-style-type: none"> View Edit Cancel

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Status	Description	Providers can do the following: (Employee)	Staff can do the following: (Supervisor Role)
Rejected	An entry that fails a business rule(s) will automatically reject, or upon review, is otherwise inaccurate and while in a pending status, the entry is manually rejected by the provider, a staff member, or the consumer.	<ul style="list-style-type: none"> View 	<ul style="list-style-type: none"> View
Canceled	<p>An approved entry that crosses the midnight hour. Once approved, the original entry is shown as canceled and the system creates new entries to reflect each calendar day (ending time – 11:59pm and 12:00 am – starting time).</p> <div style="border: 2px solid orange; padding: 5px;"> <p>Note: When an entry is manually canceled, the status does not change to canceled. The status remains the same, the entry is flagged as compensated, and a new entry for a negative amount is created to counter the original entry.</p> </div>	<ul style="list-style-type: none"> View 	<ul style="list-style-type: none"> View