Time Entry - Account Type Client Transportation

Description: In this topic, the user will learn about the client transportation account type. Client transportation account type is associated with a service code, authorization, and a client. This account type is based on service code settings and can be payable or non-payable, billable or non-billable, and the unit type is miles (unit type dollars can be used as well). The client transportation account type is used when the employee is driving a client (while on the clock for an hourly shift) and needs to track those miles specific to the client and the authorization. Punch entries can be entered in real time in the mobile app or historically in the web portal.

*Please note: When entering a punch entry for mileage in the mobile app for multiple stops, follow the steps below in the Enter Client Transportation Punch in the Mobile App section, for each stop. If Start Client Transportation and End Client Transportation are not clicked for each stop, the mileage will be inaccurate as round-trip is not calculated.

Role Required: Employee (base user)

Permission Required: N/A

Enter a Client Transportation Punch in the Mobile App

1. Log in to the DCI mobile app
2. Click the blue **Clock In** button on the Dashboard
    a. If the Continue to Clock Out button is displayed, this means the user did not clock out of their last shift and must complete the clock out process before clocking in again.
    b. The Clock In button will not display if the user has an open shift
3. Complete the Clock In page
    a. Client - If there is only one client the field will auto-populate. If the user provides service to more than one client, click on the field and then select the client from the list.
    b. Service Code - If there is only one service code the field will auto-populate. If there is more than one service code, click on the field and then select the service code from the list.
    c. Cost Center - The cost center will auto-populate
4. Click **Continue**
5. Click **Confirm Clock In**
6. Click **Start Client Transportation**
7. Select the service code **Client Transportation** from the drop-down and click **Ok**
8. Click **Continue**
9. Click **Confirm** to acknowledge the alert "Please select your Client Transportation start location for accurate map route."
    a. This feature is integrated with Google Maps. The current Google Map location will display.
10. Click **Confirm** to validate that the map location is correct
    a. The starting location is marked on the map with a pinpoint labeled A
    b. The mileage is now being recorded from the confirmed location
11. Click **End** when arrived at the destination
12. Click **Confirm** to acknowledge the Alert - "Are you sure you want to End Client Transportation?"
13. Click **Confirm** to acknowledge the Alert - "Please select your Client Transportation end location for accurate map route."
    a. This feature is integrated with Google Maps. The Google Map location will display.
14. Click **Confirm** to validate that the map location is correct
    a. The ending location is marked on the map with a pinpoint labeled B
15. The Client Transportation entry will state "The drive session was ended here. You have driven ___ miles in ___ minutes." It will display:
    a. Estimated mileage (miles driven)
    b. Estimated Travel Time (minutes)
    c. Recaps Client
    d. Recaps Service Account
16. Click **Continue to Clock Out**

Enter a Client Transportation Punch in the Web Portal

1. Login to the DCI web portal
2. Click the blue **Add Entry** button on the Dashboard
3. Complete the **Add New Entry** form wizard
    a. Entry Type: Punch defaults
    b. Employee Name: Auto-populates the name of the employee logged in
    c. Account Type: Select **Client Transportation** from the drop-down list
    d. Client: Type and select the client name from list
    e. Service Code: Click the drop-down and select **Client Transportation**
    f. Service Date: The date the driving took place. Please ensure that it is within the acceptable date range of the organization.
    g. Remaining Balance: Authorization remaining balance may be visible as determined by the organization
    h. EVV Method: Click the drop-down and select **Portal Signoff**
    i. Starting Odometer Reading: Enter the starting odometer
        i. Some programs allow the starting odometer to be 0
    j. Ending Odometer Reading: Enter the ending odometer
        i. Some programs allow this to be the number of miles driven
    k. Calculated No. of Miles: The system will subtract the Ending Odometer Reading from the Starting Odometer Reading field to total the miles driven for the entry
    l. Notes (optional): Enter notes per organizational requirements
    m. Attachment (optional): Click the blue Add Attachment hyperlink to add an attachment
4. Click **Save** and **Yes** to confirm

Related articles

- Messaging Module - Navigation - Mobile App
- Messaging Module - Navigation - Web Portal
- Message - Send a Message
- Authorization Remaining Balances as Time in the Mobile App
- Mobile App - Logging into the Mobile App