

CASE MANAGER/SERVICE COORDINATOR - PORTAL INSTRUCTIONS CREATING YOUR NEW USER AND LOGGING ONTO THE PORTAL

Go to the website at: <https://fwportal.wegnercpas.com/>

*****TIME SHOULD BE ENTERED EVERY TWO WEEKS OR MONTHLY AT MINIMUM*****

CREATING YOUR NEW USER ACCOUNT

The screenshot shows the 'Select Company' section with a dropdown menu for 'Company' set to 'FW Consulting - DHFS, LLC'. Below this is the 'Login to ESS Portal' section with fields for 'User Name or Employee ID' and 'Password', both marked with a red asterisk. There is a 'Login' button and a 'Forgot Password' link. Below the login section, there is an 'OR' separator and a 'Create New User' button, which is highlighted with a red rectangular box.

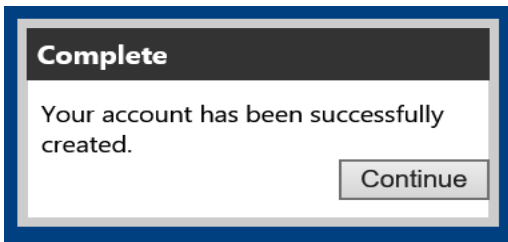
1. From the Company drop down menu, select FW Consulting – DHFS LLC.

2. Click on “Create New User”.

The screenshot shows the 'Create ESS Account' form. It has a 'Help' icon in the top right. The form contains the following fields: 'Username:', 'Employee ID:', 'PIN:', 'New Password:', 'Confirm Password:', 'Last 4 SSN:', and 'Zip Code:'. At the bottom of the form, there are two buttons: 'Create User' and 'Cancel'. The 'Create User' button is highlighted with a red rectangular box.

3. **Username:** Enter a Username that you will remember.
4. **Employee ID:** This is the Employee ID number provided in your email.
5. **PIN:** This is the PIN number provided in your email. This PIN number can only be used **one** time.
6. **New Password:** Enter a password that you will remember. (Passwords must be between 8 and 20 characters, have at least one capital and lower case letter, one number and one special character - @!#\$%^&*).
7. **Confirm Password:** Reenter the password.
8. **Last 4 SSN:** PLEASE USE THE NUMBERS 1234 FOR YOUR SOCIAL SECURITY NUMBER.
9. **Zip Code:** PLEASE USE THE NUMBER 12345 FOR YOUR ZIP CODE.

10. Click “Create User”.



11. Click “Continue”. This will take you back to the **Login Screen**.

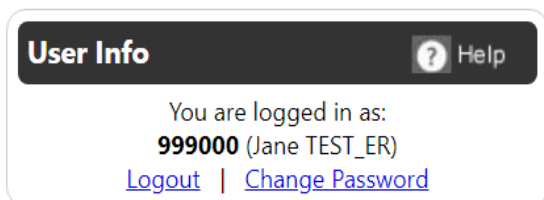
LOGGING ONTO THE PORTAL

12. From the Company drop down menu, select FW Consulting – DHFS LLC.

13. Enter the username you created or your Employee ID.
NOTE: Your Employee ID will work with the password if you forget your user name.

14. Enter the password you created.

15. Click “Login”.



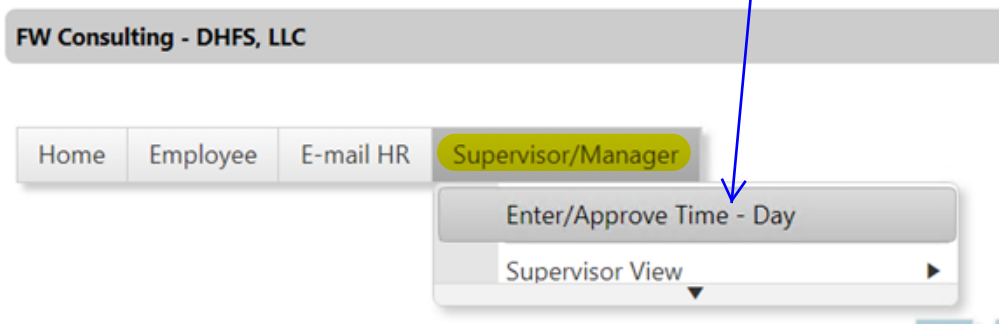
NOTES:

Your Case Manager-Service Coordinator/Username will be listed in the top right corner of your Home screen in the **User Info Section**

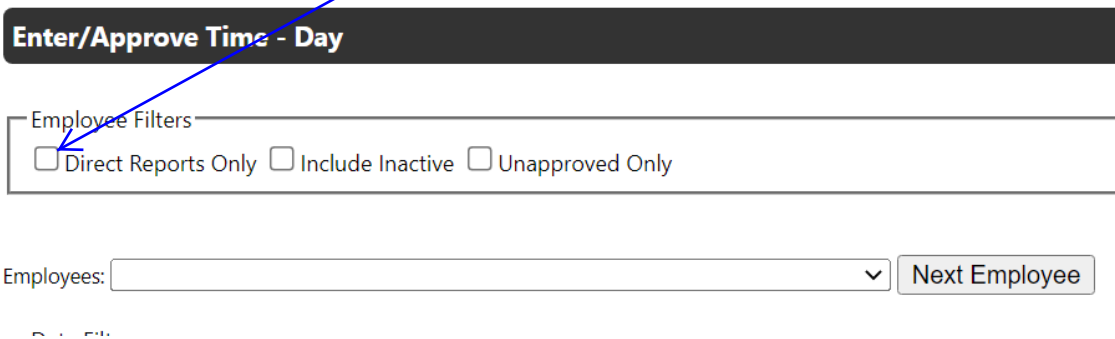
Please keep your Username, Employee ID and Password in a safe place for reference.

How to Enter Time

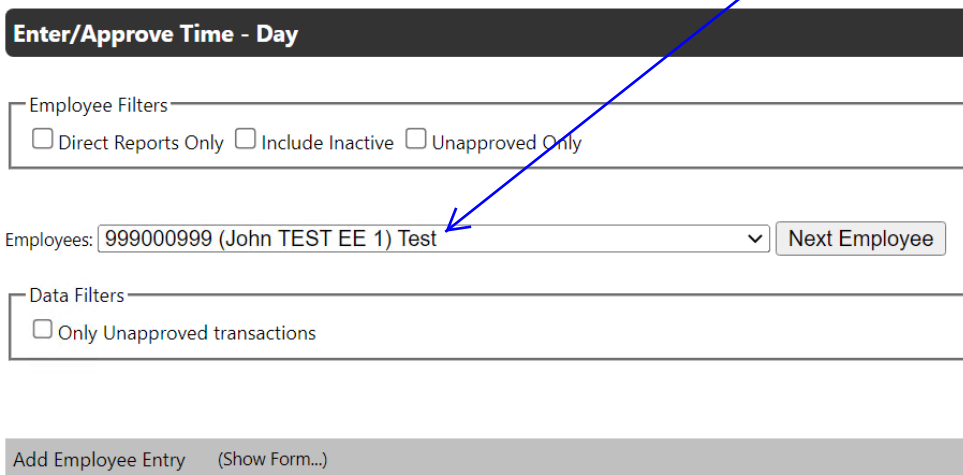
1. Click on Supervisor/Manager Tab and then in the drop down box click on Enter/Approve Time-Day



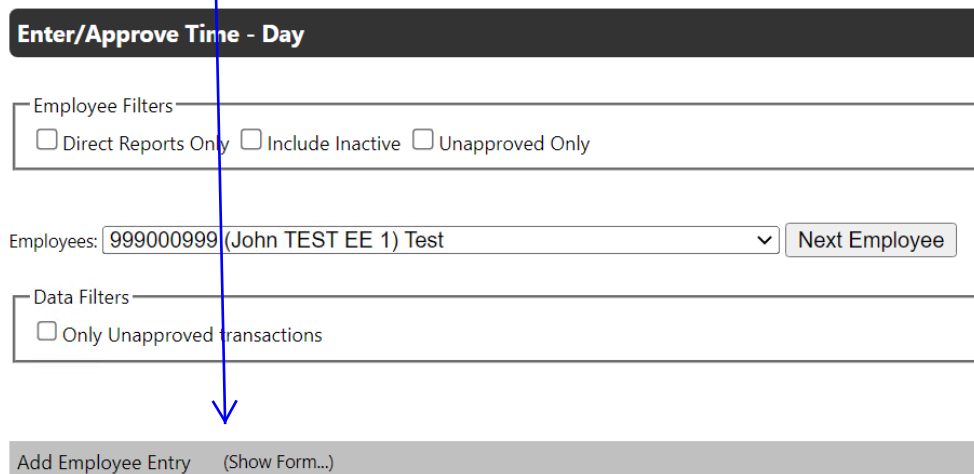
2. Under Employee Filters, UNCHECK the "Direct Reports Only" Box



3. Choose the Employee's Name from the Employees Drop Down Box.



4. Click on "Show Form"



5. Enter the date your employee provided the services. Select your Service Code from the Earnings Type drop down menu. Enter the total hours worked for that day. Click "Add Entry" when complete.

Add Employee Entry (Hide Form...)

Date:

Earnings Type:

Hours/Sales/Qty:

Transaction Classifications

Trans Class 1:

Add Entry

Confirm date is correct

Select service type from earnings drop down box

Enter total hours worked for the day. *If you provide transportation services, please log the total number of miles for the day in whole numbers.

Do NOT change the information in the Trans Class 1 box. Leave as is and/or leave blank

NOTES:

- Hours must be entered for **each** day the service was provided.
 - Hours must be rounded to the nearest **quarter hour** (i.e .25 for 15 min, .50 for 30 min and .75 for 45 min.)
 - Hours that are entered in "minutes" and not quarter hours will be rounded DOWN to the closest quarter hour.
 - If your services were for a **day period or overnight period**, use the earnings type for **"DAY/Overnight"** and use **"1"** for the number of hours worked for that DAY/Overnight.
 - The entry will be rejected if more than 24 hours are entered for one day.
 - *****Transportation services, please log the total number of miles for the entire day in whole numbers.**
 - *****TIME SHOULD BE ENTERED EVERY TWO WEEKS OR MONTHLY AT MINIMUM**
 -
6. Repeat Step number 5 until you have entered all of the days and hours worked.

7. Entered time will display at the bottom of the screen. Confirm all dates have a checkmark in the Approved Column.

	Approved	Date	T1005U2-Respite Hrly	S9125U2-Respite-Day/Overnight	Trans Class1	Employee Entered
Edit Delete	<input checked="" type="checkbox"/>	2/6/2023	5.00	0.00	052023	
Edit Delete	<input checked="" type="checkbox"/>	2/7/2023	0.00	1.00	052023	
Edit Delete	<input checked="" type="checkbox"/>	2/8/2023	3.00	0.00	052023	

OR, you can click "View all Entries" to via a PDF document of all time entered.

2/28/23 7:35:36 AM

FW Consulting - DHFS, LLC
Employee Time Entries

Day of Week	Date	Feature	Hours	Trans Class 1	Trans Class1 Description	Approved?
CLIENT: TEST						
EMPLOYEE: 99900999 - John TEST EE 1						
Tuesday	02/07/23	T1005U2-Respite care in-home	3.50	042023	02-16-2023 - 02-28-2023	True
Wednesday	02/08/23	S9125U2-Respite Day/Overnight	1.00	042023	02-16-2023 - 02-28-2023	True
Thursday	02/09/23	T1005U2-Respite care in-home	8.00	042023	02-16-2023 - 02-28-2023	True
			<u>12.50</u>			
		CLIENT TOTAL:	<u>12.50</u>			
		REPORT TOTAL:	<u>12.50</u>			

REMINDERS:

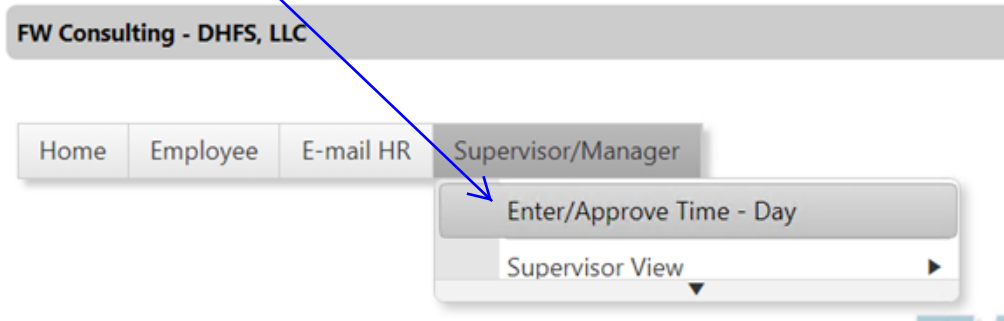
Time entries must be approved by **5:00PM on the deadline date**. (Refer to payroll calendar). Any time entries approved after the 5:00PM deadline will **NOT** be pulled from the Portal for payroll processing.

Time entries rejected for payment by WPS will **NOT** be paid until funds are received from WPS.

Please confirm that authorizations are on file at WPS for your Consumer and Providers' services.

How to Approve Time if your employee enters their own time on the Portal

1. Click on Supervisor/Manager Tab, then in the drop down click "Enter/Approve Time-Day"



2. Uncheck "direct reports only" box and then choose the Employee's Name from the Employees Drop Down Box.

Enter/Approve Time - Day

Employee Filters

Direct Reports Only Include Inactive Unapproved Only

Employees: 999000999 (John TEST EE 1) Test

Data Filters

Only Unapproved transactions

Add Employee Entry (Show Form...)

3. The employee's un-approved time entries will display on the screen.

	Approved	Date	T2017-Daily Living - Hourly	T1005U2-Respite Hrly	Trans Class1	Employee Entered
Edit Delete	<input type="checkbox"/>	2/1/2023	2.50	0.00	202021	09:57:45 Sunday, February 26, 2023
Edit Delete	<input type="checkbox"/>	2/4/2023	5.25	0.00	202021	09:58:25 Sunday, February 26, 2023
Edit Delete	<input type="checkbox"/>	2/8/2023	2.00	0.00	202021	09:58:57 Sunday, February 26, 2023
Edit Delete	<input type="checkbox"/>	2/12/2023	5.75	0.00	202021	10:00:10 Sunday, February 26, 2023
Edit Delete	<input type="checkbox"/>	2/16/2023	0.00	3.00	202021	10:02:34 Sunday, February 26, 2023
Edit Delete	<input type="checkbox"/>	2/19/2023	0.00	5.25	202021	10:03:06 Sunday, February 26, 2023
Edit Delete	<input type="checkbox"/>	2/25/2023	4.50	0.00	202021	10:03:41 Sunday, February 26, 2023

4. Review the employee's time entries. Click the "Approve All" button. After clicking on "Approve All", check marks will show in the Approved Column.

	Approved	Date	T2017-Daily Living - Hourly	T1005U2-Respite Hrly	Trans Class1	Employee Entered
Edit Delete	<input checked="" type="checkbox"/>	2/1/2023	2.50	0.00	202021	09:57:45 Sunday, February 26, 2023
Edit Delete	<input checked="" type="checkbox"/>	2/4/2023	5.25	0.00	202021	09:58:25 Sunday, February 26, 2023
Edit Delete	<input checked="" type="checkbox"/>	2/8/2023	2.00	0.00	202021	09:58:57 Sunday, February 26, 2023
Edit Delete	<input checked="" type="checkbox"/>	2/12/2023	5.75	0.00	202021	10:00:10 Sunday, February 26, 2023
Edit Delete	<input checked="" type="checkbox"/>	2/16/2023	0.00	3.00	202021	10:02:34 Sunday, February 26, 2023
Edit Delete	<input checked="" type="checkbox"/>	2/19/2023	0.00	5.25	202021	10:03:06 Sunday, February 26, 2023
Edit Delete	<input checked="" type="checkbox"/>	2/25/2023	4.50	0.00	202021	10:03:41 Sunday, February 26, 2023

5. All information has been automatically saved and will be pulled for payroll processing. Log-out of the Portal.

FWCONSULTING DHFS PORTAL – FREQUENTLY ASKED QUESTIONS

WHAT IS THE PORTAL ADDRESS FOR TIME ENTRY?

<https://fwportal.wegnercpas.com/>

WHAT IS MY USER ID AND PASSWORD?

If you cannot remember your passwords, you can use the [reset password](#) link to create a new password. Be sure to store your Employee ID and password in a safe place for future reference.

You will need the following information to reset your password:

Employee ID:

Last 4 of your SSN: If you are the **EMPLOYER**, you will use "1234" for your child's SSN.

Your Zip Code:

WHEN ARE TIMESHEETS DUE? WHEN WILL I BE PAID?

Payroll is paid on/around the 15th and the last day of each month. Deadlines and pay dates are listed on the Portal website. Time must be entered and approved before 5:00PM on the 1st and 16th of each month to be paid on the upcoming payroll. Time not entered and approved WILL NOT be processed until the following payroll. After you have entered your hours, remind your family or approver to log on and approve your hours.

HOW DO I ENTER MY TIME? WHAT IF I WORKED ALL DAY OR OVERNIGHT?

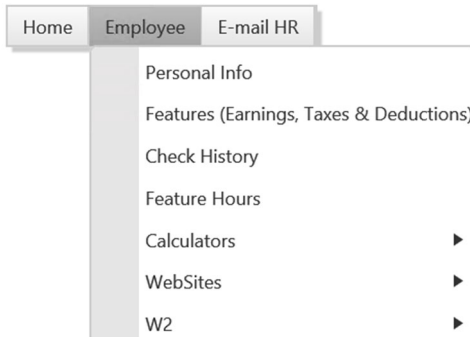
Hours must be entered for each day the service was provided. Time must be entered to the nearest quarter hour (i.e .25 for 15 min, .50 for 30 min and .75 for 45 min. If your service code is a "DAY/OVERNIGHT" code, use the number "1" for that day. Do NOT enter the number of hours worked. Time entries will be rejected if more than 24 hours are entered for any one day.

WHY CAN'T I SEE MY HOURS ON THE PORTAL?

When the hours that have been entered and approved are pulled from the Portal for payroll processing, **they no longer appear on the Portal screen**. Once the payroll is processed and the hours are paid, **they will appear in the report on the bottom of your Portal screen entitled "Payroll Approved Entries"**. If you have already entered hours for an employee on a specific date and you try to enter hours again, the system will not allow that entry and will tell you that is a duplicate entry.

HOW DO I VIEW/PRINT MY PAYSTUB OR W2?

Log into your Portal Account and click on the EMPLOYEE TAB and choose an option.



HOW DO I CHANGE MY DIRECT DEPOSIT? HOW DO I UPDATE MY ADDRESS? HOW DO I CONTACT FW CONSULTING DHFS?

Please send all questions to help@wegnercpas.on.spiceworks.com. Be sure to include your full name, the full name of the provider and/or the first name and initial of last name for the child.



FW Consulting-DHFS
 2921 Landmark Place, Ste #300
 Madison, WI 53713

2024 CLTS WAIVER – PAYROLL SCHEDULE

PAY PERIOD END DATE	TIMESHEET DUE entered and approved by 5:00 PM	PAYROLL PAY DATE
Friday, December 15, 2023	Monday, December 18, 2023	Friday, December 29, 2023
Sunday, December 31, 2023	Tuesday, January 2, 2024	Tuesday, January 16, 2024
Monday, January 15, 2024	Tuesday, January 16, 2024	Wednesday, January 31, 2024
Wednesday, January 31, 2024	Thursday, February 1, 2024	Thursday, February 15, 2024
Thursday, February 15, 2024	Friday, February 16, 2024	Thursday, February 29, 2024
Thursday, February 29, 2024	Friday, March 1, 2024	Friday, March 15, 2024
Friday, March 15, 2024	Monday, March 18, 2024	Monday, April 1, 2024
Sunday, March 31, 2024	Monday, April 1, 2024	Monday, April 15, 2024
Monday, April 15, 2024	Tuesday, April 16, 2024	Tuesday, April 30, 2024
Tuesday, April 30, 2024	Wednesday, May 1, 2024	Wednesday, May 15, 2024
Wednesday, May 15, 2024	Thursday, May 16, 2024	Friday, May 31, 2024
Friday, May 31, 2024	Monday, June 3, 2024	Friday, June 14, 2024
Saturday, June 15, 2024	Monday, June 17, 2024	Monday, July 1, 2024
Sunday, June 30, 2024	Monday, July 1, 2024	Monday, July 15, 2024
Monday, July 15, 2024	Tuesday, July 16, 2024	Wednesday, July 31, 2024
Wednesday, July 31, 2024	Thursday, August 1, 2024	Thursday, August 15, 2024
Thursday, August 15, 2024	Friday, August 16, 2024	Friday, August 30, 2024
Saturday, August 31, 2024	Tuesday, September 3, 2024	Monday, September 16, 2024
Sunday, September 15, 2024	Monday, September 16, 2024	Monday, September 30, 2024
Monday, September 30, 2024	Tuesday, October 1, 2024	Tuesday, October 15, 2024
Tuesday, October 15, 2024	Wednesday, October 16, 2024	Thursday, October 31, 2024
Thursday, October 31, 2024	Friday, November 1, 2024	Friday, November 15, 2024
Friday, November 15, 2024	Monday, November 18, 2024	Friday, November 29, 2024
Saturday, November 30, 2024	Monday, December 2, 2024	Monday, December 16, 2024
Sunday, December 15, 2024	Monday, December 16, 2024	Tuesday, December 31, 2024
Tuesday, December 31, 2024	Thursday, January 2, 2025	Wednesday, January 15, 2025

*MLK Jr. Day = 1/15/24

*Columbus Day = 10/14/24

*Thanksgiving = 11/28/24

WEBSITE for forms and tutorials : <https://www.wegnercpas.com/services/accounting/fiscal-agent/fiscal-agent-client-portal/#forms>

PORTAL Address: fwportal.wegnercpas.com

HELPDESK email: help@wegnercpas.on.spiceworks.com