

# 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

**Select Company**

Company  
FW Consulting - DHFS, LLC

**Login to ESS Portal** ? Help

User Name or Employee ID \*

Password \*

Login [Forgot Password](#)

OR

**Create New User**

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

2. Click on “Create New User”.

**Create ESS Account** ? Help

Username:

Employee ID:

PIN:

New Password:

Confirm Password:

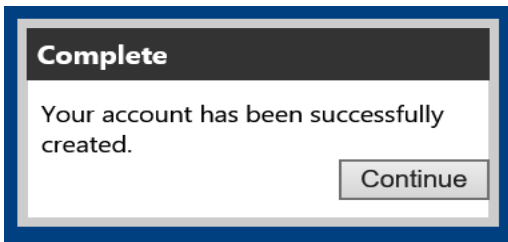
Last 4 SSN:

Zip Code:

**Create User** **Cancel**

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**.

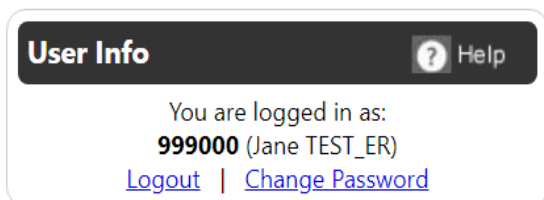
## LOGGING ONTO THE PORTAL

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”.



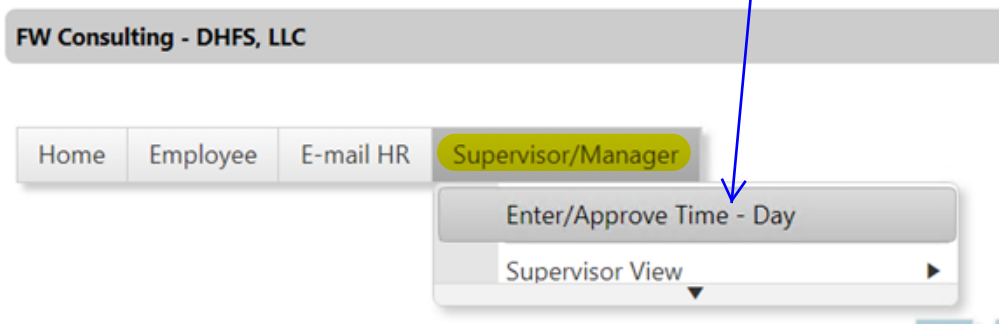
### NOTES:

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

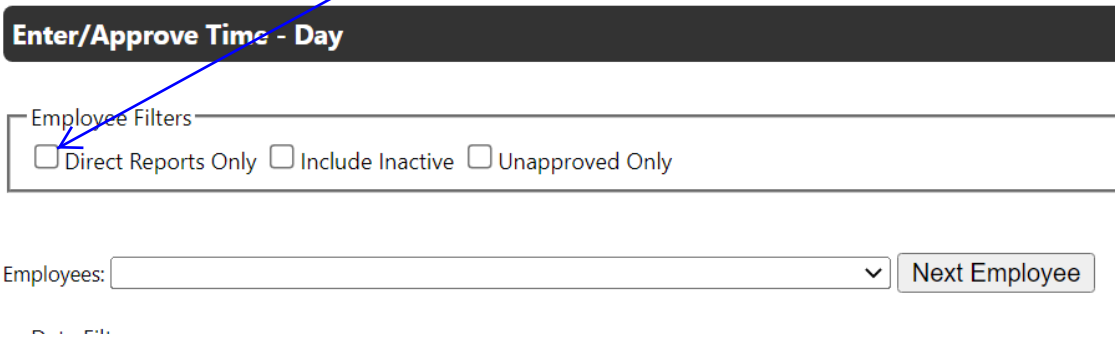
**Please keep your Username, Employee ID and Password in a safe place for reference.**

# How to Enter Time

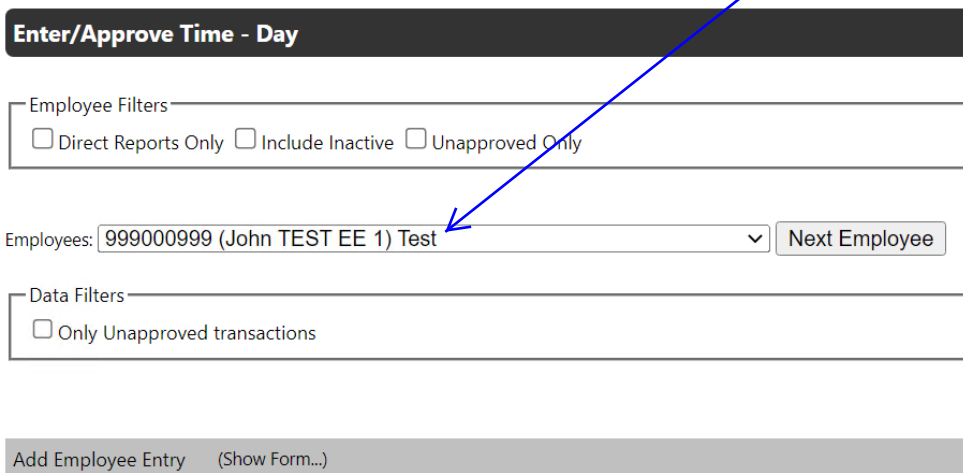
1. Click on Supervisor/Manager Tab and then in the drop down box click on Enter/Approve Time-Day



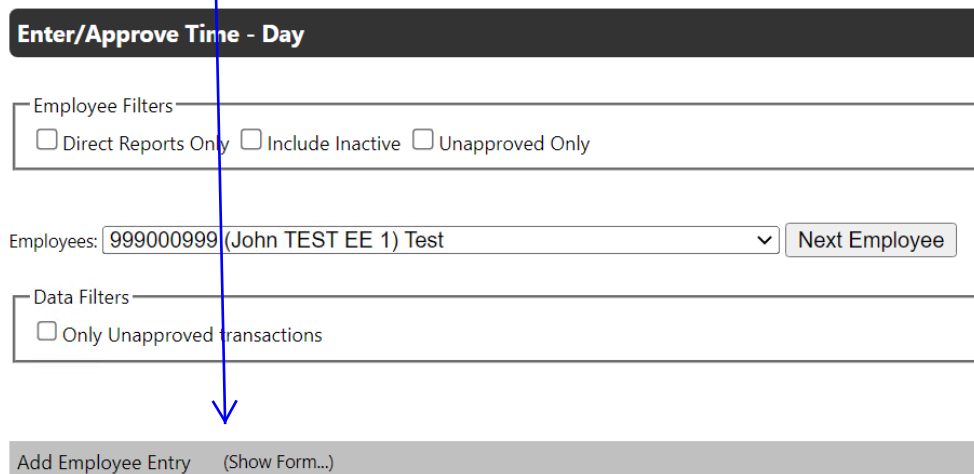
2. Under Employee Filters, UNCHECK the "Direct Reports Only" Box



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
<a href="#">Edit</a> <a href="#">Delete</a>	<input checked="" type="checkbox"/>	2/6/2023	5.00	0.00	052023	
<a href="#">Edit</a> <a href="#">Delete</a>	<input checked="" type="checkbox"/>	2/7/2023	0.00	1.00	052023	
<a href="#">Edit</a> <a href="#">Delete</a>	<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?
<b>CLIENT: TEST</b>						
<b>EMPLOYEE: 99900999 - John TEST EE 1</b>						
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>			
		<b>CLIENT TOTAL:</b>	<u>12.50</u>			
		<b>REPORT TOTAL:</b>	<u>12.50</u>			

**REMINDERS:**

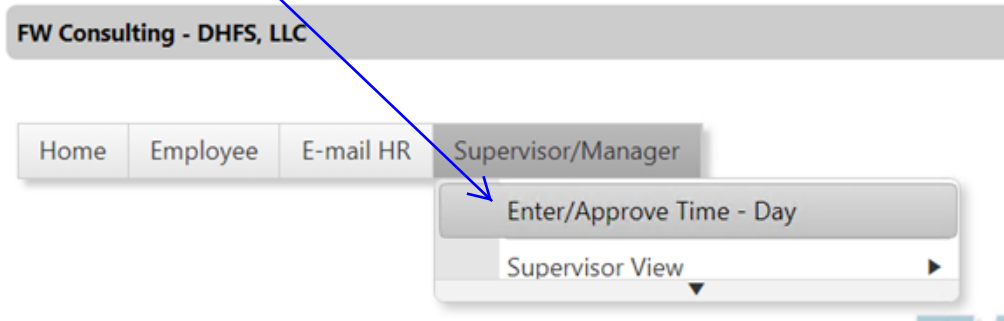
Time entries must be approved by **5:00PM on the deadline date**. (Refer to payroll calendar). Any time entries approved after the 5:00PM deadline will **NOT** be pulled from the Portal for payroll processing.

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
<a href="#">Edit</a> <a href="#">Delete</a>	<input type="checkbox"/>	2/1/2023	2.50	0.00	202021	09:57:45 Sunday, February 26, 2023
<a href="#">Edit</a> <a href="#">Delete</a>	<input type="checkbox"/>	2/4/2023	5.25	0.00	202021	09:58:25 Sunday, February 26, 2023
<a href="#">Edit</a> <a href="#">Delete</a>	<input type="checkbox"/>	2/8/2023	2.00	0.00	202021	09:58:57 Sunday, February 26, 2023
<a href="#">Edit</a> <a href="#">Delete</a>	<input type="checkbox"/>	2/12/2023	5.75	0.00	202021	10:00:10 Sunday, February 26, 2023
<a href="#">Edit</a> <a href="#">Delete</a>	<input type="checkbox"/>	2/16/2023	0.00	3.00	202021	10:02:34 Sunday, February 26, 2023
<a href="#">Edit</a> <a href="#">Delete</a>	<input type="checkbox"/>	2/19/2023	0.00	5.25	202021	10:03:06 Sunday, February 26, 2023
<a href="#">Edit</a> <a href="#">Delete</a>	<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
<a href="#">Edit</a> <a href="#">Delete</a>	<input checked="" type="checkbox"/>	2/1/2023	2.50	0.00	202021	09:57:45 Sunday, February 26, 2023
<a href="#">Edit</a> <a href="#">Delete</a>	<input checked="" type="checkbox"/>	2/4/2023	5.25	0.00	202021	09:58:25 Sunday, February 26, 2023
<a href="#">Edit</a> <a href="#">Delete</a>	<input checked="" type="checkbox"/>	2/8/2023	2.00	0.00	202021	09:58:57 Sunday, February 26, 2023
<a href="#">Edit</a> <a href="#">Delete</a>	<input checked="" type="checkbox"/>	2/12/2023	5.75	0.00	202021	10:00:10 Sunday, February 26, 2023
<a href="#">Edit</a> <a href="#">Delete</a>	<input checked="" type="checkbox"/>	2/16/2023	0.00	3.00	202021	10:02:34 Sunday, February 26, 2023
<a href="#">Edit</a> <a href="#">Delete</a>	<input checked="" type="checkbox"/>	2/19/2023	0.00	5.25	202021	10:03:06 Sunday, February 26, 2023
<a href="#">Edit</a> <a href="#">Delete</a>	<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 15<sup>th</sup> 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 1<sup>st</sup> and 16<sup>th</sup> 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?

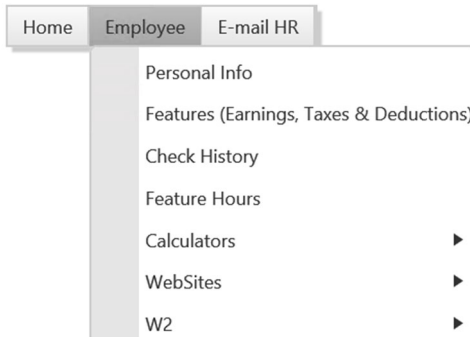
Hours must be entered for each day the service was provided. Time must be entered to the nearest quarter hour (i.e .25 for 15 min, .50 for 30 min and .75 for 45 min. If your service code is a “DAY/OVERNIGHT” code, use the number “1” for that day. Do NOT enter the number of hours worked. Time entries 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](mailto: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.