



User Guide



STUART T. WILSON CPA, PC

Fiscal Intermediary

Basic Features

SD Works is designed to replace traditional timesheets. With this app, you will be able to:

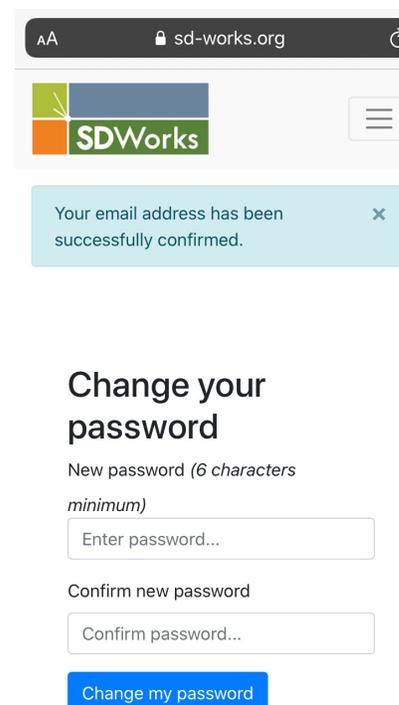
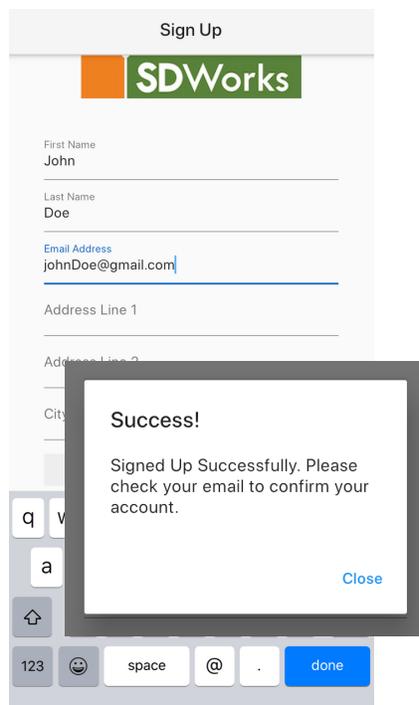
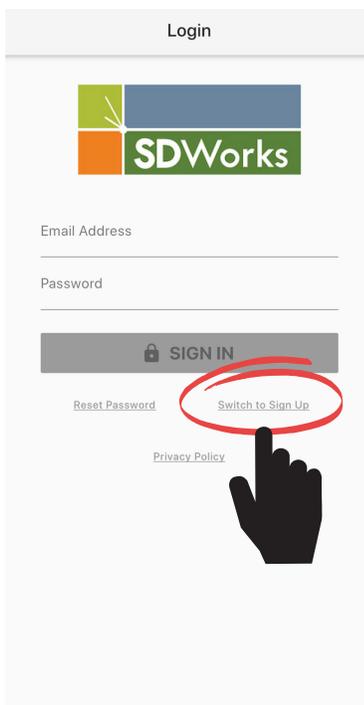
- Clock in and out of your shift in real time
- Select the service code for each shift
- Indicate the tasks, list goals, and provide a narrative for each shift
- Collect all required employee and employer signatures
- Transmit your shift information instantly
- Submit corrections to your shifts
- Contact Stuart T. Wilson, CPA, PC with questions
- Submit reimbursement forms



Getting Started

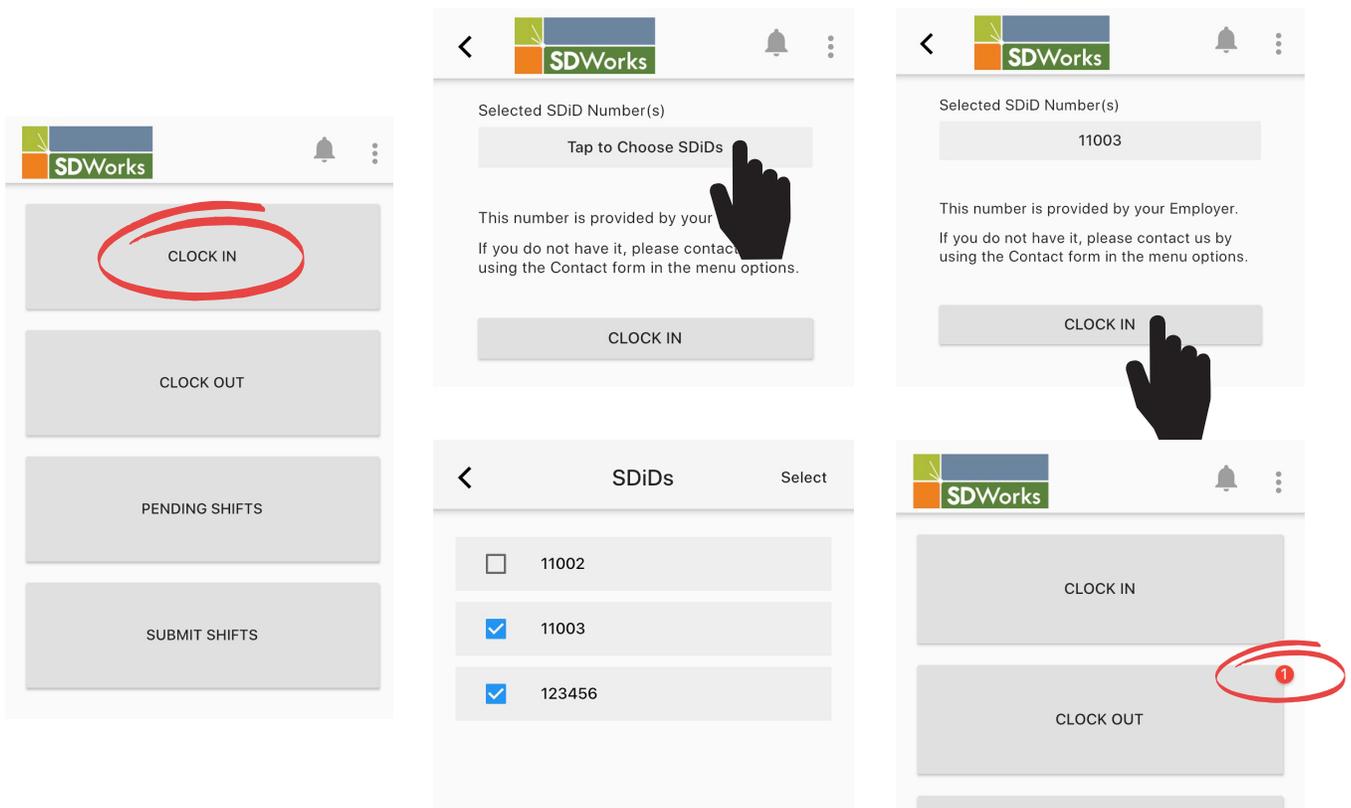
Please note that you will need a smartphone or tablet to operate SDWorks.

1. Download the SD Works app from Google Play or App Store.
2. Open the app and select "Switch to Sign Up" to create your account.
3. Enter your information in the prompted areas.
 - Please note that the address entered for your SD Works account will not change the mailing address on file with Stuart T. Wilson, CPA, PC. You may use the Contact Me feature in the app to change your mailing address with Stuart T. Wilson, CPA, PC or contact the office directly.
4. Double check that your information is accurate and select SIGN UP.
5. You will receive confirmation that your sign up has been successful.
6. Next you will need to confirm your account.
7. Check your inbox for an email from SDWorks@stuartwilsonfi.com. If you don't see the email, check your junk or spam folder.
8. Open the email and click the link to confirm your account.
9. The link will open and prompt you to set up a password for your new SD Works account.
10. You will now be able to login to the SD Works app.



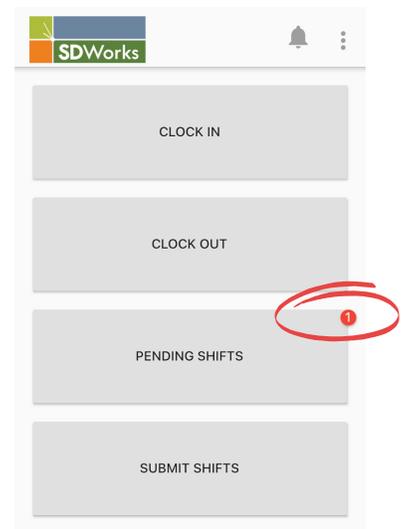
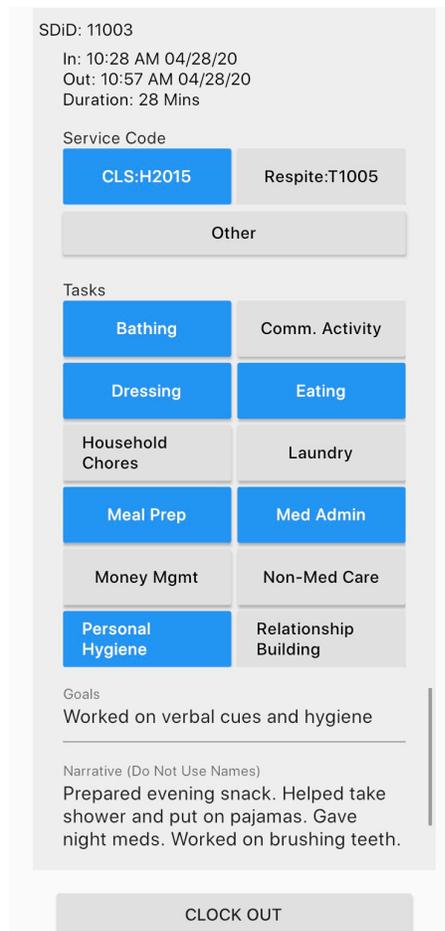
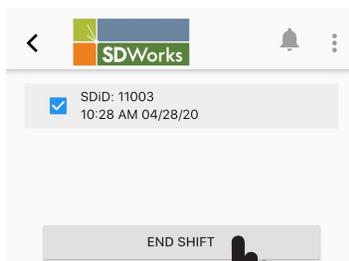
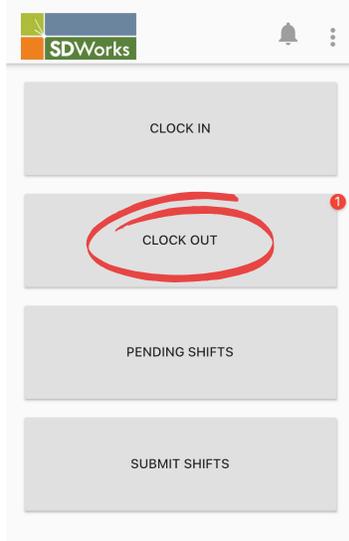
Starting a Shift

- Open SD Works and login
- Select "Clock In" from the main menu
- Select "Tap to Choose SDiDs"
- Select your employer's unique SDiD
 - If you are working for more than one employer during the shift you may select multiple SDiDs.
- Select "Clock In" and you will be returned to the main menu
- There is now an alert on the "Clock Out" menu to indicate that you will need to clock out when the shift has ended



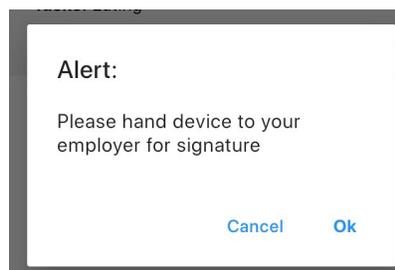
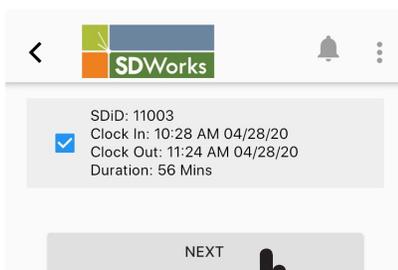
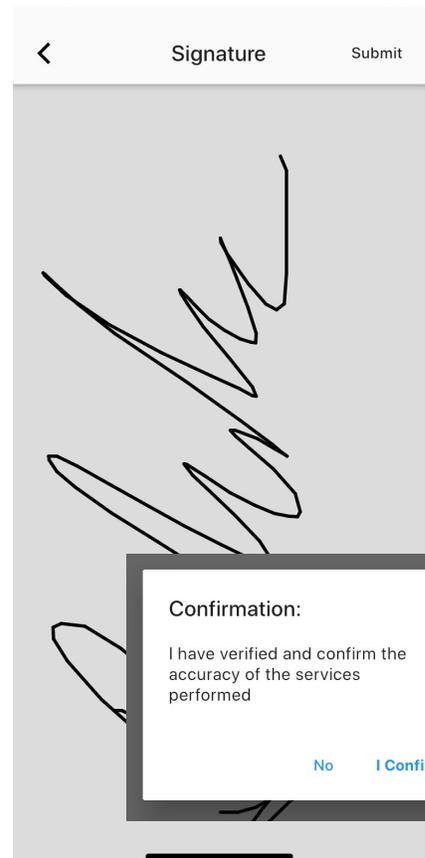
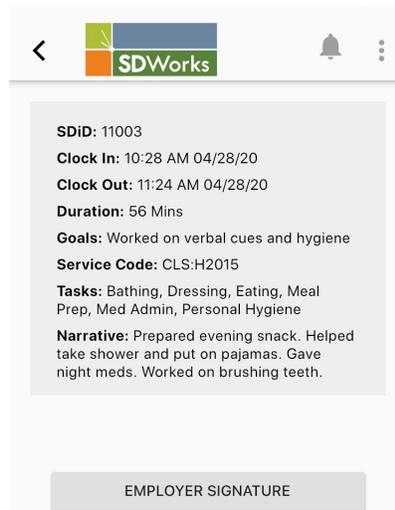
Ending a Shift

- Open SD Works and login
- Select "Clock Out" from the main menu
- Select the shift you are ending and hit "End Shift"
 - If you are clocked in under more than one employer you will need to clock out from each employer separately.
- Next you must select the service code for your shift and indicate the tasks
 - If the service code isn't listed, select "Other" and manually enter the code
- If required by your employer, you may list the goals for your shift.
- You are required to provide a narrative. There is no limit to the amount typed for this item. *Due to HIPAA, please do not use the consumer's name.*
- Select "End Shift" and you will be returned to the main menu
- There is now an alert on the "Pending Shifts" menu to indicate that you have a shift to be reviewed and signed by your employer



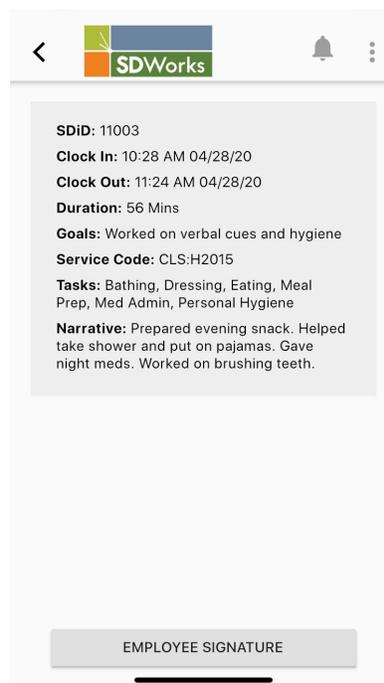
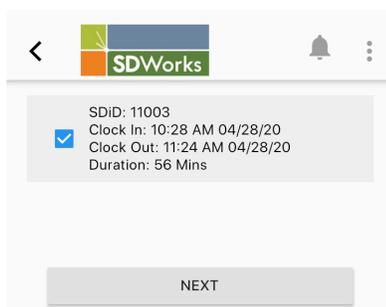
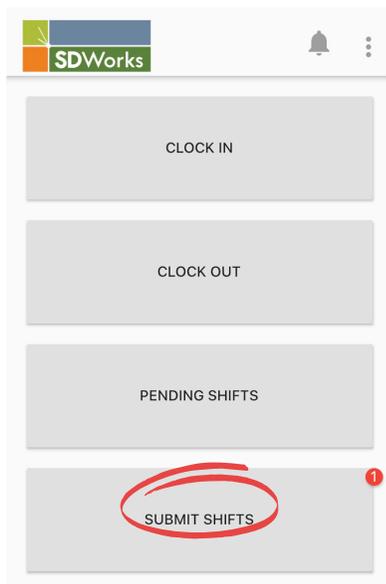
Employer Review

- Open SD Works and login
- Select "Pending Shifts" from the main menu
- Select the shift for your employer or employer's representative to review
 - If this individual is not available when you end a shift, you may wait and have the employer/representative review multiple shifts.
 - You must review and submit all shifts by the end of the pay period.
- A summary of your shift will generated. Hand your device to your employer/representative for review.
- Select "Employer Signature". Your employer/representative must sign the device with their finger or a stylus, hit "Submit", and select "I Confirm"
- You will be returned to the main menu and there is now an alert on the "Submit Shifts" menu to indicate that you have a shift that requires your signature to be submitted for processing



Submit Your Shift

- Open SD Works and login
- Select "Submit Shifts" from the main menu
- Select a shift to review
 - You may wait and review multiple shifts at the same time.
 - You must submit all shifts by the end of the pay period.
- A summary of your shift will generated. Double check that all information is accurate.
- Select "Employee Signature". Sign the device with your finger or a stylus
- Hit "Submit" and select "I Confirm" on the pop up window
- Your shift has been submitted to Stuart T. Wilson, CPA, PC for processing and you will be returned to the main menu



Correcting a Shift

FORGOT TO USE SD WORKS

If you completed a shift and forgot to use SD Works to clock in or out, you must fill out and submit a paper timesheet.

FORGOT TO CLOCK IN

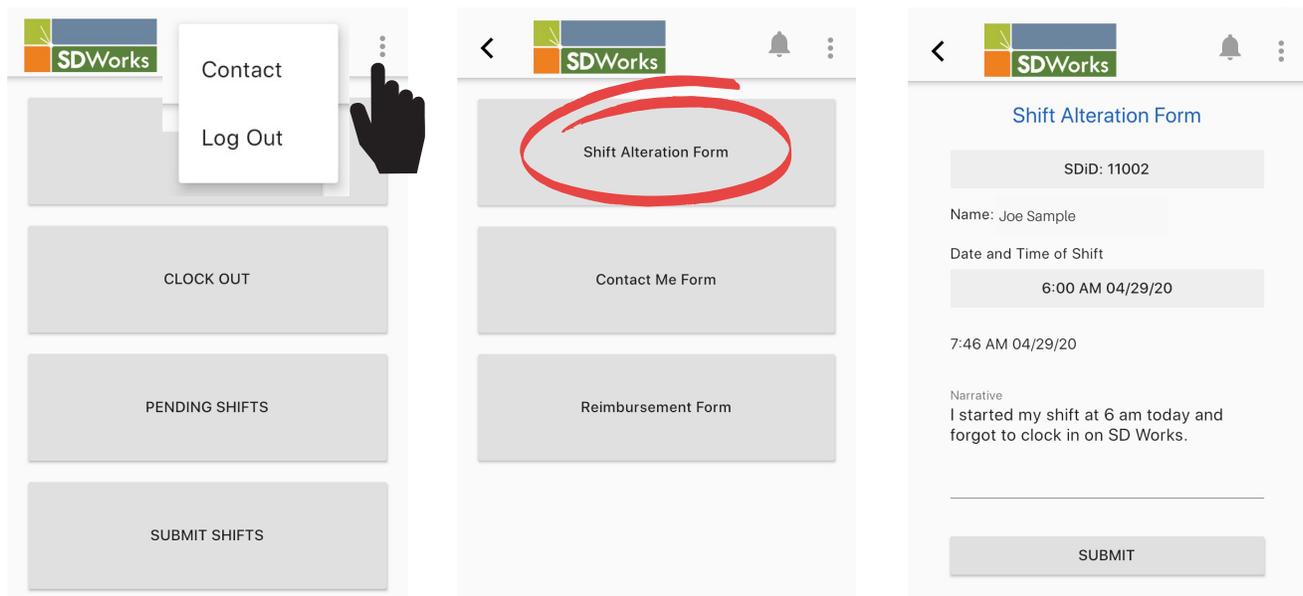
If you are working and realize you forgot to clock in at the start of your shift, clock in on SD Works immediately. Use the "Contact" feature and fill out a "Shift Alteration Form". Select the date and time your shift began and detail in the narrative why the change is needed.

FORGOT TO CLOCK OUT

If you finished your shift and realize you forgot to clock out, clock out on SD Works immediately. Use the "Contact" feature and fill out a "Shift Alteration Form". Select the date and time your shift ended and detail in the narrative why the change is needed.

INCORRECT SERVICE CODE, TASKS, OR NARRATIVE

If you already clocked out and find an error in the service code, tasks, or narrative, use the "Contact" feature and fill out a "Shift Alteration Form". Select the date and time the shift started. Detail in the narrative what changes are needed.



Contact Me Feature

If you have questions or need assistance, use the "Contact Me Form" to get in touch with Stuart T. Wilson, CPA, PC.

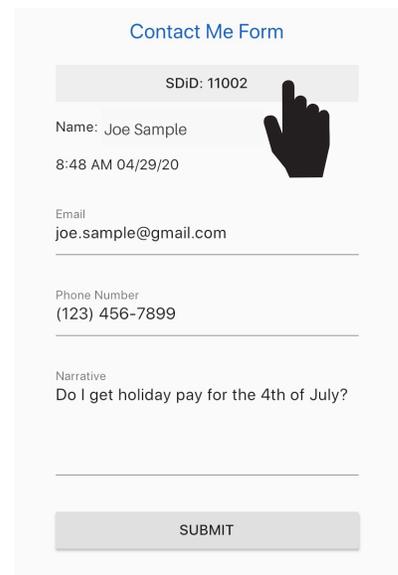
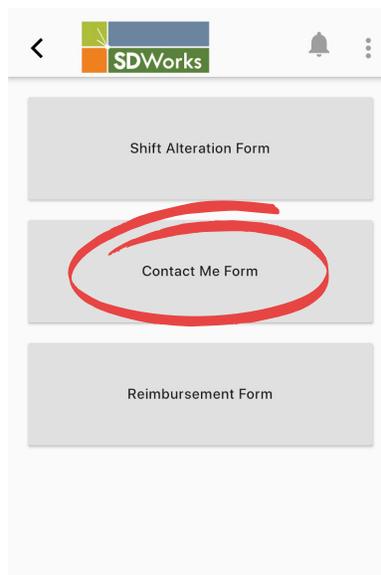
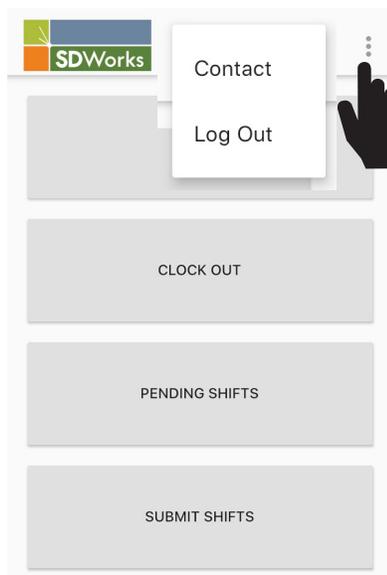
Please note that this feature only allows for communication with staff at Stuart T. Wilson, CPA, PC. This feature is not affiliated with community mental health staff, waiver agency staff, case managers, or supports coordinators.

TO USE THE CONTACT ME FEATURE:

- Click on the 3 dots in the upper right corner
- Select "Contact" on the pop up menu
- Select "Contact Me Form"
- Select "Tap to Choose SDiDs" to choose your employer
- Enter your contact information
- Under "Narrative", type in your question or how we can assist you.
- Select "Submit" when you are finished
- You can expect a response by the end of the next business day

EXAMPLES

- Do I get holiday pay for the 4th of July?
- I moved and need to update my address. My new address is....
- How do I sign up to get my paycheck direct deposited?
- Please update the phone number and email you have on file for me.



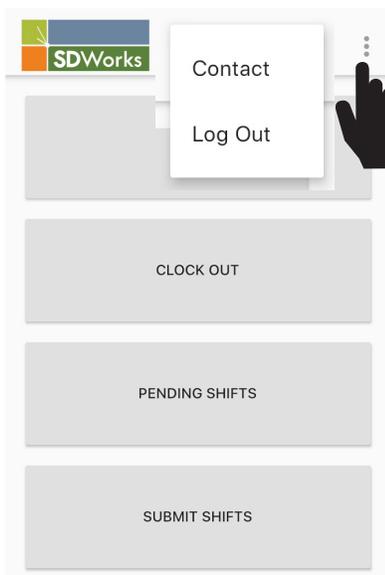
Submit a Reimbursement Form

The Reimbursement Form cannot be used for mileage reimbursements.

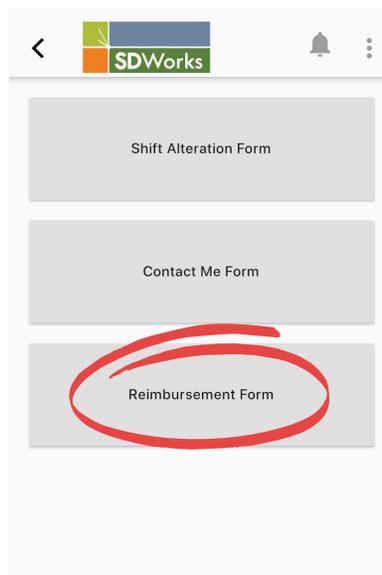
Only employees that have specific reimbursement items outlined in their employment agreement should submit a Reimbursement Form.

TO SUBMIT A REIMBURSEMENT FORM

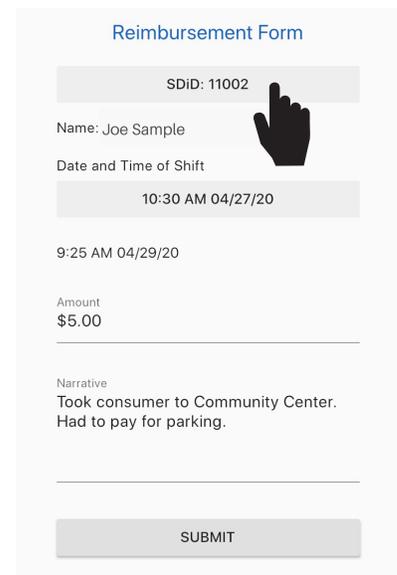
- Click on the 3 dots in the upper right corner
- Select "Contact" on the pop up menu
- Select "Reimbursement Form"
- Select "Tap to Choose SDiDs" to choose your employer
- Enter the date and time the expense occurred
- Enter the dollar amount to be reimbursed
- Under "Narrative", type the reason for the expense
- Select "Submit" when you are finished



This screenshot shows the SDWorks app home screen. The top left corner features the SDWorks logo. In the top right corner, a three-dot menu is open, displaying a 'Contact' pop-up menu with 'Contact' and 'Log Out' options. A hand icon indicates the user is interacting with the 'Contact' option. Below the menu, there are four main buttons: 'CLOCK OUT', 'PENDING SHIFTS', and 'SUBMIT SHIFTS'.



This screenshot shows the SDWorks app menu. The top left corner features the SDWorks logo. In the top right corner, there is a back arrow, a bell icon, and a three-dot menu. The menu items are 'Shift Alteration Form', 'Contact Me Form', and 'Reimbursement Form'. The 'Reimbursement Form' option is circled in red, indicating it is the selected option.



This screenshot shows the 'Reimbursement Form' submission screen. The title is 'Reimbursement Form'. The form fields are: 'SDiD: 11002' (with a hand icon pointing to it), 'Name: Joe Sample', 'Date and Time of Shift' (10:30 AM 04/27/20), and '9:25 AM 04/29/20'. Below these fields is the 'Amount' field, which contains '\$5.00'. The 'Narrative' field contains the text 'Took consumer to Community Center. Had to pay for parking.' At the bottom of the form is a 'SUBMIT' button.

Frequently Asked Questions

I forgot my password. How do I reset it?

Select "Reset Password" on the SD Works login screen. Enter the email address for your SD Works account and select "Reset". An email with a link to reset your password will be sent to your inbox.

How do I find the SDiD for my employer?

- For new employees, a card with your employer's SDiD was included in your new hire paperwork.
- For existing employees, an SDiD will be assigned to your employer when any of their employees enroll in SD Works. You will be contacted with your employer's SDiD.
- If you forget or lose your employer's SDiD, you should ask your employer or employer's representative. You can also submit a "Contact Me Form" to request the SDiD.

I submitted a "Contact Me Form". How long will it take for someone to get in touch with me?

You can expect a response by the end of the next business day. Please note that holidays may delay the response time.

How can I get more help learning to use the SD Works app?

Call Stuart T. Wilson, CPA, PC at (989) 832-5400 and we will connect you with our SD Works Administrator.

Why does the app want to use location services?

SD Works records your GPS location when you clock in and out of a shift. This information is collected, as it may be requested during a Medicaid audit. For more information, please see the Stuart T. Wilson, CPA, PC Privacy Policy.