



This guide provides instructions for using Galt Foundation’s client time approval and billing system – Web Portal.

Clients can *batch approve time sheets, assign two approvers, and easily access Web Portal through a laptop or mobile device.*

Logging In

Time approval: If you approve time only, no login is needed. Starting 7/2/21, you will receive a weekly email from notifications@p20.com with a link that will automatically log you into Web Portal to approve time each week. You will receive an email if your Galt Foundation field staff has entered time; if no time was entered for that week, you will not receive a time approval email. The emailed link is good for 72 hours; if you do not approve time within 72 hours, a second email will be sent to you.

Billing: If you are Galt Foundation’s billing contact, you will receive an email from notifications@p20.com with your login information to manage invoices. Look for the email between the end of June through mid-July 2021 as we transition to Web Portal. If you also approve time and are the billing contact, you will be able to approve time when logged in as well.

Approving or Disputing Time

Summary of Steps

1. Receive the weekly time approval email and click link.
2. If logging into Web Portal directly with Billing Contact access, click *Time Approval*.
3. View submitted hours and timesheets.
4. Select and approve time.
5. Select and dispute time.

Approving or Disputing Time

1. Receive and open your weekly time approval email, and click *Click here to Approve Timesheets*.

TIP: Clicking this link will allow you access to timesheets to either approve or dispute time. Each link expires after 72 hours. If you have not approved time within 72 hours, a second email with a new link will be sent to you. You will receive a unique link each week.

2. If logging into Web Portal directly with Billing Contact access, click *Time Approval*.
3. View to confirm submitted hours and timesheets.



Approving or Disputing Time Continued

- Individually or batch select time, then click *Approve*.

REMINDER:

Please review the submitted time and if correct, click Approve. If the time submitted by the employee is incorrect, click the Dispute button and in the Approved Hours column for the appropriate date, make the correction in the total hours worked. A note is required with a reason why you are reporting different hours than what the employee submitted. After entering the corrected hours, click the Save button and then click the Approve button next to the timesheet that is being disputed. If you wish to save the information and return later, use the Save button.

If you encounter any issues approving timesheet(s), please contact our local office for assistance.

PENDING (4) APPROVED (6) UNSUBMITTED (5) Search

Customer: (ED-OR) (213741) Department: Beaverton UI Call Center Pay Period: 05/16/2021 - 05/22/2021 Frequency: Weekly

Select All APPROVE SELECTED

| Employee Name | Job Position | Assignment | Employee Note | Details | Submitted Hours | Approved Hours | Hours Select | Approve | Dispute |
|---------------|----------------------|------------|---------------|---------|-----------------|----------------|--------------------------|---------|---------|
| Richard | PSR 3- Beaverton | 1976996 | ⊖ | i | 42.50 | 42.50 | <input type="checkbox"/> | APPROVE | DISPUTE |
| Nadine | PSR3-Covid Beaverton | 1976997 | ⊖ | i | 20.00 | 20.00 | <input type="checkbox"/> | APPROVE | DISPUTE |
| Sandy | PSR3 | 1977078 | ✓ | i | 42.00 | 42.00 | <input type="checkbox"/> | APPROVE | DISPUTE |
| Michael | PSR3-Covid Beaverton | 1977079 | ⊖ | i | 40.00 | 40.00 | <input type="checkbox"/> | APPROVE | DISPUTE |
| TOTALS | | | | | 144.50 | 144.50 | | | |

Click to view field staff notes

Click to select all timesheets to batch approve

Click to individually approve time

- Individually select time, then click *Dispute*. Edit approved hours if modifying hours, click *Save*, enter required note, click *Add Note*, then click *Dispute*.

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| TOTALS | | | | | 144.50 | 144.50 | | | |

Click to view field staff notes

Click to individually dispute time

Dispute Timesheet

Timesheet: 741384
Pay Period: 05/16/2021 - 05/22/2021
Employee: [Redacted]

Mon 05/17

Enter Dispute Note

3

40.00

42.50

48.00

2.58

42.50

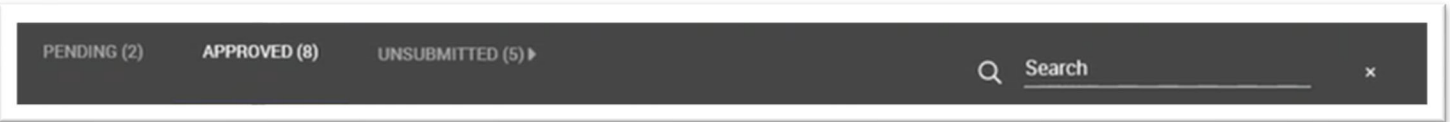
42.50

Save Edit

2

Approving or Disputing Time Continued

TIP: You can view pending time, already approved time, or unsubmitted time for all your Galt Foundation field staff.



You can also assign up to two time approvers for your organization. Contact your Galt Foundation Account Manager to add a second time approver.

Managing Invoices

As Galt Foundation's billing contact, you can easily view invoices and payments online from your computer or mobile device. You will receive an email from notifications@p20.comw with your login information.

The screenshot shows the 'Invoices' section of the Galt Foundation web portal. On the left is a sidebar with 'Galt Foundation' logo and navigation links: HOME, INVOICES, INVOICES, INVOICE SUMMARY, PAYMENTS, and OUTSTANDING INVOICE STATEMENT. The main content area displays an 'Invoice Summary' table with two rows of invoice data. Callouts provide additional information:

- 'Filter by paid, unpaid, date, or account number' points to the 'FILTER BY' dropdown.
- 'Sort or manage number of items shown' points to the 'SORT BY' dropdown.
- 'View invoice details or download a copy' points to the 'DETAILS' and 'DOWNLOAD' links for an invoice.
- 'If balance amount is \$0.00, then invoice has been paid. This invoice will also be listed under Payments.' points to the 'Balance Amount' column.

| Account Number | Invoice Date | Customer/Department Name | Currency | Due Date | Invoice Amount | Payment Amount | Balance Amount |
|----------------|--------------|--------------------------|----------|----------|----------------|----------------|----------------|
| | | | | | | | |
| | | | | | \$ 1,029.60 | \$ 0.00 | \$ 1,029.60 |

Questions

I have not received my weekly time approval email from notifications@p20.com. What do I do? Confirm the email is not in your email Junk folder. Also confirm your field staff entered time for the week. If you still do not see it listed, please contact your Galt Foundation Staffing Manager to request a new email.

I cannot access Web Portal. What do I do? First try opening Web Portal using another web browser, such as Chrome. If you are still unable to access it, contact your Galt Foundation Account or Staffing Manager for help.

When are timesheets due? Timesheets are due by end of day Saturday for non-Eugene, OR field staff. Timesheets are due by end of day Sunday for field staff working in Eugene, OR.

When do I need to approve time? Please continue to approve time by Noon on Mondays each week.

Additional questions? Contact your Galt Foundation Account or Staffing Manager.