

EMPLOYEE/PROVIDER - PORTAL INSTRUCTIONS

CREATING YOUR NEW USER AND LOGGING ONTO THE PORTAL

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

Your account will be used to enter hours worked with a client and to view your paystubs.

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, which includes fields for 'User Name or Employee ID' and 'Password', a 'Login' button, and a 'Forgot Password' link. At the bottom of the login section, there is an 'OR' separator and a 'Create New User' button, which is highlighted with a red rectangular box.

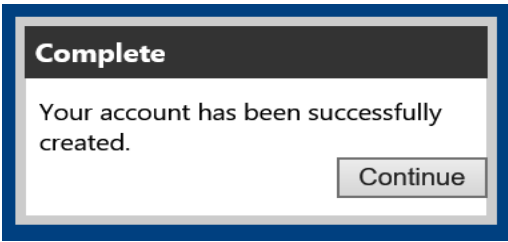
1. From the Company drop down menu, select FW Consulting – DHFS LLC.

2. Click on “Create New User”.

The screenshot shows the 'Create ESS Account' form. It includes 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. If you work for multiple employers, you must create a separate account for each employer with a different username for each account.
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:** Enter the last four numbers of your social security number.
9. **Zip Code:** Enter your zip code.

10. Click “Create User”.



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

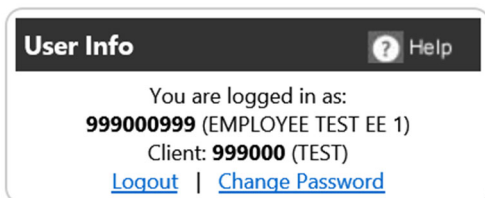
LOGGING ONTO THE PORTAL

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:

If you work for multiple employers, your Client/Employer’s Name will be listed in the top right corner of your Home screen in the **User Info Section** under your Employee ID and UserName.

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

When you log into the portal you will be directed to the dashboard. The calendar on the dashboard is NOT for time entry. The dashboard calendar outlines Timesheet deadlines and Payroll Dates.

DO NOT USE THIS CALENDAR TO ENTER TIME

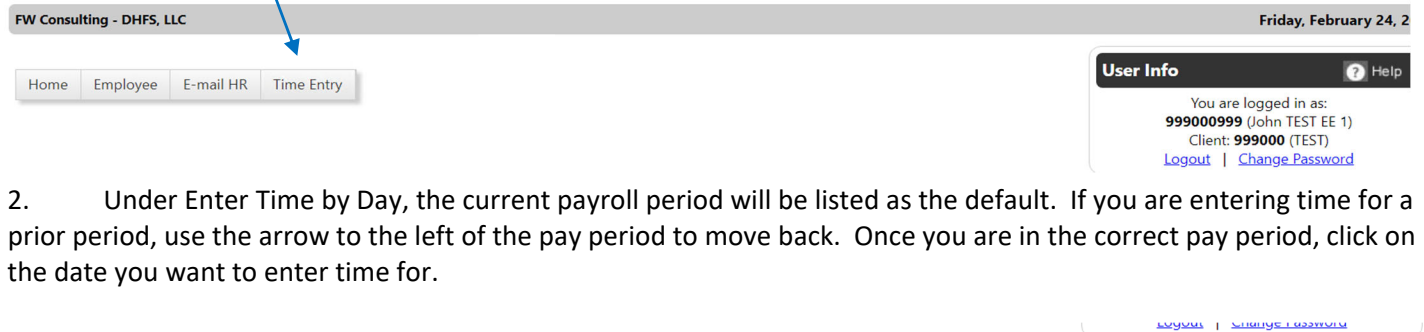
EMPLOYEE SELF SERVICE



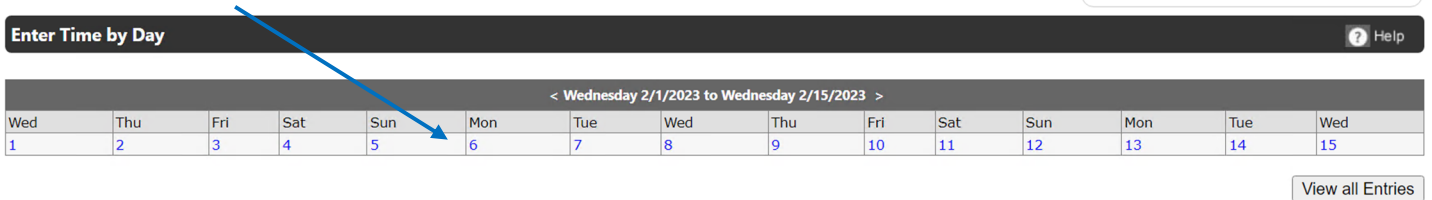
Follow the instructions below for employee time entry:

EMPLOYEE HOW TO ENTER TIME:

1. Click "Time Entry"



2. Under Enter Time by Day, the current payroll period will be listed as the default. If you are entering time for a prior period, use the arrow to the left of the pay period to move back. Once you are in the correct pay period, click on the date you want to enter time for.



3. Select your Service Code from the Earnings Type drop down menu. Enter the total hours worked for that day. Click "Save" when complete.

A screenshot of the 'Enter Time by Day' form for the date 2/6/2023. The form has a header with the date and a 'Confirm date is correct' message. Below that, there is a dropdown menu for 'Earnings Type' and a text input field for 'Hours/Sales/Qty:'. A 'Calculate Time' button is also present. Below the form, there is a 'Detail Entry' section with a dropdown for 'Transaction Classifications' and a text input field for 'Trans Class 1:'. A 'Clear Form' button is at the bottom right. At the very bottom, there are 'Cancel' and 'Save' buttons.

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.)
- If your service code is a **"DAY" code, 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.

4. **Repeat Step number 2 and 3** until you have entered all of the days and hours worked.

5. Click "Save" when completed and then OK at the next prompt. You may then logout.

6. Entered time will display at the bottom of the screen.

Entered Entries (select row to edit)			
Earnings Type	Date	Hours	TransClass1
<input type="text"/> ▼	<input type="text"/> ▼		
T1005U2-Respite Care-Hourly	2/6/2023	5.00	042023
T1005U2-Respite Care-Hourly	2/7/2023	3.50	042023
S9125U2-Respite-Day/Overnight	2/8/2023	1.00	042023
		9.50	

OR you can click **'View all Entries'** to view a PDF document of all time entered.

Day of Week	Date	Feature	Hours	Trans Class 1	Trans Class1 Description	Approved?
CLIENT: TEST						
EMPLOYEE: 999000999 - John TEST EE 1						
Monday	02/06/23	T1005U2-Respite care in-home	5.00	042023	02-16-2023 - 02-28-2023	False
Tuesday	02/07/23	T1005U2-Respite care in-home	3.50	042023	02-16-2023 - 02-28-2023	False
Wednesday	02/08/23	S9125U2-Respite Day/Overnight	1.00	042023	02-16-2023 - 02-28-2023	False
			<u>9.50</u>			
		CLIENT TOTAL:	<u>9.50</u>			
		REPORT TOTAL:	<u>9.50</u>			

REMINDERS:

To ensure timely processing, once you have entered your hours you **must inform your employer that your hours are ready for approval.** Your employer’s approval is all that is needed to complete the time entry process.

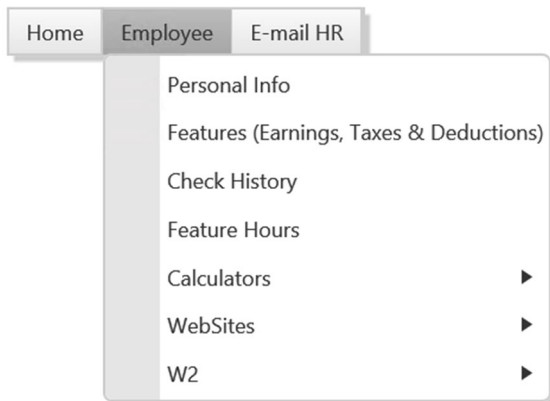
Time entries must be approved **by 5:00 pm on the deadline date.** Any Time entries approved after 5:00 pm will **NOT** be paid with the current payroll period.

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

EMPLOYEE TAB AND EMAIL HR TAB

EMPLOYEE TAB OPTIONS

FW Consulting - DHFS, LLC



Once you are logged in, hover your mouse over the EMPLOYEE TAB and you will see several options.

Personal Information

Title:
Birth Date: 1/1/2000
Email Address: fwconsulting@wegnerpcpas.com
Address: 123 main street
City: madison
State: Wisconsin
Zip: 53713
Country:
Supervisor: EMPLOYER TEST_ER
Hire Date: 1/1/2022
Start Date: 1/7/2022
Rehire Date:
Position:

Personal Info Tab:

This section displays your personal information as entered in our software program. Please review this section from time to time to make sure FW Consulting DHFS has your updated contact and personal information.

Employee Contacts:

Type	Phone/Fax/Email	Description
U.S. Standard	(608) 274-4020 ex.	

Features (Earnings, Taxes and Deductions) Tab:

Employee Features

Employee Features

Earnings

- ▶ T2013-Daily Living - Hourly
- ▶ T1005HQUN-Respite -Group
- ▶ S9125U2-Respite-Day/Overnight
- ▶ T1005U2-Respite Care-Hourly
- ▶ 99509U2-Personal Supports
- ▶ T2027U2-Childcare-Hourly

Tax Deductions

- ▶ Federal Income Tax
- ▶ State Income Tax

Earnings: This section displays your approved earning information along with the service code, description and pay rate. Hover your mouse over an earnings type to see the pay rate.

Employee Features

- Employee Features
 - Earnings
 - ▶ T2013-Daily Living - Hourly
 - ▶ T1005HQUN-Respite -Group
 - ▶ S9125U2-Respite-Day/Overnight
 - ▶ T1005U2-Respite Care-Hourly
 - ▶ 99509U2-Personal Supports
 - ▶ T2027U2-Childcare-Hourly
 - Tax Deductions
 - ▶ Federal Income Tax
 - ▶ State Income Tax

S9125U2-Respite-Day/Overnight	
Effective Dates	
Beginning Date:	1/7/2022
Base Rate:	\$0.00
x Multiplier:	1.00
= Default Rate:	\$0.00
Hourly Rate Override:	\$220.31

Tax Deductions: This section displays your tax deduction information as entered in our software program. Hover your mouse over a tax deduction type to see your filing status.

Federal Income Tax	
Filing Status:	Single
Exemptions:	0
Additional Withholding:	\$0.00
Supplemental Wage Percentage:	0%

Check #	Check Date	Amount
251913	11/15/2022	\$138.52 View/Print
251067	10/31/2022	\$41.56 View/Print
250157	10/14/2022	\$263.20 View/Print
249209	9/20/2022	\$290.90 View/Print
248196	9/15/2022	\$221.64 View/Print

Check History Tab:

This section will display the last 12 months of check history including Check #, Check Date and Net Deposit. You can click on an individual check to view a copy of the paystub.

Feature	Check Date	Period End Date	Hours
T1005U2-Respite Care-Hourly	7/15/2022	6/30/2022	16.00
T1005U2-Respite Care-Hourly	7/29/2022	7/15/2022	12.00
T1005U2-Respite Care-Hourly	8/15/2022	7/31/2022	12.00
T1005U2-Respite Care-Hourly	8/31/2022	8/15/2022	16.00
			56.00

Feature Hours Tab:

This section displays information about hours by earnings type/service code for specified time period for a specified earnings type.

FW Consulting - DHFS, LLC
Employee Feature Hours

Page: 1

Feature	Date	Hours
T1005U2-Respite Care-Hourly	07/15/22	16.00
T1005U2-Respite Care-Hourly	07/29/22	12.00
T1005U2-Respite Care-Hourly	08/15/22	12.00
T1005U2-Respite Care-Hourly	08/31/22	16.00
		56.00

You can click on print to get a detailed or summary report of earnings type worked in each payroll period.

Calculators

- 1040 Tax Estimator
- Buy or Lease?
- Amortizing Loan
- Loan Comparison

Calculators Tab:

The section includes links to web based calculators that you might find useful.

WebSites

- IRS.gov
- Social Security Administration

Websites Tab:

The section includes links to websites that you might find useful.

W2

- 2021
 - Copy 2 - State, City, Local
 - Copy B - Federal
 - Copy C - For Your Records
- 2022

W2 Tab:

The **W2** page will display current and past W-2s that are available to print. The current year W-2 will be shown as a proof report until the company has finalized the amounts for the year. Once the amounts have been finalized the W2 form will display instead of the proof report.

For all questions or concerns regarding the Portal or Payroll, please send a help desk ticket to:

help@wegnerpcpas.on.spiceworks.com

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?

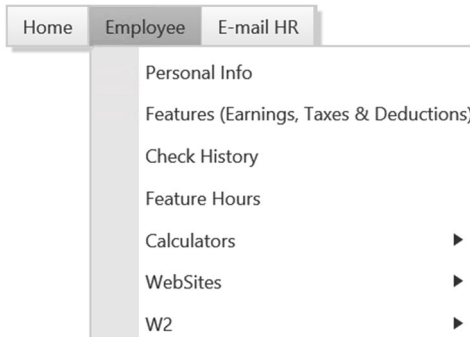
Hours must be entered for each day the service was provided. Time must be entered to the nearest quarter hour (i.e .25 for 15 min, .50 for 30 min and .75 for 45 min. If your service code is a “DAY/OVERNIGHT” code, use the number “1” for that day. Do NOT enter the number of hours worked. Time entries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