ADMIN GUIDE: EVV PHONE v1.1

EVV phone is an option for clients who live in regions that have little or no access to the internet. This option allows the client to receive service while meeting the standards for electronic visit verification. EVV phone is used for employees to clock in/out for hourly, Residential Programs, Day Programs and Parenting Programs.

Managing Prompts

*Please check in with your System Administrator prior to making any changes to EVV Phone Prompts.

Permissions/Roles Needed to perform the actions below: Super Admin Permission

Prompts & Examples:

- Greeting Message – *"Hello! Thank you for calling the Rise time keeping system."*
- SSN Authentication – *"Please enter the last four digits of your social security number."*
- SSN Re-authentication – *Please re-enter the last four digits of your social security number."*
- *Pin Authentication – "Please enter your pin."*
- Employee Authentication Failed – *"We are unable to locate your employee record. Please contact your supervisor."*
- Exceeded Attempts – "*You have exceeded the number of attempts allowed."*
- Date of Birth Authentication – *"Please enter your birth month and date. For example, June 4th would be 06/04."*
- Invalid Selection – *"You have made an invalid selection."*
- No Employee Record – *"We are unable to recognize the number you are calling from, please try again from an approved number."*
- Punch Should Be Closed – *"We are unable to continue until your punch is closed."*
- Punch Validation Failed – *"Punch validation failed. Please contact your supervisor."*
- Unknown Number – Profile – *"We are unable to locate any profiles that matches the number you are calling from. Please call back from a valid number or contact your supervisor if you feel this is an error."*
- Inactive Hourly Service Account – *"There is no active hourly service account for this client. Please verify you have selected the correct client, or contact your supervisor."*
- Inactive Authorization – *"There is no active authorization for this client. Please contact your supervisor."*
- Inactive Residential Client Service Account – *"The client you have selected does not have an active residential account. Please verify your entry. If you feel this is an error, contact your supervisor."*

**See also "EVV Phone Prompt Workflow" in the Help Center.*

To edit the prompts:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click "Settings" from the header then "EVV Phone" from the side bar
3. Select the prompt you would like to manage

4. Select “Actions” then click “Edit Phone Prompt”
5. Enter the prompt text you wish to use and click “Save” and then click “Yes” on the confirmation window

To add an attachment to the prompts:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click “Settings” from the header then “EVV Phone” from the side bar
3. Select the prompt you would like to manage
4. Select “Actions” then click “Edit Phone Prompt”
5. Click “Add Attachment”, find the file on your computer
6. Select the file you would like to upload
7. You will see a status bar that displays the progress of attaching the audio file, once complete click “Save” then click “Yes” on the confirmation window

To listen to the prompts:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click “Settings” from the header then “EVV Phone” from the side bar
3. Select the prompt you would like to manage
4. Select “Actions” then click “Edit Phone Prompt”
5. If the prompt has an audio file associated with it, you will see an attachment and a mini audio player.
6. You can either click the play button or download the file to listen to the prompt

EVV Call Logs

Permissions/Roles Needed to perform the actions below: Supervisor Role or Super Admin Permission

To view EVV call logs:

Option A

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click “Reports” from the header then “EVV Reports” and “Call Log Reports” from the side bar
3. You can enter in search criteria at the top of the screen if you are looking for a particular call or select “Search” to view all results

Option B

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click “Settings” from the header then “EVV Call Logs” from the side bar
3. You can enter in search criteria at the top of the screen if you are looking for a particular call or select “Search” to view all results

These reports contain the following information:

- Date
- Start Time/End Time
- Residential/Day/Parenting Program

- Cost Center
- Phone Number
- Client Name
- Employee Name
- Result

In order to find the most relevant information, the system allows the ability to filter the report by:

- Date of Call
- Residential/Day/Parenting Program
- Cost Center
- Phone Number
- Employee Name
- Client Name

EVV Phone Service Code

*Once the EVV Phone method has been approved by your supervisor for a particular client and/or service, proceed with the following steps.

Permissions/Roles Needed to perform the actions below: Funding Source Admin Permission

To create a new EVV Service Code:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click “Settings” from the header then “Funding Sources” from the side bar
3. Choose the Funding Source where you would like to create a new EVV Phone Service Code for
4. Select “Actions” then “New Service Code”
5. Fill out all required fields per usual, however ensure the toggle button next to “EVV Required” is set to “Yes”
6. Click “Save” then select “Yes” on the confirmation window

To edit an existing Service Code to comply with EVV:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click “Settings” from the header then “Funding Sources” from the side bar
3. Choose the Funding Source where the Service Code is located that you wish to edit
4. Click “Service Codes” from the horizontal menu underneath Funding Source Details
5. Find the Service Code that you wish to add EVV to and select it
6. Select “Actions” then “Edit Service Code”
7. Verify the toggle button next to “EVV Required” is set to “Yes”
8. Click “Save” then click “Yes” on the confirmation window

* We will set the EVV type in the Service Account

EVV Service Account

Permissions/Roles Needed to perform the actions below: Supervisor Role or Super Admin Permission

To create a new EVV Client Service Account:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click “Clients” from the sidebar then choose the client you wish to create a Service Account for
3. Select “Actions” then “New Service Account”
4. Fill out all required fields per usual
5. Next, set the EVV Frequency Type. This can be set to
    a. Clock Out Only
    b. Clock In and Out
    c. Clock In, Out and Defined Intervals During Shift
        i. If you select this option you will also have to define the intervals in minutes
6. Click “Save” then select “Yes” on the confirmation window

To edit an existing Client Service Account to comply with EVV:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click “Clients” from the sidebar then choose the client you wish to create a Service Account for
3. Select “Accounts” from the horizontal menu underneath Client Details
4. Find the Client Service Account that you wish to add EVV to and select it
5. Select “Actions” then “Edit Account”
6. Next, set the EVV Frequency Type. This can be set to
    a. Clock Out Only
    b. Clock In and Out
    c. Clock In, Out and Defined Intervals During Shift
        i. If you select this option you will also have to define the intervals in minutes
7. Click “Save” then select “Yes” on the confirmation window

EVV Punches

Permissions/Roles Needed to perform the actions below: Supervisor Role or Employer Role

To view a punch:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click “Pending Entries” from the side bar
3. You can filter the entries to view only pertinent information first using the fields at the top of the page
    a. From/ To Date
    b. Service Code
    c. Client Name
    d. Employee Name
    e. Cost Center
    f. Account Type
    g. EVV
4. Click anywhere in the line to view the punch details
5. Under Punch Details Be sure to observe:
        i. EVV Method
        ii. Employee Fail In Home Validation
        iii. Supervisor Approved In Home Validation
        iv. Input Method

v. Client Signoff

6. Click “EVV Verifications” on the horizontal bar under Punch Details to view all EVV details
   a. If the EVV is a signature, select “Compare” to view the signature obtained at the visit and compare it with the signature on file for that client

To quickly approve or reject a punch:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click “Pending Entries” from the side bar
3. Once you have reviewed the information you can either select “A” or “R” to approve or reject an entry

To edit a punch:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click “Pending Entries” from the side bar
3. Click anywhere in the line to view the punch details
4. Select “Actions” to approve or reject from this screen
5. If this punch was made in error, choose “Actions” then “Edit Entry”
   a. Here you can modify the Check In/Out Date and Time
6. Once you have made the appropriate changes select the old punch is deemed “Rejected” and a new punch created with a status of “Unverified”. The newly created punch will have a reference entry to the previously created punch for bookkeeping purposes
7. The employee will need to login to the system and verify the new punch to ensure their supervisor made the correct changes
8. At this point the punch is available for the supervisor to approve

EVV Reports

Permissions/Roles Needed to perform the actions below: Any Role (except Employer Role)

To view the EVV Details Report:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click “Reports” in the header then “EVV Reports” on the side bar
3. Select “EVV Details Report”

To view the EVV Verification Exception Report:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click “Reports” in the header then “EVV Reports” on the side bar
3. Select “EVV Verification Exception Report”

To view the Call Log Report

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click “Reports” in the header then “EVV Reports” on the side bar
3. Select “Call Log Report”