

## ADMIN GUIDE: EVV LOCATIONS

The EVV Locations functionality is a way to specify and record approved work locations per Electronic Visit Verification requirements. This guide will outline how to manage, select, and review EVV Locations.

### Managing EVV Locations

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

It will be most common to use EVV locations on Client Profiles, as these are the locations that will be available when creating an hourly punch. However, EVV locations can be added to any of the following pages:

- Client Profile
- Employee Profile
- Residential Program Profile
- Day Program Profile
- Group Service Profile
- Parenting Program Profile

To **add** a location to an existing profile:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click the desired profile type from the sidebar and select the profile you wish to add a location to
3. Select "Actions" then click "New EVV Location" from the menu
4. Type the name of the location in the EVV Location Name field. This should be something recognizable by the employee providing services.
5. Select the EVV Location Type from the dropdown field.
6. Enter the EVV Location address.
7. Select a Begin Date and End Date if desired. If these fields are left blank, the EVV Location will always be available when it is active.
8. Select Status
  - a. Active: Location will be available when entering a punch
  - b. Inactive: Location will be hidden when entering a punch
9. Check the Primary checkbox if this is the location that should auto populate on the New Entry wizard.
10. Click "Save." The system will verify the EVV Location is a valid address.
  - a. If it is not, an error will be shown that reads, "Google Maps does not recognize this Location Address." You will need to enter a valid address to continue.
  - b. If it is, select "Yes" on the confirmation window.
11. To view the EVV Location Details, click the EVV Locations Tab on the Profile Details Page

To **edit** a location for an existing profile:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click the desired profile type from the sidebar and select the profile you wish to make any changes regarding EVV locations.

3. Click the EVV Locations Tab, then click the desired EVV Location to open the EVV Location details page.
4. Click Actions, then click "Edit EVV Location"
5. Make the desired changes
  - a. Please note that an address cannot be changed. If the address is no longer used and a new address is needed, the EVV Location should be set to Inactive and a new evv location should be created.
6. Click "Save" then select "Yes" on the confirmation window.

### Enabling EVV Locations

Displaying the EVV Locations dropdown field on punch entry forms is based on an instance level setting, and is also configurable per Service Code or Program. If the instance level setting is **enabled**, the EVV Locations dropdown field will appear on *all* entry forms, regardless of Service Code or Program configuration. If the instance level setting is **disabled**, the field will only appear on punches where EVV is required. To change the instance level setting, please contact your DCI system administrator.

To have the dropdown appear when the instance level setting is disabled follow the steps below:

#### Service Code with EVV Locations

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

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 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

\* The supervisor will set the EVV frequency on the Service Account. EVV Location will be required at Clock Out or Clock In/Out, depending on EVV frequency setting. EVV Location will *not* be required at interval check-ins.

#### Programs with EVV Locations

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

To add a new program that requires EVV Locations:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click the desired Program Type from the side bar
3. Choose Actions->Add New Program
7. Fill out all required fields per usual, however ensure the toggle button next to "EVV Required" is set to "Yes"
8. Complete all pages of the wizard and click "Save" then "Yes" on the confirmation window

To edit an existing Program to require EVV Locations:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click the desired Program Type from the side bar
3. Choose the program that you wish to edit
4. Select "Actions" then "Edit Program"
5. Verify the toggle button next to "EVV Required" is set to "Yes"
6. Click "Save" then click "Yes" on the confirmation window

#### Punches with EVV Locations

*Permissions/Roles Needed to perform the actions below: Supervisor 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
  - h. Review
4. Click anywhere in the line to view the punch details
5. Clock In and Clock Out EVV Locations are listed in the EVV Details box on the Punch Details Page

#### EVV Locations Reports

*Permissions/Roles Needed to perform the actions below: Any Role*

To view the Complete EVV 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 "Complete EVV Report"

To view the Geofence Distance Report 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 “Geofence Distance Report”

#### EVV Locations Imports

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

EVV Locations can be imported into DCI. To learn about how to do imports, see the “Admin Guide - Import Module” in the DCI Help Center.