Admin Guide: EVV Fob V1.1

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

Managing Fobs

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

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

To add a fob to an existing client:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click “Clients” from the sidebar and select the client you wish to add a fob to
3. Select “Actions” then click “Add New Fob” from the menu
4. Ensure the client's name that populates is the correct client
5. Enter the serial number from the back of the fob into the field “FOB Serial Number”
6. Touch the button on the front of the fob to generate a code and enter it into the “Code” field
7. Click “Save” then select “Yes” on the confirmation window

To manage a fob for an existing client:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click “Clients” from the sidebar and select the client you wish to make any changes regarding the fob.
3. Select “Actions” then click “Manage Fob” from the menu
4. Verify the serial number is correct then touch the button on the front of the fob to generate a code
5. Enter the one time code into the “Code” field
    a. Note – this is a unique code that will change every time the button is pressed
6. Click “Save” then select “Yes” on the confirmation window

To remove a fob from an existing client:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click “Clients” from the sidebar and select the client you wish to remove from an existing fob
3. Select “Actions” then click “Remove Fob” from the menu
4. Click “Save” then select “Yes” on the confirmation window

To view all clients that are assigned a fob in your database:

1. Login to a profile with the appropriate role and/or permission via the DCI website
2. Click “Settings” from the header then “EVV Fob” from the side bar

This reports contains the following information:

- Serial Number

- Profile ID
- Profile Type
- Name (from Profile)
- Cost Center

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

- Serial Number
- Profile Type
- Name
- Cost Center

EVV Fob Service Code

*Once the EVV Fob 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 fob 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 in the Service Account

EVV Service Account

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

To create a new EVV 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 an EVV Service Account for

3. Select “Actions” then “New Service Account”
4. Fill out all required fields per usual
5. Click “Save” then select “Yes” on the confirmation window

To edit an existing 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 edit the EVV frequency for and select it
5. Select “Actions” then “Edit Account”
6. Click “Save” then select “Yes” on the confirmation window

EVV Punches

Permissions/Roles Needed to perform the actions below: Supervisor 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 the EVV Details box
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

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 Fob 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 “Fob Report”

EVV Fob Imports

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

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