



END USER GUIDE: MOBILE APP v1.3

The mobile app is a platform in which a user can make punches, clock in/out with or without electronic visit verification (EVV), send messages to other users in their organization, and view/verify entries. The app provides real time punches so you must clock in and out at the correct time. If you have any trouble downloading, installing or using the mobile app please contact customer service at 855-344-3729.

Mobile App Overview

In this user guide you will learn how to:

1. Download the DCI mobile app
2. Navigate the features of the app, including:
 - a. Add a Punch (Group Service, Administration, Training, Vacation, Sick, PTO)
 - b. Clock In/Out with or without electronic visit verification (EVV)
 - c. Client Transportation
 - d. Secure DCI Messaging
 - e. View & Verify Entries

Download App

The app is available in both the Apple App Store (iPhone users) and the Google Play Store (Android users); both versions of the app are free.

To download the mobile app:

1. Open the app store relevant to your device
 - a. Apple App Store (iPhone)
 - b. Google Play Store (Android)
2. In the search field enter 'DCI Mobile EVV'
3. Once you find the app, click 'Install' to download the app
 - a. You may be prompted to enter the password associated with your account for the app store you are utilizing
4. Navigate to the home screen on your device and locate the app to ensure the download was completed successfully

Login to the App

To self-register and create a DCI profile:

***Only If you do NOT already have a DCI profile**

1. Open a web browsing app or use a computer to complete the self-registration process
2. Navigate to your company's DCI URL
 - a. If you are using a mobile device for this you will need to click 'Go to Full Site' below the Sign In button
3. Click 'Create a Profile'
4. If you have an email address click 'Yes, Continue'
 - a. If you don't have an email address select 'No, Create a New Email'. The system will redirect you to create a Gmail account before you can continue with the self-registration process.

5. Complete the registration form and ensure all required fields are completed.
 - a. If you are not sure what your Cost Center is, please verify this information with you supervisor or system administrator
 - * Please note that your information security is our top priority. Your social security number is not visible to any other users in the system.
6. Click 'Next' to review your information
7. Select 'Save' then click 'Yes' on the confirmation window
8. In your email inbox you will receive an email from 'support@directcareinnovations.zendesk.com' and will be titled 'DCI – Confirm Registration'
9. Click 'Activate Your Profile' in the email body to complete the registration process
 - a. You will not be able to login until you activate your profile
10. Follow the steps below to complete the login process

If you already have a DCI profile:

1. Navigate to the home screen on your device and locate the app
2. Open the app
3. Type the System Identifier provided by your company's system administrator. This will be a numeric string consisting of 1-6 numerals.
 - a. i.e. 000000
4. A new page will load prompting you to enter your DCI username and password or pin
5. Click 'Sign In'
6. The app will ask you to allow use of geolocation and access to your phone's camera. You will need to allow access in order to use the app.
 - a. If you have any concerns regarding data usage or privacy please reach out to your system administrator

If you forgot your password:

1. Navigate to the home screen on your device and locate the app
2. Open the app
3. A new page will load prompting you to enter your DCI username and password or pin. Below the username, password and login fields you will see text that says 'Forgot Password?'
4. Click on this text and enter the email address associated with your DCI profile then click 'Next'
5. You will receive a notification alerting you that an email was sent to you with a link to reset your password
 - a. If you do not see the email in your inbox, please check you spam
6. Answer your security question or enter your SSN and date of birth
7. Select 'Verify'
8. The Reset Password screen will load. Enter your new password into the first field then re-enter the same password in the field below to confirm.
9. Select 'Reset' then click 'Yes' on the confirmation window
10. Now enter your new credentials into the login screen

To change your profile:

1. Open a web browser and navigate to your company's DCI URL
2. Login with your username and password

3. In the top right corner you will see your username and an icon next to it. Click here then select 'Settings' from the dropdown menu
4. On the sidebar click 'Change Pin'
5. You will be prompted to re-enter your password, then click 'Verify'
6. Enter your new pin in the first field then re-enter the same pin in the field below to confirm
7. Select 'Change Pin' then click 'Yes' on the confirmation window

Navigating the App

Navigating the Home Page:

1. Login to the mobile app using the instructions above
2. From the home screen you can:
 - a. Clock In/Out
 - i. For hourly services that also provide client transportation, this option will be available to you once you clock in
 - b. Punch 'Other Entries'
 - i. Group Service
 - ii. Administration
 - iii. Training
 - iv. Vacation
 - v. Sick
 - vi. PTO
 - c. Punch 'Drive' to track drive time and mileage when you are not with a client
 - d. View Total Hours Gauge. This widget displays how many hours you have entered and how close you are to reaching 40 hours for the pay period.
 - e. The Total Hours widget displays
 - i. Approved Hours – hours that you have previously punched that have been approved
 - ii. Pending Hours – hours you have previously punched that are still awaiting approval
 - iii. Unverified Hours – hours punched/edited by your employer on your behalf that are awaiting your approval
 1. To approve these punches, please follow [these](#) instructions
 - iv. Total Hours – Sum total of all hours you have entered during the pay period
 - f. News Posts – includes the latest news from your organization or program
3. To view all tasks available in the mobile app, click the menu icon in the top left of the screen
 - a. Set Profile Picture/Signature
 - b. Home
 - c. Message
 - d. Entries
 - e. Search
 - f. Logout

* If you do not see any of these buttons it means that your organization has chosen not to activate that particular function of the app.

Making Punches

No Electronic Visit Verification (EVV)

Clock In/Out of a Shift Without EVV – No Client Transportation:

1. Login to the mobile app using the instructions above
2. Click 'Clock In' from your Home Page
3. Select the client you are working with from the dropdown menu
 - a. You will only see clients you are linked to
4. Choose a service code from the dropdown menu
 - a. You will only see service codes available for the client you have selected
5. Click 'Continue'
6. You will be prompted to confirm the clock in, select 'Confirm Clock In'
 - a. You will be clocked into a shift and immediately on the clock. You will remain clocked in until it is time to end the shift and clock out.
7. When you are ready to end the shift, select 'Continue to Clock Out' then 'Confirm' to continue with clocking out.
8. The next screen is used to enter notes. By clicking in the 'Add Notes' box you can type notes about the shift with your keypad or select the microphone on your keypad and add notes through the voice input function on your phone.
 - a. You can add pictures or scanned documents by clicking on the 'Add Picture' icon.
 - b. If your service code has any required note statements, you will see checkboxes with standard notes.
 - i. You may be required to check one or more boxes depending on the service code. If so, you will need to check the appropriate boxes before you can clock out.
9. Select 'Confirm Clock Out'
 - a. Remember the app provides real time entries so you must clock in and out at the correct times.
10. The next screen is the punch information screen. Here you will see all of the information regarding the shift you just completed.
11. After reviewing the information, click the 'Home' button to take you back to the home screen.

Clock In/Out of a Shift Without EVV – Client Transportation:

1. Login to the mobile app using the instructions above
2. Click 'Clock In' from your Home Page
3. Select the client you are working with from the dropdown menu
 - a. You will only see clients you are linked to
4. Choose a service code from the dropdown menu
 - a. You will only see service codes available for the client you have selected
5. Click 'Continue'
6. You will be prompted to confirm the clock in, select 'Confirm Clock In'
7. You will be clocked into a shift and immediately on the clock. You will remain clocked in until it is time to end the shift and clock out.
8. If you want to track your client transportation within a shift, click 'Start Client Transportation'.
 - a. If your provider pays for mileage this is how it will be tracked and paid to you.

9. On the next screen select the service code for transportation from the dropdown menu, then click 'Continue' and 'Confirm' to begin client transportation.
10. You will be connected to the maps portion of the app which tracks your travel time and distance through geolocation. Please note:
 - a. This portion of the app may take a few seconds to load.
 - b. The app may request you to confirm your location during the shift. This is to increase accuracy of the mileage and route captured.
11. When you finish transporting your client, select 'End' then 'Confirm' to end the trip and you will return to the clocked in screen.
 - a. Here you will see how far you drove and how long it took you.
12. When you are ready to end the shift, select 'Continue to Clock Out' then 'Confirm' to continue with clocking out.
13. The next screen is used to enter notes. By clicking in the 'Add Notes' box you can type notes about the shift with your keypad or select the microphone on your keypad and add notes through the voice input function on your phone.
 - a. You can add pictures or scanned documents by clicking on the 'Add Picture' icon.
 - b. If your service code has any required note statements, you will see checkboxes with standard notes.
 - i. You may be required to check one or more boxes depending on the service code. If so, you will need to check the appropriate boxes before you can clock out.
14. Select 'Confirm Clock Out'
 - a. Remember the app provides real time entries so you must clock in and out at the correct times.
15. The next screen is the punch information screen. Here you will see all of the information regarding the shift you just completed.
16. After reviewing the information, click the 'Home' button to take you back to the home screen.

Electronic Visit Verification (EVV)

Depending on the service account configuration, you will be prompted for EVV at different times throughout the punch. The three EVV frequency types are clock out only, clock in and out, and clock in, out and defined intervals during shift.

*All EVV submissions will be completed by the client from the employee's device.

EVV Frequency Type Instructions

1. Clock Out Only
 - a. Complete all punches as described below, however you will only be required to complete EVV at the end of your punch when you clock out.
2. Clock In and Out
 - a. Complete all punches as described below. You will be required to complete EVV at the beginning and end of your punch when clocking in and out.
3. Clock In, Out and Defined Intervals During Shift
 - a. Complete all punches as described below, however you will be required to complete EVV at the beginning and end of your punch when clocking in and out as well as defined

intervals during your shift. Your supervisor has set intervals in minutes for which you will need to complete EVV.

- i. You will not need to have the app open during your whole shift for the interval reminders. A push notification will alert you when an interval EVV is needed. Once you receive the push notification you have five minutes to complete the interval EVV.
 1. If an EVV Interval is missed:
 - a. Depending on your company and the settings that are enabled, you may be able to complete other interval EVV's and clock out of your punch if an EVV interval was not completed. However, your supervisor will see that an interval was missed on your punch details screen.
 - b. Some organizations will choose to have punches automatically rejected if an interval EVV is missed. Please contact your company's super user to determine the settings for your DCI environment.

* The instructions below simulate a punch with EVV frequency type set to clock in and out

Clock In/Out of a Shift With EVV – No Client Transportation:

1. Login to the mobile app using the instructions above
2. Click 'Clock In' from your Home Page
3. Select the client you are working with from the dropdown menu
 - a. You will only see clients you are linked to
4. Choose a service code from the dropdown menu
 - a. You will only see service codes available for the client you have selected
5. Click 'Continue'
6. You will be prompted to confirm the clock in, select 'Confirm Clock In'
7. Next you will see clock in verification required. There are three options for verification:
 - a. Pin/Password, E-Signature, Picture, and Fob
 - i. You can select any of these buttons to complete your clock in verification.
8. EVV Instructions:
 - a. Pin or Password – when selected, your client will enter their unique pin or password assigned to them via their DCI login.
 - i. Give the device to the client and they can click the password button to enter their unique password for verification
 - ii. The app will also use geolocation to mark your global positioning coordinates at the point of verification
 - iii. Once the client has entered their password have them click the 'Submit' button
 - iv. At this time the client's password has been verified and you will then be prompted to confirm the visit verification
 - b. E-Signature – your client will be presented with a signature screen where they can sign with their finger.
 - i. This signature will be compared to the client signature your employer has on file
 - c. Picture – take a picture of the client and the picture will be matched using facial recognition technology to a picture of the client your employer has on file

- d. Fob - turn on the designated secure fob (fixed device) at the client's location, and enter the 6 digit token that appears in the token field.

* If you receive an alert that the visit verification failed, your client may have entered their password incorrectly. Click 'Confirm' and allow your client to re-enter their password. If after three attempts they cannot get the app to confirm their password, you will see a screen prompting the client to reset their pin or password. This can be done from the DCI login screen in the app or web portal and following [these](#) instructions.

9. Once you have completed a method of EVV, click 'Save' then 'Confirm' and you will be clocked into a shift and immediately on the clock. You will remain clocked in until it is time to end the shift and clock out, unless your employer
10. When you are ready to end the shift, select 'Continue to Clock Out' then 'Confirm' to continue with clocking out.
11. The next screen is used to enter notes. By clicking in the 'Add Notes' box you can type notes about the shift with your keypad or select the microphone on your keypad and add notes through the voice input function on your phone.
 - a. You can add pictures or scanned documents by clicking on the 'Add Picture' icon.
 - b. If your service code has any required note statements, you will see checkboxes with standard notes.
 - i. You may be required to check one or more boxes depending on the service code. If so, you will need to check the appropriate boxes before you can clock out.
12. Select 'Confirm Clock Out'
 - a. Remember the app provides real time entries so you must clock in and out at the correct times.
13. Complete the EVV instructions again then click 'Save' then 'Confirm'
14. The next screen is the punch information screen. Here you will see all of the information regarding the shift you just completed.
15. After reviewing the information, click the 'Home' button to take you back to the home screen.

Clock In to a Shift With EVV – Client Transportation:

1. Login to the mobile app using the instructions above
2. Click 'Clock In' from your Home Page
3. Select the client you are working with from the dropdown menu
 - a. You will only see clients you are linked to
4. Choose a service code from the dropdown menu
 - a. You will only see service codes available for the client you have selected
5. Click 'Continue'
6. You will be prompted to confirm the clock in, select 'Confirm Clock In'
7. Next you will see clock in verification required. There are four options for verification:
 - a. Pin/Password, E-Signature, Picture, and Fob
 - i. You can select any of these buttons to complete your clock in verification.
8. EVV Instructions:
 - a. Pin or Password – when selected, your client will enter their unique password assigned to them via their DCI login.

- i. Give the device to the client and they can click the password button to enter their unique password for verification
 - ii. The app will also use geolocation to mark your global positioning coordinates at the point of verification
 - iii. Once the client has entered their password have them click the 'Submit' button
 - iv. At this time the client's password has been verified and you will then be prompted to confirm the visit verification
 - b. E-Signature – your client will be presented with a signature screen where they can sign with their finger.
 - i. This signature will be compared to the client signature your employer has on file
 - c. Picture – simply take a picture of your client and the picture will be matched using facial recognition to a picture of then client your employer has on file
 - d. Fob - turn on the designated secure fob (fixed device) at the client's location, and enter the 6 digit token that appears in the token field.

* If you receive an alert that the visit verification failed, your client may have entered their password incorrectly. Click 'Confirm' and allow your client to re-enter their password. If after three attempts they cannot get the app to confirm their password, you will see a screen prompting the client to reset their pin or password. This can be done from the DCI login screen in the app or web portal and following [these](#) instructions.

9. Once you have completed a method of EVV, click 'Save' then 'Confirm' and you will be clocked into a shift and immediately on the clock. You will remain clocked in until it is time to end the shift and clock out
10. If you want to track your client transportation within a shift, click 'Start Client Transportation'.
 - a. If your provider pays for mileage this is how it will be tracked and paid to you.
11. On the next screen select the service code for transportation from the service code dropdown box, then click 'Continue' and 'Confirm' to begin client transportation.
12. You will be connected to the maps portion of the app which tracks your travel time and distance through geolocation. Please note:
 - a. This portion of the app may take a few seconds to load.
 - b. The app may request you to confirm your location during the shift. This is to increase accuracy of the mileage and route captured.
13. When you finish transporting your client, select 'End' then 'Confirm' to end the trip and you will return to the clocked in screen.
 - a. Here you will see how far you drove and how long it took you.
14. When you are ready to end the shift, select 'Continue to Clock Out' then 'Confirm' to continue with clocking out.
15. The next screen is used to enter notes. By clicking in the 'Add Notes' box you can type notes about the shift with your keypad or select the microphone on your keypad and add notes through the voice input function on your phone.
 - a. You can add pictures or scanned documents by clicking on the 'Add Picture' icon.
 - b. If your service code has any required note statements, you will see checkboxes with standard notes.

- i. You may be required to check one or more boxes depending on the service code. If so, you will need to check the appropriate boxes before you can clock out.
16. Select 'Confirm Clock Out'
 - a. Remember the app provides real time entries so you must clock in and out at the correct times.
17. Complete the EVV instructions again then click 'Save' then 'Confirm'
18. The next screen is the punch information screen. Here you will see all of the information regarding the shift you just completed.
19. After reviewing the information, click the 'Home' button to take you back to the home screen.

Other Entries:

1. Login to the mobile app using the instructions above
2. Click 'Other Entries'
3. Select the Account Type, Date, Clock In/Out Time, any notes for the punch and attach and photos. Depending on the account type, you will be prompted to provide the appropriate information relevant to that punch:
 - a. Activity
 - b. Cost center
 - c. Group service name
 - d. Clients
4. Click 'Save'

Drive:

1. Login to the mobile app using the instructions above
2. Click 'Drive'
3. The Drive account and Cost Center will automatically populate. If you wish to select different options use the drop down menu to modify the selections
4. Choose the Vehicle Type then select 'Ok'
5. Click 'Next' to confirm the battery usage alert
6. You can now begin your drive and the app will use your geolocation to determine your mileage.
 - a. The app may request you to confirm your location during the shift. This is to increase accuracy of the mileage and route captured.
7. Once you have reached your final destination click 'End' then select 'Confirm' on the confirmation window.
8. The next screen is the drive information screen. Here you will see all of the information regarding the drive you just completed.
9. After reviewing the information, click the 'Home' button to take you back to the home screen.

Entries

View Entries

1. Login to the mobile app using the instructions above
2. In the top left corner next to the word 'Home' you will see the menu icon which will give you all function options in the DCI app.
3. Click 'Entries'

4. Here you can scroll through all of your punch entries and view the status, verify, and add pictures

Verify Entries

1. Login to the mobile app using the instructions above
2. In the top left corner next to the word 'Home' you will see the menu icon which will give you all function options in the DCI app.
3. Click 'Entries'
4. Select the entry marked 'Unverified' and the details screen for that entry will appear
5. Select 'Actions' in the top right corner
6. Choose 'Verify' then select 'Confirm' on the confirmation window
7. The punch now shows as pending in your Entries screen.
 - a. This means the punch has been approved by you and now needs your supervisor's/employer's approval. This punch will be put into an approval process to be completed by your supervisor/employer. Once the supervisor/employer approves the punch the status will change to 'Approved' or if your supervisor/employer rejects the punch the status will change to 'Rejected'

Add Picture

1. Login to the mobile app using the instructions above
2. In the top left corner next to the word 'Home' you will see the menu icon which will give you all function options in the DCI app.
3. Click 'Entries'
4. Select the entry you wish to add a picture to
5. Select 'Actions' in the top right corner, then click 'Add Picture'
6. Take the photo, then click 'Use Photo'

Messages

View Messages

1. Login to the mobile app using the instructions above
2. In the top right corner you will see an envelope icon, select this
3. You will be directed to your inbox
4. Here you can click on a message to view it and reply, compose a new message, or navigate back to your home screen by clicking the back arrow to the left of 'Inbox'

Search for a Message

1. Login to the mobile app using the instructions above
2. In the top right corner you will see an envelope icon, select it
3. You will be directed to your inbox
4. Click the magnifying glass in the top right hand corner to search for a particular message
5. Enter your search criteria then select 'Search'

Send a New Message

1. Login to the mobile app using the instructions above
2. In the top right corner you will see an envelope icon, select it
3. You will be directed to your inbox

4. In the bottom right corner you will see a pen and paper icon, select this
5. Enter the name of the individual you wish to send a message to, subject, priority, message, and attach and pictures
6. Once you have crafted your message, click 'Send' in the top right corner

Check Inbox/Sent/Archive/Trash Folders

1. Login to the mobile app using the instructions above
2. In the top left corner click the menu icon, then select 'Message'
3. Choose to view your inbox, sent, archive or trash folders

Delete/Archive Messages

1. Login to the mobile app using the instructions above
2. In the top left corner click the menu icon, then select 'Message'
3. Click either inbox or sent depending where the message you want to delete or archive is located
4. Select the message
5. At the bottom of the message you will see a folder icon which will move the message to your archive folder and a trash can icon which will move the message to your trash folder