

USER GUIDE - EVV WORKFLOW FOR CLIENTS AND GUARDIANS

This guide is intended to provide clients and guardians with a clear explanation of the workflow for punches requiring Electronic Visit Verification.

Electronic Visit Verification (EVV) is now required by most funding sources in order for services to be paid for. If you are informed that EVV must be collected for a particular service, you have a few options depending on how your portal is configured. If you have any questions about which method of EVV to use, please contact your agency.

Key Points for punches requiring EVV:

- There are several methods in which EVV can be obtained
 - Mobile App
 - Client Picture/Facial Recognition
 - Client Signature
 - Client PIN/Password
 - Secure FOB
 - Portal/Mobile Web
 - Secure FOB
 - Client Portal Signoff
 - Phone
 - Phone EVV
- The client/guardian will be required to log in to the portal and perform manual Client Portal Sign Off in the following situations:
 - EVV was not completed during the shift via mobile app
 - EVV failed via mobile app
 - A punch was created via mobile web or web portal after the shift was completed
- EVV details can be viewed by navigating to the Punch Details Page
 - EVV Details Box - overview of EVV
 - EVV Verifications Tab - shows all mobile app verifications
- If a pending punch is edited, the corrected punch will require Client Portal Sign Off
- If an approved punch is edited, it is not necessary to re-obtain EVV/Client Portal Sign Off

For full details on each EVV Method, please refer to the [Electronic Visit Verification \(EVV\) Guide](#).

Mobile App

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

1. The employee will log in to the mobile app with his/her credentials and start shift.
2. After confirming clock in, the employee will see clock in verification required. There are four options for verification:
 - a. Pin/Password - the employee will hand the mobile device to you. Enter your personal PIN or password for your DCI profile.

- i. If you enter an incorrect password, the employee will receive an alert that the visit verification failed. Please re-enter your password. If after three attempts, you cannot get the app to confirm your password, you will be prompted to reset your pin or password. This can be done from the DCI login screen in the app or web portal and following [these](#) instructions.
 - b. E-Signature - the employee will hand the mobile device to you. Use your finger to draw your signature. This will be reviewed by the program supervisor and compared to the signature you provided when your profile was first created.
 - c. Picture - the employee will take a picture of you. The system will compare the picture to the picture saved on your profile.
 - d. Fob - If FOB is selected, the employee will enter a token from the fixed device at your location. No further action is needed from you.
 - e. NOTES:
 - i. Some of the listed options may not be enabled for your agency. Please contact your Program Coordinator if you have any questions.
 - ii. Any of the listed options can select any of these buttons to complete clock in verification.
3. Once you have completed a method of EVV, the employee will finish clock in.
 4. At the end the shift, the employee will clock out.
 5. After confirming clock out, you will need to complete the EVV instructions again.
 6. The employee will then save the punch.
 7. At this point, the punch will be reviewed by your supervisor/employer. You can view the EVV details of the punch by logging into your personal profile and clicking Entries. Click any blue entry ID to open the Punch Details Page.

Portal/Mobile Web

If a punch is entered after the shift rather than using real-time clock in and out via mobile app, you will need to review the punch and provide sign off after it is created. To complete Client Portal Sign Off:

1. Sign into your Personal Profile
2. Click "Entries Requiring Sign Off" on the sidebar
3. To approve a single punch, click the check box in the punch row and click the green "Sign Off". You can also approve multiple entries by clicking the check boxes for every punch you want to sign off on.
4. To approve all entries, click the check box in the Table Header, next to "Id" to select all entries in the table. Click the green "Sign Off" button.
5. To reject a single punch, click the check box in the punch row and click the red "Reject". You can also reject multiple entries by clicking the check boxes for every punch you want to reject.
6. To reject all entries, click the check box in the Table Header, next to "Id" to select all entries in the table. Click the red "Reject" button.

To review the details of any punch, click the blue Entry ID in the punch row.

Phone/FOB

No action is required on the part of the client or guardian for EVV phone or EVV FOB. To review punches that were submitted via phone or with EVV FOB:

1. Sign into your Personal Profile
2. Click "Entries" on the sidebar
3. To review the details of any punch, click the blue Entry ID in the punch row.