



## USER GUIDE - EVV WORKFLOW FOR EMPLOYEES

This guide is intended to provide base users 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 instructed to collect EVV for a particular client/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
- If EVV is not obtained during the shift via mobile app, the client/guardian will be required to log in to the portal and perform manual Client Portal Sign Off
- 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

*EVV Frequency – This is set on the employee service account and is specific to the employee, member and service provided.*

- *Clock Out Only* - Requires EVV completion at the end of a shift.
- *Clock In and Out* - Requires EVV completion at the start and end of a shift.
- *Clock In, Out and Defined Intervals During Shift* - Requires EVV completion at the start, end and throughout the shift. (I.e. If the interval is set to 60 minutes, EVV will be requested every hour for the duration of the shift until clock out.)

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

1. Log in to the mobile app

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.
    - ii. NOTE: some of the listed options may not be enabled for your agency. Please contact your supervisor if you have any questions.
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.
16. At this point, the punch will be reviewed by your supervisor/employer. You can view the EVV details of your punch by going to the Punch Details Page.

### **Portal/Mobile Web**

To obtain client sign off on a punch that was entered after completion (via web portal or mobile web):

1. Log in to your profile from a web browser on your computer or phone.
2. Click Add New Entry
3. Complete the Add New Entry form
4. Select EVV Method
  - a. Client Portal Sign Off - the entry will be created with EVV pending. The client or guardian will need to then log in to their own profile and sign off on the entry.
  - b. Secure FOB - be sure to record the tokens at the beginning and end of your shift. Enter the start token and end token in the appropriate fields. If the tokens fail, the entry will require Client Portal Sign Off.
5. Click Save then Yes on the confirmation window.

### **Phone**

To make a punch via EVV Phone:

Clock-In

1. Once you have arrived at the place of service, dial the 800 number assigned to your program. You must place the call from the phone number listed on the client's DCI Profile.
2. Follow the prompts and make the necessary entries regarding your personal information, the client, and the service provided.

Clock-Out

1. Prior to leaving the place of service, dial the 800 number assigned to your program

2. Follow the prompts and make the necessary entries regarding your personal information, the client, and the service provided.