USER GUIDE - EVV WORKFLOW FOR EMPLOYERS

This guide is intended to provide employers 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. There are a few EVV options depending on how your portal is configured. If you have any questions about which method of EVV should be used, 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

Punches entered via mobile app will have 1 or more EVV verifications, depending on the EVV frequency set on the Employee Service Account. EVV methods available via mobile app include:

1. Pin/Password - No EVV verification review is required when the client uses their PIN/password to complete EVV.
2. E-Signature - The client draws his/her signature using the employee's mobile device. You will need to review the signature and compare it to the signature saved on the Client Profile. To do review EVV verifications, follow the instructions listed below.

3. Picture - The employee takes a picture of the client. The system will compare the picture to the picture saved on the client profile. If facial recognition passes, no further action is required from you. If facial recognition fails, you will need to review the EVV verifications.

4. Fob - If FOB is selected, the employee will enter a token from the fixed device at the client's location. No further action is needed from you.

5. NOTES:
   a. Some of the listed options may not be enabled for your agency. Please contact your agency if you have any questions.
   b. Any of the listed options can be used to complete EVV verification.

Once a punch is closed via Mobile App, it will require your review. To find punches ready for review:

1. Log in to your personal profile.
2. Click Pending Entries
3. All entries requiring your review will be listed on the Pending Entries screen. Use the search filters to find a specific entry.
   a. Red Eye Icon: If there is any issue with EVV on a punch, there will be a red eye icon displayed in the Needs Review column. For full details on why the red eye icon might appear, please review this article in the Help Center.
4. To review EVV verifications or details, click anywhere in the punch row to open the Punch Details Page.
   a. Click the EVV Verifications tab
   b. If any EVV verifications require your approval, there will be an A and R in the Approve column. Verifications that require your approval include:
      i. Client Signature: Click the icon in the Compare column to compare the Client Profile signature to the signature provided on the punch
      ii. Client Picture: If Facial Recognition failed, then you will need to review Client Picture EVV. Click the icon in the Compare column to compare the Client Profile picture to the picture taken on the punch
   c. All other EVV verifications will be listed, but will not require action. To view EVV verification details, click anywhere in the verification row to open the details page.
5. Once EVV verifications have been reviewed, you can approve or reject the punch.

NOTE: In addition to the Pending Entries page, punches can also be viewed from the Client or Employee Details Page.

Portal/Mobile Web

EVV collected through client portal sign off for hourly services. This method is completed after the shift is over.

EVV Method	Definition
Client Portal Sign Off	Requires the use of a computer by the client or guardian. The client or guardian will log in to the portal using a unique username and password. After the punch is created, the client or guardian will select the punch and click a sign off button.

If a punch is entered after the shift rather than using real-time clock in and out via mobile app, the client or guardian will need to review the punch and provide sign off after it is created. Please note that without client sign off, the punch will appear in the Pending Entries table, but will list a question mark icon in the Needs Review column. Hovering over the question mark will display a tooltip, "Client Portal Sign Off Pending." The punch can be approved without Client Portal Sign Off, but will not meet the EVV requirements. Prompt the client/guardian to provide sign off prior to approving the punch. Or, if you as the employer are also the client/guardian, you can sign off by:

- Click anywhere in the entry row to open the Punch Details Page
- Click Actions
- Click EVV
- Click Yes on the Alert window

Your name will be recorded as the user who provided Client Portal Sign-Off.

Phone/FOB

EVV collected through either phone or fob devices. Useful in remote areas with little or no access to internet or cell phone reception.

EVV Method	Definition
Phone	Requires the employee to call an 800 number at the beginning of their shift from the phone number listed on the member's DCI profile. Once the number has been verified and linked to a member, the employee will be walked through a series of prompts to complete the clock in process. This same procedure is completed during the clock out process.
FOB	Requires the use of a device that is registered to a specific member. When an employee begins and concludes their shift, the device will generate a six digit code that is directly correlated to a particular date and time. This data is recorded on a time card and entered into DCI after the fact. Once the shift has been completed and an employee has access to the internet, they will login to DCI and enter the data that was collected. The agency will specify a deviation threshold, if any of the fob codes exceed that threshold the punch will not allow the employee to click save and provide an error message detailing the insufficient data.

Punches that have EVV Phone or FOB will list Client Phone or Secure FOB as the EVV method on the Punch Details page. No further action is required from you as an employer before approving the punch.