Time Entry - Account Type Hourly

Description: In this topic, the user will learn about the hourly account type. Hourly account type is for hourly, 1:1 service, meaning one employee working with one client.

The hourly account type may be entered using the following methods:

- Mobile app
- Phone EVV
- FOB
- Web portal
    - Allowing web portal punch entries is determined by each organization
    - Web portal punch entries are non-EVV compliant with the exception of FOB punch entry
    - Please refer to a supervisor or employer prior to entering time via web portal

Role Required: Employee (base user)

Permission Required: N/A

Clock In on the Mobile App

1. Log in to the DCI EVV app
2. Click the blue **Clock In** button on the dashboard
    a. If the Continue to Clock Out button is displayed, this means the user did not clock out of their last shift and must complete the clock out process before clocking in again.
    b. The Clock In button will not display if the user has an open shift
3. Complete the **Clock In** page
    a. Client - If there is only one client the field will auto-populate. If the user provides service to more than one client, click on the field and then select the client from the list.
    b. Service Code - If there is only one service code the field will auto-populate. If there is more than one service code, click on the field and then select the hourly service code from the list.
    c. Cost Center - The cost center will auto-populate
4. Click **Continue**
5. Click **Confirm Clock In** to complete the clock in process
    a. A summary of the clock in, including the authorization remaining balance (if enabled) will display
    b. If the information is incorrect, click the **Left Arrow** to edit
6. The user is now clocked in and can log out or close the mobile app until the end of the shift

Clock Out on the Mobile App

1. Log in to the DCI EVV app
2. Click the blue **Continue to Clockout** button
3. Click **Confirm**
4. Choose the client attestation method as determined by the organization. If not collecting client attestation, skip to step number five.
    a. Option 1: Click **Client PIN or Password**
        i. Hand the device to the client or authorized representative who enters their PIN or Password and then hands the device back to the user
            1. *Please note: If the client or authorized representative enters their PIN or Password incorrectly too many times (as determined by the organization), the PIN or Password option becomes unavailable for this clock out and another verification method must be selected. The PIN or password option will be available again for the next shift.
        ii. Click **Submit**
        iii. Click **Confirm** to validate PIN or password
    b. Option 2: Click **E-Signature**
        i. Hand the device to the client or authorized representative to draw their signature on the screen
            1. If the client approves their signature click **Save**
            2. If the client would like to try again click **Clear.** This process can be repeated if necessary**.**
        ii. Click **Confirm** to validate the signature
        iii. Click **Confirm Clock Out**
    c. Option 3: Click **Picture**
        i. Device camera will open
        ii. Click the **Camera** icon to take the picture
            1. Click **Check** icon to accept picture
            2. Click **Refresh** icon to retake picture
            3. Click **X** icon to delete picture

            iii. Click **Confirm** to validate picture
    d. Option 4: Click **Voice**
        i. Optionally, if device requires, allow app to record audio by selecting **While using the app**
        ii. Voice verification window will open
        iii. Click the **Red Play** button at the bottom of the page to start voice recording
            1. A computer voice will recite a phrase for the client to repeat
            2. Hand the device to the client to record the verification message in their voice
        iv. Click the **Red Stop** button at the bottom of the page again to stop voice recording
        v. Click **Save**
        vi. Click **Confirm** to validate voice recording
    e. Option 5: Click **Portal Signoff**
        i. If the client is not present, willing or able to complete one of the real-time signoff options, then portal signoff may be an option. The signoff process is not complete until the client or client employer representative logs in and approves the punch in the web portal.
        ii. Click **Confirm**
5. Add Notes and/or Attachments (optional based on organization requirements)
    a. Add notes functionality works using device keyboard. If talk-to-text is enabled as an option on the mobile device, microphone feature may be used to enter notes by speaking.
    b. Add attachment allows a picture to be taken and added to the note
6. Click **Confirm Clock Out**
7. Shift details will be displayed. Click **Home** to return to the dashboard.

Real-Time Phone EVV Clock In

The following is an example of how to clock in using phone EVV for real-time punches. Please note that the questions or voice prompts at each organization may be different. The process takes three to five minutes to complete.

1. Arrive at the client's home to begin the shift. Prior to starting, use the client's **landline** phone to dial the phone number provided by the organization.
2. An automated voice will prompt for the **last four digits of the employee's social security number** on the landline keypad. If the organization offers multiple languages, select the preferred language prior to entering social security digits.
3. When prompted enter the **four-digit PIN** provided by the organization
4. When prompted enter **month and day of birth** (e.g., January 01 - enter 01 01)
5. When prompted **press 1 for hourly services**
6. The system will read the name(s) of client associated with the landline phone number. **Press the number on the keypad associated with the client** (e.g., press 1 for John Smith).
7. **Press 1** for real-time. The options will be to **press 1 for hourly service** or 2 for historical entries.
8. **Press the appropriate number** to confirm the service code (e.g., hourly respite)
    a. If more than one service code, the system will read all service codes available (e.g., press 1 for hourly respite, press 2 for attendant care)
9. The system will read how many hours are left on the current authorization. To continue, **press 1**. Otherwise, **press 2** to end the call.
    a. This is a configurable setting that is not used by all organizations
    b. Move on to next step if no balance announced
10. Select **clock in EVV Location**
    a. If the user is calling from the associated EVV phone number, this step will not be presented as the EVV location will be automatically selected.
    b. If this is required by the organization, a selection must be made ("none" will not be an option). The system will provide numbered options for EVV locations associated with the client.
    c. If this is not required by the organization, "none" will be an available option.
11. **Press 1** to save the entry and clock in

Real-Time Phone EVV Clock Out

The process for clocking out will be similar to the process for clocking in. Please note that questions or voice prompts at each organization may vary. The process takes three to five minutes to complete.

1. At the end of the shift, use the client's **landline** phone to dial the phone number provided by the organization.
2. An automated voice will prompt for the **last four digits of the employee's social security number** on the landline keypad. If the organization offers multiple languages, select the preferred language prior to entering social security digits.
3. When prompted enter the **four-digit PIN** provided by the organization
4. The system will read each canned statement if applicable. **Select 1** if the task was completed or **2** if the task was not completed (e.g., Laundry, press 1 for yes and 2 for no). Select at least one canned statement or the call will disconnect, and the process must be restarted.
5. The system will alert that there is an open punch. When prompted **press 1** to confirm closing the punch.
6. **Press 2** to disconnect (clock out has now occurred), or if needed, **press 1** to start a new shift (e.g., A real-time clock out was just completed, but a historical punch also needs to be entered. Stay on the line and complete both.).

Historical Phone EVV

Historical phone EVV allows users to enter time after the shift has already happened. Because the shift is in the past, clock in and out during the same call. Historical phone EVV requires that the client or authorized client representative verify the historical time entry. Historical time entries can happen for many reasons. The most common reason is that the employee forgot to clock in for a shift. Another reason may be that there were urgent care needs at the beginning of the shift and the employee had to attend to the client before they were able to clock in. Please note that the questions or voice prompts at each organization may be different. Allow five to eight minutes to complete this process.

1. The client or authorized representative must be present for historical punches. Use the client's **landline** phone to dial the phone number provided by the organization.
2. An automated voice will prompt for the **last four digits of the employee's social security number** on the landline keypad. If the organization offers multiple languages, select the preferred language prior to entering social security digits.
3. When prompted enter the **four-digit PIN** provided by the organization

4. When prompted **press 1 for hourly services**
5. The system will read the name(s) of the client associated with the landline phone number. **Press the number on the keypad associated with the client** (e.g., press 1 for John Smith).
6. **Press 2** for historical. The options will be to press 1 for hourly service or 2 for historical entries.
7. **Press the appropriate number** to confirm the service code (e.g., hourly respite)
    a. If more than one service code, the system will read all service codes available (e.g., press 1 for hourly respite, press 2 for attendant care)
8. **Enter Date of Service** in **MMDDYYYY** format (e.g., August 1, 2021, is 08012021)
9. **Enter Clock-In Time** in **HHMM** format (e.g., 8:30 is 0830)
    a. Press 1 for AM or 2 for PM
10. **Enter Clock-Out Time** in **HHMM** format (e.g., 4:45 is 0445)
    a. Press 1 for AM or 2 for PM
11. The system will read each canned statement if applicable. **Select 1** if the task was completed and **2** if the task was not completed (e.g., Laundry, press 1 for yes and 2 for no). Select at least one canned statement or the call will disconnect, and the process must be restarted.
12. The system will read back punch details. **Press 1** to confirm.
13. Hand the landline phone to the client or authorized client representative to verify the historical entry
14. The client or authorized client representative will **press 1** when ready
15. They listen to the punch details and **press 1** to accept or **2** to reject
16. They enter their **PIN** to validate
17. The call will end automatically, and the historical punch is now recorded.

Clock In via Mobile App with FOB

1. At the beginning of the shift, locate the DCI FOB that is in a fixed place in the client's home.
2. Press the red button on the FOB to generate the six-digit token
3. Log in to the DCI mobile app
4. Click the blue **Clock In** button on the dashboard
    a. Please note: The **Clock In** button will not display if there is an open shift. Instead, the **Continue to Clockout** button will be displayed. Clock out if needed.
5. Complete the Clock In screen
    a. Client: If the user has only one client, this field will auto-populate. If more than one client, click on the field and select the client from the list.
    b. Service Code: If the user has only one service code, this field will auto-populate. If more than one service code, click on the field and select the service code from the list.
    c. Cost Center: The cost center will auto-populate
6. Click **Continue**
7. Click **Confirm Clock In** to complete the clock in process
    a. This screen displays a summary of the clock in, including the authorization remaining balance if enabled.
    b. If something is incorrect, click the **Left Arrow** on the **Main Menu** to edit the **Clock In** screen
8. The user is now clocked in and can log out or close the mobile app

Clock Out via Mobile App with FOB

1. At the end of the shift, press the red button on the FOB to generate the six-digit token.
2. Log in to the DCI mobile app
3. Click the blue **Continue to Clockout** button
4. Click **Confirm**
5. Click **FOB**
    a. Locate the FOB
    b. Press the red button on the FOB
    c. Enter the six-digit token into the mobile app
        i. Six horizontal lines indicate 10 seconds each. The lines count down for each token and will generate a new token every 60 seconds representing the time.
6. Click **Submit**
7. Click **Confirm Clock Out**
8. Shift details will be displayed. Click **Home** to return to the Dashboard.

FOB Entry in the Web Portal

The FOB requires the employee to enter the recorded information (date of service, start time, start token, end time, and end token) into the DCI web portal.

Log in to DCI and click the blue **Add Entry** button on the dashboard. The Add New Entry form wizard will open, and the first three fields will auto-populate:

- Entry Type: Punch
- Employee Name: Your Name
- Account Type: Hourly

Follow the steps below to complete the required fields. Each program may have different requirements or additional fields to document. Speak with a supervisor to ensure there are no additional required fields for the program.

1. Client: Enter the client's name and select it from the list
2. Service Code: The service code(s) authorized for the client. Select the one that is most appropriate for the service rendered.
3. Service Date: The date the service took place and was recorded.
4. Check In/Check Out: Enter the recorded clock in/clock out times. Both fields are required. Click in the field for a time drop-down which displays in half-hour increments.
    a. Time can be entered directly into the field OR
    b. Select the time from the drop-down if the shift started or ended at either the top of an hour or half past the hour
5. Click the **EVV Method** drop-down and choose **FOB**
    a. The EVV Location fields may be optional or required

    b. This will create a new field labeled Start Token and End Token below the EVV Location fields
6. Enter **Start Token**
    a. The token is the 6-digit code from the FOB that was previously recorded
7. Enter **End Token**
    a. The token is the 6-digit code from the FOB that was previously recorded
8. Notes & Attachments are optional but refer to the program's policy regarding notes and attachments
    a. Grayed-out fields such as Employee Name, Check Out Date and Diagnostic Code are not editable.
9. Click **Save** and **Yes** to confirm

Repeat these steps for any additional days that you need to submit. For example, submitting this on Friday for the week, a separate entry is needed for each day, Monday through Friday. Repeat these steps five times.

<u>**Web Portal**</u>

1. Log in to DCI web portal
2. Click blue **Add Entry** button on dashboard
3. Complete form wizard
    a. Entry Type **(required)**: Defaults to Punch. Other options may be available per organization.
    b. Employee Name **(required)**: Prefilled with name of employee logged into system
        i. Fields with a gray background are locked and unable to be edited. The system generates the responses. These fields include Employee Name, Remaining Balance (if enabled), and Check Out Date.
    c. Account Type **(required)**: Hourly will default. Available account types depend upon authorizations.
    d. Client **(required)**: Enter the client's name then select it from the list
    e. Service Code **(required)**: The service code(s) authorized for the client. Select the one that is most appropriate for the service rendered.
    f. Service Date **(required)**: The date the service took place. Must be in the past. Please ensure it is within the acceptable date range for the organization.
        i. Manually type in the service date and check-in/check-out times or use the calendar icon and clock drop-down
    g. Remaining Balance: This is specific to the client and appears after client name is selected. Shows how many hours or units are remaining on the authorization.
        i. Fields with a gray background are locked and unable to be edited. The system generates the responses. These fields include Employee Name, Remaining Balance (if enabled), and Check Out Date.
        ii. Please note: Some organizations do not display Remaining Balance
    h. Check In/Check Out **(required)**: Clock in/clock out times. Time can be entered directly into the field or selected from the drop-down if the shift started or ended at either the top of an hour or half past the hour.
    i. EVV Method (required): For DCI Web portal time entry, this option will be **Portal Signoff**.
        i. The only exception is if FOB is enabled for the organization
    j. Check Out Date: Tied to the service and cannot be edited. Check Out Date will be automatically generated based on check out time.
        i. Fields with a gray background are locked and unable to be edited. The system generates the responses. These fields include Employee Name, Remaining Balance (if enabled), and Check Out Date.
    k. Reason **(required based on organization)**: The organization may require a reason code when adding historical entries to explain why the punch was not completed using an EVV compliant method of entry in real-time.
        i. Click the blue **plus sign (+)**
        ii. Select the reason code
        iii. Add a note if required
        iv. Click the blue **plus sign (+)** to populate the reason in the Added Reason Codes box
    l. Diagnostic Code (optional): Enter ICD-10 code
    m. Notes (optional): Enter notes per organizational requirements
    n. Attachment (optional): Click the **Choose File** button to upload attachment(s) per organizational requirements
4. Click **Save** then **Yes** to confirm
    a. If the punch errors when attempting to save, the user may not have an account for that type of punch, or there may not be an active authorization for the client selected.

Web portal entries require the client or authorized client representative to sign off on (approve) an entry/entries to verify service provided.

Related articles

- Group Service - Supervisor Guide
- What is the "Needs Review" column on my employees' pending entries?
- Authorization Remaining Balances as Time in the Mobile App
- Mobile App - Logging into the Mobile App
- Enter a Punch - Web Portal