

# Phone EVV - Admin

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**Description:** In this topic, the user will learn how to set up and manage the EVV phone system. Phone EVV is an option for clients who live in regions that have little or no access to a cellular or internet network but have landline phone access. This option allows the client to receive service while meeting the requirements for EVV. Phone EVV is used for employees to clock in/out for hourly, group services, residential programs, day programs, and parenting programs. The employee must call the IVR phone number from the phone number (landline) on the clients profile to create real time and historical punches.

\*Please note: Phone EVV has multi-language capability. This requires an instance-level setting change. Please contact DCI for more information.

**Role Required:** Super User, varies by object for Supervisor, Employer

**Permission Required:** Varies by object for Funding Source Admin, Client Admin

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## **Prompts & Examples**

The system is enabled with standard phone prompts and during implementation the prompts will be configured per the organization's requirements.

- Greeting Message – *"Hello! Thank you for calling the DCI time keeping system."*
- SSN Authentication – *"Please enter the last four digits of your social security number."*
- SSN Re-authentication – *"Please re-enter the last four digits of your social security number."*
- PIN Authentication – *"Please enter your PIN."*
- Employee Authentication Failed – *"We are unable to locate your employee record. Please contact your supervisor."*
- Exceeded Attempts – *"You have exceeded the number of attempts allowed."*
- Date of Birth Authentication – *"Please enter your birth month and date. For example, June 4th would be 0604."*
- Invalid Selection – *"You have made an invalid selection."*
- No Employee Record – *"We are unable to recognize the number you are calling from. Please try again from an approved number."*
- Punch Should Be Closed – *"We are unable to continue until your punch is closed."*
- Punch Validation Failed – *"Punch validation failed. Please contact your supervisor."*
- Unknown Number – Profile – *"We are unable to locate any profiles that match the number you are calling from. Please call back from a valid number or contact your supervisor if you feel this is an error."*
- Inactive Hourly Service Account – *"There is no active hourly service account for this client. Please verify you have selected the correct client, or contact your supervisor."*
- Inactive Authorization – *"There is no active authorization for this client. Please contact your supervisor."*
- Inactive Residential Client Service Account – *"The client you have selected does not have an active residential account. Please verify your entry. If you feel this is an error, contact your supervisor."*
- Confirm Client PIN - *"Confirm Client PIN."*
- Initiate Client Validation - *"Initiate Client Validation."*
- Goodbye Message - *"Thanks for calling. Goodbye."*
- Client PIN Failure - *"Client PIN authentication failed."*

## **Edit the IVR Prompts**

Please check with the organization's System Administrator before making any changes to EVV Phone Prompts.

1. Log in to DCI
2. Click **Settings** on the main menu
3. Click **EVV** on the submenu
4. Select **EVV IVR Prompts** on the flyout menu
5. Select the prompt to manage it
6. Click **Actions**
7. Select **Edit IVR Prompt** from the drop-down menu
  - a. If multi-language is enabled, multiple languages will be visible on the language tab.
8. Enter the **prompt text**
  - a. The prompt text will be read by a computer generated voice
  - b. Add an attachment by clicking **Add Attachment**, then select the file to upload
    - i. A voice recording attachment, like an mp3 file, can be added to the voice prompt. The system will play the attachment so users will hear a human voice instead of the computer-generated one.
  - c. Update the greeting for multi-language (if enabled) and click the **Translate** button
9. Click **Save** and **Yes** to confirm

### Listen to the IVR Prompts

1. Log in to DCI
2. Click **Settings** on the main menu
3. Click **EVV** on the submenu
4. Click **EVV IVR Prompts** on the flyout menu
5. Select the prompt to manage
6. Click **Actions**
7. Select **Edit Phone Prompt** from the drop-down menu
8. If the prompt has an audio file attachment, an attachment and a mini audio player will be visible.
9. Click the play button or download the file to listen to the prompt

### Create a New Service Code with EVV and EVV Location

Enabling EVV on a service code will enable it for Phone EVV. Choose whether EVV Location is a required field.

1. Log in to DCI
2. Click **Settings** on the main menu
3. Click **Funding Sources** on the submenu
4. Search for and select the funding source
5. Click **Actions**
6. Select **New Service Code** from the drop-down menu
7. Complete the form wizard
  - a. Require EVV Location: Select **Yes** to make this a required field or **No** so that users may optionally choose it.
    - i. If location is required, a selection must be made during Phone EVV entry ("none" will not be an option). The system will provide numbered options for EVV locations associated with the client.
      1. 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.
    - ii. If location is not required, "none" will be an available option.
  - b. EVV Required: Select **Yes** to make EVV required or **No** if it is not
8. Click **Save** and **Yes** to confirm

### Edit an Existing Service Code to Comply with EVV and EVV Location

1. Log in to DCI
2. Click **Settings** on the main menu
3. Click **Funding Sources** on the submenu
4. Search for and select the funding source
5. Scroll down and click on the **service code** to edit to open the service code details page
6. Click **Actions**
7. Select **Edit Service Code** from the drop-down menu
  - a. Require EVV Location: Select **Yes** to make this a required field or **No** so that users may optionally choose it.
    - i. If location is required, a selection must be made during Phone EVV entry ("none" will not be an option). The system will provide numbered options for EVV locations associated with the client.
      1. 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.
    - ii. If location is not required, "none" will be an available option.
  - b. EVV Required: Select **Yes** to make EVV required or **No** if it is not
8. Click **Save** and **Yes** to confirm

### Create a New EVV Employee Service Account

1. Log in to DCI
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Enter the employee's name in the filter and click **Search**
5. Click anywhere in the employee row to open the Employee Details page
6. Click **Actions**
7. Select **New Service Account** from the drop-down menu
8. Complete the **form wizard**
  - a. Set the **EVV Frequency Type**:
    - i. Clock Out Only
    - ii. Clock In and Out
    - iii. Clock In, Out, and Defined Intervals During Shift
      1. Define the intervals in minutes for this option
    - iv. Clock In Only
9. Click **Save** and **Yes** to confirm

### Edit an Existing Employee Service Account to Comply with EVV

1. Log in to DCI
2. Click **Home** on the main menu
3. Click **Employees** on the submenu
4. Enter the employee's name in the filter and click **Search**
5. Click anywhere in the **employee row** to open the Employee Details page
6. Click the **Accounts** tab
7. Select the account to be edited

8. Click **Actions**
9. Select **Edit Account** from the drop-down menu
10. Set the **EVV Frequency Type**:
  - a. Clock Out Only
  - b. Clock In and Out
  - c. Clock In, Out, and Defined Intervals During Shift
    - i. Define the intervals in minutes for this option
  - d. Clock In Only
11. Click **Save** and **Yes** to confirm

### **Phone EVV Locations**

Creating an EVV location for a client associates a landline phone with that client's EVV location. While DCI does not have a phone verification service, each organization can mark a phone number as verified or not verified when creating an EVV location.

- The employee will need to be calling the IVR phone number from the phone number (landline) listed on the clients profile
  - If the phone number is not listed on the client profile the result on the **EVV Call Log** will show an **Unrecognized Number**.
- If EVV Location is required by the organization and the user is calling from the associated EVV phone number, the EVV location will be automatically selected for the user.

### **Add a Location to an Existing Profile**

1. Log in to DCI
2. Click the desired profile type from the submenu
3. Search and select the profile to add a location to
4. Click **Actions**
5. Select **New EVV Location** from the drop-down menu
6. Complete the **Add New EVV Location** form wizard
  - a. EVV Location Name (required) - Should be recognizable by the employee providing services
  - b. EVV Location Type (required) - Residential, Commercial, or Public Space
  - c. Address (required) - Enter the EVV Location address
  - d. Phone Number (optional) - For phone EVV, this is the client's landline number.
    - i. Every active EVV Location for a client must have a unique phone number associated with it, if a phone number is entered.
    - ii. The client's landline number needs to also be listed on the client profile in the phone number field
  - e. Phone Verified - Tracking done by the organization
  - f. Phone Type (optional)
    - i. This list is configurable via **Settings > Custom Dropdowns**
    - ii. Examples might include Landline, Mobile, Apple, Android, etc.
  - g. Phone Carrier (optional)
    - i. This list is configurable via **Settings > Custom Dropdowns**
    - ii. Examples might include local carriers or national carriers such as ATT or Verizon
  - h. Begin Date (required)
  - i. End Date (optional)
    - i. If no End Date is selected, the EVV location will always be available.
  - j. Status (required) - Active or Inactive
    - i. Active: Location will be available when entering a punch
    - ii. Inactive: Location will be hidden when entering a punch
  - k. Primary checkbox - Check if this is the location that should auto-populate on new punches
    - i. Only one location can be primary
7. Click **Save**
  - a. The system will verify the EVV Location is a valid address
    - i. If it is valid, click **Yes** to confirm.
  - b. If it is not, an error will display that reads, "Google Maps does not recognize this Location Address." Enter a valid address to continue.
8. To view the EVV Location Details, click the **EVV Locations Tab** on the Profile Details page.

\*For new client profiles, follow steps six through eight when completing the EVV Location tab of the Add New Client Wizard.

### **EVV Phone Report**

1. Log in to DCI
2. Click **Reports** on the main menu
3. Click **EVV Reports** on the submenu
4. Click **EVV Phone Report** on the flyout menu

This report contains the following information:

<b><u>Filters Available:</u></b>	<b><u>Columns Available:</u></b>
• Date of Call	• Punch Id

• Service Code	• Date of Call
• Cost Center	• Start Time
• Phone Number	• End Time
• Employee Name	• Service Code
• Client Name	• Cost Center
	• Phone Number
	• Client/Program Name
	• Employee
	• Clock In EVV Location
	• Clock Out EVV Location
	• Result

### **EVV Call Logs**

1. Log in to DCI
2. Click **Settings** on the main menu
3. Click **EVV** on the submenu
4. Click **EVV Call Logs** on the flyout menu

The call logs provide the following information:

<b><u>Filters Available:</u></b>	<b><u>Columns Available:</u></b>
· Date of Call (MM/DD/YYYY)	· Date of Call
· Account Type	· Start Time
· Cost Center	· End Time
· Phone Number	· Prompt Language
· Employee Name	· Account Type
· Client Name	· Cost Center
	· Phone Number
	· Client/Program Name
	· Employee
	· Result

### **Historical Phone Entries**

Historical phone EVV allows users to enter time after the shift has already happened using the client's landline phone number. Because the shift is in the past, users clock in and out during the same call. Historical phone EVV requires that the client or authorized client representative be present to verify the historical time entry.

Historical phone entries are not EVV compliant and should only be used when necessary. For example, 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. These should be exceptions and every effort should be made to ensure an EVV-compliant method is completed at the time of the shift.

## Related articles

- [Import Formats - Admin Guide](#)
- [Reports Guide](#)
- [System Set-Up - Admin Guide](#)
- [Billing Module - Admin Guide](#)
- [Payroll Module - Admin Guide](#)