EVV FOB - Admin

Description: In this topic, the user will learn how to add and manage fobs. The Electronic Visit Verification (EVV) fob is an option for clients who live in regions that have little or no access to the internet and have no access to phone lines. This option allows the client to receive service while meeting the standards for electronic visit verification. EVV fob is used for employees to clock in/out for hourly, Residential Programs, Day Programs, and Parenting Programs.

Role Required: Super User, Supervisor

Permission Required: N/A

Related articles

Managing Fobs

Please check with a system administrator before making any changes to EVV Fobs.

Order FOBs

1. Log in to DCI
2. Navigate to the DCI Help Center by clicking **Help** in the upper right-hand corner of the main menu on the dashboard
3. Click the blue **Submit a Request** link
4. The sign-in page will open. Enter the Help Center **credentials** (email and password) and click the blue **Sign in** button
   a. The Help Center credentials are different than the DCI Portal credentials
5. Complete the form as follows:
   a. Subject - FOB order request
   b. Description - Include the following:
      i. Number of FOBs needed
      ii. Shipping address with recipient name (Attention to:)
   c. Your Name - Enter the name of the person submitting the ticket
   d. Your Organization - Enter the name of the organization
   e. Requested Completion Date - Only enter if the request is urgent
   f. Page URL - N/A
   g. Attachments - N/A
6. Click the gray **Submit** button at the bottom of the form. A member of the DCI Support Team will be in touch soon!
7. Please sign off on the DocuSign invoice for the FOBs upon receipt. FOBs will ship after signing.
8. To view the status of open tickets, click on the **user's name** in the upper right-hand corner of the screen, and select **My Activities** from the drop-down menu.

Add a Fob to an Existing Client

1. Log in to your personal profile
2. Click **Home** from the main menu
3. Click **Clients** from the submenu
4. Click the **Actions** button
5. Click **Add New Fob** button to open the form wizard
   a. Ensure the client's name that populates is the correct client
6. Enter the serial number from the back of the fob into the field **FOB Serial Number**
7. Touch the button on the front of the fob to generate a code and enter it into the **Code** field
8. Click **Save** then select **Yes** on the confirmation window

Manage a Fob for an Existing Client

1. Log in to your personal profile

2. Click **Home** from the main menu
3. Click **Clients** from the submenu
4. Click the **Actions** button
5. Click **Manage Fob** from the menu
6. Verify the serial number is correct then touch the button on the front of the fob to generate a code
7. Enter the one-time code into the **Code** field
    a. Note – this is a unique code that will change every time the button is pressed
8. Click **Save** then select **Yes** on the confirmation window

Remove a Fob from an Existing Client

1. Log in to your personal profile
2. Click **Home** from the main menu
3. Click **Clients** from the submenu
4. Click the **Actions** button
5. Click **Remove Fob** from the menu
6. Click **Save** then select **Yes** on the confirmation window

Recycle Broken FOBs

When FOBs no longer function, please recycle them. The FOBs have button-cell, or coin batteries like batteries in a watch. Please see the following federal site for button-cell or coin battery recycling guidance: EPA - Used Household Batteries

View all Clients that are Assigned a Fob in your Database

1. Log in to a profile with the appropriate role and/or permission via the DCI website
2. Click **Settings** from the main menu then **EVV** from the submenu to open the flyout menu
3. Click **EVV FOBS** from the flyout menu

You will find the following information:

- Serial Number
- Profile ID
- Profile Type
- Name (from Profile)
- Cost Center

Filter by:

- Serial Number
- Profile Type
- Name
- Cost Center

EVV Fob Service Code

*Once the EVV Fob method has been approved by your supervisor for a particular client and/or service, proceed with the steps below.

Service Code with EVV

Create a new service code with EVV. Enabling EVV will enable EVV on a service code will enable it for Fob EVV. There is no setting Fob EVV prompt to select.

1. Log in to a profile with the appropriate role and/or permission via the DCI website
2. Click **Settings** from the main menu then **Funding Sources** from the submenu
3. Choose the Funding Source where you would like to create a new Service Code for
4. Click **Actions**
5. Click **New Service Code**
6. To enable EVV:
    a. Fill out all required fields per usual
    b. For EVV Required click **Yes**
7. Click **Save** then select **Yes** on the confirmation window

Edit an Existing Service Code to comply with EVV

1. Log in to a profile with the appropriate role and/or permission via the DCI website
2. Click **Settings** from the main menu then **Funding Sources** from the submenu
3. Choose the Funding Source where you would like to edit the Service Code for
4. Scroll down and click on the service code you wish to edit to open the Service Code Details screen
5. Click **Actions** then click **Edit Service Code**
6. Verify the toggle button next to **EVV Required** is set to **Yes**
7. Click **Save** then click **Yes** on the confirmation window

The supervisor will set the EVV frequency on the Service Account. EVV Location will be required at Clock Out or Clock In/Out, depending on the EVV frequency setting. EVV Location will *not* be required at interval check-ins.

EVV Service Account

Create a new EVV Client Service Account

1. Sign into your Personal Profile
2. Click **Home** on the main menu
3. Click **Clients** on the submenu
4. Search for the client by typing their name in search filters and selecting the name when it comes up
5. Click **Search**
6. Select the client from the table by clicking anywhere in the row
    a. This will open up the **Client Details** page
7. Click **Actions** button
8. Click **New Service Account** from the actions dropdown
9. Fill out the **form wizard** as usual
10. Next, set the **EVV Frequency Type**. This can be set to
    a. Clock Out Only
    b. Clock In and Out
    c. Clock In, Out, and Defined Intervals During Shift
        i. If you select this option you will also have to define the intervals in minutes
11. Click **Save** then select **Yes** on the confirmation window

Edit an existing Client Service Account to comply with EVV

1. Log in to DCI with your personal profile
2. Select **Home** from the main menu
3. Select the **Clients** tab from the submenu
4. Search for the client by entering the name and using the filters, then select the **Search** button
5. The search results will update in the table below the search box
6. Click anywhere in the **client row** to open up the Client Details page
7. Select the **Accounts** tab located below the details window
8. Select **the account** that needs to be deactivated or edited
9. Select the **Actions** button
10. Select **Edit Account** from the actions dropdown
11. Next, set the **EVV Frequency Type**. This can be set to
    a. Clock Out Only
    b. Clock In and Out
    c. Clock In, Out and Defined Intervals During Shift
        i. If you select this option you will also have to define the intervals in minutes
12. Click **Save** then select **Yes** on the confirmation window

EVV Punches

View a Punch

1. Sign in to your **Personal Profile**
2. Click **Home** on the main menu
3. Click **Entries** on the submenu
4. Use the filters to search for specific punches and select **Search**
5. The Entries table will display all punches or will be updated with the search criteria
6. Open the **punch** by clicking anywhere in the punch entry row
7. The Punch Details page will display for your review
8. Clock In and Clock Out EVV Locations are listed in the EVV Details box on the Punch Details Page in the EVV details section

Approve or Reject a Punch

1. Sign into your Personal Profile
2. Click **Home** on the main menu
3. Click **Pending Entries** on the submenu
4. Use the filters to **Search for a punch or group of punches** and select the **Search** button
    a. The Entries table will update with the results based on the filter criteria entered
5. In the Entries table below the search box, locate the punch to take action on
    a. Click the **A** in the entry row to **approve** the punch
        i. Click **Yes** in the confirmation alert window
    b. Click the red **R** in the entry row to **reject** the punch
        i. Click **Yes** in the confirmation alert window
    c. Click anywhere in the entry row to **view** the Punch Detail page

Edit a Punch

1. Log in to a profile with the appropriate role and/or permission via the DCI website
2. Click **Pending Entries** from the submenu
3. Below the search box, in the entries table, click anywhere in the **punch row** of the punch you want to edit
    a. Optionally use the filters to search for punch and click **Search**, the table will update based on the filters entered
    b. Please note: Edits can only be made a punch in a pending status
4. View the punch details on the Punch Details Page
5. Click **Actions** button

6. Click **Edit Entry from the actions dropdown**
7. Make the necessary changes to the Edit Entry form wizard
    a. If your organization requires a Reason Code when editing a punch, click on the **Blue Plus (+) Sign** button next to the Reason field
    b. Select a reason from the **Add Reason Codes** drop-down that best describes why you need to make the edit
    c. Some **Reason Codes** require a text explanation. If you select a **Reason Code** with this requirement, a text box will appear and it is required to enter text before saving.
    d. Click the **Blue Plus (+) Sign** next to the **Add Reason Codes** drop-down to add your selection to the **Added Reason Codes** box
8. Click **Save**
9. Click **Yes** on the confirmation alert window
10. The **original punch status** has changed to **rejected**, view the details on the Punch Details page
11. A **new punch** with the corrections has been generated and is in a **pending status**
    a. The new punch will have a Ref. Entry # listed and links it to the original punch
12. To view the original and new punch, select **Entries** on the submenu
13. Both punches are listed in the **Entries table** below the search box

EVV Reports

The following are the EVV report options. The Fob Report is going to have information about Fob EVV.

- EVV Entries Report
- Geofence Report
- EVV Phone Report
- **FOB Report**
- Portal Sign Off Report

Access EVV Phone Report

1. Log in to a profile with the appropriate role and/or permission via the DCI website
2. Click **Reports** in the main menu then **EVV Reports** on the submenu
3. The flyout menu options display all EVV reports, click the **Fob Report**.

EVV Fob Imports

Fobs can be imported into DCI. To learn about how to do imports, see the “Admin Guide - Import Module” in the DCI Help Center.

Related articles

- Import Formats - Admin Guide
- Reports Guide
- System Set-Up - Admin Guide
- Billing Module - Admin Guide
- Payroll Module - Admin Guide