

# Attestation (\*EVV) Workflow for Employers and Supervisors

**Description:** In this topic, the user will learn the workflow for punches requiring electronic visit verification. Electronic Visit Verification (EVV) is now required by most funding sources for services to be paid.

**Role Required:** Employer, Supervisor

**Permission Required:** N/A

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## Key Points for Punches Requiring EVV

- There are several methods by which EVV can be obtained. The frequency of collection is defined on the employee service account and is specific to the employee, client, and service provided. Frequency options are: Clock In Only, Clock Out Only, Clock In and Out; Clock In, Out, and Defined Intervals During Shift.
  - Client Picture/Facial Recognition - A picture taken of the client using the employee's smart device
    - NOTE: Photos are used for verification purposes only and are not stored or accessible on the employee's device. Please refer to the help center article entitled How Does DCI use client photos and photos taken for electronic visit verification (EVV)?
  - E-Signature - The employee's mobile device will be used to obtain an electronic signature
  - Client PIN/Password - The client or authorized representative enters their pin or password on the employee's mobile device
  - FOB - A FOB device remains in a fixed location in the client's home. It generates a token, or 6-digit code, corresponding to the time. The employee enters the token(s) into the mobile device.
  - Voice - The client provides a voice recording on the employee's mobile device
  - Portal Signoff - The client or authorized representative must log in to the web portal and sign off
  - FOB - The employee enters the token(s), or 6-digit code, generated by the FOB.
  - Portal Signoff - The client or authorized representative must log in to the web portal and sign off.
  - Phone EVV - The employee will use the client's landline phone to clock in and clock out at the time of service.
  - Historical Phone Entries - Using the client's landline phone, the employee will enter time for dates that have already passed, i.e. they forgot to clock in and out for a shift. The client or authorized representative provides their pin during this call. Historical phone entries are not EVV compliant.
  - Mobile App
  - Portal/Mobile Web
  - Phone
- The client/guardian will be required to log in to the portal and perform manual Portal Sign Off in the following situations:
  - Portal Signoff was chosen as an EVV method
  - EVV was not completed during the shift via the mobile app
  - EVV failed via the 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 widget - Provides an overview of EVV data
  - EVV Verifications Tab - Shows all mobile app verifications
- If a pending punch is edited, the corrected punch will require 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)/Client Attestation Quick Reference article in the DCI help center.

## Mobile App

Clocking in and out in real-time on the mobile app meets federal EVV requirements. These time entries may or may not meet the criteria for auto-approval (see below). This means that employers or supervisors do not have to manually approve time entries that meet the EVV requirements. If auto-approval is not enabled, employers or supervisors may have to log in to approve punches. Please consult the program policy regarding employer or supervisor signoff.

The instructions below simulate a punch with EVV frequency type set to Clock In and Out. Not all options may be enabled for each organization. Please contact a program coordinator with questions.

1. The employee logs in to the mobile app and starts the shift
2. After confirming clock in, the employee sees Clock In Verification Required. Verification options are:
  - i. If the client enters an incorrect password, the employee will receive an alert that the visit verification failed. The client should re-enter the password. If after three attempts, the client cannot get the app to confirm the password, they will be prompted to reset their pin or password. This can be done from the DCI login screen in the app or web portal.
  - a. Pin/Password - The client or authorized representative enters their pin or password on the employee's mobile device
  - b. E-Signature - The employee's mobile device will be used to obtain the client's electronic signature. This can be reviewed by the program supervisor and compared to the signature the client provided when the profile was first created.
  - c. Picture - A picture taken of the client using the employee's smart device. If facial recognition is enabled, the system will compare the picture taken at the time of service to the picture saved on the client profile.

- d. FOB - A FOB device remains in a fixed location in the client's home. It generates a token, or 6-digit code, corresponding to the time. The employee enters the token(s) into the mobile device.
- e. Voice - The client provides a voice recording on the employee's mobile device
- f. Portal Signoff - The client or authorized representative must log in to the web portal and sign off
3. After the EVV method has been selected and completed, the employee finishes clocking in (if EVV is required at clock in).
4. At the end of the shift, the employee clocks out.
5. After confirming clock out, the client or authorized client representative completes the EVV attestation again (if EVV is required at clock out).
6. The employee saves the punch. It is now available to be reviewed by the supervisor or employer.

## **Auto Approval**

Auto Approval is a system function that will automatically approve time entries if they meet the criteria and rules established by the program. These entries do not need to be manually approved by the employer or supervisor. This system process runs frequently. As new punches are entered, they appear in a **Pending** status. If auto approval is enabled and the punch passes all the business rules, the system will update the status to **Approved**.

If a punch fails auto approval, it will require sign off from the employer or supervisor. The punches that need review will appear on the **Pending Entries** tab on the submenu with a **red eye** or **gray question mark** icon in the Needs Review column. Hover over the review icons to see which criteria or rule caused the punch to fail auto approval and approve or reject the punch accordingly.

Auto approval is not enabled for all programs. Please follow your program's criteria regarding approvals.

## **Approve, Reject, View, and Search for Employee Punches through the Web Portal**

1. Log in to 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 click **Search**
5. In the Entries table below the search box, locate the punch.
  - i. Click **Yes** to confirm
  - i. Click **Yes** to confirm
  - a. Click the **A** in the entry row to **approve** the punch
  - b. Click the red **R** in the entry row to **reject** the punch
  - c. Click anywhere in the entry row to view the Punch Detail page

## **Review EVV Details**

1. Log in to 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 click **Search**
5. In the Entries table below the search box, locate the punch to review EVV.
  - a. **Click anywhere in the entry row** to view the Punch Detail page
6. To review EVV verifications or details, scroll down and click the **Verifications** tab.
  - i. Client Signature: Click the arrows icon in the Compare column to compare the signature on the client profile to the signature provided on the punch
  - ii. Client Picture: If Facial Recognition failed, review the Client Picture EVV. Click the icon in the Compare column to compare the picture on the client profile to the picture taken at the time of the punch.
  - a. If any EVV verifications require approval there will be an **A** and **R** in the Approve column. Verifications that may require approval include:
  - b. All other EVV verifications entered via mobile app will be listed, but will not require action. To view EVV verification details, **click anywhere in the verification row** to open the details page. Please note that Client Portal Sign Off and EVV Phone will not appear in the EVV Verifications table.
7. To manually approve from the Punch Detail page:
  - a. Click **Actions**
  - b. Select **Approve** or **Reject** from the drop-down menu

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

## **Portal/Mobile Web**

Portal or mobile web entries can be entered by employees for either FOB or historical time entries. FOB entries are EVV compliant and do not require further action. Historical entries are not EVV compliant and require sign-off.

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 creation. Please note that without client sign-off, the punch will appear in the Pending Entries table, and will be indicated with a gray question mark icon in the Needs Review column.

Hovering over the gray question mark will display a tooltip, **Portal Sign Off Pending**. The punch can be approved without client sign-off, but will not meet the EVV requirements. Prompt the client/guardian to provide sign-off prior to approving the punch. Or, if the employer is also the client/guardian, they can sign off by following the instructions above. Their name will be recorded as the user who provided Client Portal Sign-Off.

## **Phone/FOB**

No action is required on the part of the employer or supervisor for EVV phone or EVV FOB. To review punches that were submitted via phone or with EVV FOB:

1. Log in to personal profile
2. Click **Entries** on the submenu
3. To review the details of any punch, click the blue **Entry ID** hyperlink in the punch row.

Historical phone entries require the client or authorized client representative to key in their pin on the landline phone after the employee has completed the entry. Historical phone entries are not EVV compliant and should only be used when absolutely necessary. For example, if the landline service was down during the shift or if the employee forgot to clock in and out. These historical entries should be exceptions and every effort should be made to ensure an EVV-compliant method is completed.

There is no action required by the employer or supervisor for historical entries, but employees may be reminded to use an EVV-compliant method if historical entries occur frequently.

## Related articles

- [Create a Vendor Payment Entry - Employer & Client - FI Mode Only](#)
- [What is the difference between Service Provider \(SP\) mode and Fiscal Intermediary \(FI\) mode?](#)
- [System Set-Up - Admin Guide](#)
- [Attestation \(\\*EVV\) Workflow for Clients and Guardians](#)
- [Electronic Visit Verification \(EVV\) / Client Attestation Quick Reference](#)