Attestation (*EVV) Workflow for Employees

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. There are multiple methods to complete EVV. Please contact a supervisor for specifics.

Role Required: Employee (base user)

Permission Required: N/A

Related articles

Key Points for Punches Requiring EVV

- The frequency of EVV collection is set on the employee service account and is specific to the employee, client, and service provided. Options include:
    - Clock Out Only - Requires EVV completion at the end of a shift
    - Clock In and Out - Requires EVV completion at the start and end of a shift
    - Clock In, Out, and Defined Intervals During Shift - Requires EVV completion at the start, end, and throughout the shift. For example, if the interval is set to 60 minutes, EVV will be requested every hour for the duration of the shift until clock out.
- There are several methods by which EVV can be obtained:
    - 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
- If EVV is not obtained during the shift via mobile app, the client/guardian will be required to log in to the portal and perform manual portal signoff.
- 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 client portal signoff.
- If an approved punch is edited, it is not necessary to re-obtain client portal signoff.

Mobile App - Clock In and Out

1. Log in to the mobile app at the beginning of the shift
2. Choose a service code from the drop-down menu
    a. Only service codes available for the selected client will be viewable
3. Click **Continue**
4. Click **Confirm Clock In**
5. Clock in verification required message will appear. There are six verification options. Not all options may be enabled. Please contact a supervisor for specifics.
    a. Pin/Password
        i. Hand mobile device to client or authorized representative who enters their pin or password
        ii. If the pin or password is entered incorrectly multiple times, it 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.
        iii. Click **Submit**
        iv. Click **Confirm**
    b. E-Signature
        i. Hand mobile device to client or authorized representative who uses their finger to draw their signature. This will be reviewed by the supervisor and compared to the signature the client provided when the client profile was created.
        ii. Click **Save** if signature if acceptable, or **Clear** to repeat.

        iii. Click **Confirm**
    c. Picture
        i. Device camera will open
        ii. Click the **Camera** icon to take a picture of the client. The system will compare the picture to the picture saved on the client profile.
        iii. Click **Check** icon to accept picture
        iv. Click **Refresh** icon to retake picture
        v. Click **X** icon to delete picture
        vi. Click **Confirm**
    d. FOB
        i. At the beginning of the shift locate the fob device in the client's home
        ii. Press the red button on the fob to generate the six-digit token (code). Enter the token in the mobile app.
        iii. At the end of the shift, press the red button on the fob to generate the six-digit token (code). Enter the token in the mobile app.
    e. Voice
        i. If the device requires, allow the 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**
    f. Portal Signoff
        i. Click **Confirm**
6. Add Notes and/or Attachments (optional based on organization requirements)
    a. Add Notes functionality works using the device keyboard. If talk-to-text is enabled as an option on the mobile device, the microphone feature may be used to enter notes by speaking.
    b. Add Attachment allows a picture to be taken and added to the note
7. Click **Confirm Clock Out**

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** (i.e., 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** (i.e., 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 (i.e., respite)
    a. If more than one service code, the system will read all service codes available (i.e., press 1 for 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 alert that there is an open punch. When prompted **press 1** to confirm closing the punch.
5. Select **clock out 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.
6. **Press 2** to disconnect (clock out has now occurred), or if needed, **press 1** to start a new shift (i.e., 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, users 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** (i.e., 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 (i.e., respite)
    a. If more than one service code, the system will read all service codes available (i.e., press 1 for respite, press 2 for attendant care)
8. **Enter Date of Service** in **MMDDYYYY** format (i.e., August 1, 2021, is 08012021)
9. **Enter Clock-In Time** in **HHMM** format (i.e., 8:30 is 0830)
    a. Press 1 for AM or 2 for PM
10. **Enter Clock-Out Time** in **HHMM** format (i.e., 4:45 is 0445)
    a. Press 1 for AM or 2 for PM
11. Select **clock in EVV Location**
    a. 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.
        i. 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 not required by the organization, "none" will be an available option.
12. Select **clock out EVV Location**
    a. 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.
        i. 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.
13. The call will end automatically, and the historical punch is now recorded.
14. The client or authorized client representative will **press 1** when ready
15. They enter their **PIN** to validate
16. They listen to the punch details and **press 1** to accept or **2** to reject
17. The system will read back the punch details. **Press 1** to confirm.
    a. If this is not required by the organization, "none" will be an available option.
18. Hand the landline phone to the client or authorized client representative to verify the historical entry

Portal/Mobile Web

The portal or mobile web may be used for fob, historical, and mileage entries. Fob entries are EVV compliant. Historical entries are not EVV compliant. EVV compliance states that time entries should be made in real time at the time of service. Historical entries refer to time entries that are made after the date of service, meaning they are not in compliance with EVV rules. The funding source may require a reason code for why the time entry was not completed in real time using an EVV-compliant method.

Enter FOB Tokens on the Portal

1. Log in to web portal
2. Click the blue **Add Entry** button on the dashboard
3. Complete the **Add New Entry** form wizard
    a. Entry Type: Default is set to Punch Entry. Additional entry types may be available.
    b. Employee Name: Defaults to the employee who is logged into the system
    c. Account Type: Default is set to Hourly. Additional account types may be available.
    d. Client: Enter the client name and select it from the list
    e. Service Code: The service code(s) authorized for the client. Select the one that is most appropriate for the service rendered.
    f. Service Date: The date the service took place
    g. Remaining Balance: This is an instance-level setting, is specific to the client, and if enabled, appears after the client is selected. It shows how many hours or units are remaining on the authorization.
    h. Check In/Check Out: Enter the clock in/clock out times. Both fields are required.
    i. EVV Method:
        i. Secure FOB: Enter the start and end tokens generated by the fob device at the time of service. If the fob tokens are incorrect, the entry will not be EVV-compliant. This will require client or authorized client representative sign off.
        ii. Portal Signoff: Select this for historical entries. These entries require client or authorized client representative sign off. They are not EVV-compliant and should only be used when necessary. These may require reason codes (see the next section below).
    j. Clock in EVV Location: Where the service was performed. There may be none or one or more options available depending on the client.
    k. Clock out EVV Location: See above. This should remain the same as the Clock in location unless the service ended in a different location.
    l. Check Out Date: This field cannot be edited and is tied to the service
    m. Diagnostic Code: Optionally enter the ICD-10 code
    n. Notes: Optionally enter notes per organizational requirements
    o. Attachment: Optionally select to attach a file. Examples include receipts and photos.
    p. Statements: Select applicable canned statements if canned statements are required
4. Click **Save** and **Yes** to confirm

Reason Codes

The organization may require a reason code when entering a punch. This explains why a non-EVV-compliant method was used for time entry.

Select a Reason Code (if required)

1. Follow steps a-j above
2. In the **Reason** field, click the blue **plus sign (+)**
    a. This adds two additional fields to the form: **Add Reason Codes** and **Added Reason Codes**
3. Select a reason from the **Add Reason Codes** drop-down that best describes why the punch was not made in real-time
    a. Some **Reason Codes** require a text explanation. The text box will appear and text must be entered to save.
4. Click the blue **plus sign (+)** next to the **Add Reason Codes** drop-down to add the selection to the **Added Reason Codes** box
5. Complete optional steps k-p above
6. Click **Save** and **Yes** to confirm

Related articles

- Messaging Module - Navigation - Mobile App
- Messaging Module - Navigation - Web Portal
- Message - Send a Message
- Authorizations Widget
- Authorizations - Overview