

# Attestation (\*EVV) Workflow for Clients and Guardians

**Description:** In this topic, the user will learn the workflow for punches requiring electronic visit verification. EVV is now required by most funding sources for services to be paid. There are multiple methods to complete EVV.

**Role Required:** Client, Guardian

**Permission Required:** N/A

- [Key Points for Punches Requiring EVV](#)
- [Mobile App](#)
- [Portal/Mobile Web](#)
- [Phone/FOB](#)

[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.
  - Clock In Only - Requires EVV completion at the beginning of the shift
- 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
- The client/guardian will be required to log in to the portal and perform manual portal signoff in the following situations:
  - Portal signoff was selected as the EVV method
  - EVV was not completed during the shift via mobile app
  - EVV failed via 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 - Overview of EVV
  - Verifications tab - Shows all mobile app verifications
- If a pending punch is edited, the corrected punch will require portal signoff.
- If an approved punch is edited, it is not necessary to re-obtain client portal signoff.

## **Mobile App**

1. The employee logs in to the mobile app
2. After confirming clock in, depending on the EVV frequency set on the service account, the employee may see Clock In Verification required. There are six verification options. Not all options may be enabled. Please contact the organization for specifics.
  - i. 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.
  - a. PIN or Password - The employee hands the mobile device to the client who enters their pin or password
  - b. E-Signature - The employee hands the mobile device to the client or authorized representative who uses their finger to draw their signature. This will be reviewed by the program supervisor and compared to the client's signature on file.
  - c. Picture - The employee takes a picture of the client. If facial recognition is enabled, the system will compare the picture to the picture saved on the client profile. Otherwise, the picture taken will be reviewed by the program supervisor and compared to the client's picture on file.
  - d. FOB - The employee records the token (six-digit code) from the fob
  - e. Voice - The client provides a voice recording on the employee's mobile device
  - f. Portal Signoff - The client or authorized representative logs in to the web portal and signs off on the entry
3. After capturing EVV (if required by the EVV frequency set on the service account) the employee will finish clocking in
4. At the end of the shift the employee will clock out
5. After confirming clock out, the client will need to complete EVV again (if determined by the EVV frequency set on the service account).

6. The employee saves the punch
7. The punch will now be reviewed by the supervisor/employer. Punch EVV details can be viewed by logging in with a personal profile and clicking Entries on the submenu. Click any blue entry ID hyperlink to open the punch details page.

### **Portal/Mobile Web**

If a punch is entered after the shift rather than using real-time via mobile app, the client or guardian must review the punch and provide sign off after it is created. To complete Client Portal Sign Off:

1. Log in to the web portal
2. Click **Entries Requiring Sign Off** on the submenu
  - a. Check the box in the punch row and click S to sign off or R to reject
  - b. Click **Yes** to confirm
  - c. Take action on multiple entries at once by clicking checkboxes for applicable punches or click the blue **Select All** button

### **Phone/FOB**

No action is required on the part of the client or guardian for EVV phone or EVV FOB, except for historical phone entries. Historical phone entries require the client or authorized client representative to enter 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 (i.e., landline service was down during the shift). These should be exceptions and every effort should be made to ensure an EVV-compliant method is used at the time of service.

1. Log in to the web portal
2. Click **Entries Requiring Sign Off** on the submenu
  - a. Check the box in the punch row and click S to sign off or R to reject
  - b. Click **Yes** to confirm
  - c. Take action on multiple entries at once by clicking checkboxes for applicable punches or click the blue **Select All** button

### **Related articles**

- [Reimbursements - Client Creates Reimbursement Entry - FI Mode Only](#)
- [Create a Vendor Payment Entry - Employer & Client - FI Mode Only](#)
- [Authorizations Widget](#)
- [Authorizations - Overview](#)
- [Attestation \(\\*EVV\) Workflow for Clients and Guardians](#)