

# Guardian Guide

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**Description:** In this guide, guardians or authorized representatives will learn how to use DCI to complete necessary tasks.

**Roles Required:** Guardian

**Permissions Required:** N/A



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## **Direct Care Innovations (DCI)**

**Description:** Fiscal Intermediary (FI) and Service Provider (SP) agencies use DCI (Direct Care Innovations) software to track time and attendance for payroll and billing purposes. This guardian guide will provide information and instruction for all necessary guardian tasks. Please reach out to a service coordinator with any questions or visit the DCI Help Center.

About DCI:

- Software designed to track time and attendance for payroll and billing and meet the EVV (electronic visit verification) requirements prescribed by the 21st Century Cures Act
- Built for caregivers by caregivers
- Collects EVV using the mobile app, landline phone, or FOB.
- Manages authorizations
- Electronic, eliminating the need for paper timesheets.

## **Electronic Visit Verification (EVV)**

**Description:** The 21st Century Cures Act, signed into law in December of 2016, requires state agencies to implement a system of electronic visit verification (EVV) for personal care services and home health services provided and reimbursed under Medicaid.

EVV is a process that uses electronic means to verify these care provider visits. There are six components of EVV that the provider will collect at each visit:

1. The date of the service
2. The location of the service
3. The time the service begins and ends
4. The individual receiving the service
5. The individual providing the service
6. The type of service performed

Using DCI, the provider can collect EVV using the following methods\*:

- Mobile app

- Landline telephone
- FOB device

\*Not all EVV methods are available for all programs. Contact a service coordinator to learn which EVV methods are approved for the program or service.

## **Profile Types**

### **Client**

The client profile is for the person receiving the service. It allows the client to view and sign off on services provided, and to view and track authorization information. The client profile may also be used by a representative. If the representative is using the client profile, the profile name will be of the person receiving services, while the login credentials will be those of the representative. The client profile only allows access to one client's information. If the representative is using the client profile and oversees services for more than one client, they will have login credentials for each client profile.

### **Guardian**

The guardian profile is for parents, family members, guardians, or other designated representatives. It allows authorized representatives to view and sign off on services provided and to view and track authorization information. A user with the guardian profile may have access to one or more clients. While the guardian profile can be linked to multiple clients, the client profile can only be linked to one guardian profile.

### **Employer**

The employer profile is for the employer of record who could be the client, parent, or other designated representative. It is the individual that hires and fires employees, who are those that render services to the client. A user with an employer role may manage employee punch entries, add employee punches, add notes or attachments, and run reports for the associated cost center(s). An employer may have multiple clients. For example, the parent may be the employer, managing care for two siblings who receive services. This role is available for fiscal intermediaries only.

## **EVV Punches**

There are several methods in which EVV can be obtained, which vary by program. Please contact a service coordinator to learn which EVV methods are available for the program or service.

### **Mobile App**

- Client Picture/Facial Recognition – The employee takes a picture of the client at the time of service using the employee's smart device
  - Please 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 titled How does DCI use client photos and photos taken for electronic visit verification (EVV)?
- Client Signature – The client or guardian uses the employee's mobile device to provide an electronic signature at the time of service
- Client PIN/Password – The client or guardian uses the employee's mobile device to enter a PIN or password at the time of service
- Secure FOB - A small device that generates a token (code) based on the time, kept in the client's home. The employee generates a code from the FOB at the time of service to enter into their mobile device.
- Voice – The client or guardian uses the employee's mobile device to provide a voice recording at the time of service
- Portal Signoff – The client or guardian logs into the web portal to sign off on the time entry

### **Web Portal / Mobile Web**

- Secure FOB - A small device that generates a token (code) based on the time, kept in the client's home. Employee generates a code from the FOB at the time of service.
- Portal Signoff – The client or guardian logs into the web portal to sign off on the time entry

### **Phone EVV (Landline)**

- Phone EVV - Employee uses client's landline phone to clock in and out at the time of service
- Historical Phone Entries - Employee uses client's landline phone to enter time for dates that have already passed, for example, the employee forgot to clock in and out for a shift. The client or guardian must provide their PIN during this call. Historical phone entries are not EVV compliant.

The client or guardian is required to log in to the web portal and perform sign-off in the following situations:

- Portal Signoff was chosen as an EVV method
- EVV was not completed via the mobile app during the shift (e.g., forgot, or EVV failed)
- 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.

- EVV Details Widget - Overview of EVV
- 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) Guide in the Help Center.

### **Mobile App**

The DCI Mobile EVV app is a free application that is available in both the Apple App Store and Google Play Store. It does not take up much space on a smart device.

Requirements to use the DCI Mobile App:

- Have a smart device (phone or tablet)
  - Apple – iPhone 6s or 6s Plus or later, iPhone SE, iPod touch (7<sup>th</sup> generation)
  - Android – 4.6" screen or larger
- Have a smart device that runs Android 8.0 or Apple iOS 13 or later operating system
  - The operating system information can be found in the system settings of the device
- Have internet access or mobile data available
  - Please note: The app does work in areas of low or no network availability using offline mode. This setting must be enabled by the program or service. Additionally, to use offline mode, the device must be connected to the internet the first time the user logs in. This registers the device.
- Web browsers
  - Google Chrome (preferred), Firefox, Edge, or Safari

### **Download the Mobile App**

1. Open the Apple App Store or Google Play store on the smart device and enter **DCI Mobile EVV** into the search bar
  - a. Please note: There are multiple DCI application options. Be sure to choose the right one for the specific program.
2. Select **DCI Mobile EVV** from the list of available apps
3. Click **Install**
4. After installation, click **Open** to launch the app.
  - a. A shortcut will be placed on the device home screen

### **Before Initial Login**

- Username and password will be provided by the program
- The program will also provide a System Identifier, which is a code that will connect the user to the organization's instance of DCI.
- These three items are needed for login

### **Initial Login**

1. Upon opening the app, a system alert will appear saying, "Allow DCI EVV to use your location?" Click "Allow While Using App".
  - a. This happens at initial login only
2. Enter the System Identifier provided and click **Next**
  - a. This happens at initial login only
3. Enter Username/Email and Password or PIN and click **Login**

### **Log in after Initial Login**

1. Enter Username/Email and Password or PIN and click **Login**

### **Preferred Language**

DCI offers the user the ability to select a preferred language if the organization has enabled this feature. If enabled, an EN will be visible in the top right-hand corner of the login screen. EN stands for English, which is the default language of the system, however, the following languages are available:

- English
- Spanish
- Vietnamese
- Russian
- Mandarin
- Somali
- Arabic

### **Change Preferred Language at Login**

1. Click **EN**
2. Select the **Preferred Language** from the list. Scroll to see all available languages.
3. Click **OK**

### **Mobile App EVV Process**

The instructions below simulate a punch with EVV frequency type set to clock in and out. Some of the EVV options may not be enabled by the organization. Please contact the program coordinator with questions.

1. Employee logs in to the mobile app with credentials and starts the shift
2. After confirming the clock-in, the employee will see the clock-in verification required. Here are the options for verification:
  - a. **Client PIN or Password** - Employee hands mobile device to the client or guardian who enters their PIN or Password
    - i. If the client or guardian enters an incorrect password, the employee will receive an alert that the visit verification failed. The client or guardian must re-enter their password. If after three attempts, the app cannot confirm the password, the client or guardian will be prompted to reset their PIN or password. This can be done from the DCI login screen in the app or web portal.
  - b. **E-Signature** - Employee hands mobile device to the client or guardian who uses their finger to draw their signature. This will be reviewed by the program supervisor and compared to the signature the client or guardian provided when their profile was created.

- c. **Picture** - Employee uses their device to take a picture of the client. If the organization has enabled facial recognition, the system will compare the picture to the picture saved on the client profile. If facial recognition is not enabled, the picture will be reviewed by the program supervisor.
  - d. **FOB** - Employee uses the FOB located at the client's home to generate a token (code) that they enter. This token corresponds to the time of day.
  - e. **Voice** - Employee hands mobile device to the client or guardian who provides a voice recording
  - f. **Portal Signoff** – The client or guardian logs into the web portal and signs off on the punch entry
3. Employee completes clock in
  4. At the end of the shift, the employee logs in to the mobile app and initiates the clock out, working with the client or guardian to repeat the EVV process outlined above.
  5. Employee confirms clock out which completes the punch entry. The punch will be reviewed by the supervisor/employer. The guardian may view the EVV details of the punch by logging in to DCI, clicking Clients on the submenu, clicking on the client row to open, viewing the entries on the Entry tab, and clicking the punch row to open the punch details page.

## **Web Portal**

The web portal is an easy way to manage schedules and authorizations and locate information regarding employees and services.

### **Activate Web Portal Access**

After the DCI profile is created, the system will send an activation email to the address on the profile.

1. Locate the activation email sent by [support@dcisoftware.com](mailto:support@dcisoftware.com)
  - a. Check spam if the email is not received
2. Select the **Activate Your Profile** button in the email
  - a. Please note: The Active Your Profile or Reset Password button link will only be active for a specific amount of time (typically 24 hours) as determined by the organization
  - b. After clicking the Activate Your Profile button in the email, if the link is inactive, an alert will appear "Invalid Token. Please contact your DCI administrator." Select the Resend the email button and proceed back to step 2.
3. The Authenticate Password page will open. Enter the temporary password and click the **Authenticate**
  - a. The temporary password should be communicated to the user based on individual company procedures.
4. The Update Password page will open. Enter a new password into both of the fields (must enter and confirm) and select the **Update Password**
  - a. Password Criteria
    - i. Must be at least 10 characters
    - ii. Must contain 1 uppercase letter, lowercase letter, number, and special characters.
    - iii. Must not contain more than two repeated characters in a row
    - iv. The password should be different from the three previous passwords
5. An alert box will appear. Select **Yes** to confirm.
6. The DCI profile login page will open. Enter the updated login credentials (username/email and password) and click **Sign In**.
  - a. Please note: Before signing in, use the preferred language drop-down in the upper right-hand corner of the page to update the preferred language, if applicable.
7. The Update Security Details page will open
  - a. Select a Security Question and type the Security Answer
    - i. Please note: Answers are case sensitive
    - ii. These will be used as a verification option if the user selects the Forgot Password link to reset their password
  - b. Click **Save**
8. The user is now logged in to their DCI profile

Upon logging in to DCI, the user lands on the dashboard. The header is referred to as the **main menu** and has the following options from left to right:

- Home
  - Click to return to the dashboard
- Messaging Module (envelope icon)
  - Send and receive secure messages
  - See Messaging Module section in this guide for details
- Help
  - Access the Help Center
  - Search for articles, guides, and videos regarding navigation and processes in DCI.
- Username
  - Displays who is currently logged in to DCI
- Settings (person icon)
  - Update PIN, password, security question, email, and username.
  - Verify mobile device

The left side of the dashboard contains two tabs and is called the **submenu**:

- Dashboard
  - Authorizations - Review authorization information
    - Enter client name (required) and date of service (optional) and click **Search** to view data
    - Use the scroll bars to view all information including service code, start and end date, initial balance, remaining balance, pre-authorization holds, current available balance, and monthly, weekly, and daily max.
  - Client Total Hours Per Week - Review hours worked by week by employee
    - Enter the client's name and click **Search** to view data
  - News Posts - Receive updates from the program
    - Click on a news post to view details

- Clients
  - Use the filters to locate a client and click **Search** or select a client from the table
  - Click anywhere on the client row to open the client details page and view important information in the basic demographics and other details widget boxes
  - Click the **Actions** button to add a new note, new attachment, or a new client request.
  - Entries tab:
    - Entries - View all entries associated with the client profile
      - Employee punch entries
      - Client attendance or absence entries
      - Click the blue Entry ID in the row to view details
    - Entries Requiring Sign Off - Punches entered after the shift instead of using real-time clock in and out via mobile app require review
      - Entries requiring signoff are indicated with a checkbox to the left of the row
      - Select the checkbox then click the green **Sign Off** or red **Reject** button
      - Process multiple entries at once by selecting all applicable checkboxes and then clicking the green **Sign Off** or red **Reject** button
      - Process all entries at once by clicking the checkbox on the header row and then clicking the green **Sign Off** or red **Reject** button
      - Click the blue Entry ID in the punch row to view punch details
  - Schedule tab:
    - View the client's schedule
    - Request services
      - Click **Actions**
      - Select **Add New Client Request** from the drop-down menu
    - Not available in all programs
    - See the Scheduling section in this guide for details
  - Notes tab:
    - View notes associated with the client
    - Click on a row to view the note details page
  - Attachments tab:
    - View attachments associated with the client
    - Click the eye icon to view the attachment
    - Click the download icon to download
      - Please note: Download access may be restricted

## **Phone EVV**

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 must be used with a landline and can be used for both real-time (at the time of service – EVV compliant) or historical (after the service was completed – not EVV compliant) entries. No action is required on the part of the client or guardian for real-time phone EVV.

Historical phone entries are not EVV compliant and should only be used when necessary, such as if the landline service was down during the shift or the employee forgot to clock in and out. They 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 should be exceptions.

## **FOB EVV**

The DCI FOB is an alternative method of EVV that can be used when the employee does not have a smartphone/device and the client does not have a landline. The FOB is a small device secured in the client's home. FOB EVV is not available for all programs. There is a replacement cost for lost, missing, or broken fobs. Reach out to a program coordinator for details. There is no action required for a client or guardian for FOB EVV. At the start and end of the shift, the employee uses the FOB to generate a token (code) which they enter in the mobile app if the employee has a device, or on paper if they do not have a device, to be entered in the web portal later. This token (code) corresponds to the time of day.

## **Scheduling**

The scheduling module allows guardians to view the client's schedule by employee, program, and service. Each published shift will appear in blue on the schedule and includes the employee, program, or service name, start and end time, and total hours. The schedule can be viewed by day or week and can be printed. Guardians may receive notifications when changes are made to the schedule and can request services directly for a specific date and time. The scheduling module is not available for all programs.

### **View Client(s) Schedule**

1. Log in to DCI with personal profile
2. Click **Clients** on the submenu
3. Use the filters to locate a client and click **Search** or select a client from the table
4. Click anywhere on the client row to open the client details page
5. Click the **Schedule tab**

### **Request Services**

1. Log in to DCI with personal profile
2. Click **Clients** on the submenu
3. Use the filters to locate a client and click **Search** or select a client from the table
4. Click anywhere on the client row to open the client details page
5. Click **Actions**

6. Select **Add New Client Request**
7. Complete the Client Requests form
  - a. Day – Select date
  - b. Time – Enter requested start time
  - c. To – Enter requested end time
  - d. Service Code – Select from drop-down options
  - e. Employee – Begin typing the requested employee's name and select from the drop-down
    - i. Please note: If the employee is unavailable, the supervisor may schedule an alternative employee.
  - f. Click **Save** and **Yes** to confirm
  - g. Click the **Schedule** tab
    - i. The request will appear on the schedule in orange as a requested shift and has been sent to the supervisor for review
    - ii. The guardian will receive a notification when this review is complete if the organization has enabled messaging
    - iii. The shift will appear in blue on the schedule if the request is approved
    - iv. If rejected, it will no longer appear, and the supervisor will provide details surrounding the rejection.
    - v. To send a message to the supervisor using the messaging module, right-click on the requested shift and click Send Message.

## **Messaging**

DCI offers the opportunity for guardians to interact with users who are linked to them, such as program supervisors and employees, through the secure messaging module. Guardians may also receive automated system notifications.

### **View and Manage Messages**

1. Log in to DCI with personal profile
2. Select the **envelope icon** in the upper right area of the main menu
3. Select **See All Messages** to open the Inbox page
  - a. View messages
    - i. Messages in bold are unread
    - ii. A yellow star indicates high priority
  - b. Select messages to take actions such as Archive or Delete
  - c. Use filters to locate a specific message and click **Search**
  - d. Click anywhere in the message row to open and view the message details
    - i. From (sender)
    - ii. To (recipient)
      1. Recipient name will be highlighted in red if the message is unread
      2. Recipient name will be highlighted in green if the message has been read
    - iii. Date sent
    - iv. Priority level
    - v. Message body
    - vi. View notes and attachments by clicking the tabs
  - e. Click the **Actions** button and select New Message to compose a message (see Send a Message instructions below for an alternate option)
  - f. In a message strand, select the single message to expand the section and display the message details.
4. Select various submenu tabs to view messages outside of the inbox:
  - a. Sent
  - b. Archive
  - c. Draft
  - d. Trash

### **Send a Message**

1. Log in to DCI with personal profile
2. Select the **envelope icon** in the upper right area of the main menu
3. Select **Compose Message** and complete the New Message form
  - a. To - Enter the recipient(s)
    - i. Messages can only be sent to users linked to the profile. If the name does not appear in the recipient field, they cannot be messaged.
  - b. Subject
  - c. Priority– Low, Normal, or High
    - i. High-priority messages will be indicated with a yellow star
  - d. Enter the message body
4. Save for later by clicking **Save as Draft**
  - a. View and act on the draft by selecting Draft from the submenu
5. Select **Cancel** to delete the message
6. Select **Send** when ready to send

## **Related articles**

- [Authorizations - Overview](#)
- [Attestation \(\\*EVV\) Workflow for Clients and Guardians](#)
- [Client - FOB Attestation \(\\*EVV\)](#)
- [October 2023 Release Notes](#)
- [Client - Web Portal & Mobile App Punch Sign-Off](#)