

EVV Locations

Description: In this topic, the user will learn EVV locations functionality. EVV locations specify and record approved work locations per electronic visit verification requirements. EVV locations may be required for hourly punch entries and can be used for group services, residential and parenting programs, and day programs. EVV locations can be manually inputted or imported.

*Please note: To require EVV locations at clock in and clock out, enable the setting Require EVV Locations on the service code for hourly account types.

Role Required: Super User, Supervisor, Employer

Permission Required: Varies by object

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Managing EVV Locations

The most common use of EVV locations occurs on client profiles, as they are the locations that will be available when creating an hourly punch, however, EVV locations can be added to any of the following profiles:

- Client
- Employee
- Residential Program
- Day Program
- Group Service
- Parenting Program

Create a Profile with EVV Location

1. Log in to DCI
2. Select **Home** on the main menu
3. Select the **profile type** on the submenu (Client, Employee, Group Service, Residential Programs, Day Programs, or Parenting Programs)
4. Click **Actions**
5. Select **Add New (profile type)** (Client, Employee, Group Service, Residential Programs, Day Programs, or Parenting Programs)
6. Complete the form wizard
 - i. The phone number will be associated with the EVV location.
 - ii. When using the IVR phone system to create a punch entry the system will associate the EVV location linked to the phone number.
 1. If no phone number is listed the user will be prompted to make a selection.
 - iii. The phone number listed on the EVV location for a client must be unique
 - iv. Must be the client's landline for EVV compliance (connected to the location)
 - i. DCI does not offer phone number verification. However, if the organization has verified that the phone is a landline number, it may be marked as verified. This field is used for reporting purposes only.
 - i. This list is configurable via **Settings > Custom Dropdowns**. Examples might include landline, mobile, apple, android, etc.
 - i. This list is configurable via **Settings > Custom Dropdowns**. Examples might include local or national carriers such as AT&T, Verizon, or T-Mobile.
 - i. Active - Location will be available when entering a punch
 - ii. Inactive - Location will be hidden when entering a punch
 - a. To use EVV locations for the program complete the EVV locations tab
 - b. EVV Location Name - This should be something recognizable by the employee providing services
 - c. EVV Location Type - Residential, Commercial, or Public Space
 - d. Address - Enter the EVV location address
 - e. Phone Number (optional)
 - f. Phone Verified - Click **Yes** if the phone number has been verified. Select **No** if it has not.
 - g. Phone Type is an optional field
 - h. Phone Carrier is an optional field
 - i. Begin Date is a required field
 - j. End Date is an optional field. If no end date is selected, the EVV location will always be available.
 - k. Status
 - l. Check the Primary checkbox if this is the location that should auto-populate on the new entry form wizard. Only one location can be primary.
7. Click **Save** and **Yes** to confirm
8. The system will verify the EVV Location is a valid address. If it is not, the error will read, "Google Maps does not recognize this Location Address." Enter a valid address to continue. If it is a valid address, select **Yes** to confirm.
9. To view the EVV location details click the **EVV Locations tab** on the profile details page

Add an EVV Location to an Existing Profile

1. Log in to an appropriate profile
2. Click **Home** on the main menu
3. Click the desired **profile type** from the submenu (Client, Employee, Group Service, Residential Programs, Day Programs, or Parenting Programs)
4. Use filters to locate the profile and click **Search**
5. Click anywhere on the profile row to open the details page
6. Click **Actions**
7. Select **New EVV Location**
8. Complete the Add New EVV Location form wizard
 - i. The phone number will be associated with the EVV location.
 - ii. When using the IVR phone system to create a punch entry the system will associate the EVV location linked to the phone number.
 1. If no phone number is listed the user will be prompted to make a selection.
 - iii. The phone number listed on the EVV location for a client must be unique
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 - a. EVV Location Name - This should be something recognizable by the employee providing services
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 - d. Phone Number (optional)
 - e. Phone Verified - Click **Yes** if the phone number has been verified. Select **No** if it has not.
 - f. Phone Type is an optional field
 - g. Phone Carrier is an optional field
 - h. Begin Date is a required field
 - i. End Date is an optional field. If no end date is selected, the EVV location will always be available.
 - j. Status
 - k. Check the Primary checkbox if this is the location that should auto-populate on the new entry form wizard. Only one location can be primary.
9. Click **Save**
10. The system will verify the EVV Location is a valid address. If it is not, the error will read, "Google Maps does not recognize this Location Address." Enter a valid address to continue. If it is a valid address, select **Yes** to confirm.
11. To view the EVV location details click the **EVV Locations tab** on the profile details page

Edit an EVV Location for an Existing Profile

1. Log in to an appropriate profile
2. Click the desired profile type from the submenu
3. Use filters to locate the profile and click **Search**
4. Click anywhere on the profile row to open the details page
5. Scroll down and click the **EVV Locations tab**
6. Click the desired EVV location to open the details page
7. Click **Actions**
8. Select **Edit EVV Location**
9. Make the desired changes
 - a. Please note that an address cannot be changed. If the address is no longer used and a new address is needed, the EVV location should be set to **Inactive** and a new EVV location created.
10. Click **Save** and **Yes** to confirm

Create a Service Code to Require EVV Locations - Hourly Account Type Only

1. Log in to an appropriate profile
2. Select **Settings** from the main menu
3. Select **Funding Sources** from the submenu
4. Use filters to locate the funding source and click **Search**
5. Click **Actions**
6. Click **Add New Service Code and complete the form wizard**
 - i. When the setting is enabled, employees will be required to select an EVV location at clock in and clock out for punch entries.
 - ii. If an EVV location is not selected, the user will receive an alert and the clock in or clock out cannot occur until the location is selected.
 - a. Require EVV Locations - Select **Yes** in the Require EVV Locations
7. Click **Save** and **Yes** to confirm

Edit an Existing Service Code to Require EVV Locations - Hourly Account Type Only

1. Log in to an appropriate profile
2. Select **Settings** from the main menu
3. Select **Funding Sources** from the submenu
4. Use filters to locate the funding source and click **Search**
5. Click anywhere on the funding source row to open the details page
6. Scroll down and click the **Service Codes tab**
7. Click the desired service code to open the details page

8. Click **Actions**
9. Select **Edit Service Code**
10. Edit the field Require EVV Locations - Select **Yes** in the Require EVV Locations
 - i. When the setting is enabled, employees will be required to select an EVV location at clock in and clock out for punch entries.
 - ii. If an EVV location is not selected, the user will receive an alert and the clock in or clock out cannot occur until the location is selected.
11. Click **Save** and **Yes** to confirm

View Punches with EVV Locations

1. Log in to personal profile
2. Click **Home** on the main menu
3. Click **Entries** on the submenu
4. Use filters to locate the punch and click **Search**
5. The entries tab will display all punches or will be updated with the search criteria
6. Click anywhere in the punch entry row to open the details page
7. Clock in and clock out EVV locations are listed in the EVV details box on the punch details page in the EVV details section

EVV Locations Reports

All EVV reports contain EVV Location information for clock in and clock out locations. Report options include:

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

Access EVV Reports

1. Log in to an appropriate profile
2. Select **Reports** from the main menu
3. Select **EVV Reports** from the submenu
4. Select a report from the flyout menu

Related articles

- [Business Rule List](#)
- [Business Rules](#)
- [Service Codes - Create, View, Edit, or Deactivate](#)
- [Authorization Remaining Balances as Time in the Mobile App](#)
- [System Set-Up - Admin Guide](#)