

evvie Mobile App & evvie Portal

User Guide



Updated February 2025

© Copyright 2025 HHAeXchange |130 West 42nd Street, 2nd Floor | New York, NY 10036



Table of Contents

User Guide for Workers, Participants, and Representatives	2
Introduction	2
What is EVV?	2
What is evvie?	2
HHAX System Key Terms and Definitions	3
Getting Started With evvie & evvie Portal	4
Create an FMSOne Account and Sign-in to evvie Portal	4
Link to FMS One Video Walkthrough	4
Download, Install, and Sign-in to the evvie Mobile App	5
Using the evvie App	8
Change App Language	8
Logging a Visit	
Offline Shift Submission	
Using the evvie Portal Web App	
Getting Started	14
Order of Approvals	
Viewing Visits	
One Step Approvals (in-app Approval for Workers)	
Batch Approvals	
Denying A Visit	
Adjusting A Visit	
Creating A Manual Visit	
Two-Step Shift Approvals	42
Batch Shift Entry	46
Creating Batch Shifts	46
Viewing a Batch	
Edit a Shift in the Batch	54
Delete a Shift from the Batch	
Add a Shift to the Batch	
Submit a Batch	
Quick Guides	
Logging in to evvie Portal	
Logging in to evvie Mobile App	61
Reset FMS One Password	62
Access the evvie/evvie Portal User Guide	64
Change Your Notification Preferences	
User Guide Updates	67

User Guide for Workers, Participants, and Representatives

Introduction

What is EVV?

EVV stands for Electronic Visit Verification. **Workers** use an app to <u>electronically</u> record the start and end times of each shift they work (also called a <u>visit</u>). **Workers** will be required to send information about visits to an EVV system at the beginning and end of each visit. EVV helps <u>verify</u> that **Participants** are getting the care they need. Congress passed the 21st Century Cures Act, requiring state Medicaid programs to use EVV for certain home and community-based services.

What is evvie?

evvie is software that helps self-directing **Participants** meet the EVV requirements while keeping choice and control in their self-direction. evvie meets EVV requirements in the least-restrictive way possible for **Participants** and their **Workers**. There are two components to evvie: The evvie mobile app and the evvie Portal website.

The **evvie** mobile app lets **Worker**s record visits easily, quickly, and securely on their smartphones or GPS-enabled tablets. The **evvie Portal** is a website where **Participants**, **Worker**s, and Representatives will review and approve all EVV visits.

HHAX System Key Terms and Definitions

This guide uses these words to describe the users of **evvie**: **Participants, Workers**, **Representatives, and Financial Management Services (FMS)**. Depending on where you live and what program you participate in, you may use different words to describe yourself.

Term	Definition
	Can also be called: Consumers, Clients, Members, Individuals, or
Participant	Employers. This is the person who receives home and community-based
	services.
	Can also be called: PCAs, DSPs, PHWs, Employees, or Caregivers. This is
Worker	a person who provides Home and Community-based Services to
	Participants.
	Can also be called: Family, Designees, or Circle of Support. They are
	usually a friend or family member of the Participant. A representative
Representative	might help with approving timesheets, finding a worker to hire, and
	scheduling workers.
	Can also be called: Fiscal Intermediaries (FI), Fiscal Employer Agent
FMS Provider	(F/EA), or Fiscal Support Entity (FSE). This is an organization that collects
	the timesheets, processes hiring paperwork, and manages payroll
ННАХ	Acronym for HHAeXchange



Getting Started With evvie & evvie Portal

Create an FMSOne Account and Sign-in to evvie Portal

The Financial Management Services (FMS) Provider will begin the setup of each user of evvie Portal & evvie. **Participants**, **Workers**, and Representatives all use the evvie Portal. Only the **Workers** will have access to use the evvie mobile app.

A valid email address is required to create your account so be sure your FMS has your up-todate and preferred email if there have been changes recently. Once an administrator at your FMS creates your account, you will receive an email with instructions on the remaining steps to confirm your account and set a password.

FMSOne is a single sign-on solution that allows you to manage your online accounts securely and easily. When signing into the system, log in using the FMSOne sign in button on the login screen pictured below.



FMS One Sign-in Button

If you have already signed up for your **FMS One** account previously, you can log into your account by entering your email and password. If you have not signed up for **FMS One** yet, click the **Sign Up** link and follow the steps included in your welcome email that was sent to you by the FMS. Detailed **FMSOne** sign-up instructions are available in the FMSOne Quick Guide.

Link to FMS One Video Walkthrough

For a detailed video walkthrough of setting up your **FMS One** account, please visit <u>https://vimeo.com/675013615/9d446a7f9b</u>



Download, Install, and Sign-in to the evvie Mobile App

Only **Workers** need to download and install the **evvie** App. **Participants and Representatives** will not use the **evvie** app to manage shifts. **Participants and Representatives**, please continue to the section of the manual titled: <u>Using the **evvie** Portal</u>.

 All Workers need to download the evvie mobile app from the Android or Apple app store. Links to the app can be found at the bottom of the Invitation email, or by clicking either link shown below. You can also open the app store on your phone/tablet and search for "evvie."



2. Locate the app on your phone and click the icon to open.





3. The first time you open the app, you will be asked to allow **evvie** to access your device's location. Click "**Allow While Using App**" or "**Allow only while using the app**." **evvie** will only record your location when you start and end a shift. These locations are part of the information that must be collected to verify your shifts with EVV.



Allow Location Sharing Notifications



 After you allow evvie to use your location, click the blue "FMS ONE" button to sign in. You will be redirected to a web page to sign in. On Apple Devices: if prompted, click continue.



FMS One Sign-in and Apple Device Redirect Notification

5. You will now log in to **FMSOne** using your email and password that you set up earlier. Click **Log in**.

Log in
Email
Password
Log in

FMS One Log-in Screen (Mobile)

 The first time you use the evvie app, you will need to authorize it. Click the green Authorize button.



evvie Authorization Screen



7. Most users will not need to complete this step. On the next screen, you may need to select the FMS you are working with. For most users, there will be no selection screen at all. For some users, there will only be one option to select. If you work for more than one Participant, and those Participants are served by different FMS Providers, you will want to select the FMS associated with the Participant you want to log a visit for. After selecting the FMS, press Done in the upper right corner.

15:45 🕫		ui 🕈 🚮	15:45 🕫	.il 🕈 🚧
	Select FI	Done	Select FI	Done
Finest FMS		۲	Finest FMS	۲
			FMS Provider Two	0
Mo	st Jears		Some Users	

Select FI Screen (Mobile App)

8. The evvie mobile app is now set up and you are ready to start logging visits.



Using the evvie App

Change App Language

1. You can change the language of the in app text and buttons. To access the language options, click the menu button on the Consumer Selection page.



Menu Button

2. This will bring up your profile/account page in evvie.

Account	Crogour
r.	
juage	
	None
	٥
	>
end log	
	r puoge

3. The first section of the page shows a language icon and "Choose your Language". Click on this section of the page.



Choose your Language



4. Click the language you'd like to use from the popup.

Choose your Language	
FMS Provider	
Choose your Language	
English	~
Hmong	
Russian	
Somali	
Spanish	
Chinese (Mandarin)	
Chinese (Cantonese)	
Portuguese	
Vietnamese	
Haitian Creole	

Language Selection

5. Your profile/account page and the rest of the app will now be in the language you chose.

Regresar	Cuenta	Cerrar se
Winifred Wo	orker	
Elija su idio	ma	
Manual		
Proveedor de FM	s	
Turnos a transmi	itir	Ninguna
Identificación de	I dispositivo	٥
Enlace del portal	Evvie	>
	Bitácora de envío.	

Account Page (Spanish)



Logging a Visit

Logging a visit on the **evvie** mobile app is quick, easy, and can be done with just a few clicks. It is important to note, that although **evvie** supports offline visit capture, **Workers** must log in while connected to the internet at least one time before they log a visit. This will allow the app to load data for both the **Worker** and their **Participants**. After this is done, the **Worker** can complete the steps below to log a visit either with or without an internet connection.

Once the **Worker** is signed into the **evvie** mobile app, (and has selected the FMS, if applicable) they will be presented with a page that displays all the **Participants** they work for. If the **Worker** is already signed in from a previous session, they will see this screen as soon as they open the app.



Participant Select Screen

6. Click the checkbox next to the Participant you want to log a visit for. Then click Start Shift at the bottom of the screen. You will need to click Yes in the pop-up to confirm that the selected Participant is accurate. If your program, working with more than one Participant at a time, select all Participants you are working with before clicking Start Shift.



Start Shift Button and Confirmation Popup



7. The shift has now begun and **evvie** is tracking the time.



Clock Icon and Shift Timer

8. The Worker will need to fill out the required fields on the shift tracking page at some point before completing the shift. Required fields are marked with an asterisk *. The fields may include information like start/end location, service code, notes, goals, ADLs/tasks, etc. Please note that the fields on the shift tracking page are unique for each different FMS using evvie, so the fields shown in the example below may be slightly different for your program. The Worker can update these fields at any point in the visit but must do so before ending the visit.

00:00:02	
All fields marked with an asterisk(*) are required.	
Consumer Enrollment ID *	
CHC - PA Health & Wellness - FEA - N/A	~
Service Code *	
Select Service Code	\sim
Start Datetime	
October 24, 2024 2:43 pm	
Location *	
Select Location	\sim

Sample Shift Information Fields



 If the visit was started in error, the Worker can click the Cancel button in the top left corner to cancel the visit. No EVV data will be tracked or saved. Click End Shift in the top right corner to finalize and submit a completed shift.



Cancel and End Shift Buttons

10. After clicking End Shift, the Worker will need to confirm the visit and will have to select one of three options: End and Complete, End and Start New, or Cancel. Selecting Cancel here will return you to the shift. If your FMS Provider has enabled in-app approval, this step will automatically place the shift in a status of Approved in the evvie Portal.



11. If the Worker is connected to the internet at the end of the visit, the visit will be automatically sent to the evvie Portal website within the next 30-60 seconds. If the Worker is not connected to the internet, the visit will be stored in the Worker's account page until the Worker has connected to the internet again and the visit can be manually transmitted. Instructions for manually submitting visits to the evvie Portal website can be found in the next section of this guide titled: Offline Shift Submission.



Offline Shift Submission

As mentioned in the Logging a Visit section, visit data will be automatically submitted to the **evvie** Portal website if the **Worker** is connected to the internet when they end their visit. In that case, there are no additional steps for the **Worker**. If the **Worker** is not connected to the internet when they end a visit, the visit will not be sent automatically. Instead, all the visits that could not be sent will be stored in the mobile app. The **Worker** will need to connect the mobile device to the internet and may need complete these steps to submit the visits to the **evvie** Portal.

Typically, any pending shifts will automatically transmit as soon as an internet connection is available, and the app is opened. The **Worker** can confirm that there are no remaining shifts to be sent by following these steps.

1. After starting up the app, the **Worker** will access their account screen by clicking the person icon in the upper right corner.



2. Once on the account screen, the Worker will be able to see the number of shifts that are waiting to be transmitted. If any visits are still waiting to be transmitted, the Worker can click the blue upload button next to the text "Shifts to be transmitted." All pending visits will be submitted to evvie Portal if the Worker is connected to the internet.

Back Account	Logout	Book Account	Logout
Emma Ployee		Emma Ployee	
Choose your Language		A 🖸 Choose your Language	
FMS Provider		FMS Provider	
Shifts to be transmitted	٩	Shifts to be transmitted	None

Account Screen With and Without Shifts to Transmit



Using the evvie Portal Web App

Getting Started

If you have not completed the instructions in your Invitation Email, please go back to the section titled <u>Getting Started with evvie & evvie Portal</u> in this user guide and review the steps to confirm and authorize your FMS One account. If you have already registered and have an FMS One login, please continue with this section.

Order of Approvals

If your FMS Provider has enabled in-app approval for **Workers**, visits that have been logged in the **evvie** mobile app will start in the **evvie** Portal with a status of **Approved** and must be moved to a status of **Approval Locked** before the shift can be finalized. Once locked, the shift can no longer be edited in the **evvie** Portal. Either the **Participant** or their **Representative** will review the visit and put the visit in a status of **Approval Locked**.

When in-app approval is enabled, **Workers** will not need to use the **evvie** portal to approve visits logged in the app. They will need to use the **evvie** portal if visits need to be adjusted or denied. Manual visits, those that are created directly in the **evvie** Portal, will need to be approved by the **Worker** before the **Participant/Representative** puts the visit in **Approval Locked** status. If any changes need to be made to the visit prior to the approval process, either the **Worker** or the **Participant/Representative** needs to begin the Adjustment process prior to locking the shift.

If your FMS Provider uses the <u>two-step approval process</u>, the <u>both the **Worker** and the</u> <u>**Participant/Representative**</u> will need to complete an approval of the shift in the **evvie** Portal. The <u>two-step approval process</u> is explained in its own section of this manual after the section on manual shifts.

> Throughout this guide, if the instructions for Participants/ Representatives and Workers are different, there will be two instructions for that step. If the instructions are the same, there will only be one instruction for that step. Please also note that we have included images of the portal as viewed on a computer and a mobile device to make the process clear for users regardless of the type of device that you use.



Viewing Visits

Each person associated with a visit needs to approve it before it can be processed for payment. Once the **Worker** completes the visit in the **evvie** mobile app, it will feed into the **evvie** Portal website within 30-60 seconds if the **Worker** is connected to the internet. If the **Worker** was not connected to the internet at the end of their shift, the visit will feed to the **evvie** Portal website once the **Worker** reconnects to the internet and manually submits the visit.

With one-step approvals, the Worker's approval of the shift happens when the Worker completes and submits the shift in the evvie mobile app. If the Worker or Participant/Representative wants to view the shift in the evvie portal, they should follow these steps.

 When a visit moves from the evvie mobile app to evvie Portal, the Participant/Representative will receive a notification email prompting them to approve the visit. They can click a link in the email to be taken directly to the sign in page and then the visit's page in the portal.

A new shift has been submitted for your review in Evvie Portal!

To log in and view the details for this shift, just follow this link: https://evvie-portal.sampleurl.bluebedrock.com/shifts/321

Email Notification of New Shift

2. After signing in, if the **Participant/Representative** clicked the link in the email, they will be brought directly to the shift needing approval. They can continue to the next section of this manual for <u>Approving Shifts</u>.



3. If you have logged in to the **evvie** Portal without clicking an email link, you will arrive at the home screen. Click the **View all Shifts** button.

Evvie Portal 🕕 Shifts	tuforials+tess@annkissam.com (Con
No shifts present for this week.	
No Batch Shift Entries present	
View All Shifts	View My Pay Period

View All Shifts (Desktop)

tutorials+tess@annkissam.com (Consumer)
No shifts present for this week.
No Batch Shift Entries present
View All Shifts
View My Pay Period

View all Shifts (Mobile)

4. **Participants/Representatives**: You can search for a specific shift, by clicking the **Worker** box and typing the first few characters of the **Worker's** name, then selecting the **Worker** that appears just below the box. You can also mark the checkbox next to one or more statuses if you want to further filter the list. Start/End date/time of shift is also an option. Click **Search** to apply your filters.

Employee	
Empl	
Evvie Employee (E12345)	E
Choose a Date & Time to filter by	

Worker Select (Desktop)

*Employee
Please select an Employee
Places select on Employee
Please select an Employee
Evvie Employee (E23456)
Commonte

Worker Select (Mobile)



Workers: You can search for a specific shift, by clicking the **Participant** box and typing the first few characters of the **Participant's** name, then selecting the **Participant** that appears just below the box. You can also mark the checkbox next to one or more statuses if you want to further filter the list. Start/End date/time of shift is also an option. Click **Search** at the bottom of the form to apply your filters.

		Filter shifts
er shifts		Consumer
		Conn
onsumer		
Conn		Connie Consumer (C12345)
Connie Consumer (C12345)	Endir	Ending on or prior to
Choose a Date & Time to filter by	Chu	
Vith Status		With Status
Participant Select (Desktop)		Participant Select (Mobile)

5. Results will appear in the listing below the search button. Scroll the list to find the shift you need to approve and click the **View Shift** button next to the visit (on a Desktop) or click the box that displays the shift (on a mobile device).

End Time	Status	Duration	Service Code	Link to Shift
Thu 08/01/24, 8:00pm	Approved	8 hours, 0 minutes	Respite	ID 248
Tue 06/27/23, 7:00am	Approved	1 hour, 0 minutes	Personal Assistance Services	ID 102 View Shift
	V	iew Shifts (Des	ktop)	
		nesor		
	ID 174			
	Consumer	Connie Consumer (C23	456)	
	Employee:	Evvie Employee (E1234	45)	
	End: Fri 03	3/08/24, 12:00pm /08/24, 5:00pm		
	Shift State	Approved		
	Shift Durat	ion: 5 hours, 0 minutes		
	Service Co	de: Personal Assistanc	e Services	
	ID 173			
		12 C	150	
	Consumer	Connie Consumer (C23	456)	
	Consumer Employee:	: Connie Consumer (C23 Evvie Employee (E1234	1456) 15)	
	Consumer Employee: Start: Tue 0	Connie Consumer (C23 Evvie Employee (E1234 03/05/24, 12:00pm	456) 15)	

View Shifts (Mobile)



6. The next page will show you all the shift details, and there will be buttons available at the bottom of the shift page (below the Shift History section) to perform actions on the shift. These actions are Approve (Approve Lock), Adjust, and Deny. There is also a button to View All Shifts, which will return you to the listing of shifts. The available buttons will depend on the status of the shift.

ాల Shift History							
Date & Time	Transitioned From	Transitioned To	Actor	Notes			
Friday 03/15/24, 9:23am	Submitted	Approved	Evvie Employee (E12345)				
Friday 03/15/24, 9:21am N/A		Submitted	Evvie Employee (E12345)				
		🖌 Adjust Shift					
		⊘ Deny Shift					
		View All Shifts					

Shift Action Buttons (Desktop)



Shift Action Buttons (Mobile)



One Step Approvals (in-app Approval for Workers)

Please refer to the instructions for Two-Step Approvals if your FMS Provider uses that process.

When a **Worker** finishes a shift in the **evvie** mobile app, they are automatically approving that shift. It is then the responsibility of the **Participant/Representative** to review the shift in the **evvie** portal and place it in **Approval Locked** status. When the shift transmits from the **evvie** app to the **evvie** portal, the **Participant/Representative** will receive an email letting them know that a shift is waiting for them in the **evvie** portal. If a shift is manually created, it will need to be approved by both the **Worker** and the **Participant/Representative** following the <u>Two-Step</u> Approval Process.

Participant/Representatives: While viewing a shift, scroll to the bottom of the page. Visits captured in the evvie mobile app will already have a status of Approved and need to be Approval Locked by you.

	S	Shift History				
Date & Time	Transitioned From	Transitioned To	Actor	Notes		
Friday 03/15/24, 9:23am	Submitted	Approved	Evvie Employee (E12345)			
Friday 03/15/24, 9:21am	N/A	Submitted	Evvie Employee (E12345)			
	G	🕈 Adjust Shift				
	6	Deny Shift				
Lock as Approved						
View All Shifts						

Shift Action Buttons (Desktop)

າງ Shift History
Date & Time: Friday 03/15/24, 9:21am Transitioned From: N/A Transitioned To: Submitted Actor: Ervie Employee (E12345) Notes:
Date & Time: Friday 03/15/24, 9:23am Transitioned From: Submitted Transitioned To: Approved Actor: Evvie Employee (E12345) Notes:
🖉 Adjust Shift
🚫 Deny Shift
Lock as Approved
View All Shifts

Shift Action Buttons (Mobile)



Worker: After finishing a shift in the evvie mobile app, the shift will be displayed in the evvie Portal. Review the shift, then scroll to the bottom of the page. At this point, the visit can be Adjusted or Denied. If there are no options to adjust or deny, the shift has already been Approval Locked by the Participant/Representative. The Worker will need to contact the FMS if the shift is already locked and there needs to be an adjustment.

ື Shift History							
Date & Time	Transitioned From	Transitioned To	Actor	Notes			
Friday 03/15/24, 9:23am	Submitted	Approved	Evvie Employee (E12345)				
Friday 03/15/24, 9:21am	N/A	Submitted	Evvie Employee (E12345)				
	1	🕜 Adjust Shift					
		Solution Shift Solution Shift Solution Shift Solution Shift Solution Solution Shift Solution Shift Solution Shift Solution Solution Shift					
		View All Shifts					

Shift Action Buttons (Desktop)



Shift Action Buttons (Mobile)



Participants/Representatives should use the following steps to put shifts in a status of Approval Locked.

- 1. Scroll to the bottom of the shift page. If the visit was correct, click the **Lock as Approved** button at the bottom of the page.
- 2. After clicking Lock as Approved the Participant/Representative will be asked to check a box to declare that the shift is correct. By checking this box, you are officially signing your approval of the shift. After clicking the box, the Awaiting Confirmation button will transform to a Lock as Approved button. You can add a phone number or comments if you want to. Comments will be viewable by all parties associated with the shift.



I declare under penalty of perjury, that all hours worked and descriptions knowledge that all of this information may be subject to investigation and denial of payment and/or reporting of findings to the investigation unit of Lock as Approved

After Clicking Checkbox (Desktop)

Notes:	Notes:
Phone Number	Phone Number
Please enter a phone number at which you can be reached by a staff member in the event there are issues with this shift. Comments	Please enter a phone number at which you can be reached by a staff member in the event there are issues with this shift. Comments
I declare under penalty of perjury, that all hours worked and descriptions of work performed contained in the submitted shifts, are true and correct, with full knowledge that all of this information may be subject to investigation and that any false or dishonest information contained on these shifts may be grounds for denial of payment and/or reporting of findings to the investigation unit of the Department of Human Services.	I declare under penalty of perjury, that all hours worked and descriptions of work performed contained in the submitted shifts, are true and correct, with full knowledge that all of this information may be subject to investigation and that any false or dishonest information contained on these shifts may be grounds for denial of payment and/or reporting of findings to the investigation unit of the Department of Human Services.
Awaiting confirmation	Lock as Approved
Cancel	Cancel

Before and After Clicking Checkbox (Mobile)

3. The visit will now have a status of **Approval Locked**. The visit will be sent to the FMS for payroll processing at the end of the pay period. Once a visit is locked, it cannot be changed in the **evvie** portal.



Batch Approvals

With batch approvals users can approve and/or approval lock multiple shifts at the same time.

1. After logging in to evvie Portal, click on View My Pay Period.



View My Pay Period (Mobile)

2. This will bring you to shifts for the current pay period. From the pay period view, you may have to navigate back to the previous pay period to find the shifts, depending on when you are making the batch approval.

		D	lownload as CSV			
Date	Employee	Start Time	End Time	Service Code	Status	Shift Total Hours
Thu 08/01/2024	Emma Ployee (E237432)	12:00pm	8:00pm	Respite	Approved	8 hours, 0 minutes
• Prev 1 Next •	8 hours, 0 minutes			Emr	na Ployee (E237	432): 8 hours, 0 minutes
				View Previou	us Pay Period	View Next Pay Period
	View	ing a Pay	y Period	(Desktop)	
	1	1				
		Ba	tch Approve			
		Batch L	ock as Approv	ed		
		Dow	mload as CSV			
	Consun	ner: Tess Partic	cipant (C1992	84)		
	Employ	ee: Emma Ploy	vee (E237432)			
	Start: T	hu 08/01/24, 12	2:00pm			
	End: Th	u 08/01/24, 8:0	00pm			
	Service	Code: Respite)			
	Status:	Approved				
	Duratio	n: a nours, 0 m	inutes			
	Total Hour E	rs: 8 Emma Ployee	hours, 0 mini (E237432) : 8	utes hours, 0 minutes		
	View Pre	evious Pay Perio	d Viev	v Next Pay Period		

Viewing a Pay Period (Mobile)



3. At the top of the pay period shift listing Click on the Batch Approve or Batch Lock as Approved button depending on the action you want to take. If you are following the Two Step Approval process, the shifts will currently have a status of Submitted and you will click on Batch Approve. If you are following the One Step Approval process, or the shifts have already been approved in the Two Step process, the Shifts will currently have a status of Approved and you will click on Batch Lock as Approved. Note: There is also an option to Download as a CSV. Clicking on this button will download a list of the shifts in a spreadsheet format.

			Batch Approve					
	Batch Lock as Approved							
		D	ownload as CSV					
Date	Employee	Start Time	End Time	Service Code	Status	Shift Total Hours		
Thu 08/01/2024	Emma Ployee (E237432)	12:00pm	8:00pm	Respite	Approved	8 hours, 0 minutes		
<pre> v Prev 1 Next > </pre>	8 hours, 0 minutes			Emn	na Ployee (E237	432): 8 hours, 0 minutes		
				View Previou	us Pay Period	View Next Pay Period		

Batch Action Buttons (Desktop)



Batch Action Buttons (Mobile)



4. On the Shifts screen, the shifts about to be approved will be listed. Click on the **All** switch icon (near the upper left) to mark all shifts listed for approval. If you only want to approve some of these shifts, you can use the individual switches next to each shift on the right side of the screen. You can optionally add comments in the box at the top of the page as well.

Shifts							
.ock S	Shifts:						
hone M	Number						
Nease enter a phone number at which you can be reached by a staff member in the event there are issues with this shift. Comments							
ID	Consumer & Employee	Date & Time	Status	Multiple Time Zones		Add To Batch	
174	Connie Consumer (C23456) Evvie Employee (E12345)	Start: Fri 03/08/24, 12:00pm End: Fri 03/08/24, 5:00pm	Approved 5 hours, 0 minutes		View Shift O		
167	Connie Consumer (C23456) Evvie Employee (E12345)	Start: Thu 03/07/24, 1:50pm End: Thu 03/07/24, 1:52pm	Approved 0 hours, 2 minutes		View Shift O		

Selecting Shifts for Batch Approval/Lock (Desktop)

		Shifts							
Lock Sh	nifts:								
Phone Nu	Phone Number								
Please entr staff memb Comment	er a phone numb ber in the event t	oer at which yo here are issue:	ou can be read s with this shi	ched by a ft.					
A Here a	II are the Shifts	you can loc	k:						
ite & me	Status	Multiple Time Zones		Add To Batch					
art : Fri /08/24, :00pm nd : Fri /08/24, 00pm	Approved 5 hours, 0 minutes		View Shift						

Selecting Shifts for Batch Approval/Lock (Mobile)



5. After clicking the All switch or some of the individual switches, click the checkbox below the shift listing to certify your shifts. Clicking the checkbox will turn the Awaiting Confirmation button to a Submit All Approvals or Lock All as Approved Button. Click that button to complete the batch approval or batch lock as approved.



Checkbox to Approve and Lock All As Approved Button (Mobile)

The shifts are now approved, or approval locked, depending on the action you took.
 Repeat as needed to approve additional shifts in batch.



Denying A Visit

Users may need to deny a visit if the visit was created in error. For example, if the worker accidentally begins a visit for the incorrect participant but completes it rather than cancels it. If the visit is partially correct you can adjust the shift, instead of denying it. <u>Adjustments</u> are covered in the next section of this guide. Shifts are first denied by one party, then locked as denied by the other.

- After logging in to the evvie Portal, locate the shift by reviewing the list of shifts or by using the search feature to filter the list of shifts. You can review instructions for locating a shift in the section of this manual titled <u>Viewing Visits</u>.
- After you have located the shift that needs to be denied or locked as denied, click the View Shift button next to the visit (on a Desktop) or click the box that displays the shift (on a mobile device).

End Time	Status	Duration	Service Code	Link to Shift
Thu 08/01/24, 8:00pm	Approved	8 hours, 0 minutes	Respite	ID 248 View Shift
Tue 06/27/23, 7:00am	Approved	1 hour, 0 minutes	Personal Assistance Services	ID 102 View Shift

View Shift Buttons on Shift Index (Desktop)



View Shift (Mobile)



3. If the shift is currently in a **Submitted** or **Approved** status, scroll to the bottom of the shift page and click **Deny Shift**.

	SI	hift History		
Transitioned From		Transitioned To	Actor	Notes
Submitted		Approved	Evvie Employee (E12345)	
N/A		Submitted	Evvie Employee (E12345)	
	ľ	Adjust Shift		
	0	Deny Shift		
		View All Shifts		
	Transitioned From Submitted N/A	S Transitioned From Submitted N/A	Shift History Transitioned From Transitioned To Submitted Approved N/A Submitted Urgent Adjust Shift O Deny Shift View All Shifts	Shift History Transitioned From Transitioned To Actor Submitted Approved Evvie Employee (E12345) N/A Submitted Evvie Employee (E12345) V/A Submitted Evvie Employee (E12345) UP Adjust Shift View All Shifts

Shift Action Buttons (Desktop)

	ງ Shift History
Date & T Transitio Transitio Actor: Notes:	ime: Friday 03/15/24, 9:21am ned From: N/A ned To: Submitted
Date & T Transitio Transitio Actor: Notes:	ime: Friday 03/15/24, 9:23am ned From: Submitted ned To: Approved
	🗭 Adjust Shift
	🚫 Deny Shift
	Lock as Approved

Shift Action Buttons (Mobile)

Or if the shift is already in a **Denied** status, scroll to the bottom of the shift page. If you agree with the denial, click **Lock as Denied**. If you disagree with the denial, click **Challenge Denial**.

		ூ Shift History		
Date & Time	Transitioned From	Transitioned To	Actor	Notes
Monday 03/18/24, 8:54am	Approved	Denied	Connie Consumer (C23456)	
Sunday 10/29/23, 10:43pm	Submitted	Approved	Evvie Employee (E12345)	
Sunday 10/29/23, 10:43pm	N/A	Submitted	Evvie Employee (E12345)	
	[🖌 Adjust Shift		
		Challenge Denial		
		Lock as Denied		
		View All Shifts		

Denied Shift Action Buttons (Desktop)



Denied Shift Action Buttons (Mobile)



4. If **denying** the shift, on the next page, you will be required to select a **Denial Code** from the drop-down menu to indicate why the visit is being denied. You may also enter a comment which will be visible to all associated users. Click the checkbox to certify your denial of the shift. Once you are done, click **Submit Denial**.

		Shift History		
Date & Time	Transitioned From	Transitioned To	Actor	Notes
riday 03/15/24, 9:23am	Submitted	Approved	Evvie Employee (E12345)	
riday 03/15/24, 9:21am	N/A	Submitted	Evvie Employee (E12345)	
Please enter a phone number at which Comments	you can be reached by a staff member in t	the event there are issues with this s	hift.	
I declare under pena knowledge that all of denial of payment an	Ity of perjury, that all hours worked and this information may be subject to inve d/or reporting of findings to the investig	descriptions of work performed of estigation and that any false or dis gation unit of the Department of H	contained in the submitted shifts, are true and shonest information contained on these shifts turnan Services.	correct, with full may be grounds for

Submitting a Denial (Desktop)

Pho	ne Number
Plea by a	se enter a phone number at which you can be reached staff member in the event there are issues with this shift
	I declare under penalty of perjury, that all hours worked and descriptions of work performed contained in the submitted shifts, are true and correct, with full knowledge that all of this information may be subject to investigation and that any false or dishonest information contained on these shifts may be grounds for denial of payment and/or reporting of findings to the investigation unit of the Department of Human Services.
	Submit Denial

Submitting a Denial (Mobile)



Or if the shift was already in a **Denied** status and you clicked **Lock as Denied** on the previous screen, you will need to check the box to certify the denial. Then you can click the **Lock as Denied** button.

Date & Time	Transitioned From	Transitioned To	Actor	Notes
Aonday 03/18/24, 8:54am	Approved	Denied	Connie Consumer (C23456)	
Sunday 10/29/23, 10:43pm	Submitted	Approved	Evvie Employee (E12345)	
Sunday 10/29/23, 10:43pm	N/A	Submitted	Evvie Employee (E12345)	
Comments				
I declare under penalty knowledge that all of thi denial of payment and/o	of perjury, that all hours worked and is information may be subject to inve- or reporting of findings to the investig	descriptions of work performed stigation and that any false or d pation unit of the Department of	contained in the submitted shifts, are true and ishonest information contained on these shifts r Human Services.	correct, with full may be grounds for

Lock as Denied (Desktop)

Plea by a	ase enter a phone number at which you can be reached a staff member in the event there are issues with this shif
Cor	nments
	I declare under penalty of perjury, that all hours worked and descriptions of work performed contained in the submitted shifts, are true and correct, with full knowledge that all of this information may be subject to investigation and that any false or dishonest information contained on these shifts may be grounds for denial of payment and/or reporting of findings to the investigation unit of the Department of Human Services.
	Lock as Denied

Lock as Denied (Mobile)



Or if the shift was already in a **Denied** status and you clicked **Challenge Denial** on the previous screen, you will want to add comments to explain why it should not be denied, then check the box, before clicking the **Challenge Denial** button.

		າງ Shift History		
Date & Time	Transitioned From	Transitioned To	Actor	Notes
Monday 03/18/24, 8:54am	Approved	Denied	Connie Consumer (C23456)	
Sunday 10/29/23, 10:43pm	Submitted	Approved	Evvie Employee (E12345)	
Sunday 10/29/23, 10:43pm	N/A	Submitted	Evvie Employee (E12345)	
Please enter a phone number at which yo	u can be reached by a staff member in th	e event there are issues with this s	hit.	
Comments				
Comments I declare under penalty knowledge that all of th denial of payment and/	of perjury, that all hours worked and d is information may be subject to inves or reporting of findings to the investig:	lescriptions of work performed i tigation and that any false or di ation unit of the Department of H	contained in the submitted shifts, are true and co shonest information contained on these shifts m furman Services.	prrect, with full ay be grounds for

Challenging a Denial (Desktop)

Please e by a sta Comme	anter a phone number at which you can be reached if member in the event there are issues with this shill ants Jeclare under penalty of perjury, that all hours orked and descriptions of work performed untained in the submitted shifts, are true and mrect, with full knowledge that all of this
	leclare under penalty of perjury, that all hours orked and descriptions of work performed intained in the submitted shifts, are true and mrect, with full knowledge that all of this
thi or pa inv Se	formation may be subject to investigation and at any false or dishonest information contained these shifts may be grounds for denial of nyment and/or reporting of findings to the vestigation unit of the Department of Human ervices.
	Challenge Denial

Challenging a Denial (Mobile)

5. A challenged denial can then be approved, or it can be denied a second time. The Participant/Representative and Worker have the option to go back and forth twice with challenging a denial before they will need to decide if the visit should be locked as a denial or if the visit can be approved. If you cannot come to an agreement about the status of the shift, contact the FMS for assistance.



Adjusting A Visit

You may need to adjust a visit for a few reasons, such as if the worker arrives at their shift but cannot clock in because their phone battery is drained, or the worker may have also forgotten to log in at the start of the shift but remembered before the end of the shift. The worker would then clock in late once they are able to and the start time of the shift would need to be adjusted before it is approved for payment. Each time a visit is edited and approved; an email will be sent to the other party alerting them that a visit is awaiting their approval.

- 1. After logging in to the evvie Portal, search for the shift that needs to be adjusted. You can review instructions for locating a shift in the <u>Viewing Shifts</u> section of this manual.
- 2. Click the **View Shift** button next to the visit (on a Desktop) or click the box that displays the shift (on a mobile device).

End Time	Status	Duration	Service Code	Link to Shift
Thu 08/01/24, 8:00pm	Approved	8 hours, 0 minutes	Respite	ID 248
Tue 06/27/23, 7:00am	Approved	1 hour, 0 minutes	Personal Assistance Services	ID 102

View Shifts (Desktop)



View Shifts (Mobile)



3. Scroll down to the bottom of the shift's page and click Adjust Shift.

		SI	າງ hift History		
Date & Time	Transitioned From		Transitioned To	Actor	Notes
Friday 03/15/24, 9:23am	Submitted		Approved	Evvie Employee (E12345)	
Friday 03/15/24, 9:21am	N/A		Submitted	Evvie Employee (E12345)	
		Ľ	Adjust Shift		
		0	Deny Shift		
			View All Shifts		

Shift Action Buttons (Desktop)



Shift Action Buttons (Mobile)



4. On the next page, at the top of the form, select both an exception and a reason code to explain why the shift is being adjusted.

Please enter the correct information below:	
* Exception Code	
Forgotten clock in / clock out	Ŧ
Reason Code	
Mobile device battery died	*

Exception and Reason Code Selection (Desktop)

Please enter the correct information below:	
*Exception	
Other	
*Reason	
Attendant called in to or out of the EVV sys	
* Start Date & Time * Starting Time Zone	

Exception and Reason Code Selection (Mobile)

5. After selecting the Exception and Reason, you can change any of the fields that need to be adjusted. Click into any field or dropdown to make changes. Users may be required to leave a comment about the change, which will be viewable when the other party is prompted to approve the visit. Note that your site may look slightly different and have more/less fields available for adjustment.

Exception	
Other	
Reason	
Attendant called in to c	or out of the EVV sys
Start Date & Time	* Starting Time Zone
Apr 7, 2024 at 12:00	(GMT-05:00) Easter
End Date & Time	* Ending Time Zone
Apr 7, 2024 at 13:00	(GMT-05:00) Easter
Consumer Enrollment	
CHC - PA Health & We	llness - FEA - N/A
Service Code	
Respite	,
* Location	
Home	Ŧ
Phone Number	

Adjust Shift Form (Mobile)



Please enter the correct inf	ormation below:		
* Exception Code			
Missed clock in / clock out			Ψ
t Bassan Cada			
* Reason Code			
Mobile device battery died			Ť
<u>^</u> Start Date & Time	* Starting Time Zone	End Date & Time	Ending Time Zone
Friday 03/05/21, 10:15AM	(GMT-05:00) Eastern Time (US 🔻	Friday 03/05/21, 1:15PM	(GMT-05:00) Eastern Time (US 🔻
Consumer Enrollment			
SD - N/A - Level 3 - N/A			Ţ
Service Code			
1:1 Respite			*
<u>*</u> Consumer Response			
Positive: Loved			Ψ
Goals Independence Recreation INotes Indirect Indirect End Location Home Phone Number			
Please enter a phone number at which you can b Comments	e reached by a staff member in the event there a	are issues with this shift.	
I declare under penalty of perjuice Knowledge that all of this inform denial of payment and/or repo	ury, that all hours worked and descriptions o mation may be subject to investigation and t rting of findings to the investigation unit of th istment	f work performed contained in the submitt hat any false or dishonest information con te Department of Human Services.	ted shifts, are true and correct, with full trained on these shifts may be grounds for Cancel

Adjust Shift Form (Desktop)



6. Once finished, the user will check the box certifying the shift and click Submit Adjustment. The other party will receive an email to notify them there is a shift waiting for approval. The party that needs to approve the shift after it has been adjusted, will follow the normal steps for <u>approving a shift</u>.

Comme	nts	
Unang		/
	I declare under penalty of perjury, that all hours worked and descriptions knowledge that all of this information may be subject to investigation and denial of payment and/or reporting of findings to the investigation unit of	of work performed contained in the submitted shifts, are true and correct, with full d that any false or dishonest information contained on these shifts may be grounds for the Department of Human Services.
	Submit Adjustment	Cancel
	Submit Adjustmen	t (Deskton)

I declare under penalty of perjury, that all hours worked and descriptions of work performed contained in the submitted shifts, are true and correct, with full knowledge that all of this information may be subject to investigation and that any false or dishonest information contained on these shifts may be grounds for denial of payment and/or reporting of findings to the investigation unit of the Department of Human Services.	Con	iments
Curburait A discolutions		I declare under penalty of perjury, that all hours worked and descriptions of work performed contained in the submitted shifts, are true and correct, with full knowledge that all of this information may be subject to investigation and that any false or dishonest information contained on these shifts may be grounds for denial of payment and/or reporting of findings to the investigation unit of the Department of Human Services.
Submit Adjustment		Submit Adjustment

Submit Adjustment (Mobile)



Creating A Manual Visit

This is the process to use if you are manually entering a new visit. Manual visits for services that require EVV should be avoided unless necessary. Manually entered visits are not EVV-compliant and your program's regulations may monitor for users with high volumes of non-compliant visits. If your FMS/FI has instructed you to use evvie Portal for service types that do not require you to use EVV, then this manual entry process can be used as substitute for an electronic or paper timesheet. See <u>Batch Shift Entry</u>, for information on entering several manual shifts at a time.

1. After logging in to the evvie Portal, click "View all Shifts. See the <u>Quick Guides</u> section at the end of this manual if you need assistance with logging in.

X Evvie Portal	D Shifts	tutorials+tess@annkissam	.com (Consumer) 🤝
	No shifts present for this week.		
	No Batch Shift Entries present		
	View All Shifts	View My Pay Period	

View All Shifts (Desktop)

tutorials+tess@annkissam.com (Consumer)
No shifts present for this week.
No Batch Shift Entries present
View All Shifts
View My Pay Period
View My Pay Period

View all Shifts (Mobile)



2. Click the large blue button that near the top of the screen labeled, "Create a new Shift".



Create a New Shift Button (Mobile)

3. This will bring you to the Create Shift form. Select both an Exception Code and a Reason Code. The Exception indicates why a visit is being manually entered, and the Reason indicates why the Exception occurred. Select the Exception and Reason codes that best match your situation. If you have concerns or questions about which option is best, contact your FMS/FI for assistance.







Exception and Reason Code Selection (Mobile)



4. Click in the Start Date & Time Box. Select the date of the visit from the calendar. You can only select today's date or an earlier date. Then click on the time at the bottom of the calendar to enter the hours and minutes of when the shift started. Click on AM or PM to change it. The look of the calendar may vary on a Mobile browser, it depends on your system's settings – but the workflow is the same. Select a date, then select the time.

Monday 03/08/21, 8:00AM						(G	
<	Ν	March	~	2021			
Sun	Mon	Tue	Wed	Thu	Fri	Sat	
28	1	2	3	4	5	6	
7	8	9	10				
	15		17				
	08	:		00		AM	

Mutual	n Case/	or Clu	ster Ca	ise/ or	Live-in	C *
April	2024					
	1	2	3	4	5	6
7	8	9		11	12	13
14	15	16	17	18		20
21	22	23	24	25	26	27
28	29	30				
Time					16	:00
						Done

Date and Time Selection (Desktop).

Date Time Selection (Mobile)

5. You must select the time zone where you worked from the dropdown. It will default to the time zone of your FMS/FI.





6. Workers: Select the Consumer (Participant) from the dropdown.

Participants: Select the Employee (Worker) from the dropdown

Representatives: Select the Consumer (Participant) from the dropdown, then select the Employee (Worker) from the dropdown.

*Consumer	
Select a Consumer	•
	1
	-
Select a Consumer	
Connie Consumer (C12345)	
Comments	

Employee
Please select an Employee
Please select an Employee
Evvie Employee (E23456)
Commonto

Select a Consumer (Mobile & Desktop)

Select an Employee (Mobile& Desktop)

7. Select the Consumer Enrollment, then select the service code.

Please select an enrollment	Program - Payor - F/EA - N/A	
Please select an enrollment		

Please select a service code	
Respite	
Attendant Services	
Respite	
* Location	

Consumer Enrollment Select (Mobile & Desktop)

Service Code Select (Mobile & Desktop)

8. Complete any additional fields as required by your program. These could include location, notes, goals, ADLs, Direct/Indirect, and/or Consumer Response. Some programs will use all of these, some will use only one.

Positive: Loved	Ŧ
Goals	
Notes	
Notes can be entered here	
Indirect	
Start Location	
Start Location	*
Start Location Community End Location	¥

Additional Fields on Shifts (Mobile & Desktop)

ADL Codes
Shower/Bathing
Dressing/Changing
Prosthetics/Splints/TEDS
Grooming
Assist w/Feeding
Mobility
Transferring
Toileting

ADL Code Checkboxes (Mobile & Desktop)



9. Mark the checkbox to certify the shift and click the create shift button at the bottom of the form. The shift will be saved in a status of Submitted, and must be approved, then approval locked by the other party. This is considered a two-step approval. Instructions for these approvals are in the next section of the guide. Below are two samples of completed manual shift forms.

Shift details:		Shift details:	
*Exception		*Exception	
Other	*	Timesheet Verified	,
		*Reason	
Reason		Attendant unable to use	e mobile device
Other	•	* Start Date & Time	 Starting Time Zone
* Start Date & Time	* Starting Time Zone	Wednesday 04/17/24	(GMT-05:00) Easter
Tuesday 04/16/24, 12	(GMT-05:00) Easter *	Wednesday 04/11/24	(GINT-05.00) Easter
* End Date & Time	* Ending Time Zone	* End Date & Time	• Ending Time Zone
Tuesday 04/16/24, 6:	(GMT-05:00) Easter *	Wednesday 04/17/24	(GMT-05:00) Easter
		*Consumer	
*Consumer		Connie Consumer (C	12345)
Connie Consumer (C	*12345)	*Employee	
*Consumer Enrollment		Evvie Employee (E23	456)
Program - Payor - F/I	EA - N/A	*Consumer Enrollment	
*Service Code		Program - Payor - F/E	EA - N/A
Respite	•	*Service Code	
* Location		Respite	
Home	*	* Location	
Phone Number		Home	٣
Please enter a phone number a	at which you can be reached there are issues with this shift.	Phone Number	d
Comments		by a staff member in the event	there are issues with this shift
comments can be enter	red here	Comments	
		Comments can be add	ed here
I declare under penalty worked and description contained in the submit correct, with full knowle information may be sub that any false or dishon on these shifts may be payment and/or reportii investigation unit of the Services.	of perjury, that all hours as of work performed ted shifts, are true and edge that all of this ject to investigation and est information contained grounds for denial of ng of findings to the Department of Human	I declare under penalty worked and description contained in the submit correct, with full knowle information may be sub that any false or dishor on these shifts may be payment and/or reporti investigation unit of the Services.	of perjury, that all hours as of work performed tted shifts, are true and adge that all of this oject to investigation and test information contained grounds for denial of ng of findings to the Department of Human
Create	e Shift	Creat	e Shift



Manual Shift Form – Representative (Mobile)



Two-Step Shift Approvals

Even if your FMS Provider has enabled one-step approvals for visits recorded using the evvie app, all users of evvie and evvie portal need to complete at two-step approval process for visits/shifts that were manually created in the evvie portal. If your FMS Provider hasn't enabled one-step approvals, you will need to use these steps for each shift worked and recorded in the evvie app as well.

The process is like the one-step approval process - but each person associated to the shift, the Worker, and the Participant/Representative, will need to complete an approval step before the shift is finalized.

1. After entering a manual shift in the evvie Portal, or if your FMS/FI is using two-step approvals for all shifts entered in the evvie mobile app, the shift will be displayed in the evvie portal. Find the shift in the evvie Portal, then scroll to the bottom of the page. At this point, the visit can be **Approved**, **Adjusted** or **Denied**. The first Approval step can be done by the Worker or the Participant/Representative. They will click Approve Shift.

	S	າງ hift History		
Date & Time	Transitioned From	Transitioned To	Actor	Notes
Thursday 10/19/23, 3:54pm	N/A	Submitted	Evvie Employee (Employee)	
	~ 2	Approve Shift Adjust Shift		
	0	Deny Shift		
		View All Shifts		

Two Step Approval - Approve Shift (Desktop)



Two Step Approval - Approve Shift (Mobile)



2. After clicking Approve Shift the Worker or Participant/Representative will be asked to check a box to declare that the shift is correct. By checking this box, you are officially signing your approval of the shift. After clicking the box, the Awaiting Confirmation button will transform to a Submit Approval button. You can add a phone number or comments if you want to. Comments will be viewable by all parties associated with the shift.

Please ent	in a phone number at which you can be reached by a staff member in the event there are issues with this shift. S

Two Step Approval – Submit Approval (Desktop)

Note	95:
Pho	ine Number
Plea by a Cor	ise enter a phone number at which you can be reached staff member in the event there are issues with this shift nments
	I declare under penalty of perjury, that all hours worked and descriptions of work performed contained in the submitted shifts, are true and correct, with full knowledge that all of this information may be subject to investigation and that any false or dishonest information contained on these shifts may be grounds for denial of payment and/or reporting of findings to the investigation unit of the Department of Human Services.
	Submit Approval

Two Step Approval – Submit Approval (Mobile)

 The shift is now approved and the other party (either the Worker or the Participant/Representative) will be notified via email that a shift is waiting for them to complete the second step of the approval.



4. That person will need to login to the evvie Portal to view the shift. When they scroll to the bottom of the shift page, they can click **Lock as Approved.**

ື Shift History				
Date & Time	Transitioned From	Transitioned To	Actor	Notes
Wednesday 04/24/24, 10:54am	Submitted	Approved	Evvie Employee (Employee)	
Wednesday 04/24/24, 10:30am	N/A	Submitted	Evvie Employee (Employee)	
	C'	Adjust Shift		
	0	Deny Shift		
	Loc	k as Approved		
View All Shifts				

Two Step Approval – Lock as Approved (Desktop)



Two Step Approval - Lock as Approved (Desktop)



5. After clicking Lock as Approved the Worker or Participant/Representative will be asked to check a box to declare that the shift is correct. By checking this box, you are officially signing your approval of the shift. After clicking the box, the Awaiting Confirmation button will transform to a Lock as Approved button. You can add a phone number or comments if you want to. Comments will be viewable by all parties associated with the shift.

Phone N	umber
vlease en	ter a phone number at which you can be reached by a staff member in the event there are issues with this shift.
ommer	rts
2	I declare under penalty of perjury, that all hours worked and descriptions of work performed contained in the submitted shifts, are true and correct, with full knowledge that all of this information may be subject to investigation and that any false or dishonest information contained on these shifts may be grounds for denial of payment and/or reporting of findings to the investigation unit of the Department of Human Services.

Two Step Approvals - Lock As Approved (Desktop)

Pho	ne Number
Plea by a	ise enter a phone number at which you can be reached a staff member in the event there are issues with this shift
Cor	nments
	I declare under penalty of perjury, that all hours
	worked and descriptions of work performed
	contained in the submitted shifts, are true and
	correct, with full knowledge that all of this
	information may be subject to investigation and
<u> </u>	that any false or dishonest information contained
	on these shifts may be grounds for denial of
	payment and/or reporting of findings to the
	investigation unit of the Department of Human
	Services.
	Lock as Approved

Two Step Approvals - Lock As Approved (Mobile)

6. The visit will now have a status of **Approval Locked**. The visit will be sent to the FMS/FI for payroll processing at the end of the pay period. Once a visit is locked, it cannot be changed in the evvie Portal.



Batch Shift Entry

Batch Shift entry allows users to enter up to seven manual shifts from the same screen into evvie Portal at the same time. Please note that batch entered manual shifts are not evv-compliant and should only be used when the **Worker** could not use the evvie mobile app or IVR to record a shift. Batch entry of manual shifts can also be used when the service provided by the **Worker** does not require evv. For instructions on approving a batch of shifts, please see <u>Batch Approvals</u>.

Creating Batch Shifts

These instructions are for users with a Worker, Participant, or Representative role.

1. **Desktop:** After logging in to evvie Portal, click on Shifts in the menu bar at the top of the screen.



Shift Button in Header (Desktop)

Mobile: After logging in to evvie Portal, click on the menu icon (three bars) in the upper left corner of the screen. Then click on Shifts in the slide-in menu.

	×	m (Employee)
your_email@yourdomain.com	Evvie Portal Shifts Participant Dashboard Evvie User Guide User Preferences	
This is a banner. It has important information!	Log out	
1enu Icon (Mobile)	Shifts in Slide in Men	u (Mobi

2. On the next page, click the blue Create Batch Shift Entries button below Listing Shifts.



Create Batch Shift Entries Button (Desktop & Mobile)



3. Select an **Exception**, and a **Reason** for the manual batch entry.

	Batch Shift Entry
Batch shift entry details:	
"Exception	
Please select a reason for this exception	Υ
*Reason	
Please select a reason for this adjustment	•

Exception and Reason Selection (Desktop)

Batch Shift En	try
Batch shift entry details:	
*Exception	
Other	¥
*Reason	
Service does not require EVV	-
*Consumer	

Exception and Reason Selection (Mobile)

4. The next field to select will be either Consumer/Participant or Employee. If you are a Worker, you will need to select the Participant you worked for. If you are a Participant, you will need to select the Worker you are entering shifts for. Representatives will need to select the Participant from the Consumer dropdown first, then a Worker from the Employee dropdown.

Batch Shift E	Intry
latch shift entry details:	
"Exception	
Employee did not select a service	*
Reason	
Mobile device battery died	
Employee	
Test Employee (E00534)	
Consumer Enrollment	
Please select an enrollment	•
Add Shifts to Batch	

Entering Batch Shift Entry Details (Desktop)

	Batch Shift Entry	
Batch shift	entry details:	
*Exception		
*Exception Other		Ţ
*Exception Other		¥
"Exception Other "Reason Service do	bes not require EVV	*
*Exception Other *Reason Service do	es not require EVV	¥ ¥

Entering Batch Shift Entry Details (Mobile)



5. The Consumer Enrollment field will appear, and the current enrollment will need to be selected.

Consumer	
Patty Participant (P00204)	
Employee	
Ernie Employee (E00100)	
Consumer Enrollment	
CDCS - MNITS - FEA - None	
	Add Shifts to Batch

Consumer, Employee, Consumer Enrollment Selection (Desktop)

	Batch Shift Entry	/
atch shi	ft entry details:	
*Exceptio	n	
Other		
*Reason		
Service	does not require EVV	
*Consum	er	
Connie (Consumer (C12345)	
*Consum	er Enrollment	
Program	n - Payor - F/EA - N/A	

Consumer and Consumer Enrollment Selection (Mobile)

6. Click the Add Shifts to Batch button.





7. The Shift Details form will appear. All fields marked with a * are required for each shift that you will enter information for.

Shift Entry #1	* Starting Time Zone	* End Date & Time	* Ending Time Zone
Monday 10/23/23, 12:00:00 PM	(GMT-05:00) Eastern Time (US & *	Monday 10/23/23, 5:15:00 PM	(GMT-05:00) Eastern Time (US 8
*Service Code			
1:1 Community Habilitation			
Consumer Response			
Positive: Loved			*
_Goals			
*Notes			
* Indirect * Ctar	f Location	* End Location	Å
indirect oral	Cocalion	DIO EDCAION	

Create Shifts in Batch Form (Desktop)

ift Details	
Shift Entry #1	• Stating Time Zong
Tuesday 04/09/24, 12:0	(GMT-05:00) Eastern *
End Date & Time	* Ending Time Zone
Tuesday 04/09/24, 8:00:	(GMT-05:00) Eastern
Service Code	
Respite	
* Location	

Create Shifts in Batch (Mobile)

8. Select the Start Date/Time and Time Zone and Select the End Date/Time and Time Zone.

Start Date & Time	* Starting Time Zone	End Date & Time	Ending Time Zone	
Monday 10/09/23, 9:00:00 AM	(GMT-06:00) Central Time (US & v	Monday 10/09/23, 2:00:00 PM	(GMT-06:00) Central Time (US & *	
	Start and End Time/	/Time Zone (Desktop)		
	Shift Entry #1 _ Start Date & Time	* Starting Time Zone		
	Tuesday 04/09/24, 12:0	(GMT-05:00) Eastern * *		
	* End Date & Time	* Ending Time Zone		

Date Time and Time Zone Selection (Mobile)



9. Select the Service Code.



Service Code (Desktop & Mobile)

10. Select ADL Code(s). (Note: Not all implementations use ADL Codes).

× Mobility × Transferring

11. Select a **Location**. This may also appear as two fields, one for start location and one for end location.

* Location	
Home	
L	

Location Selection (Desktop & Mobile)

12. Repeat the selections for additional shifts. If you need to add more than seven (7) shifts, you can click the **Add Another Shift** button at the bottom of the list to add additional shifts.



Add Another Shift (Mobile)



13. Click **Save & Review Batch Entries** button at the bottom of the form. This will Save the batch and prepare it for submittal.



Submit Shift Entries (Desktop & Mobile)

14. A green success message will display on the next page. The batch is now saved and needs to be submitted. If you're ready to submit the shift now, begin with step 4 of the <u>Submit</u> <u>a Batch</u> instructions. Alternately, prior to submission a shift can be edited, deleted, or added to the batch. See <u>Editing a Batch</u> for instructions on completing those tasks.





Viewing a Batch

When a batch has been created but not submitted, a user can view the batch, <u>edit individual</u> <u>shifts in the batch</u>, <u>delete a shift from the batch</u>, or <u>add a shift to the batch</u>.

1. **Desktop:** After logging in to evvie portal, scroll to the Batch Shift Entries section of the home screen.

No shifts present for this	week.			
Batch Shift Entri	es			
Consumer & Employee	Created at	Created by	State	Action
Tess Participant (C199284) Emma Ployee (E237432)	Fri 09/27/24, 9:21am	Tess T. Participant (Participant)	Pending	Edit Batch • Delete Batch •
Tess Participant (C199284) Emma Ployee (E237432)	Fri 09/27/24, 9:21am	Tess T. Participant (Participant)	Pending	Edit Batch O Delete Batch O
	View All Shifts			View My Pay Period

Batch Shift Entries (Desktop)

Mobile: After logging in to evvie Portal, scroll to the Batch Shift Entries section of the home screen.

Consumer. Connie Cons	sumer (C12345)
Employee: Evvie Emplo	byee (E23456)
Created at: Mon 04/22	2/24, 12:41pm
State: Pending	

Batch Shift Entries (Mobile)

2. **Desktop:** Click the **Edit Batch** button next to the batch you want to edit.

	State	Action
tipant)	Pending	Edit Batch O Delete Batch O
er)	Pending	Edit Batch 💿 Delete Batch 💿

Select a Batch to Edit (Desktop)



Mobile: Click the Edit Batch button under to the batch you want to edit.

Consumer: Connie Cons	sumer (C12345)
Employee: Evvie Emplo	yee (E23456)
Created at: Mon 04/22	/24, 12:41pm
State: Pending	
Edit Batch	Delete Batch

Select a Batch to Edit (Mobile)

3. The batch will be displayed. There are edit and delete buttons next to each shift, an **Add another** shift button, and a **Save and Finish Later** button at the bottom of the list.

Start Date & Time	Starting Time Zone	End Date & Time	Ending Time Zone	Shift Duration	Service Code	Action
Mon 02/26/24, 12:00pm	Eastern Time (US & Canada)	Mon 02/26/24, 9:00pm	Eastern Time (US & Canada)	9 hours, 0 minutes	Respite	Edit Delet
Tue 02/27/24, 7:00am	Eastern Time (US & Canada)	Tue 02/27/24, 5:00pm	Eastern Time (US & Canada)	10 hours, 0 minutes	Respite	Edit Dele
Wed 02/28/24, 12:00pm	Eastern Time (US & Canada)	Wed 02/28/24, 8:00pm	Eastern Time (US & Canada)	8 hours, 0 minutes	Respite	Edit Delet

Edit Batch - Shift Selection (Desktop)

	Zone	Time	Zone	Du
Sat 03/02/24, 12:00pm	Eastern Fime (US & Canada)	Sat 03/02/24, 8:00pm	Eastern Time (US & Canada)	8 h 0 min
Wed 03/06/24, 12:00pm	Eastern Fime (US & Canada)	Wed 03/06/24, 4:00pm	Eastern Time (US & Canada)	4 h 0 min
Thu 03/07/24, 8:00am	Eastern Fime (US & Canada)	Thu 03/07/24, 6:00pm	Eastern Time (US & Canada)	10 hou min

Edit Batch - Shift Selection (Mobile)



Edit a Shift in the Batch

 From the shift entry screen, click the Edit button next to the shift that needs to be edited. On a mobile browser, you will have to swipe the list of shifts to see the action buttons on the far right of the listing.

Shift Duration	Service Code	Action
5 hours, 0 minutes	Personal Assistance Paid Parent Of Minor	Edit Delete
7 hours, 0 minutes	Personal Assistance Paid Parent Of Minor	Edit Delete

Edit a Shift Button (Desktop)

ling ie ie	Shift Duration	Service Code	Action	
tern e & nada)	8 hours, 0 minutes	Respite	Edit	Delete
tern e & nada)	4 hours, 0 minutes	Respite	Edit	Delete
tern e & nada)	10 hours, 0 minutes	Respite	Edit	Delete

Edit a Shift Button (Mobile)



2. Change one or more fields on the form, then click the **Update shift entry** Button.

Edit shift entry						
Shift Details						
Start Date & Time Sunday 10/01/23, 11:00:00 PM	* Starting Time Zone (GMT-06:00) Central Time (US & *	End Date & Time Sunday 10/01/23, 11:59:00 PM	* Ending Time Zone (GMT-06:00) Central Time (US & *			
Service Code			Ÿ			
ADL Codes						
: Location Home			v			
	Update s	shift entry				

Edit a Shift from the Batch (Desktop)

Create shift	entry in batch
Shift Details	
* Start Date & Time	* Starting Time Zone
Thursday 02/29/24, 12	(GMT-05:00) Easterr
* End Date & Time	* Ending Time Zone
Thursday 02/29/24, 9:4	(GMT-05:00) Easterr
*Service Code	
Respite	
* Location	
Home	-
Creates	shift entry

Edit a Shift from the Batch (Mobile)

3. A green success message will display on the next page.

Batch shift entry saved successfully.

Batch Edit Success (Desktop & Mobile)



Delete a Shift from the Batch

1. From the shift entry screen, click the **Delete** button next to the shift that needs to be deleted. On a mobile browser, you will have to swipe the list of shifts to see the action buttons on the far right of the listing.

Shift Duration	Service Code	Action
5 hours, 0 minutes	Personal Assistance Paid Parent Of Minor	Edit Delete
7 hours, 0 minutes	Personal Assistance Paid Parent Of Minor	Edit Delete

Delete Shift Button (Desktop)

ling Ie Ne	Shift Duration	Service Code	Action	
tern e & nada)	8 hours, 0 minutes	Respite	Edit	Delete
ern e & ada)	4 hours, 0 minutes	Respite	Edit	Delete
ern	10			

Delete Shift Button (Mobile)

2. Click OK on the pop-up.





Delete Confirmation Popup (Mobile)

3. A green success message will display on the next page.



Delete Success Message (Desktop & Mobile)



Add a Shift to the Batch

1. From the view batch screen, click the **Add another shift** button.

Batch Items			Wed	Eastern Time	Wed	Eastern Time	4 hc	
Start Date & Time	Starting Time Zone	End Date & Time	Ending Time Zone	12:00pm	(US & Canada)	4:00pm	(US & Canada)	min
Mon 02/26/24,	Eastern Time (US &	Mon 02/26/24,	Eastern Time (US &					
12.00pm	Gariada)	5.00pm	Ganada)	Thu	Eastern	Thu	Eastern	10
Tue 02/27/24, 7:00am	Eastern Time (US & Canada)	Tue 02/27/24, 5:00pm	Eastern Time (US & Canada)	03/07/24, 8:00am	Time (US & Canada)	03/07/24, 6:00pm	Time (US & Canada)	hou min
Ved 02/28/24, 2:00pm	Eastern Time (US & Canada)	Wed 02/28/24, 8:00pm	Eastern Time (US & Canada)		Canaday		Ganaday	
					Add a	nother shift		

Add another shift Button (Desktop)

Add another shift Button (Mobile)

- 2. Fill out the fields on the form as required by your program or FMS/FI.
 - a. Select the Start Date/Time with Time Zone and Select the End Date/Time with Time Zone.
 - b. Select the Service Code.
 - c. Select ADL Code(s). (If applicable)
 - d. Select a Location.
 - e. Add Notes (if applicable)

	Create shi	ft entry in bat	tch
hift Details			
* Start Date & Time	Starting Time Zone	End Date & Time	Ending Time Zone
Service Code			
Please select a service cod	e		
ADL Codes			
* Location			

entry in batch
* Starting Time Zono
(GMT-05:00) Eastern
Ending Time Zone
(GMT-05:00) Eastern
shift entry

Create Shift in Batch (Desktop)

Create Shift in Batch (Mobile)

- 3. Click the Create Shift entry button at the bottom of the form.
- 4. A green success message will display on the next page.



Shift Created Success Message (Desktop & Mobile)



Submit a Batch

After the batch has been entered, it must be submitted to move to the next step in the process.

1. After logging in to evvie portal, scroll to the Batch Shift Entries section of the home screen. **Desktop:** Click the **Edit Batch** button next to the batch you want to submit.

	State	Action
lipant)	Pending	Edit Batch O
er)	Pending	Edit Batch O Delete Batch O

Select a Batch to Submit (Desktop)

Mobile: Click the Edit Batch button under to the batch you want to submit.

Batch Shift Entries				
Consumer: Connie Consu	imer (C12345)			
Employee: Evvie Employee (E23456)				
Created at: Mon 04/22/2	24, 12:41pm			
State: Pending				
Edit Batch	Delete Batch			

Select a Batch to Submit (Mobile)



- 2. Scroll to the bottom of the form.
 - a. Optionally add a phone number or comments. Note that some implementations may require you to add a comment to the batch.
 - b. Mark the checkbox to certify the shifts.
 - c. Click the **Publish Batch Shift Entry** Button at the bottom of the form.

	Aud another shift	Save & Finish Later
Phone numbe	r	
Comments		
		ß
_	I declare under penalty of perjury, that all hours worked and descriptions of	f work performed contained in the submitted shifts, are true and correct, with full knowledge
✓	that all of this information may be subject to investigation and that any fais and/or reporting of findings to the investigation unit of the Department of H	e or dishonest information contained on these shifts may be grounds for denial of payment luman Services.
	Publish Bat	tch Shift Entry

Publish Batch Shift Entry (Desktop)

Cor	nments
	I declare under penalty of perjury, that all hours
	worked and descriptions of work performed contained
	In the submitted shifts, are true and correct, with full knowledge that all of this information may be subject
	to investigation and that any false or dishonest
	information contained on these shifts may be grounds
	for denial of payment and/or reporting of findings to
	the investigation unit of the Department of Human
	Services.
	Publish Ratch Shift Entry

3. A green success message will display on the next page.



Batch Submitted Success Message (Desktop & Mobile)

The shifts will be viewable in the Shift Index and will begin in a state of Submitted. The shifts will require an approval and an approval lock, following the <u>Two-Step Approval Process</u> or the <u>Batch</u> <u>Shift Approval Process</u>.



Quick Guides

Logging in to evvie Portal

Participants, Workers, and Representatives access the evvie Portal by visiting the sign in page. A link to the sign-in page was provided in the welcome email that all users receive when signing up to use evvie and evvie Portal for the first time. If you have lost that link or deleted the email, contact your Fiscal Intermediary, and ask them to send you a link to the sign-in page for evvie Portal.

1. From the sign-in page, click the Sign In with FMS One Button or Link.

Login Method	Sign In Email
Sign In with FMS One	Password
or Admin Sign in	Sign In Need a new password? Didn't receive confirmation instructions? Sign in with FMS One 8+ Sign in with Google

Sign in Button and Sign In Link (Desktop)



Sign in Link (Mobile)



 You'll be redirected to the FMS One Sign In. Enter your email address and password, then click the Log In button.

Log in Email
1
Password
Log in
Didn't receive confirmation instructions?
Sign up

Log In Form (Desktop & Mobile)

3. You are now signed in with FMS One and should have access to the evvie Portal and any other related web applications your FMS/FI has made available to you.

Logging in to evvie Mobile App

Only Workers have access to log in and record shifts with the evvie Mobile App. Participants and Representatives use the evvie Portal to manage shifts.

1. If you haven't downloaded the evvie Mobile App to your phone or tablet yet, please refer to the <u>instructions in this manual</u> to download and sign-in for the first time.



evvie Mobile App on App Store and Google Play (Mobile)





2. Find the Downloaded app on your phone/tablet and click on the evvie icon.



evvie Mobile App Icon

3. On the home screen of the app, click the blue FMS One Button.



4. Enter the email address and password that you created when signing up. Click Log In.

Email		
Crital		
Password		
Log in		
Forgot your	password?	
Didn't receiv	e confirmation instructions?	
Didn't receiv	e unlock instructions?	
Sign		

Log in Form

5. You are now logged in to evvie and ready to record shifts.

Reset FMS One Password

If you've forgotten your password, it is easy to reset. Using a browser, go to the sign in page for evvie portal.

A link to the sign-in page was provided in the welcome email that all users receive when signing up to use evvie and evvie Portal for the first time. If you have lost that link or deleted the email, contact your Fiscal Intermediary, and ask them to send you a link to the sign-in page for Evvie Portal.



1. From the sign-in page, click the **Sign in with FMS One** button or link.

Login Method	Sign In Email
(A) Sign In with FMS One	Password
What is FMS One?	Sign In
or Admin Sign In	Need a new password? Didn't meeke confirmation instructions? A Sign in with FMS One 8+ Sign in with Google

Sign in Button and Sign In Link (Desktop)



2. On the FMS One Sign In screen, click the "Forgot your password?" link.



Forgot Your Password Link (Desktop & Mobile)

Enter your email address then click the "Send me reset password instructions" button.
 You will get an email with a link to reset the password. Click on the emailed link.

Email				
Read m		ed lands estima		
Genum	reset passwo	ru instruction	•	
Log in				
Didn't rec	eive confirma	tion instruct	ions?	
Didn't rec	eive unlock ir	istructions?		

Forgot Password Form (Desktop & Mobile)



4. Enter your new password in both fields, then click the "Change my password" button.

Change your password
New password
(6 characters minimum)
1
Confirm new password
Change my password
Log in
Sign up
Didn't receive confirmation instructions?
Didn't receive unlock instructions?

Change Password Form (Desktop & Mobile)

5. Your password is now reset, and you can use it to login to FMS One.

Access the evvie/evvie Portal User Guide

After logging in to evvie Portal, you can access an electronic copy of this user guide.

Desktop Browsers: Click on your email address (role) in the upper right corner of the screen, then click the Evvie User Guide link.



User Guide Link (Desktop)

Mobile Browsers: Tap the menu (three bar) icon in the upper left of the screen, then tap Evvie User Guide in the slide in menu.



User Guide Link (Mobile)



Change Your Notification Preferences

Users can change how they receive some system emails from the evvie Portal. Currently, evvie Portal sends out emails to users within an hour when a shift needs to be reviewed/acted on and once per week, the user gets a summary of all shifts associated to them. To change these options, use User Preferences.

Desktop Browsers: Click on your email address (role) in the upper right corner of the screen, then click User Preferences on the dropdown menu.



User Preferences Link (Desktop)

Mobile Browsers: Tap the menu (three bar) icon in the upper left of the screen, then tap User Preferences in the slide in menu.



User Preferences Link (Mobile)

There are two options under Shift Notifier Email: Hourly and None. Selecting Hourly is the default, and the system will generate a shift notifier email within an hour of a shift changing status. This email is sent one-time per shift. By selecting None, you are opting to not receive any notifier emails for individual shifts. For the Shift Weekly Email Digest, the default is Weekly, and you will continue to receive the weekly digest email. By selecting None, you are choosing to not



get a weekly email from the system, but you will still need to login regularly to act on any shifts that need your approvals or action.

otification Preferences				
Shift Notifier Email	Shift Notifier Email		Shift Weekly Email Digest	
your.email@domain.net	None	*	None	*

Notification Preferences (Desktop)

ification Preference	s
Shift Notifier Email	
tutorials+emma@examp	le.net (Employee)
Shift Notifier Email	
Hourly	*
Shift Weekly Email Diges	ŧ
Weekly	*

Notification Preferences (Mobile)



User Guide Updates

A list of updates to this user guide is provided below in a table summary. The most recent updates are listed at the top of the table.

Date of Update	Update Summary
27 February 2025	Added Quick Guide for Notification Preferences
26 October 2024	Updated screenshots for evvie Mobile App
26 September 2024	Updated screenshots for landing page, top menu, slide menu (mobile)
	Added Quick Guide for <u>accessing latest version of user guide</u>
22 April 2024	Updated screenshots for desktop browsers throughout the guide
	Added new screenshots for mobile browsers
	Updated instructions for using evvie Portal on mobile browsers
	Streamlined instructions throughout guide for clarity
	Added instructions for changing the language in app
	Added instructions for <u>batch shift entry</u> and <u>approvals</u>
	Improved accessibility with new alt text on some images
	Refreshed look of the guide, updated cover sheet, and style.
27 May 2022	Updated instructions for <u>Two-Step Approvals</u>
27 April 2022	Updated screenshots, text formatting.
	Updated instructions for One-Step Approvals
07 January 2022	Updated FMS One sign up instructions
	Added additional alt text for accessibility
01 October 2021	Updated shift index screenshots throughout the guide
15 August 2021	Updated screenshots throughout guide
20 April 2021	User Guide released