evvie Mobile App & evvie Portal

User Guide

HHAeXchange

Updated April 2024

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User Guide for Workers, Participants, and Representatives

Introduction

What is EVV?

EVV stands for Electronic Visit Verification. **Worker**s use an app to electronically record the start and end times of each shift they work (also called a visit). **Worker**s will be required to send information about visits to an EVV system at the beginning and end of each visit. EVV helps verify 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 **Worker**s. 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
Participant	Can also be called: Consumers, Clients, Members, Individuals, or Employers. This is the person who receives home and community-based services.
Worker	Can also be called: PCAs, DSPs, PHWs, Employees, or Caregivers. This is a person who provides Home and Community-based Services to Participants.
Representative	Can also be called: Family, Designees, or Circle of Support. They are usually a friend or family member of the Participant. A representative might help with approving timesheets, finding a worker to hire, and scheduling workers.
FMS Provider	Can also be called: Fiscal Intermediaries (FI), Fiscal Employer Agent (F/EA), or Fiscal Support Entity (FSE). This is an organization that collects the timesheets, processes hiring paperwork, and manages payroll
HHAX	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**, **Worker**s, and Representatives all use the evvie Portal. Only the **Worker**s 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-to-date 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
https://vimeo.com/675013615/9d446a7f9b

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>

1. 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.
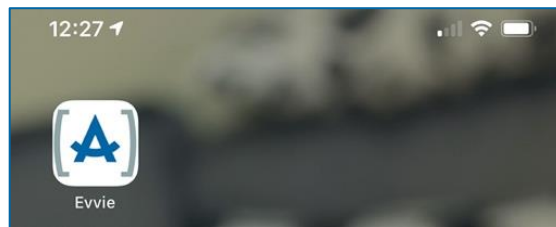
evvie App Icon

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.
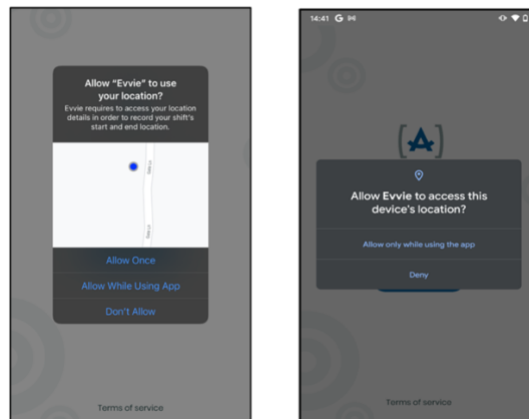
Allow Location Sharing Notifications

4. 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.*
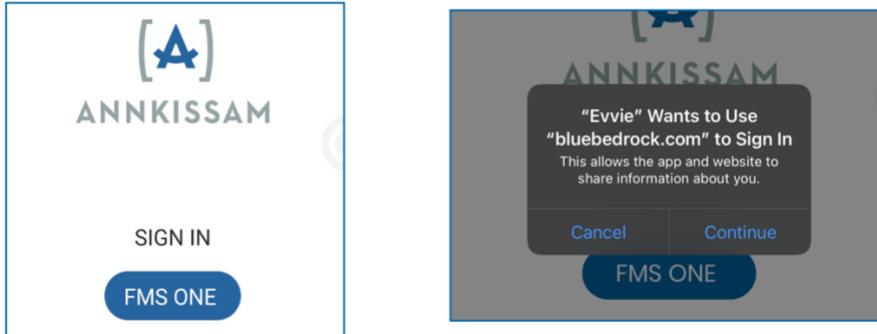
FMS One Sign-in and Apple Device Redirect Notification

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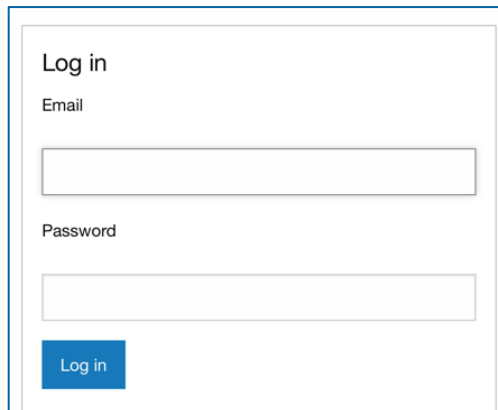

FMS One Log-in Screen (Mobile)

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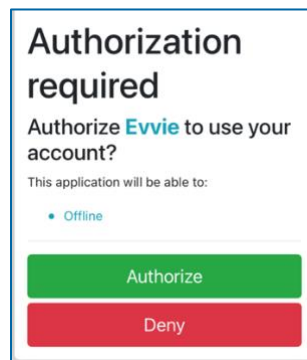
evvie Authorization Screen

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.
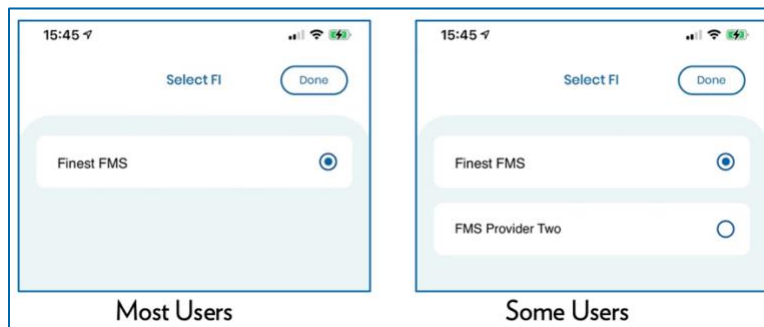
Select FI Screen (Mobile App)

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 person icon on the Consumer Selection page.
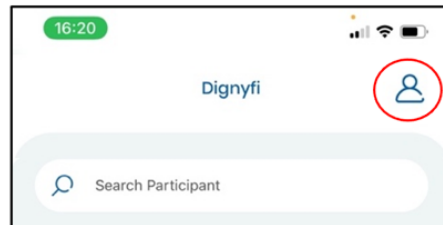
Person Icon

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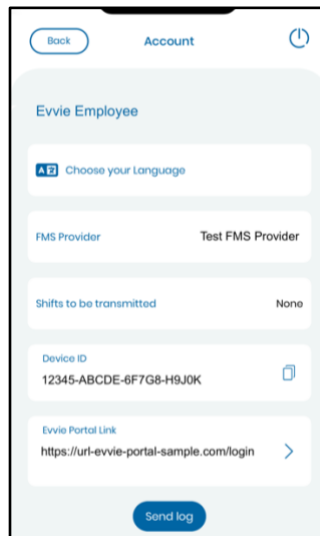
Account Page

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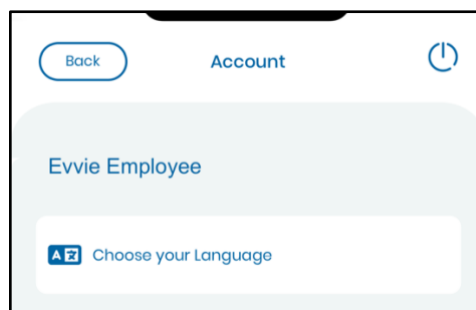
Choose your Language

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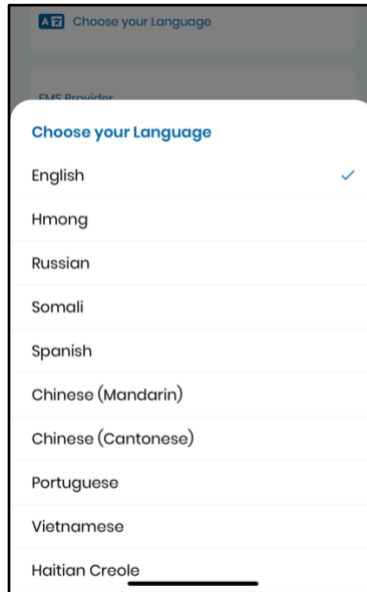
Language Selection

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

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.
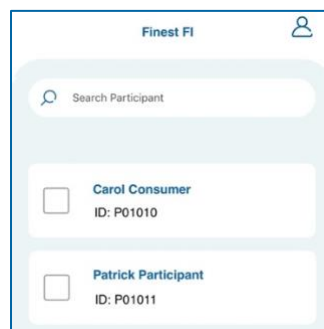
Participant Select Screen

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**.
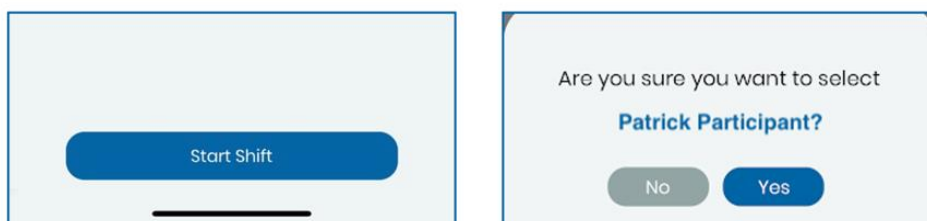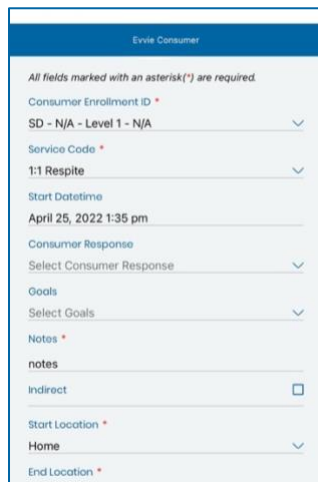
Start Shift Button and Confirmation Popup

7. The shift has now begun and **evvie** is tracking the time.
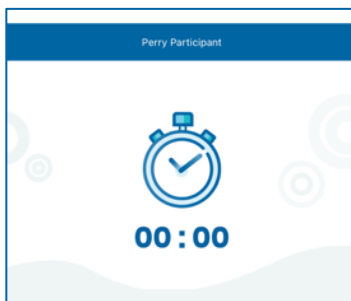
Clock Icon and Shift Timer

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.

Sample Shift Information Fields

9. 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.
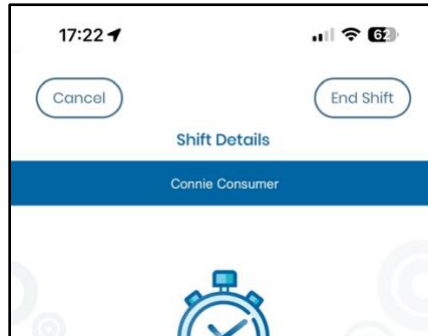
Cancel and End Shift Buttons

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.
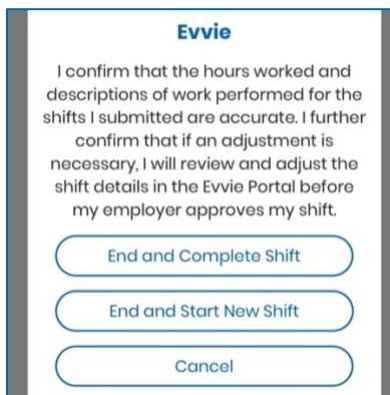
End Shift Popup

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.
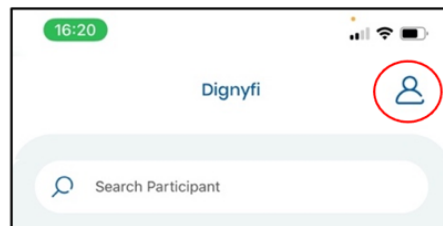
Person Icon

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.
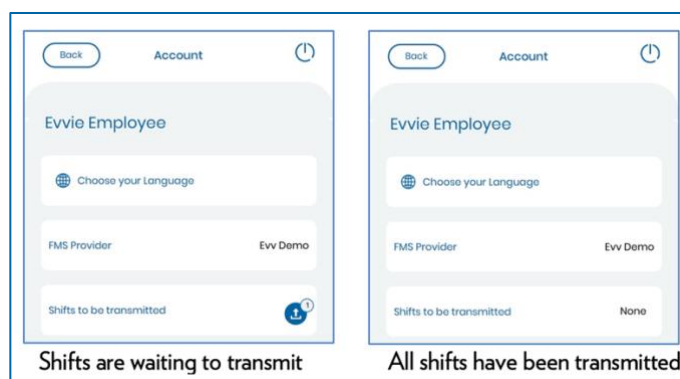
Account Screen With and Without Shifts to Transmit

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 Getting Started with **evvie** & **evvie** Portal 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 two-step approval process, the both the **Worker** and the **Participant/Representative** will need to complete an approval of the shift in the **evvie** Portal. The two-step approval process 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.

1. 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 Approving Shifts.

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.
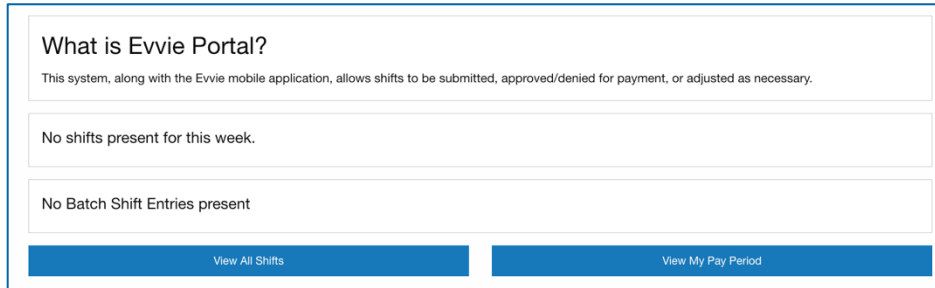
View All Shifts (Desktop)
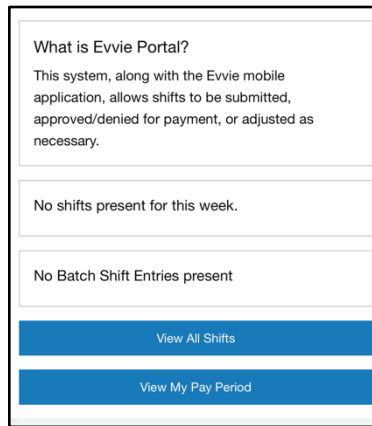
View all Shifts (Mobile)

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.
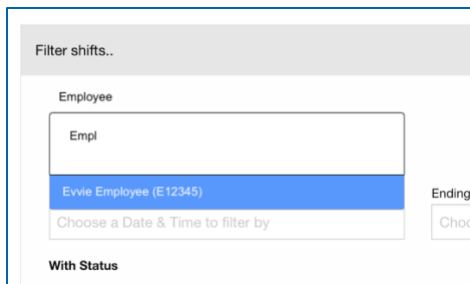
Worker Select (Desktop)
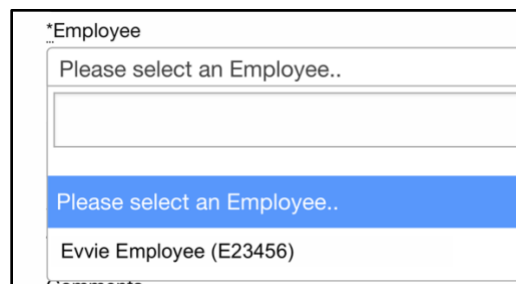
Worker Select (Mobile)

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.
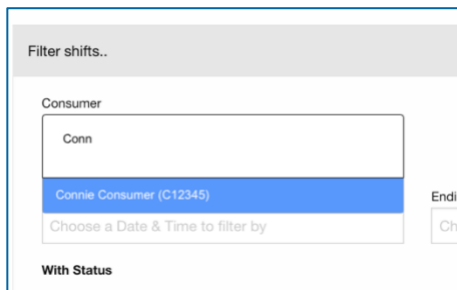
Participant Select (Desktop)
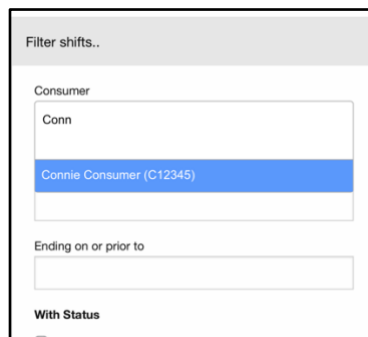
Participant Select (Mobile)

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).

View Shifts (Desktop)

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.
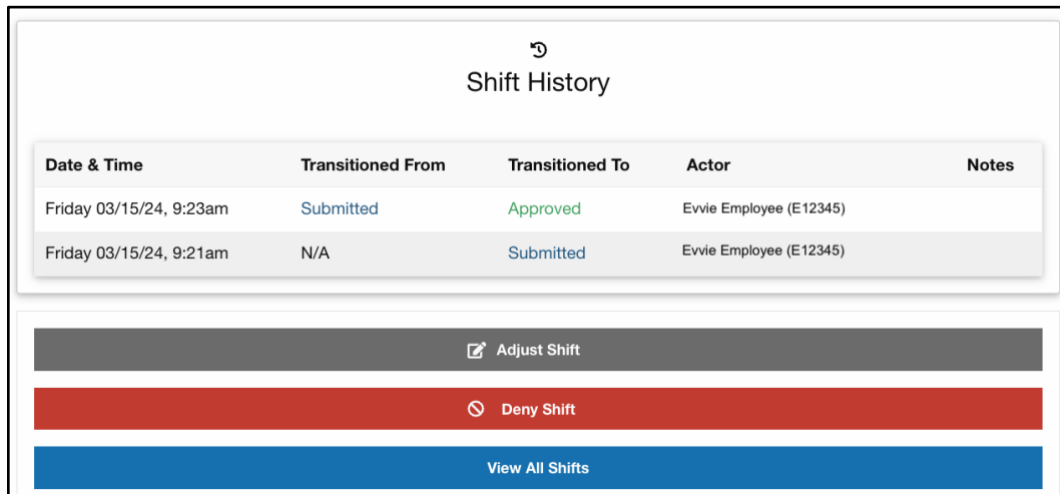
Shift Action Buttons (Desktop)
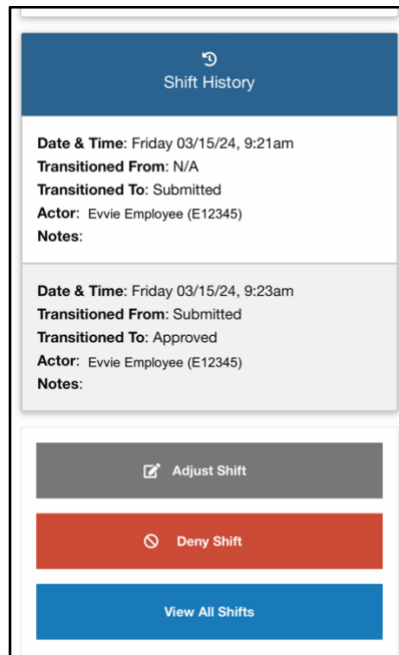
Shift Action Buttons (Mobile)

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 Two-Step 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.

Shift Action Buttons (Desktop)

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 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.

Before Clicking Checkbox (Desktop)

After Clicking Checkbox (Desktop)

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.**
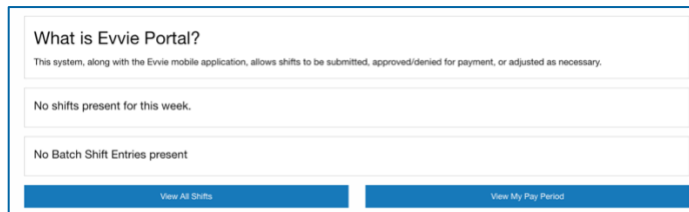
View My Pay Period (Desktop)
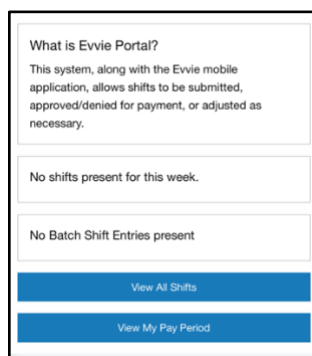
View My Pay Period (Mobile)

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.
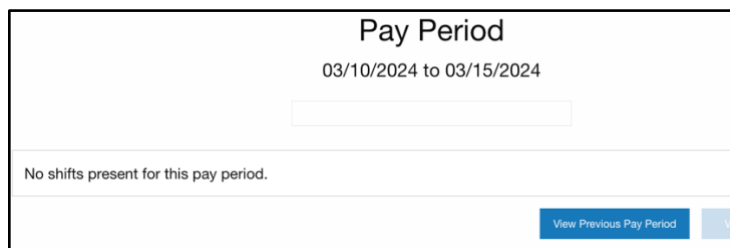
Viewing a Pay Period (Desktop)
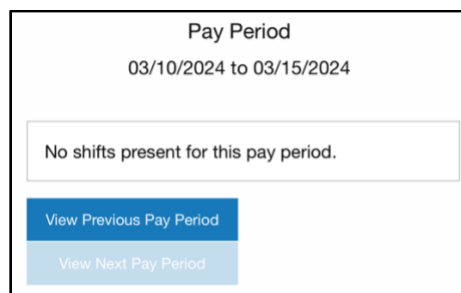
Viewing a Pay Period (Mobile)

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.

Pay Period

02/25/2024 to 03/09/2024

Batch Approve	
Batch Lock as Approved	
Download as CSV	

Date	Consumer & Employee	Time	Service Code	Status	Shift total hours
03/08/2024		**Start:** 12:00pm **End:** 5:00pm	Personal assistance services	**Approved**	5 hours, 0 minutes

Batch Action Buttons (Desktop)

Batch Approve
Batch Lock as Approved
Download as CSV

Consumer: Connie Consumer (C23456)
Employee: Evvie Employee (E12345)
Start: Fri 03/08/24, 12:00pm
End: Fri 03/08/24, 5:00pm
Service Code: Personal assistance services
Status: Approved
Duration: 5 hours, 0 minutes

Consumer: Connie Consumer (C23456)

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.
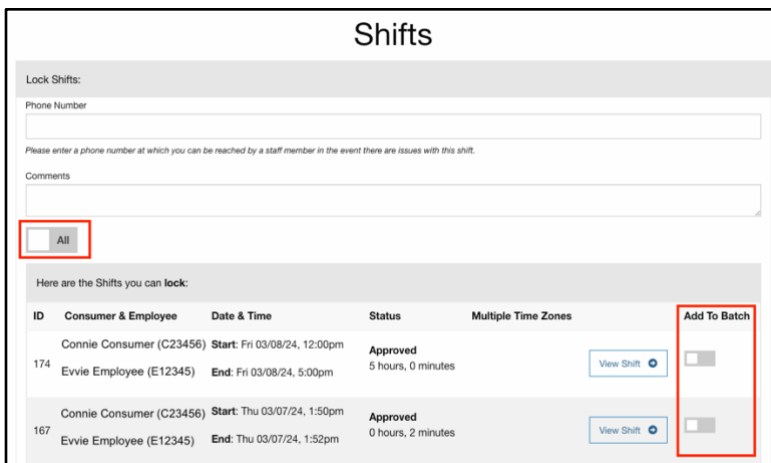
Selecting Shifts for Batch Approval/Lock (Desktop)
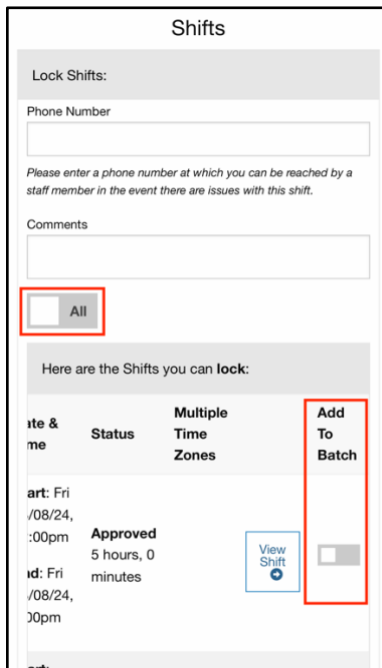
Selecting Shifts for Batch Approval/Lock (Mobile)

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.
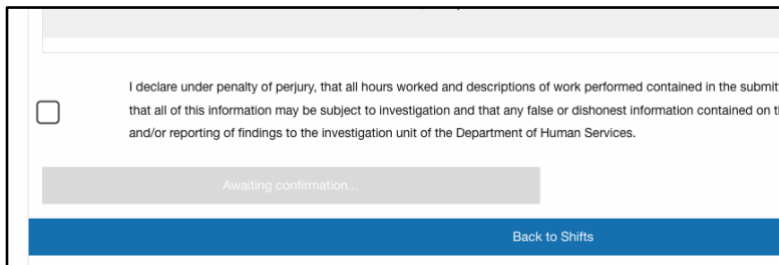
Checkbox For Approving/Locking the Batch (Desktop)
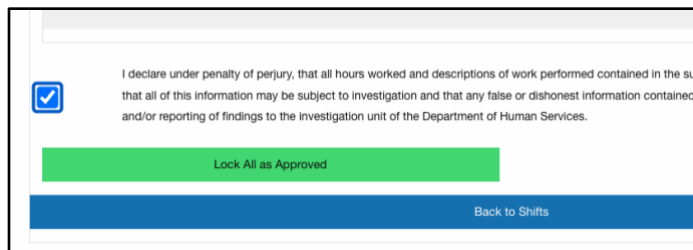
Lock All As Approved Button (Desktop)
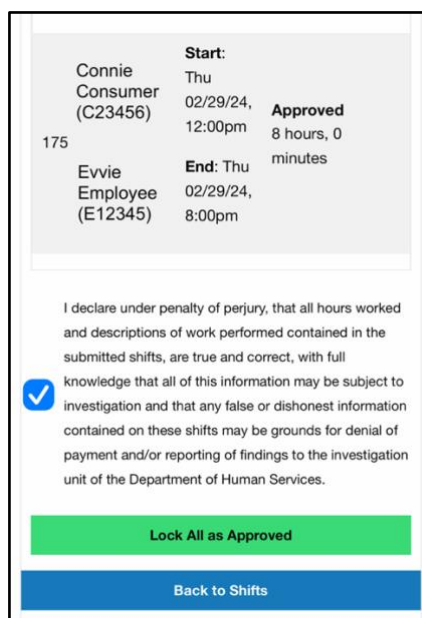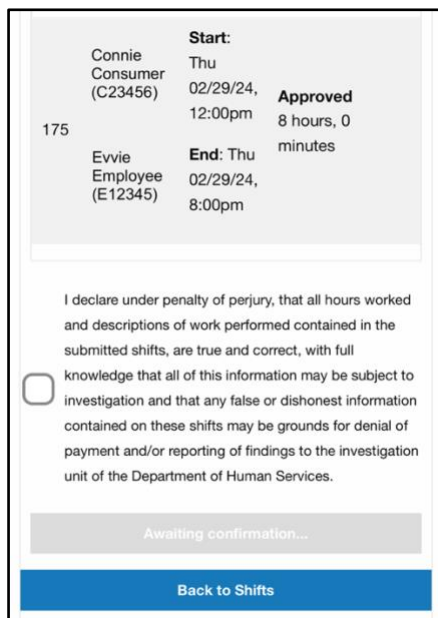
Checkbox to Approve and Lock All As Approved Button (Mobile)

6. 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. Adjustments are covered in the next section of this guide. Shifts are first denied by one party, then locked as denied by the other.

1. 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 Viewing Visits.

2. 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).

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.**

Shift Action Buttons (Desktop)

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)

Date & Time: Wednesday 03/20/24, 8:40am
Transitioned From: Approved
Transitioned To: Denied
Actor:
Notes:

☑ Adjust Shift

Challenge Denial

Lock as Denied

View All Shifts

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.**

Submitting a Denial (Desktop)

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.

Lock as Denied (Desktop)

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.

Challenging a Denial (Desktop)

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 Viewing Shifts 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).

View Shifts (Desktop)

View Shifts (Mobile)

3. Scroll down to the bottom of the shift's page and click Adjust Shift.
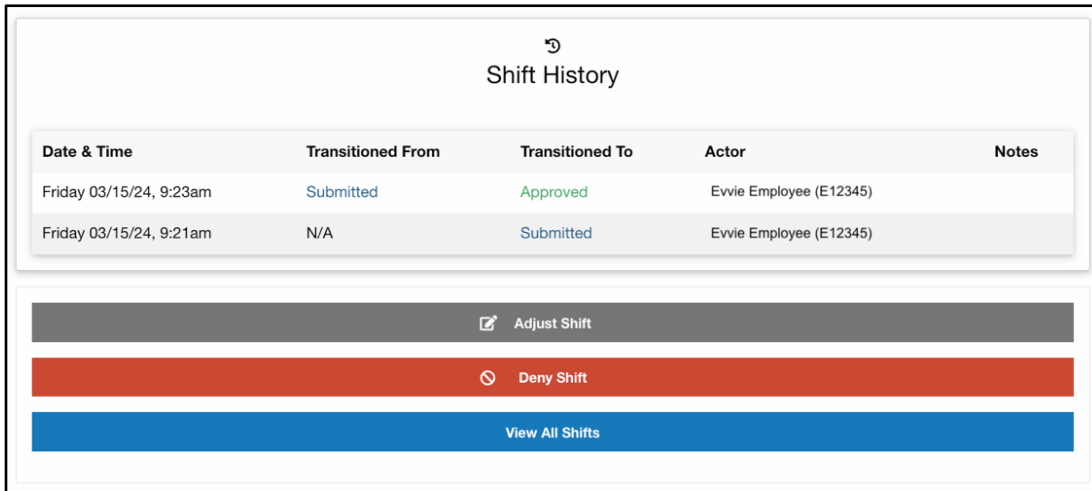
Shift Action Buttons (Desktop)
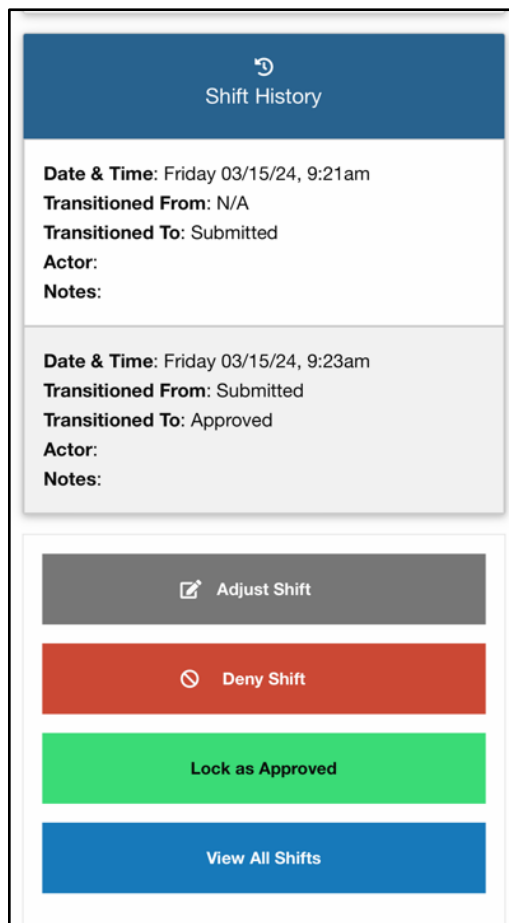
Shift Action Buttons (Mobile)

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.

Exception and Reason Code Selection (Desktop)

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.

Adjust Shift Form (Mobile)

Please enter the correct information below:

* Exception Code

Missed clock in / clock out ▾

* Reason Code

Mobile device battery died ▾

* 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 ▾

*Service Code

1:1 Respite ▾

* Consumer Response

Positive: Loved ▾

* Goals

☑ Independence

☐ Recreation

* Notes

☐ Indirect

* Start Location

Home ▾

* End Location

Home ▾

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

Changed start time to match actual arrival time.

☑ 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	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 approving a shift.

Submit Adjustment (Desktop)

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 Batch Shift Entry, for information on entering several manual shifts at a time.

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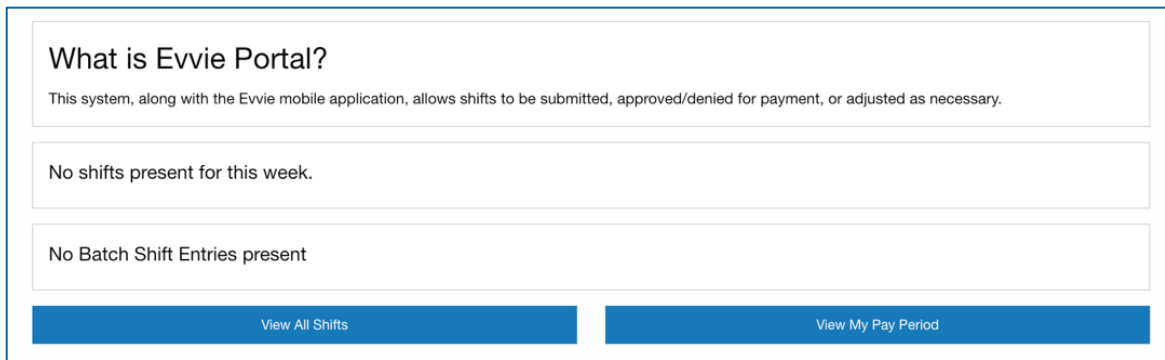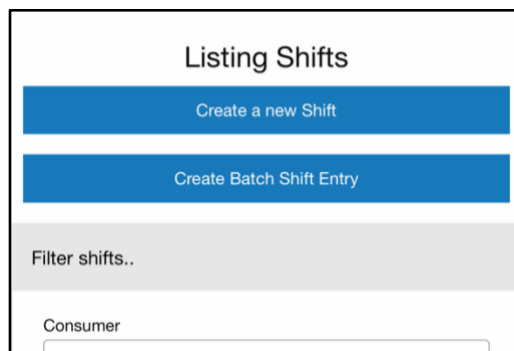

View All Shifts (Desktop)
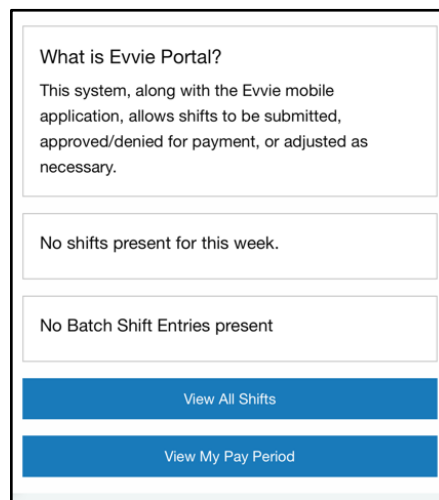
View all Shifts (Mobile)

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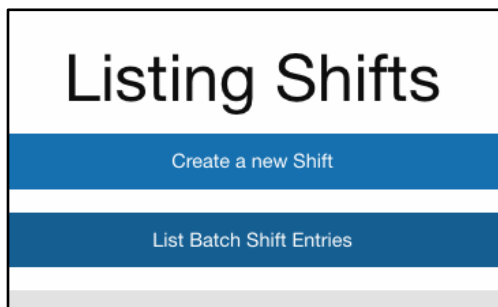

Create a New Shift Button (Desktop)

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.
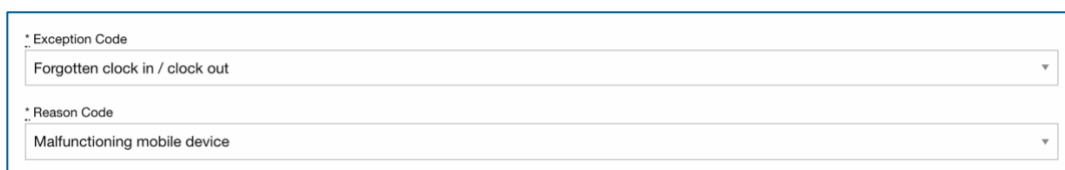
Exception and Reason Code Selection (Desktop)
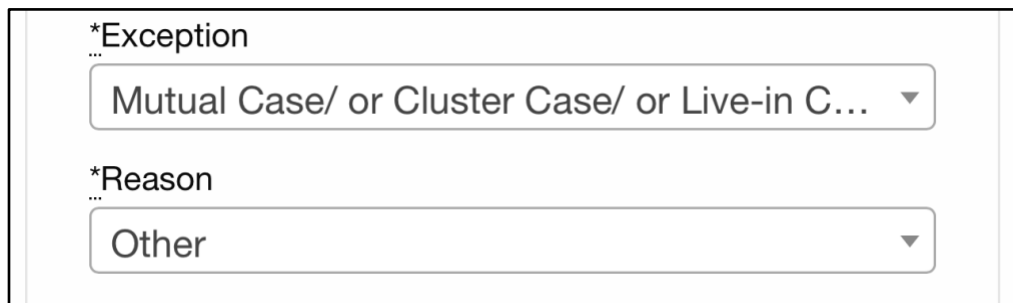
Exception and Reason Code Selection (Mobile)

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.
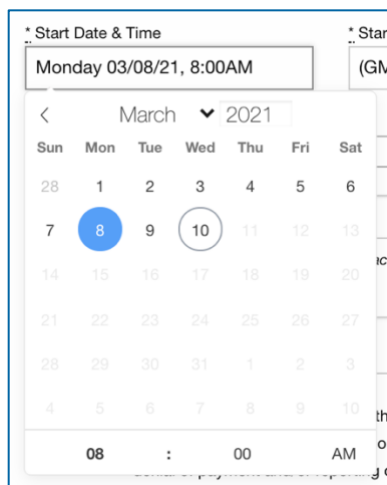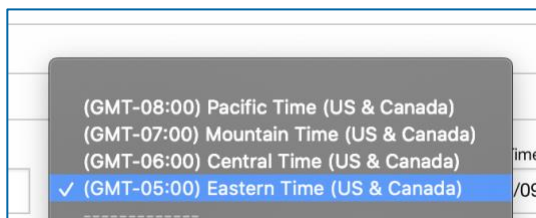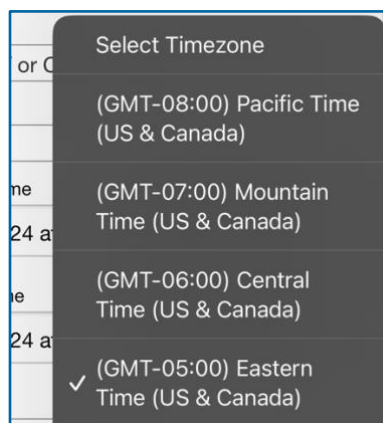

Date and Time Selection (Desktop).
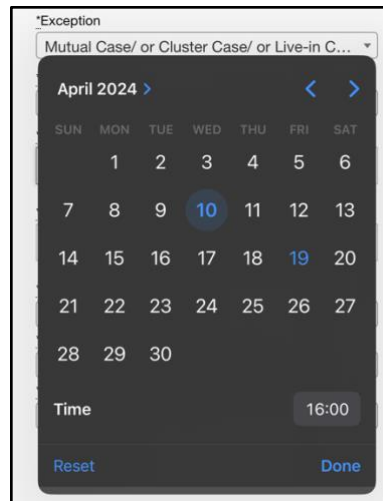
Date Time Selection (Mobile)

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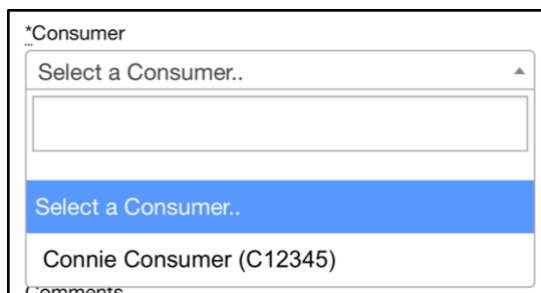

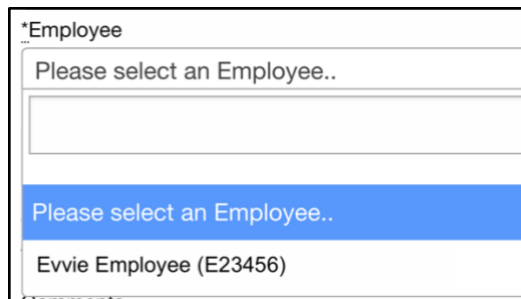**Time Zone Selection (Desktop)**

Time Zone Selection (Mobile)

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.
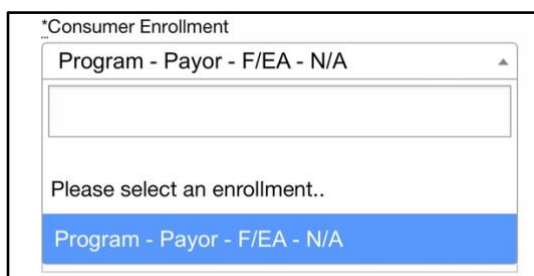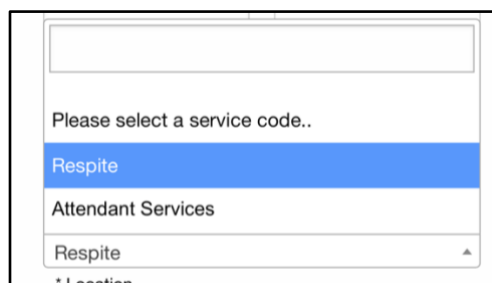

Select a Consumer (Mobile & Desktop)	**Select an Employee (Mobile& Desktop)**

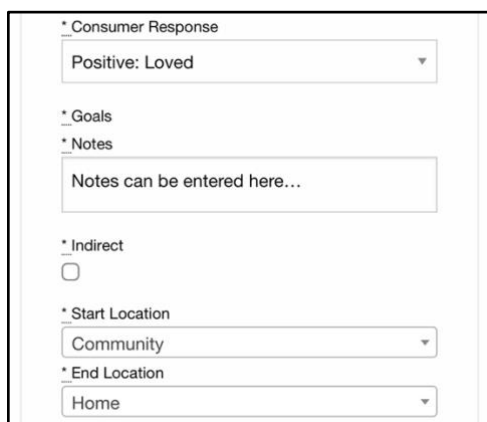7. Select the Consumer Enrollment, then select the service code.

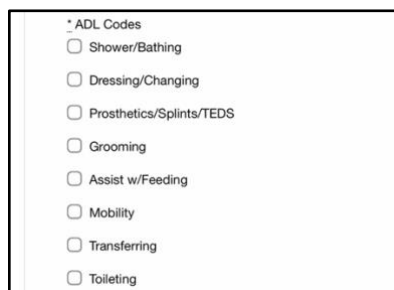|	
Consumer Enrollment Select (Mobile & Desktop)	**Service Code Select (Mobile & Desktop)**

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.

Additional Fields on Shifts (Mobile & Desktop)	**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.


Manual Shift Form – Employee (Mobile)   Manual Shift Form – Representative (Mobile)
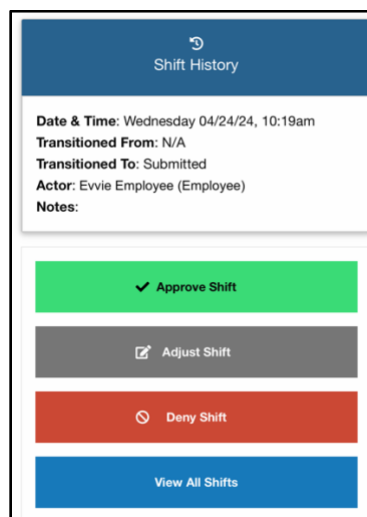
Two-Step Shift Approvals

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.**
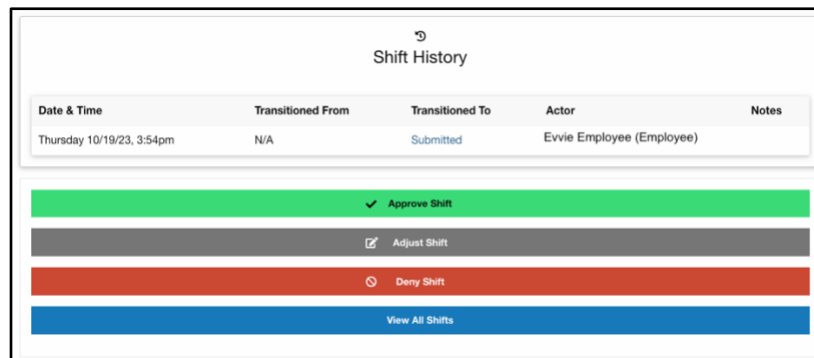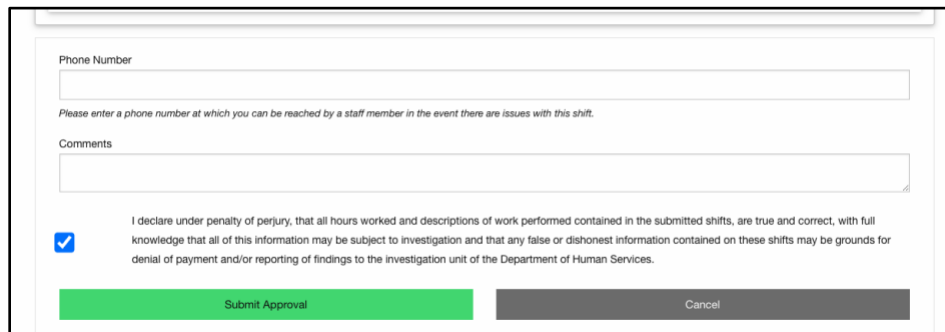

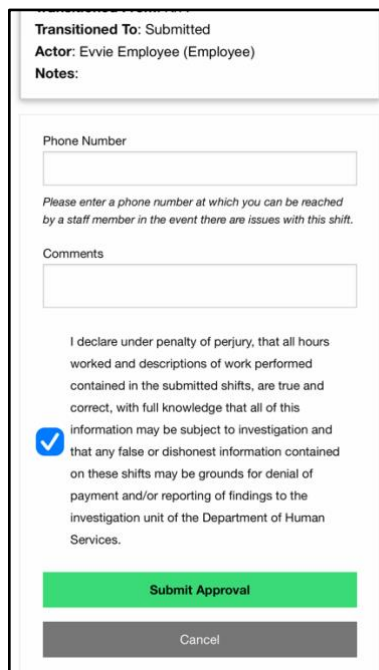**Two Step Approval - Approve Shift (Desktop)**

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.
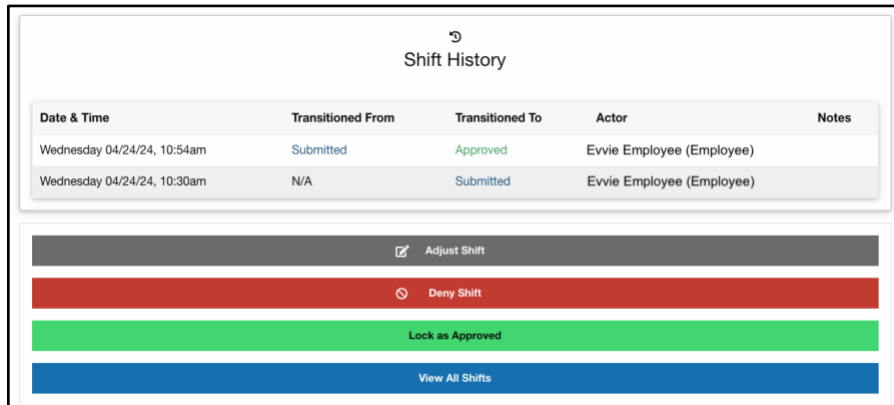

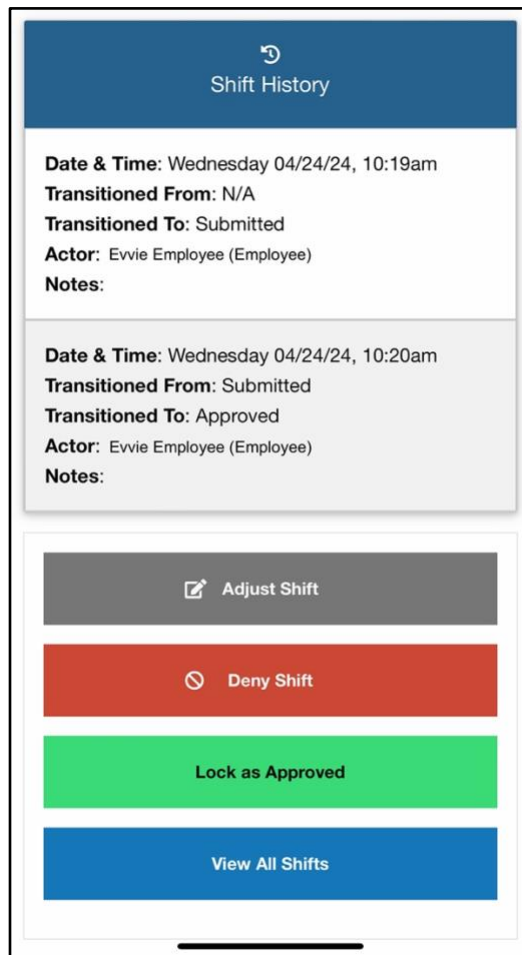**Two Step Approval – Submit Approval (Desktop)**

Two Step Approval – Submit Approval (Mobile)

3. 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.**
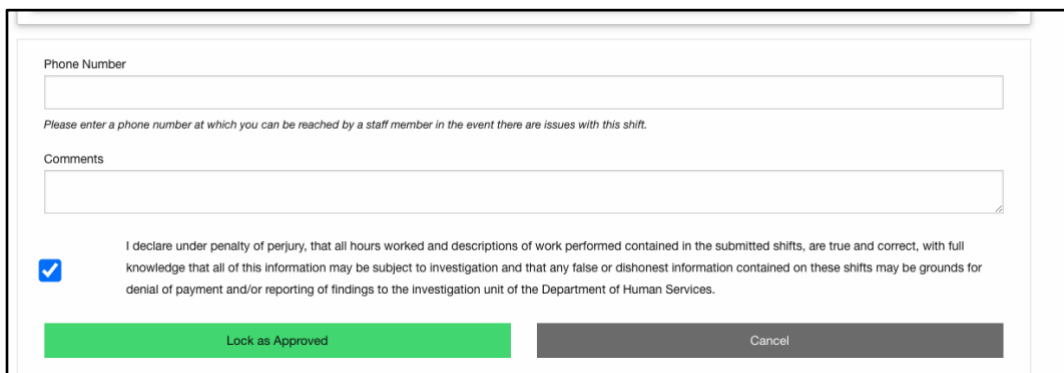
Shift History

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)	

☑ Adjust Shift

⊘ Deny Shift

Lock as Approved

View All Shifts

Two Step Approval – Lock as Approved (Desktop)

Shift History

Date & Time: Wednesday 04/24/24, 10:19am
Transitioned From: N/A
Transitioned To: Submitted
Actor: Evvie Employee (Employee)
Notes:

Date & Time: Wednesday 04/24/24, 10:20am
Transitioned From: Submitted
Transitioned To: Approved
Actor: Evvie Employee (Employee)
Notes:

☑ Adjust Shift
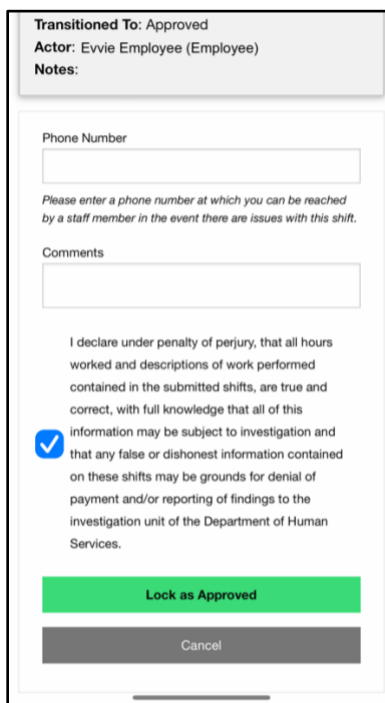
⊘ Deny Shift

Lock as Approved

View All Shifts

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.

Two Step Approvals – Lock As Approved (Desktop)

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 Batch Approvals.

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.
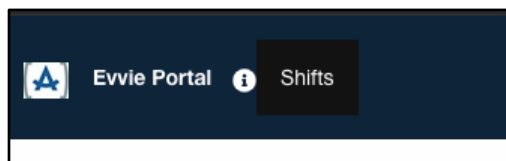
Shift Button in Header (Desktop)

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.
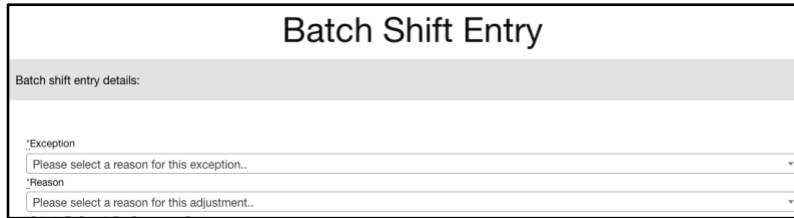

Menu Icon (Mobile)
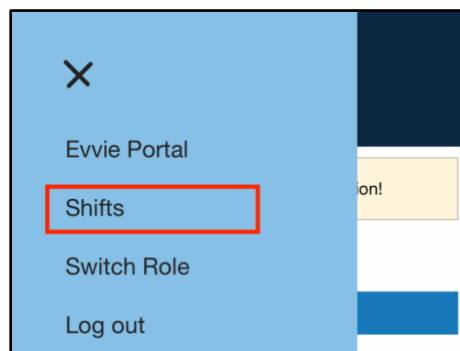
Shifts in Slide in Menu (Mobile)

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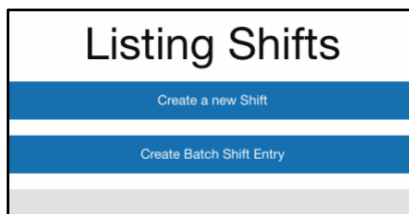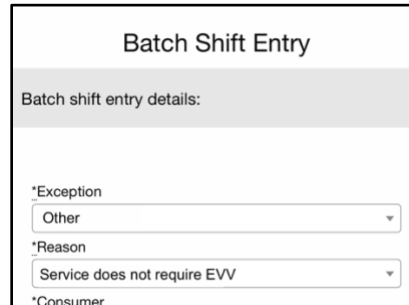

Create Batch Shift Entries Button (Desktop & Mobile)

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

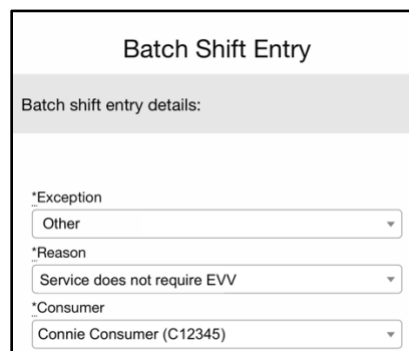**Exception and Reason Selection (Desktop)**

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.
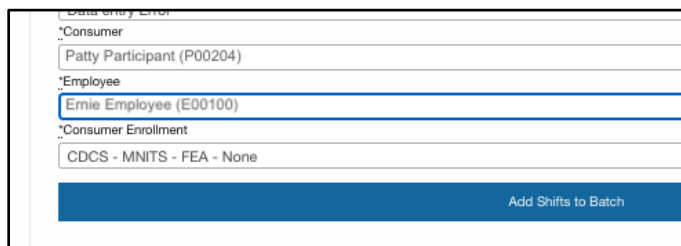
Entering Batch Shift Entry Details (Desktop)

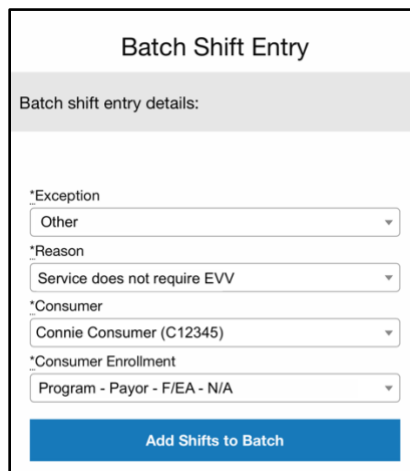**Entering Batch Shift Entry Details (Mobile)**

5. The Consumer Enrollment field will appear, and the current enrollment will need to be selected.
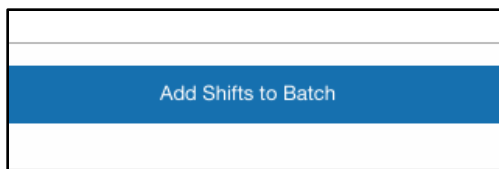
Consumer, Employee, Consumer Enrollment Selection (Desktop)

Consumer and Consumer Enrollment Selection (Mobile)

6. Click the **Add Shifts to Batch** button.

Add Shifts to Batch Button (Desktop & Mobile)

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

Create Shifts in Batch Form (Desktop)
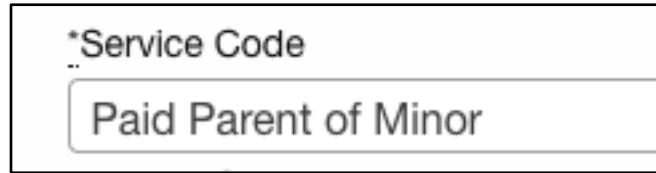
Create Shifts in Batch (Mobile)

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

Start and End Time/Time Zone (Desktop)

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).

ADL Codes (Desktop & Mobile)
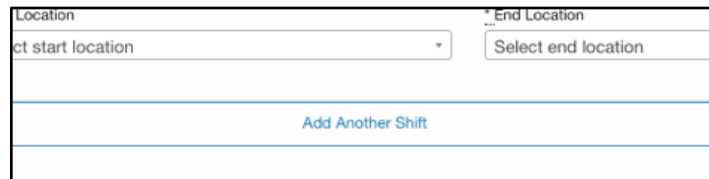
11. Select a **Location**. This may also appear as two fields, one for start location and one for end location.
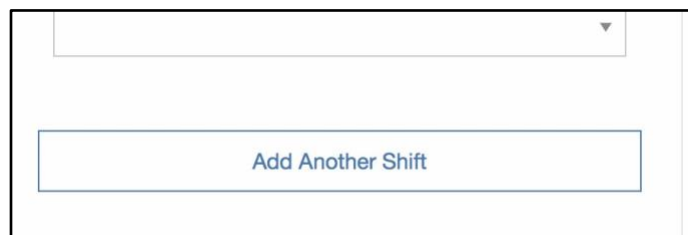
Location Selection (Desktop & Mobile)

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 Button (Desktop)

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.
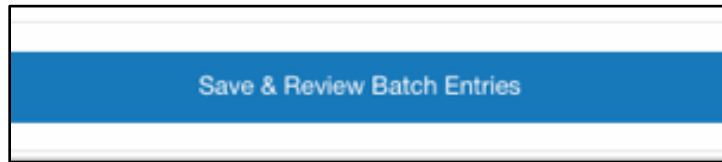
Submit Shift Entries (Desktop & Mobile)

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 [Submit a Batch](#) instructions. Alternately, prior to submission a shift can be edited, deleted, or added to the batch. See [Editing a Batch](#) for instructions on completing those tasks.
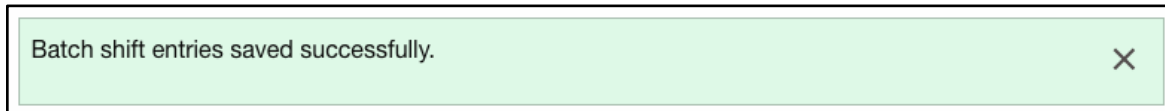
Batch Entry Success (Desktop)
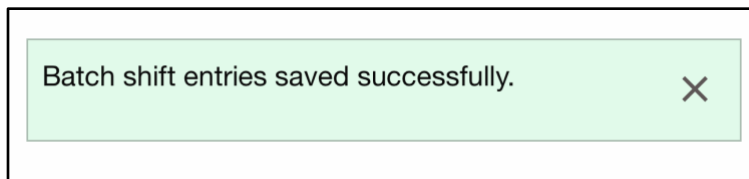
Batch Entry Success (Mobile)

Viewing a Batch

When a batch has been created but not submitted, a user can view the batch, edit individual shifts in the batch, delete a shift from the batch, or add a shift to the batch.
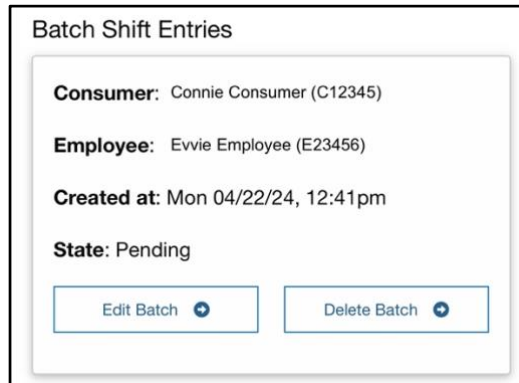
1. **Desktop:** After logging in to evvie portal, scroll to the Batch Shift Entries section of the home screen.

What is Evvie Portal?

This system, along with the Evvie mobile application, allows shifts to be submitted, approved/denied for payment, or adjusted as necessary.

No shifts present for this week.

Batch Shift Entries

Consumer & Employee	Created at	Created by	State	Action	
Rand al'Thor (C00116) Tam al'Thor (E00077)	Fri 11/10/23, 1:10pm	Rand al'Thor (Participant)	Pending	Edit Batch ●	Delete Batch ●
Rand al'Thor (C00116) Road Runner (E00016)	Fri 11/10/23, 1:30pm	Road Runner (Worker)	Pending	Edit Batch ●	Delete Batch ●

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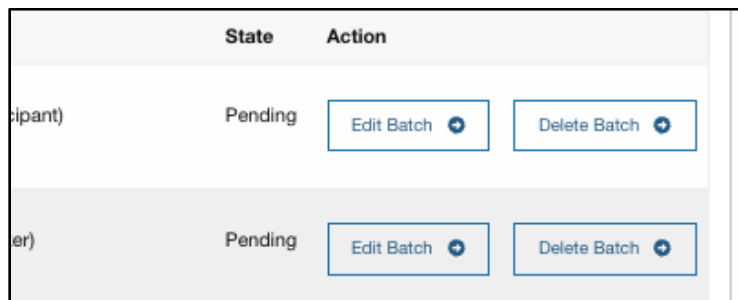
Mobile: After logging in to evvie Portal, scroll to the Batch Shift Entries section of the home screen.

Batch Shift Entries

Consumer: Connie Consumer (C12345)

Employee: Evvie Employee (E23456)
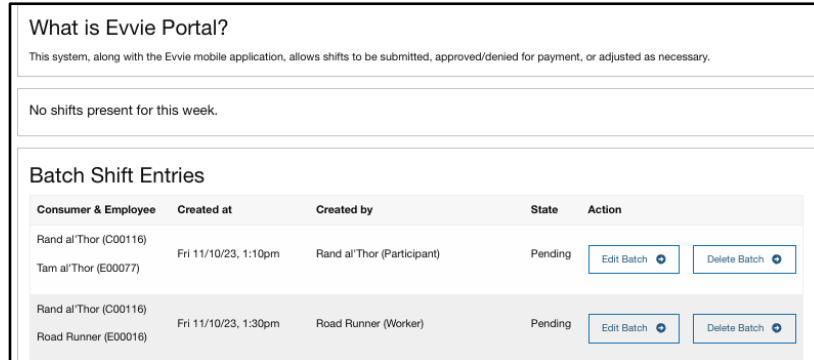
Created at: Mon 04/22/24, 12:41pm

State: Pending

Edit Batch ●   Delete Batch ●

Batch Shift Entries (Mobile)

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

	State	Action	
:ipant)	Pending	Edit Batch ●	Delete Batch ●
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.
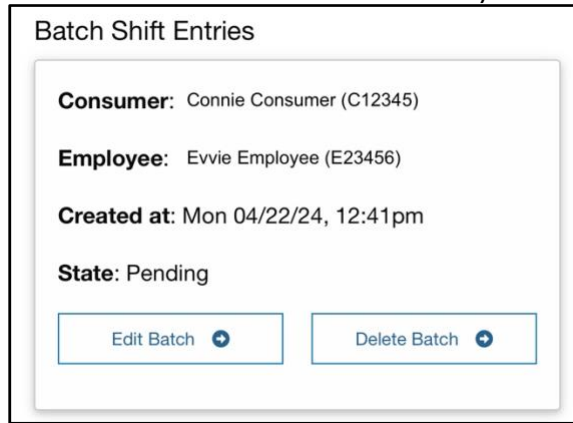
Select a Batch to Edit (Mobile)

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.
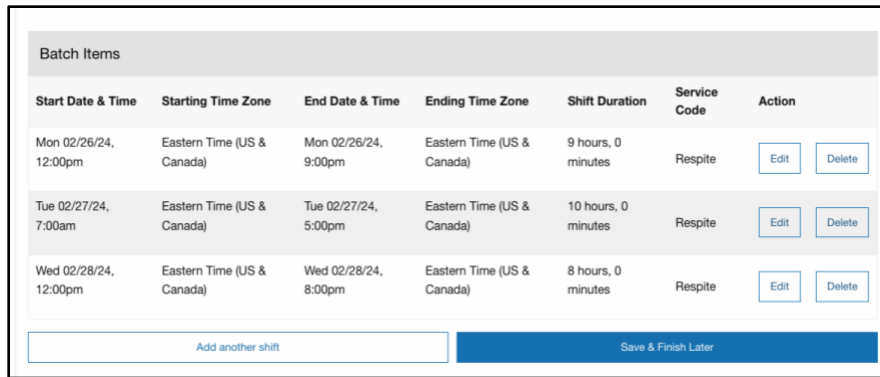
Edit Batch – Shift Selection (Desktop)

Edit Batch – Shift Selection (Mobile)

Edit a Shift in the Batch

1. 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.
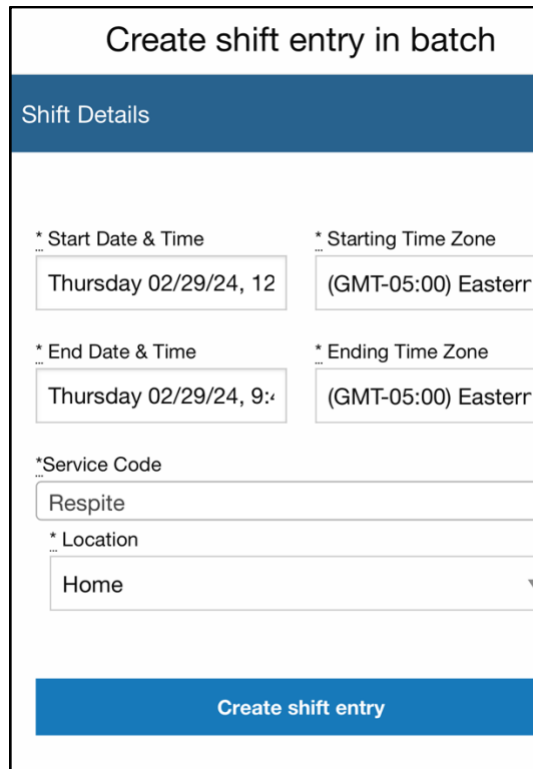
Edit a Shift Button (Desktop)

Edit a Shift Button (Mobile)

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

Edit a Shift from the Batch (Desktop)

Edit a Shift from the Batch (Mobile)

3. A green success message will display on the next page.
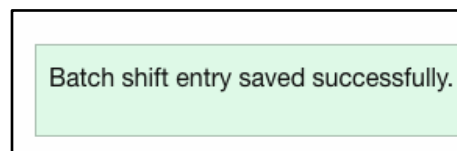
Batch Edit Success (Desktop & Mobile)

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.
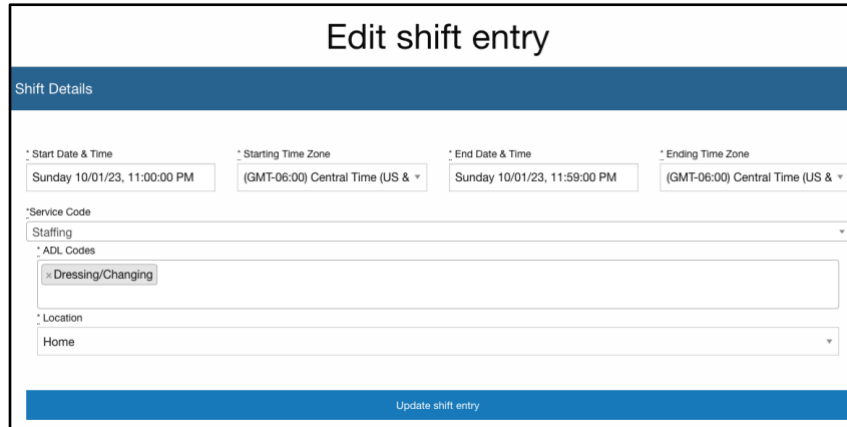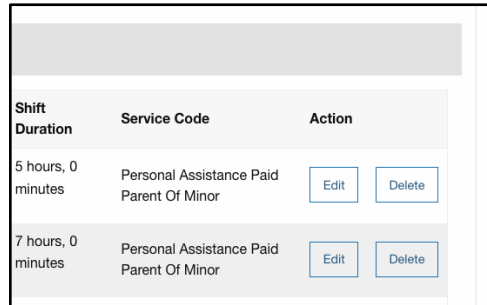

Delete Shift Button (Desktop)
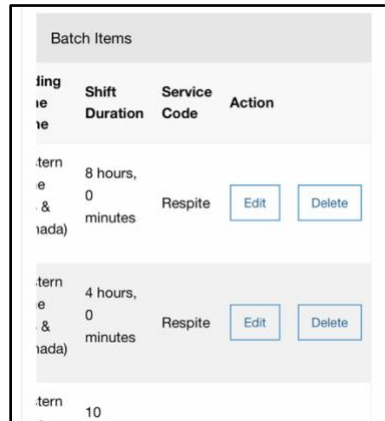
Delete Shift Button (Mobile)

2. Click OK on the pop-up.

Delete Confirmation Popup (Desktop)

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				
Start Date & Time	**Starting Time Zone**	**End Date & Time**	**Ending Time Zone**	
Mon 02/26/24, 12:00pm	Eastern Time (US & Canada)	Mon 02/26/24, 9:00pm	Eastern Time (US & Canada)	
Tue 02/27/24, 7:00am	Eastern Time (US & Canada)	Tue 02/27/24, 5:00pm	Eastern Time (US & Canada)	
Wed 02/28/24, 12:00pm	Eastern Time (US & Canada)	Wed 02/28/24, 8:00pm	Eastern Time (US & Canada)	

Add another shift

Wed 03/06/24, 12:00pm	Eastern Time (US & Canada)	Wed 03/06/24, 4:00pm	Eastern Time (US & Canada)	4 ho 0 min
Thu 03/07/24, 8:00am	Eastern Time (US & Canada)	Thu 03/07/24, 6:00pm	Eastern Time (US & Canada)	10 hou min

Add another 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 shift entry in batch

Shift Details

* Start Date & Time   * Starting Time Zone   * End Date & Time   * Ending Time Zone
   Select Timezone   Select Timezone
*Service Code
Please select a service code..
* ADL Codes

* Location

Create Shift in 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:   (GMT-05:00) Easterr
*Service Code
Respite
* Location
Home

Create shift entry

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.

Batch shift entry saved successfully.

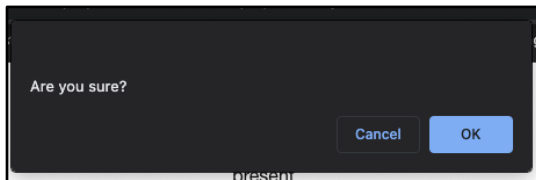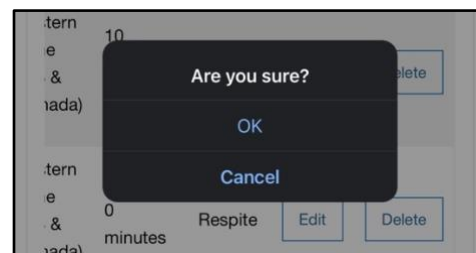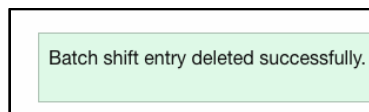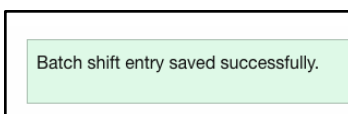**Shift Created Success Message (Desktop & Mobile)**

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.
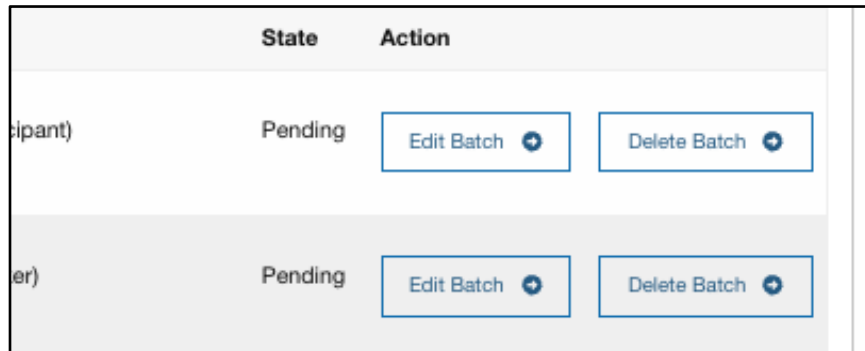
Select a Batch to Submit (Desktop)

Mobile: Click the **Edit Batch** button under to the batch you want to submit.
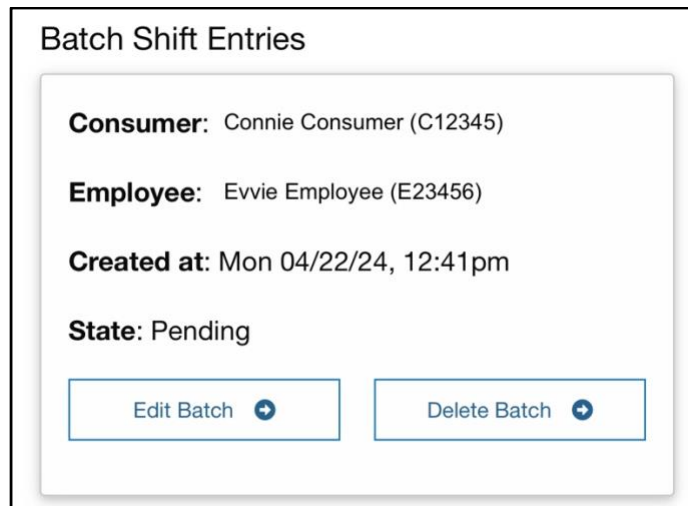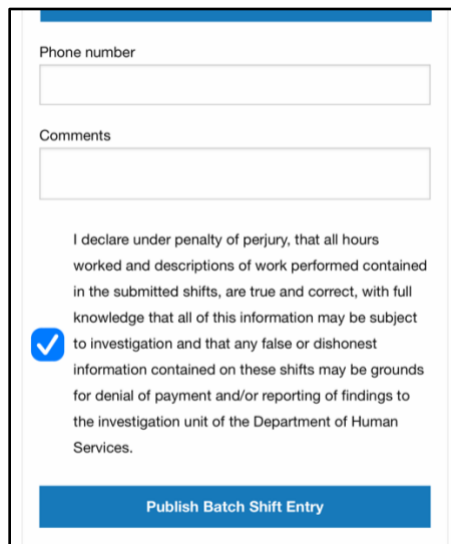
Select a Batch to Submit (Mobile)

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.
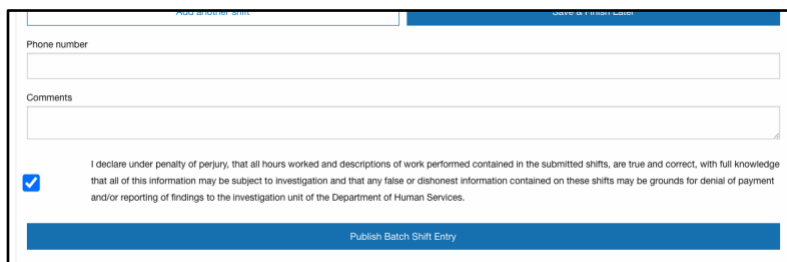

Publish Batch Shift Entry (Desktop)

Publish Batch Shift Entry (Mobile)

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 Two-Step Approval Process or the Batch Shift Approval Process.

Quick Guides

Logging in to evvie Portal

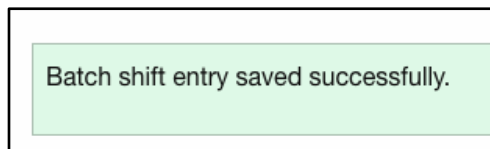**Participants, Workers, and Representatives** access the evvie Portal by visiting the sign in page. A link to the sign-in page was provided in the welcome email that all users receive when signing up to use evvie and evvie Portal for the first time. If you have lost that link or deleted the email, contact 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.
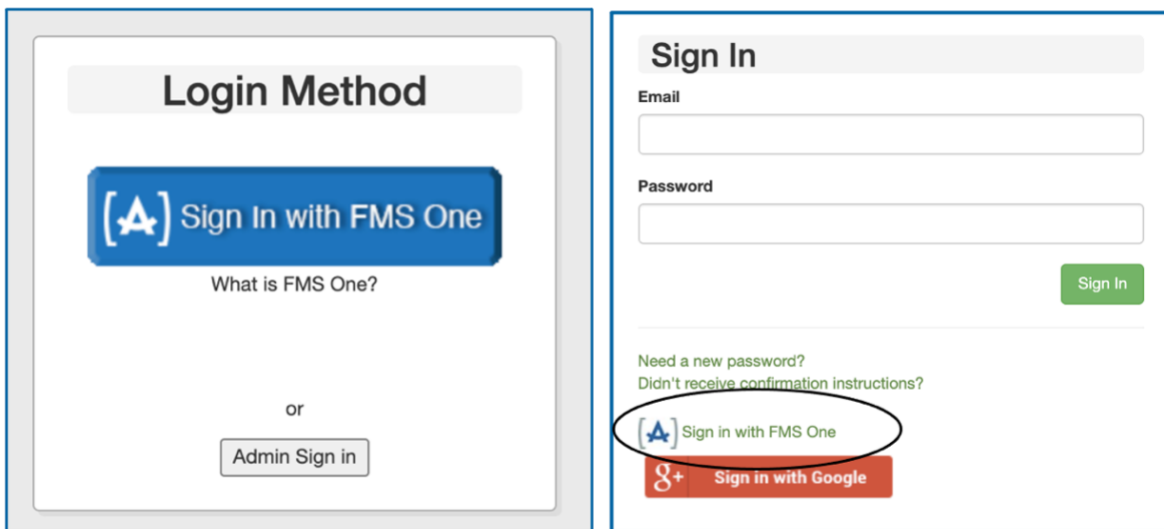
Sign in Button and Sign In Link (Desktop)

Sign in Link (Mobile)

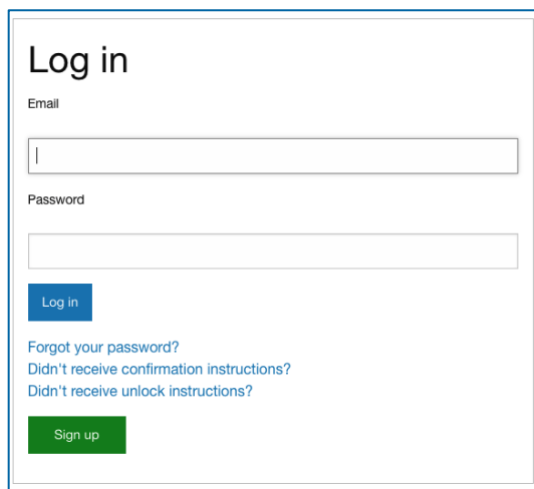2. You'll be redirected to the FMS One Sign In. Enter your email address and password, then click the **Log In** button.

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 instructions in this manual to download and sign-in for the first time.
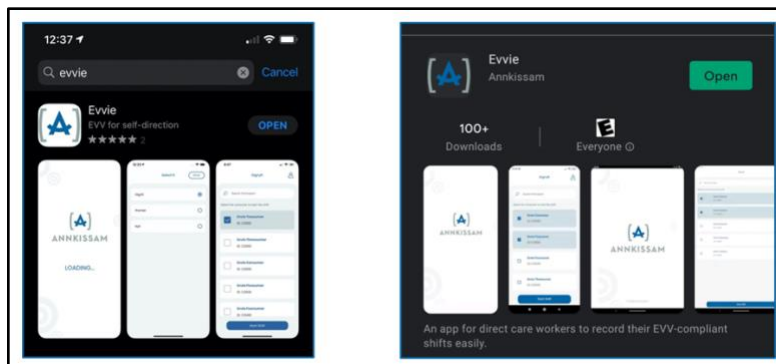
evvie Mobile App on App Store and Google Play (Mobile)

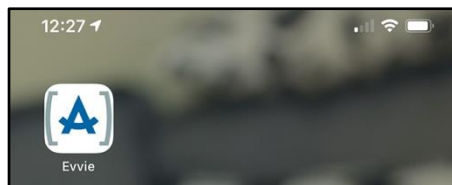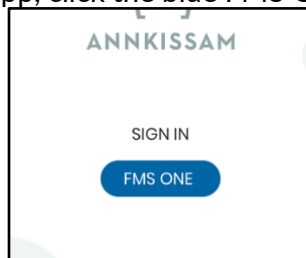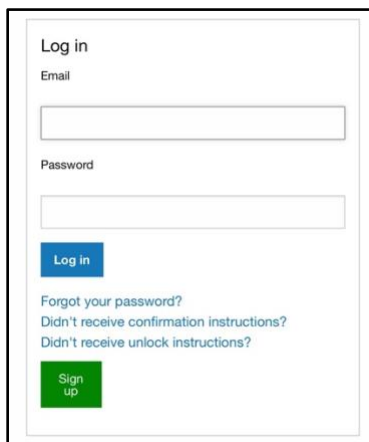2. Find the Downloaded app on your phone/tablet and click on the evvie icon.

evvie Mobile App Icon

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

FMS One Button

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

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.
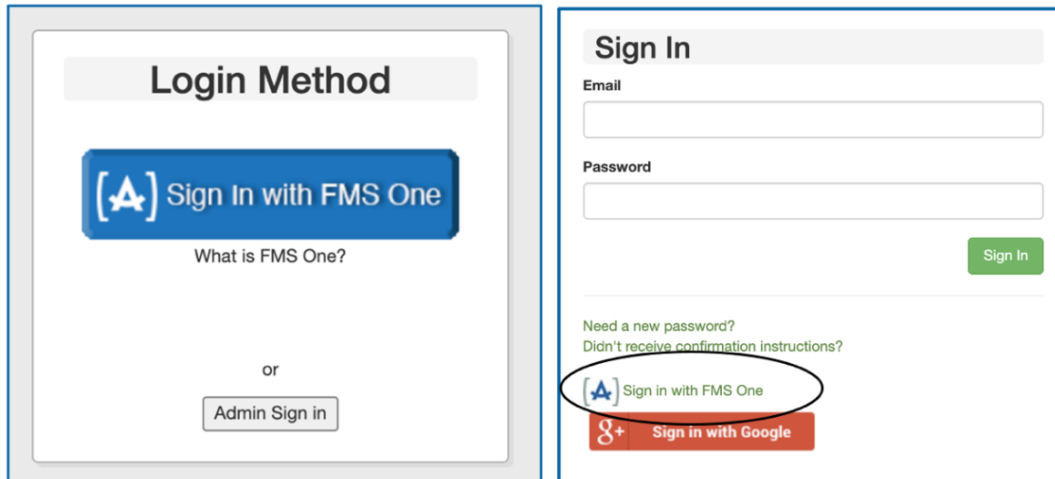
Sign in Button and Sign In Link (Desktop)

Sign in Link (Mobile)
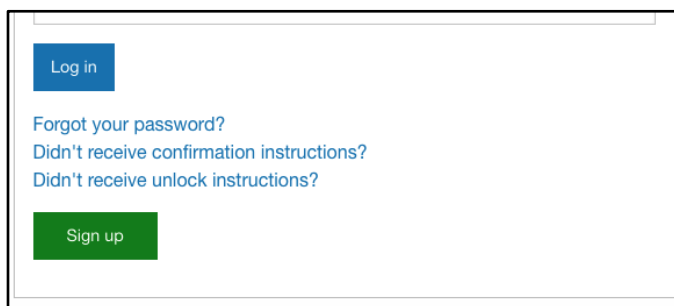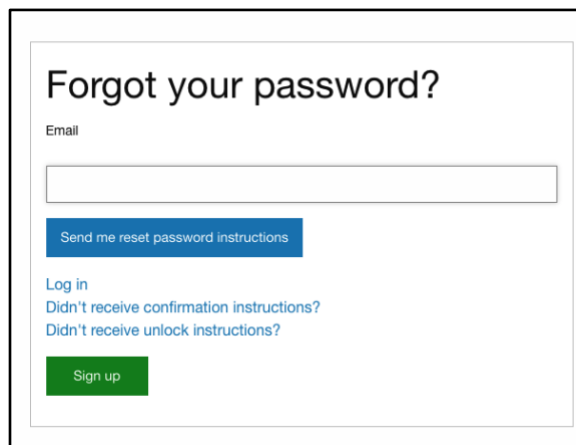
2. On the FMS One Sign In screen, click the "Forgot your password?" link.
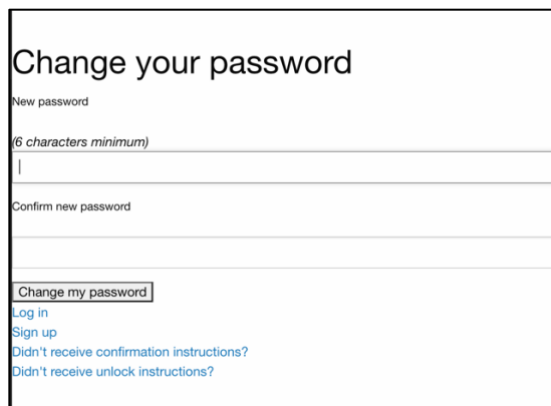
Forgot Your Password Link (Desktop & Mobile)

3. 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.

Forgot Password Form (Desktop & Mobile)

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

Change Password Form (Desktop & Mobile)

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

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
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 batch shift entry and approvals 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 Two-Step Approvals
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