# evvie and evvie portal

## User's Manual

ANNKISSAM
An HHAeXchange Company

Updated January 2022

Table of Contents

User Guide for Workers, Participants, and Representatives 3
Introduction 3
Getting Started with Evvie Portal & Evvie 4
Create an FMS One 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 7
Logging a Visit 7
Offline Shift Submission 9
Using the Evvie Portal Web App 10
Getting Started 10
Viewing EVV Visits 10
Approving an EVV Visit 12
Denying an EVV Visit 13
Adjusting an EVV Visit 16
Entering a Manual Visit 19
Quick Guides 23
Logging in to Evvie Portal 23
Reset Your FMS One Password 24
Logging in to the Evvie App 25

# User Guide for Workers, Participants, and Representatives

## Introduction

### What is EVV?

EVV stands for Electronic Visit Verification. Workers use an app to electronically record the start and end times of each shift they work (also called a visit). Workers 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 requirement 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 workers record visits easily, quickly, and securely on their smartphones or GPS-enabled tablets. The Evvie Portal is a website where Participants, Workers, and Representatives will review and approve all EVV visits.

This guide uses these words to describe the users of Evvie: **Participants, Workers, Representatives, and Fiscal Intermediaries (FIs)**. Depending on where you live and what program you participate in, you may use different words to describe yourself.

**Participants** can also be called: Consumers, Clients, Members, Individuals, or Employers. This is the person who receives home and community-based services.

**Workers** can also be called: PCAs, DSPs, PHWs, Employees, or Caregivers. This is a person who provides Home and Community-based services to Participants.

**Representatives** 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.

A **Fiscal Intermediary (FI)** can also be called: Financial Management Services (FMS), Fiscal Employer Agent (F/EA), or Fiscal Support Entity (FSE). This is an organization that collects the timesheets, processes hiring paperwork, and manages payroll.

## Getting Started with Evvie Portal & Evvie

### Create an FMS One Account and Sign-in to Evvie Portal

The Fiscal Intermediary (FI) 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 in order to create your account, so be sure your FI has your up-to-date and preferred email if there have been changes recently. Once an administrator at your FI creates your account, you will receive a welcome email with instructions on the remaining steps to confirm your account and set a password.

FMS One 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 FMS One sign in button on the login screen pictured below.

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 FI. Detailed FMS One sign-up instructions are available in the FMS One Quick Guide.**

### Link to FMS One Video Walkthrough

For a detailed walkthrough of setting up your FMS One account, please visit *https://vimeo.com/521548927*

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: Using Evvie Portal.

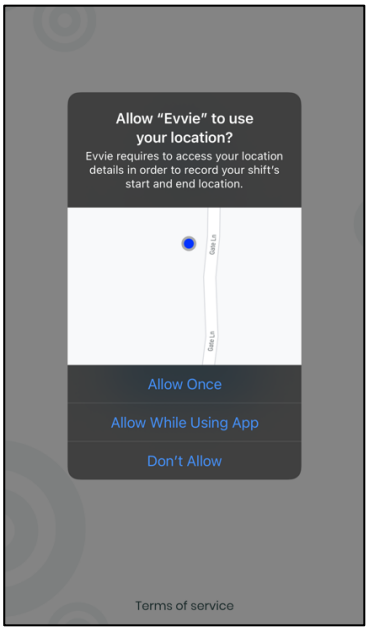
1. All Workers need to download the Evvie mobile app from the Android or Apple app store. Links to the app can be found at the bottom of the Welcome email, or by clicking either link shown below. You can also open the app store on your phone/tablet and search for "Evvie".

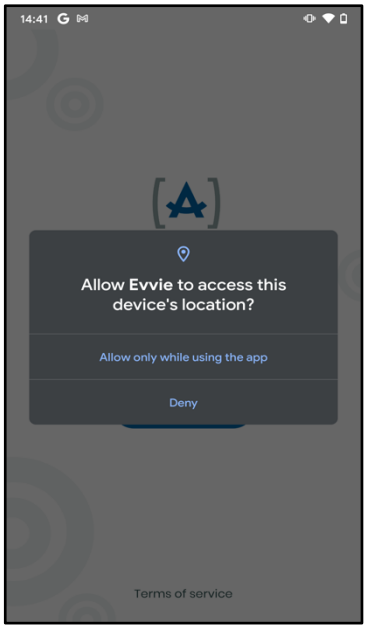
Download on the App Store

GET IT ON Google Play

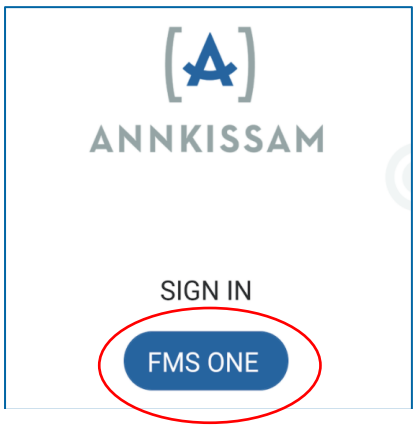
2. Locate the app on your phone and click it to open.

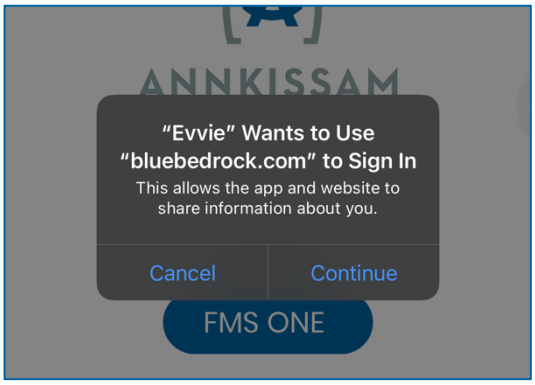
3. The first time you open the app, you will be asked to allow Evvie to access your device's location. Click "Allow While Using App" or "Allow only while using the app". Evvie will only record your location when you start and end a shift. These locations are part of the information that must be collected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



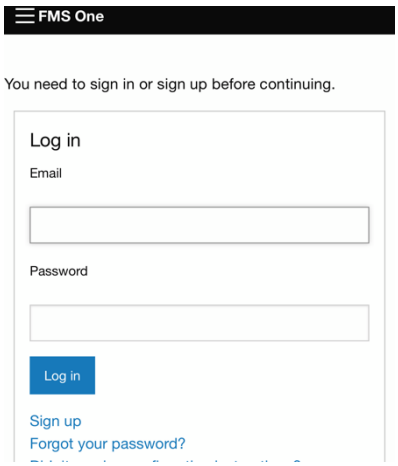




4. After you allow Evvie to use your location, click the blue "FMS ONE" button to sign in. You will be redirected to a web page to sign in. If prompted, click continue.

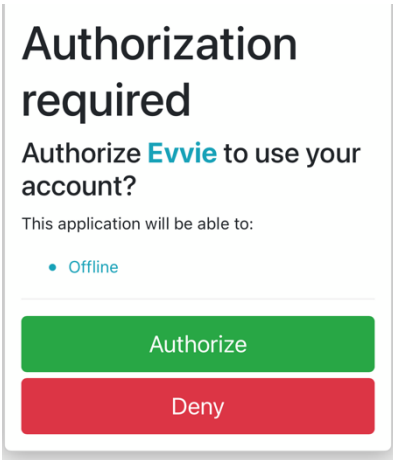


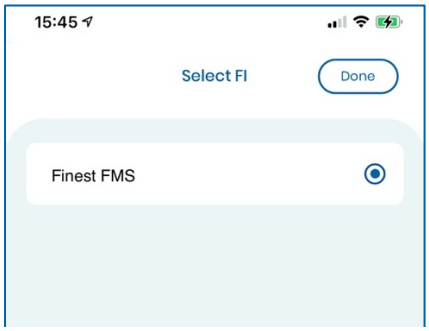
5. You will now sign in to FMS One using your email and password that you set up earlier. Enter those, then click "Log in".



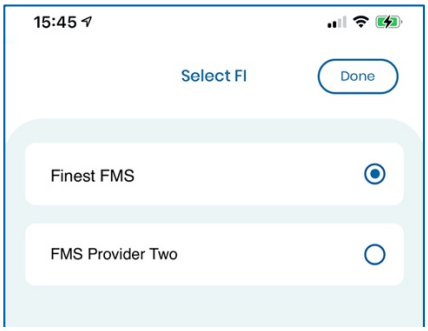

6. The first time you use the app, you'll need to authorize it. Click the authorize button.




7. Many users will not need to complete this step. On the next screen, you may need to select the FI you are working for. 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 FIs, you'll want to select the FI associated with the Participant you want to log a shift for. After selecting the FI, press Done in the upper right corner.




Some Users




A Few Users

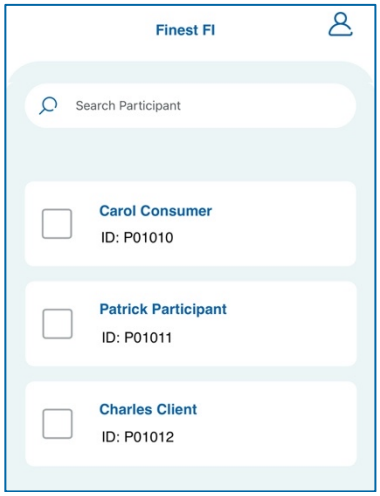
8. The Evvie mobile app is now set up and you are ready to start logging shifts.

## Using the Evvie App

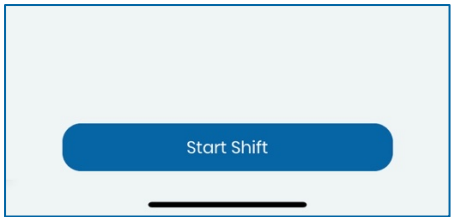
### Logging a Visit

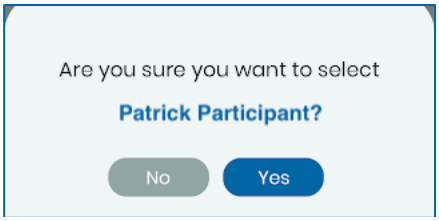
Logging a visit on the Evvie mobile app is quick, easy, and can be done with just a few clicks. It's important to note, that although Evvie supports offline visit capture, Workers must log in while connected to the internet at least one time before they log a visit. This will allow the app to load data 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.

1. Once the Worker is signed into the Evvie mobile app, (and has selected the FI, if applicable) they will be presented with a page that displays all of 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.

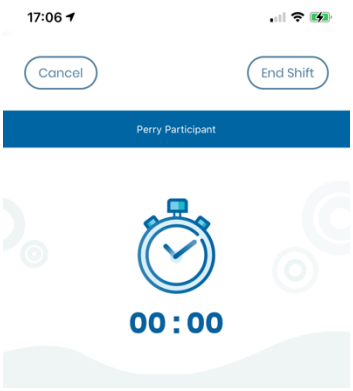



2. Click the checkbox next to the Participant you want to log a visit for. Then click "Start Shift". You will need to click "Yes" in the pop-up to confirm that the selected Participant is accurate. If you are working with more than one Participant at a time, select all Participants you are working with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

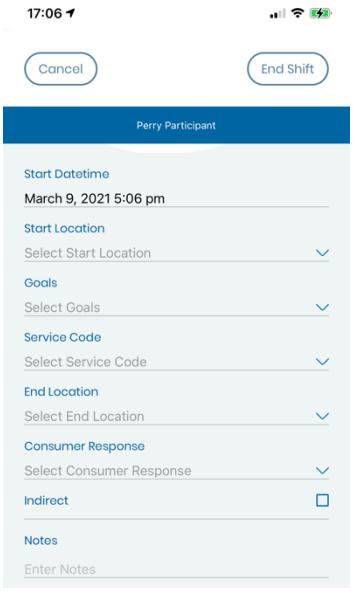


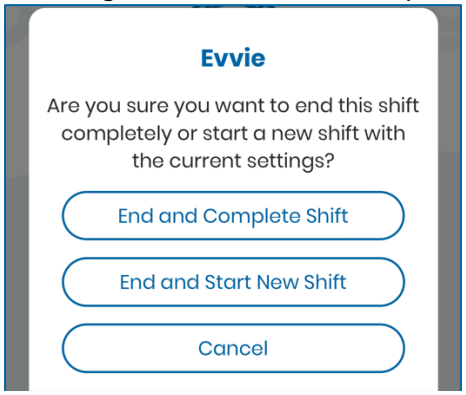
3. The shift has now begun and Evvie is tracking the time. The Worker will need to fill out the fields on the shift tracking page at some point before completing the shift. The fields include information like: start/end location, service code, notes, goals, ADLs/IDLs/etc. Please note that the fields on the shift tracking page are unique for each different FI, so the fields shown in the example to the right 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.




4. 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.




5. After clicking "End Shift" you'll need to confirm that you want to end the shift, 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.

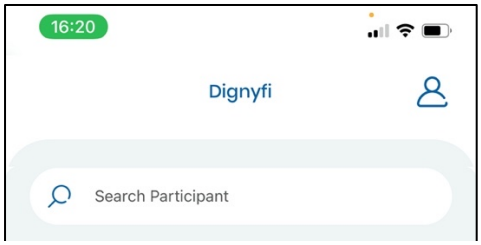



6. If the Worker is connected to the internet at the end of the visit, the visit will be automatically sent to the Evvie Portal website within the next 30-60 seconds. If the Worker is not connected to the internet, the visit will be stored in the Account page until the Worker has connected to the internet 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.

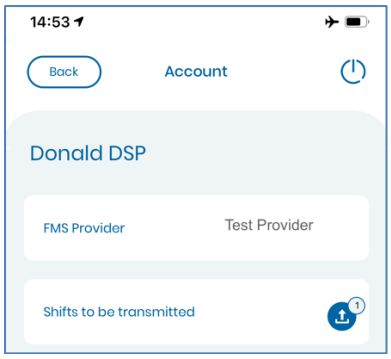
Offline Shift Submission

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 of the visits that could not be sent will be stored in the mobile app. The Worker will need to connect to the internet and complete these steps to submit the visits to the Evvie Portal.

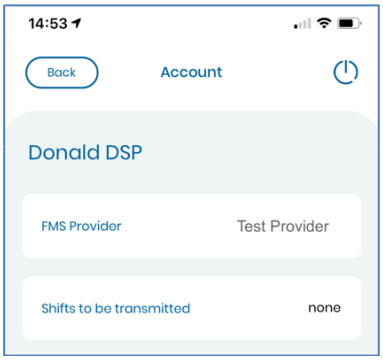
1. After starting up the app, the Worker will access their account screen by clicking the person icon in the upper right corner.




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 waiting to be transmitted, the Worker will click the blue upload button. All pending visits will be submitted to Evvie Portal as long as the Worker is connected to the internet. Typically, any pending shifts will automatically transmit as soon as an internet connection is available and the app is opened.

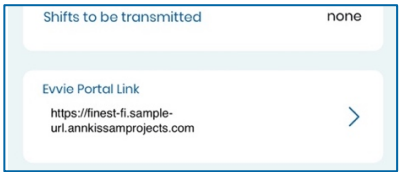



Shifts are waiting to transmit




All shifts have been transmitted

3. Workers will also notice a link to the Evvie Portal website on the Account page, which they can click for easy access.



## Using the Evvie Portal Web App

### Getting Started

If you have not completed the instructions in your Welcome Email, please go back to the section titled "Getting Started with Evvie Portal & Evvie" on page four of this user guide and follow 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

All visits start in the Evvie Portal with a status of "submitted".

1. Either party can be the first person to review and approve the visit.
2. The second person will then review the visit and "lock" the visit.

If any changes need to be made to the visit during the approval process, both parties need to approve the visit again before it can be finalized and locked.

Throughout the following instructions, 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.

### Viewing EVV Visits

Each user 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.

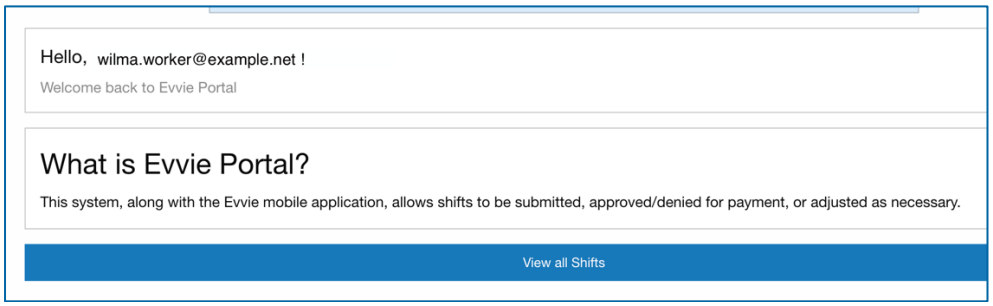
1. If you are not signed in, log in to Evvie Portal using the "Sign in with FMS One" button or link. Use the web address you bookmarked when creating your FMS One account. See the Quick Guides section at the end of this manual if you need assistance with logging in.

2. When a visit moves from the Evvie mobile app to Evvie Portal, both parties will receive a notification email prompting them to login to approve the visit. Users can click a link in the email to be taken directly to the visit.

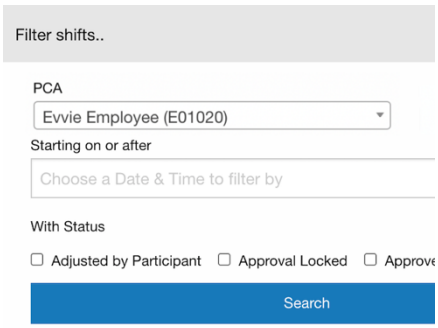
> A new shift has been submitted for your review in Evvie Portal!
>
> To log in and view the details for this shift, just follow this link: https://evvie-portal.sampleurl.bluebedrock.com/shifts/321

3. If you clicked the link in the email, you'll be brought directly to the shift needing approval, and you can go to Step 7 of this section.

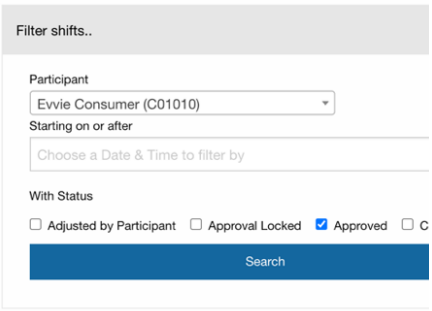
4. If you've logged in to the Evvie Portal without clicking the email link, you'll arrive at the home screen. Click the "View all shifts" button.



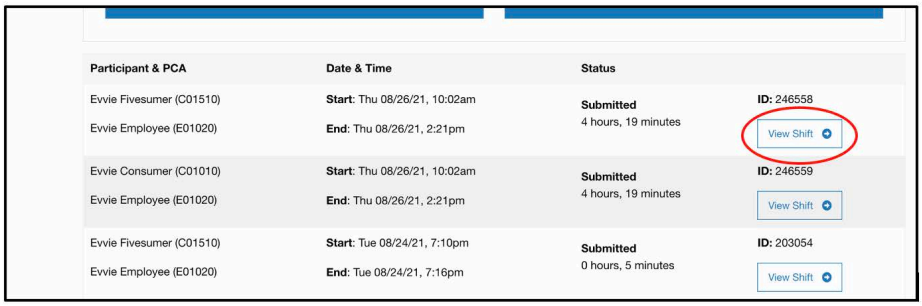

5. **Participants/Representatives:** You can search for a specific shift, by selecting the Worker's name from the dropdown. If you only have one Worker, you don't need to use the filter. You can also mark the check box next to "Submitted" to find shifts that are awaiting your approval. Click Search, if you are using any of the filters.




**Workers:** You can search for a specific shift, by selecting the Participant's name from the dropdown, if you only work for one Participant you don't need to use the filter. You can also mark the check box next to "Submitted" to find shifts that are awaiting your approval. Click Search, if you are using any of the filters.



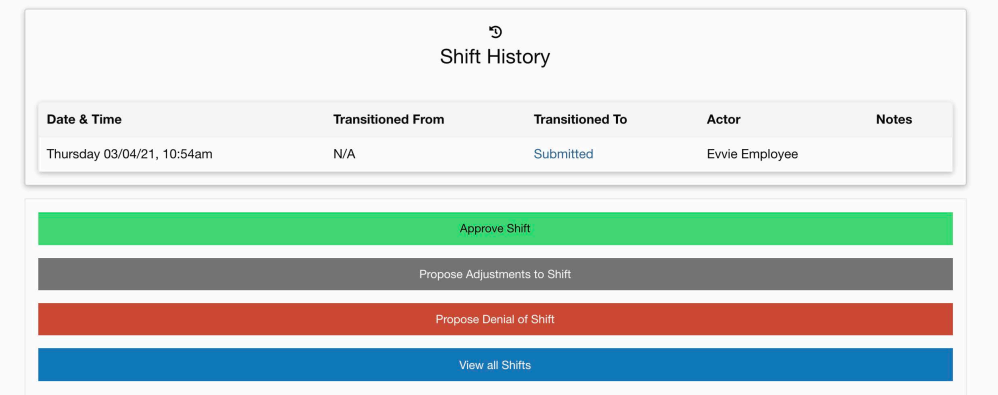

6. Results will appear in the table below the search button. Scroll the list to find the shift you need to approve and click the view shift button next to the visit.



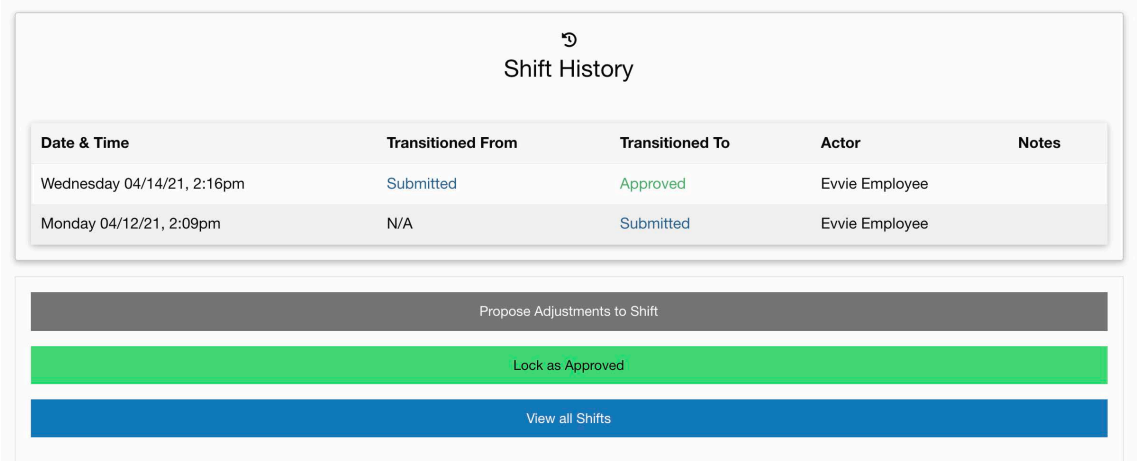
## Approving an EVV Visit

We'll explain how to approve correct shifts first. Then we'll review what to do if shifts need to be denied, or if adjustments need to be made in later steps.

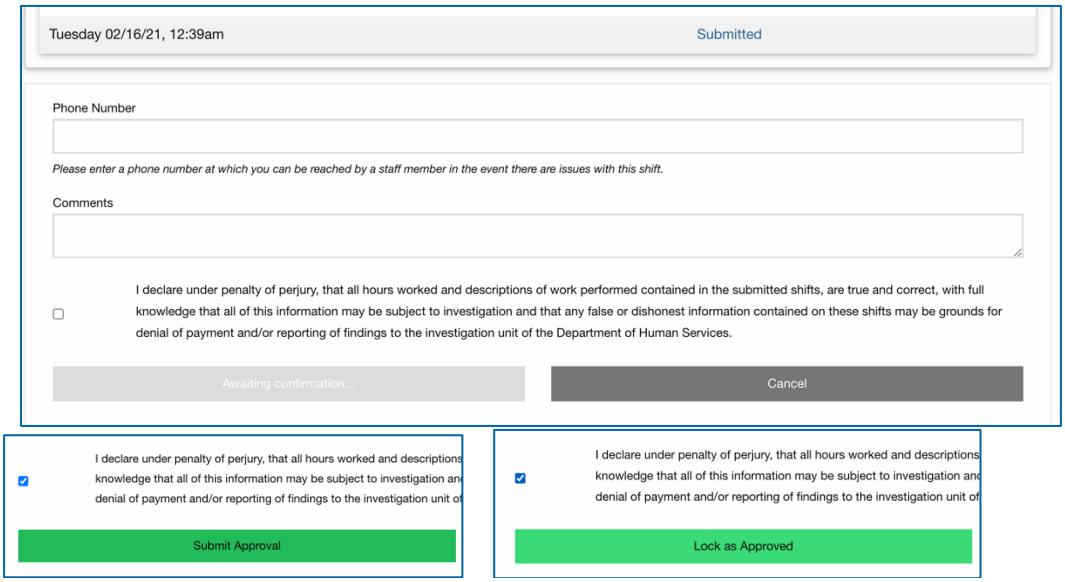
7. Information about the shiftill be displayed, along with all captured information about the shift. The first person to review the shift will scroll to the bottom of the page. If the visit was correct, they will click the "Approve Shift" button at the bottom of the page.




The second person to review the shift will need to scroll to the bottom of the page after confirming the shift is correct. At this point the visit is already be approved by the first person. If the visit is correct, click "Lock as Approved".



8.A After clicking "Approve" or "Lock as Approved" you will need to click a checkbox to declare that the shift is correct. By checking this box, you are officially signing on your approval of the shift. After clicking the box, the "Awaiting Confirmation" button will transform to a "Submit Approval" or "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.




9. First Person to Review: The visit will now have a status of "Approved" and the other person will receive an email notification alerting them that there is a visit awaiting their approval. They can click the link in the email to be taken to the visit.

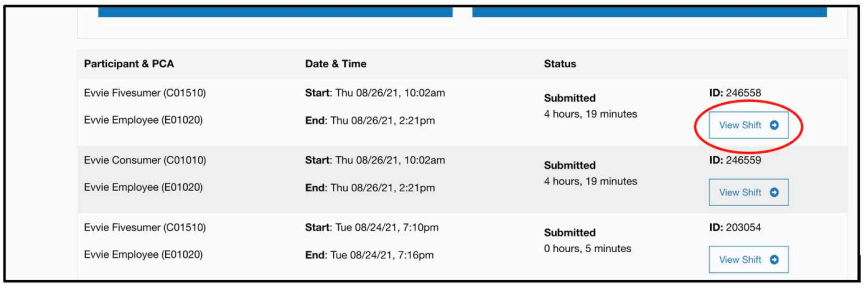
   Second Person to Review: The visit will now have a status of "Approval Locked". The visit will be sent to the FI for payment at the end of the pay period. Once a visit is locked, it cannot be changed in the Evvie Portal.

## Denying an EVV Visit

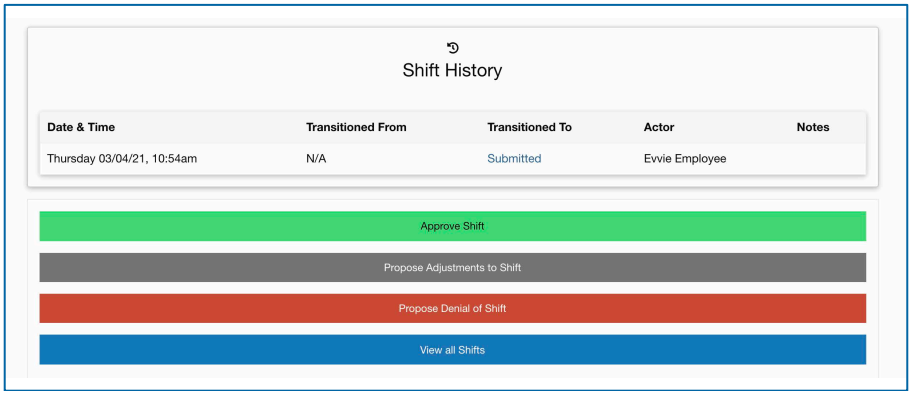
Users may need to deny a visit if the visit was created in error. For example, if the worker accidentally begins a visit for the incorrect participant but completes it rather than cancels it. If the visit is partially correct you can adjust the shift, instead of denying it. Adjustments are covered in the next section of this guide.

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 EVV Visits.

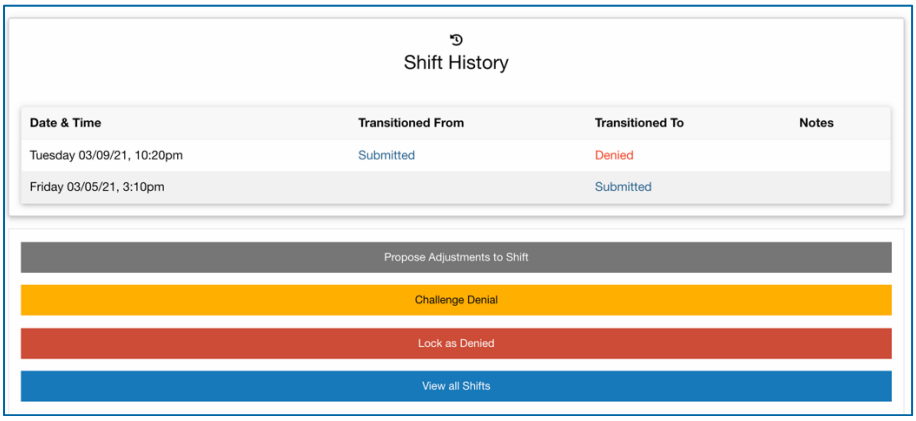
2. After you have located the shift that needs to be denied or denial locked, click the view shift button next to the shift.



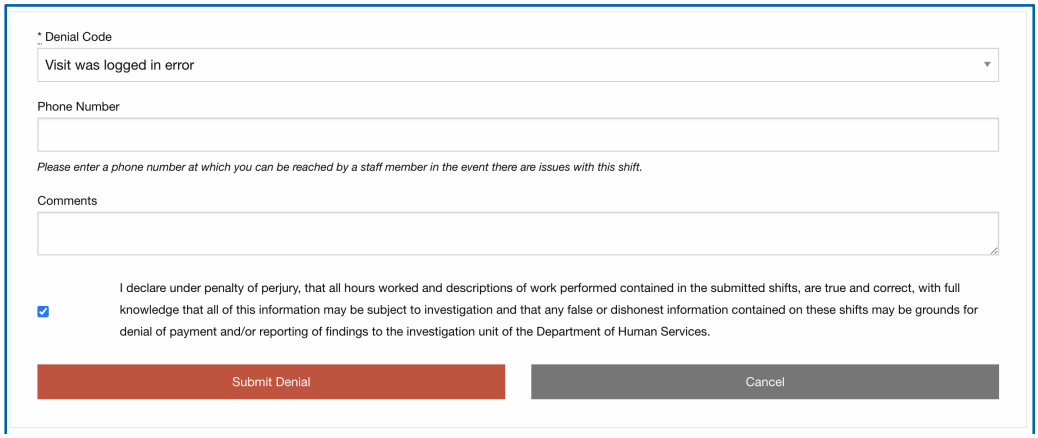

3. If the shift is in a status of **Submitted,** the first person will scroll to the bottom of the shift page and click "Propose Denial of Shift". **Go to Step 4.**



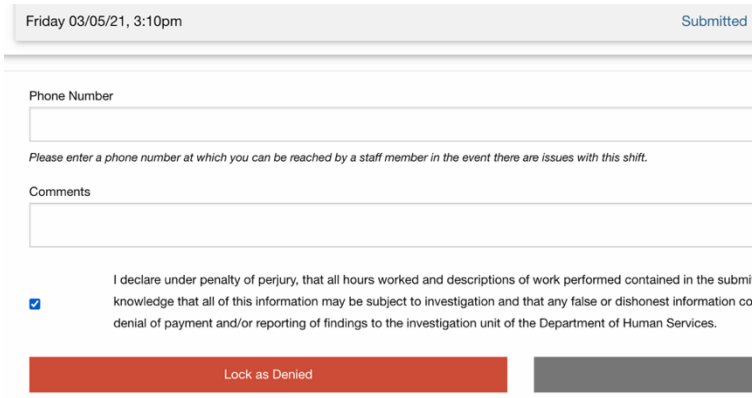

If the shift is already in a status of **Denied**, the second person to review will scroll to the bottom of the shift page. If you agree with the denial, click "Lock as Denied". If you disagree with the denial, click "Challenge Denial". **Go to Step 5.**



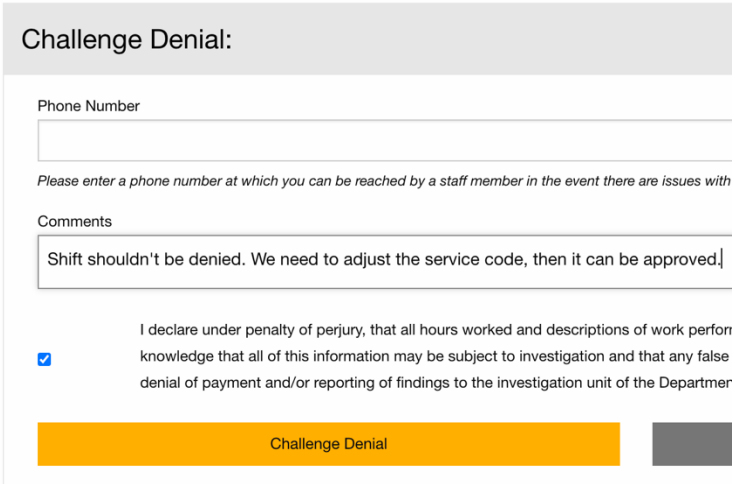
4. On the next page, you will be required to select a Denial Code from the drop-down menu to indicate why the visit is being denied. You may also enter a comment which will be visible to all associated users. Once you are done, click "Submit Denial". The shift will now be in a state of "Denied".




5. If you agreed with the denial and clicked "Lock as Denied" on the previous screen, you will need to check the box to certify the denial, then you can click the "Locked as Denied" button.




If you did not agree with the denial, and challenged it, you will want to add comments to explain why it should not be denied, then check the box, before clicking the "Challenge Denial" button.




6. A challenged denial can 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 denied.

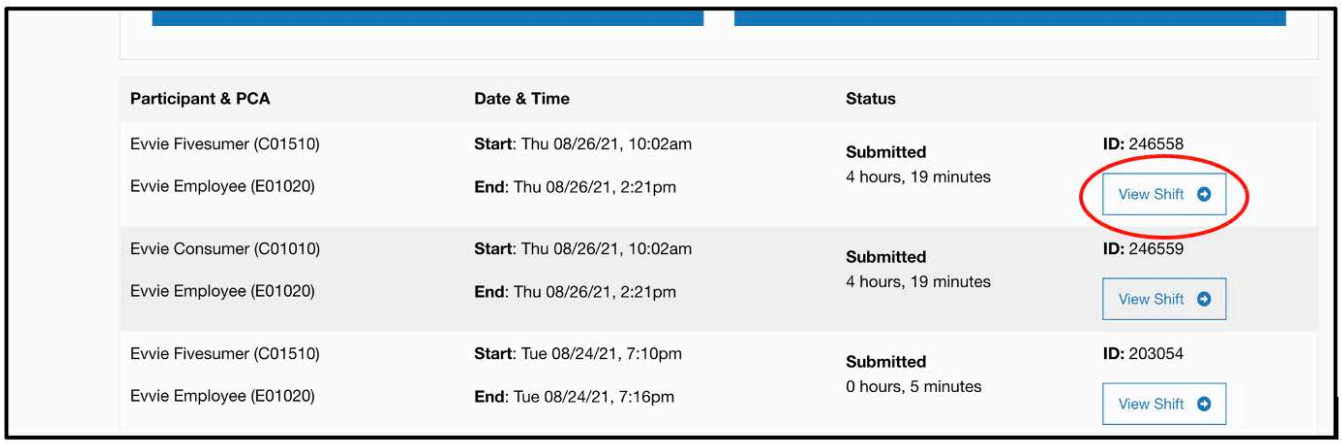
## Adjusting an EVV Visit

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 dead 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.

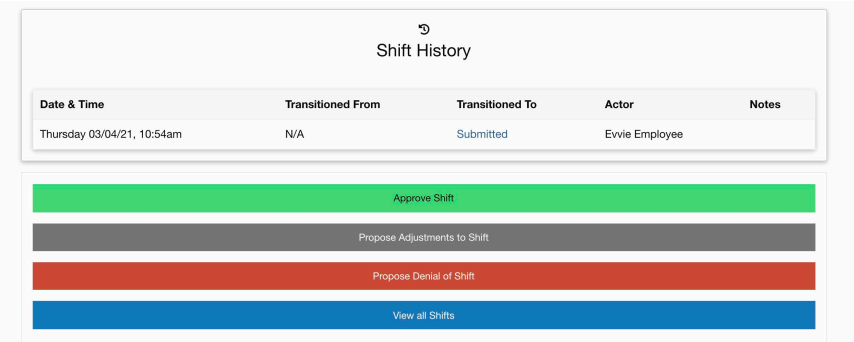
Please minimize edits unless absolutely necessary. Some states are tracking the volume of edits per user. States have discussed that corrective actions could be taken for users who have a high volume of edits in the EVV system.

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 section of this manual titled Viewing EVV Visits.

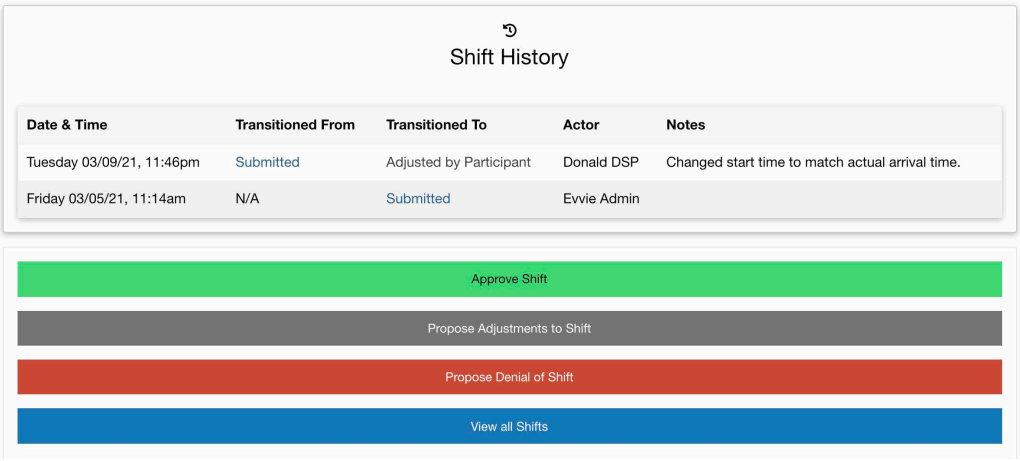
2. Click the view shift button next to the visit you wish to adjust in order to go to the visit's show page.



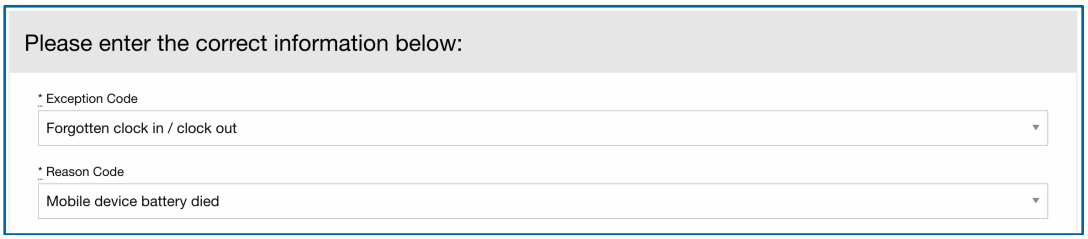
3. The first person to review will scroll down to the bottom of the shift's page and click "Propose Adjustments to Shift". Then continue to Step 4.



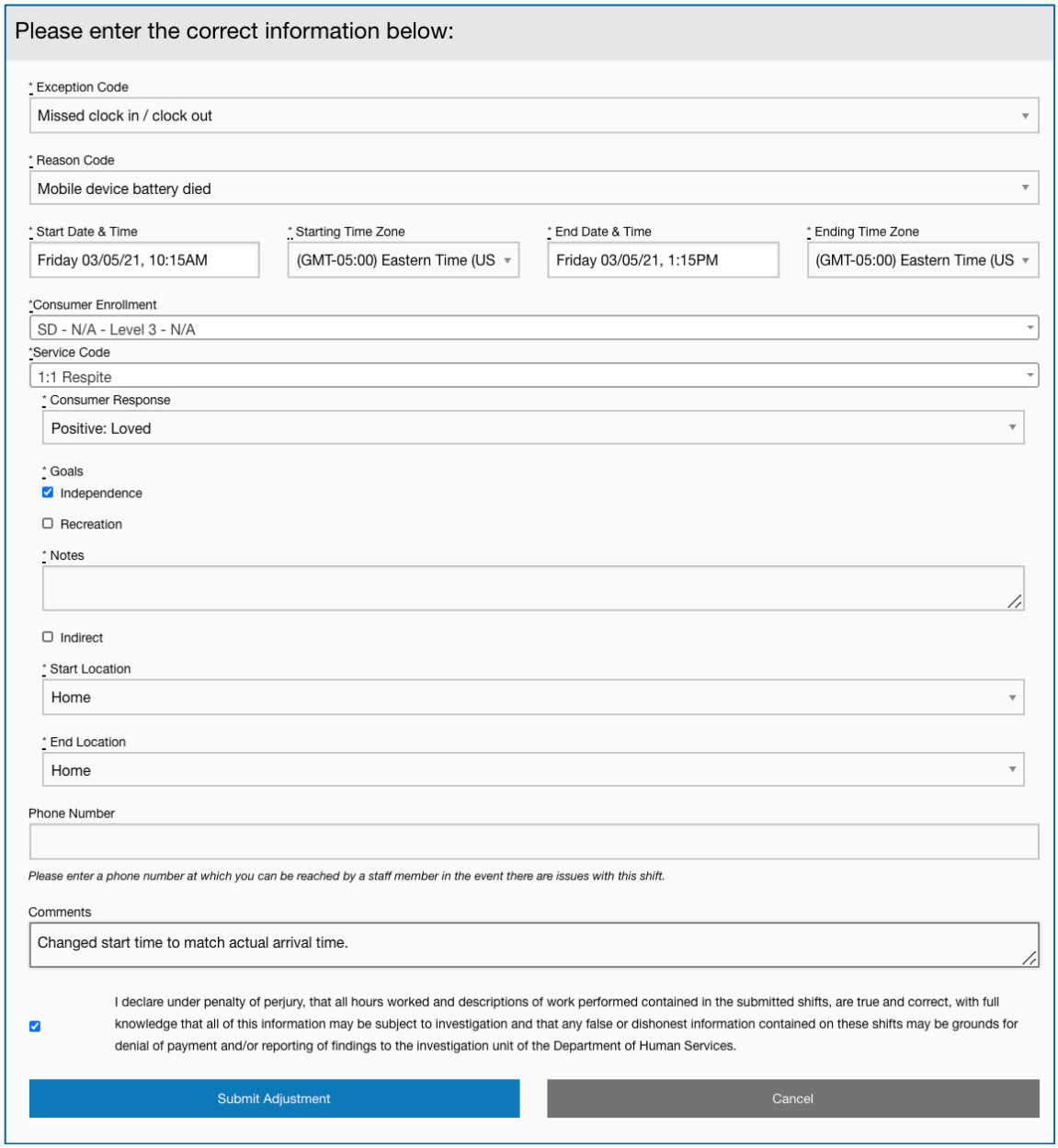

**The second person** will review the changes that were made to the shift. If you agree with the changes, scroll to the bottom of the shift page and select Approve shift (Continue to Step 5). If you do not agree with the changes, or need to add an additional change, click Propose Adjustments to Shift (Continue to Step 4).




4. On the next page, select both an Exception Code and a Reason Code. The Exception indicates why an adjustment is being made, 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 FI for assistance. (Continue to Step 5).

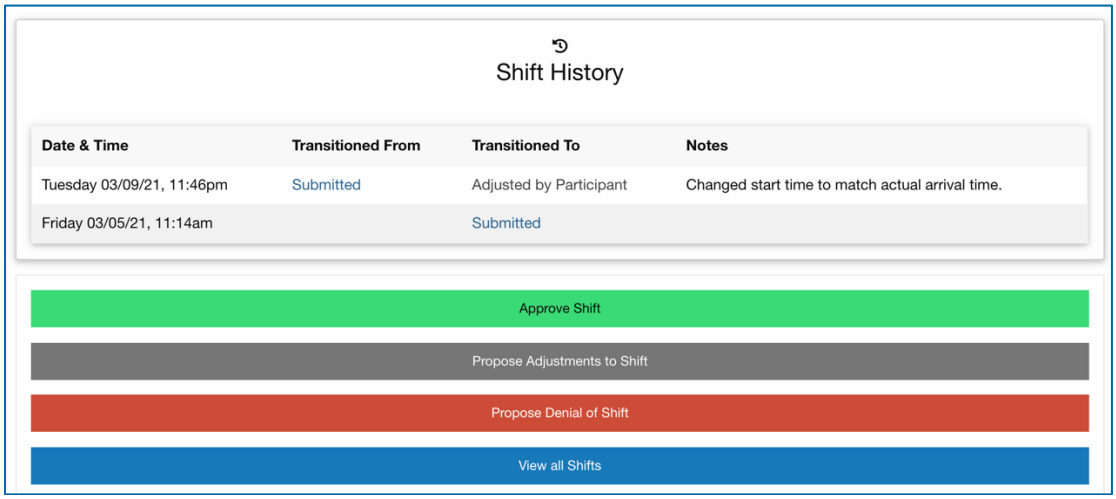


5. After selecting the codes, you can change any of the fields that need to be adjusted. Users will be required to leave a comment explaining the changes, which will be visible when the other party prompted to approve the visit. Click into any field or drop-down to make a change.




6. Once finished, the user will check the box certifying their signature and click "Submit Adjustment". The other party will receive an email that adjustments were proposed to a shift and require their review.

7. The user reviewing the adjusted visit will be presented with the usual three options again to approve, adjust, or deny the visit. The comments left when adjusting a shift are viewable in the shift history section of the shift's view page.



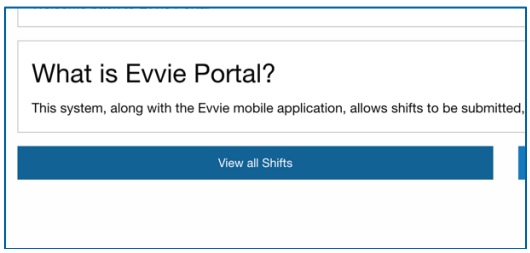

## Entering a Manual Visit

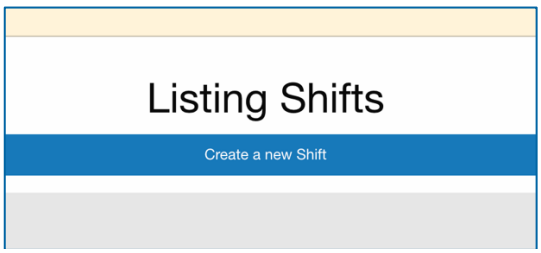
This is the process to use if you are manually entering a new shift. For information on how to approve an existing shift, see Approving an EVV Visit. For information on how to adjust an existing shift, see Adjusting an EVV Visit.

Please avoid manual shift entry unless absolutely necessary. Manually entered shifts are not EVV-compliant, and some states track the volume of non-compliant shifts per user. States have discussed that certain corrective actions could be taken for users who have a high volume of non-compliant EVV shifts. A few types of shifts, including Support Brokerage, Sick Time, Vacation, and PTO, usually do not require EVV-compliant tracking.

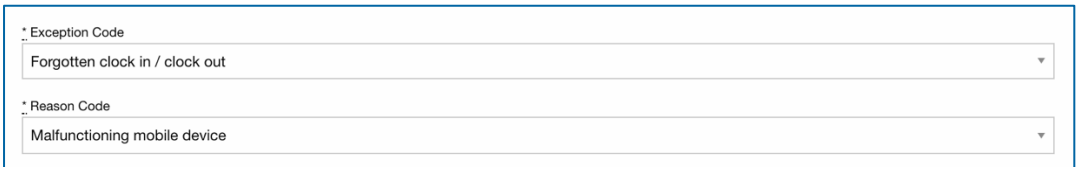
1a. After logging in to the Evvie Portal, click "View all Shifts".

1b. Then click the large blue button that near the top of the screen that says "Create a new Shift". See the Quick Guides section at the end of this manual if you need assistance with logging in.

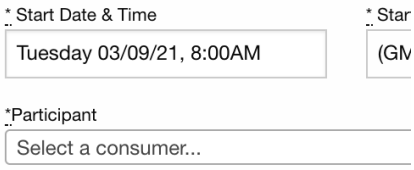


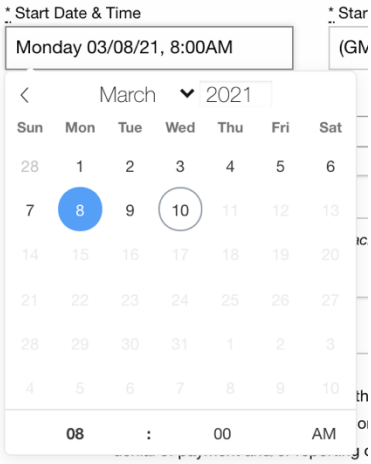
2. Select both an Exception Code and a Reason Code. The Exception indicates why a visit is being manually entered, and the Reason indicates why the Exception occurred. Select the Exception and Reason codes that best match your situation. If you have concerns or questions about which option is best, contact your FI for assistance.




3. Click in the Start Date & Time box.

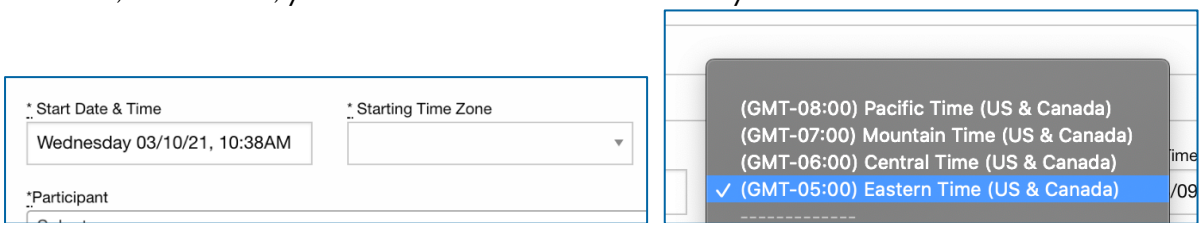



a. Then select the date from the calendar dropdown. *You can only select today's date or a date in the past. Then click on the time (hour or minutes) at the bottom of the calendar.

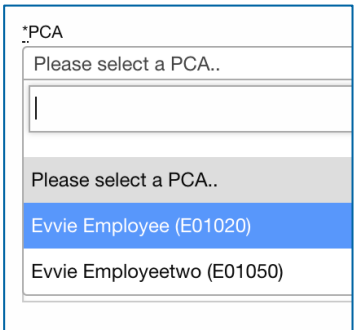


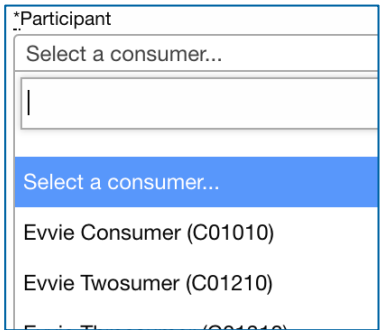

b. You can click on the number and manually type it in or you can click the arrows to adjust the time. Clicking on AM will change it to PM, clicking on PM changes it to AM.

4. You must select the time zone where you worked from the drop down. The four time zones of the mainland United States are displayed at the top of the list. If you are recording Sick Time, PTO, or Vacation, you should use the time zone where you live.

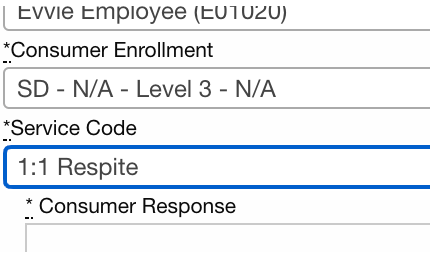


5. **Participants/Representatives:** Select the Worker (PCA) associated with the shift from the dropdown.
   **Workers:** Select the Participant associated with the shift from the dropdown.

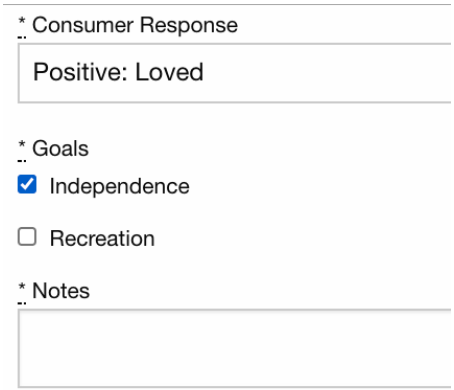


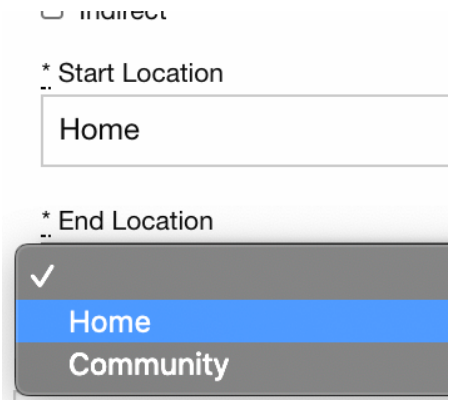

6. Select the enrollment and the service code from the dropdowns.



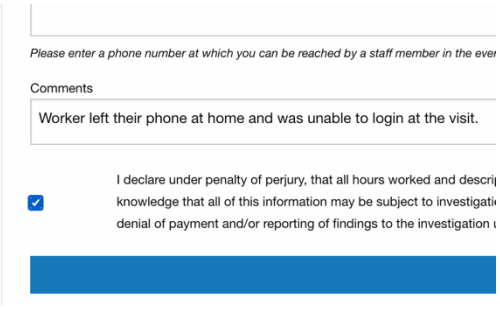

7. Select a Consumer Response (if required), then mark the checkboxes for the Goals (or ADLs) associated with the shift. You can add notes about the shift by clicking on the notes field and entering text. These notes are the notes about the shift, <u>these are not the comments about the reason for recording the shift manually.</u>




8. Select the Start and End Locations from the dropdown boxes.



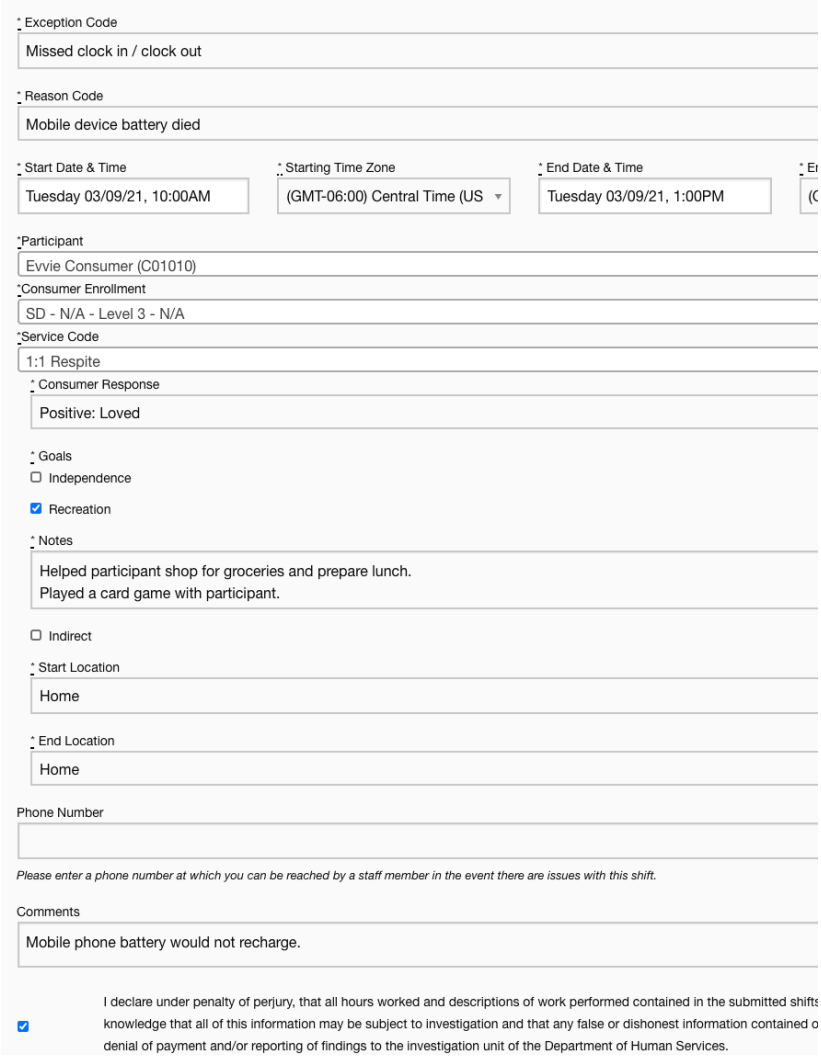
9. In the Comments box, provide information about why the visit was captured manually rather than in an EVV-compliant method. All parties associated with the visit will be able to read the comments.




10. Check the box certifying your signature and click the "Create Shift" button at the bottom of the form. An email will be sent to all parties alerting them that a shift has been manually created.

11. The visit will begin in a status of "submitted" and is ready to be approved, adjusted, or denied by the other person.

Below, you can see a manual shift that has been filled out completely.

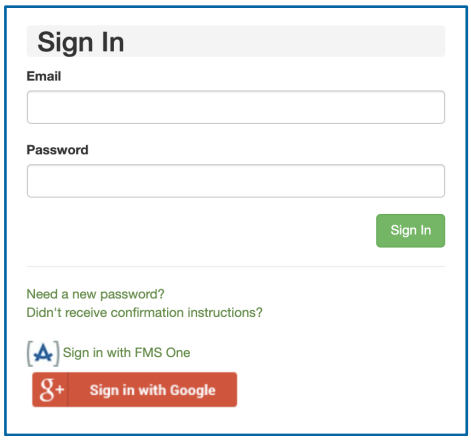


## Quick Guides

### Logging in to Evvie Portal

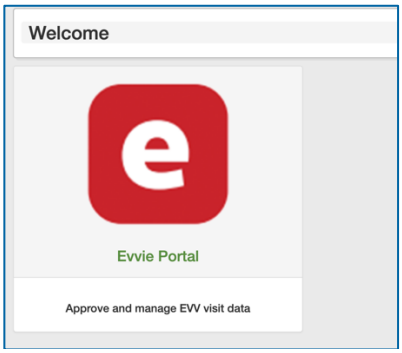
**Participants, Workers, and Representatives** access the Evvie Portal by visiting the sign in page. A link to the sign-in page was provided in the Welcome Email that all users receive when signing up to use Evvie and Evvie Portal for the first time. If you have lost that link or deleted the email, contact 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 the "Sign In with FMS One" link.




2. You'll be redirected to the FMS One Sign-in. Enter your email address and password then click "Log In". If you have forgotten your password, or need to reset it, click the "Forgot your password?" link. Detailed instructions for resetting passwords is available in the next section of this manual.

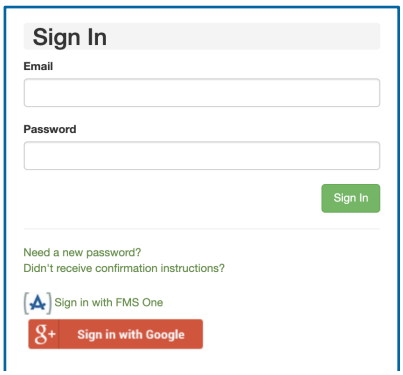
3. You are now signed in with FMS One and should have access to the Evvie Portal and any other web apps that your Fiscal Intermediary has made available to you. Click the red "e" icon to connect to Evvie Portal.



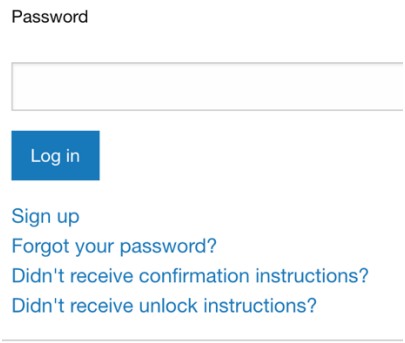
## Reset Your FMS One Password

If you've forgotten your FMS One password, it is easy to reset. Visit 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.

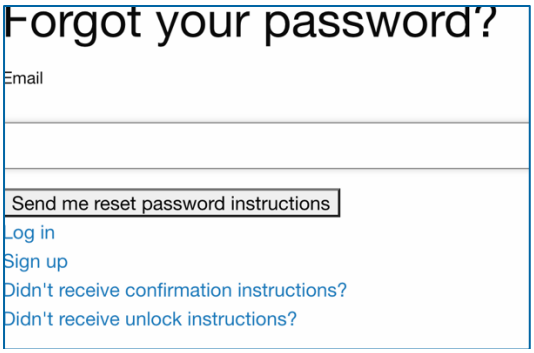
1. From the sign-in page, click the "Sign In with FMS One" button or the "Sign In with FMS One" link.

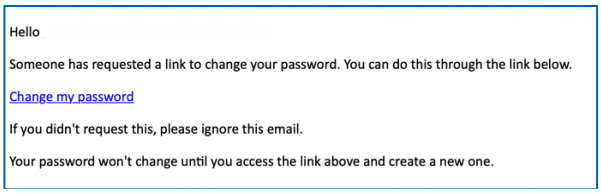



2. On the FMS One sign-in screen, click "Forgot your Password?".

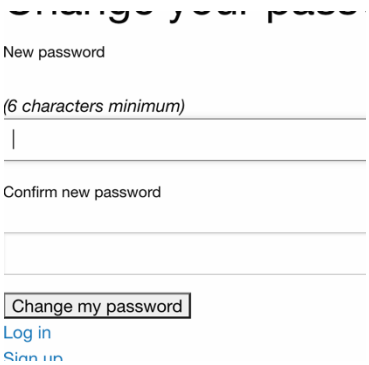



3. Enter your email address then click "Send me reset password instructions". You will get an email with a link to reset the password. Click on the emailed link.



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




5. Your password is now reset and you can log in to FMS One.

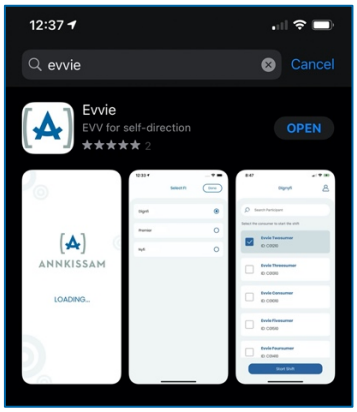
Logging in to the Evvie App

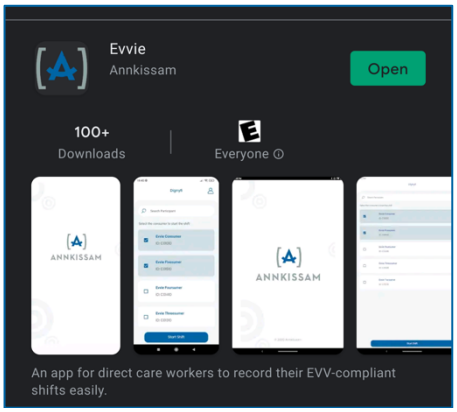
Only Workers have access to log in and record shifts with the Evvie App. Participants and Representatives use the Evvie Portal to manage the approval and denial of EVV visits or shifts.

1. If you have not downloaded the Evvie App from your app store, follow one of the links below to access the app. There is no cost to download Evvie. You can also open the App Store or Google Play app on your phone/tablet and search for Evvie. Look for the Annkissam [A] logo.

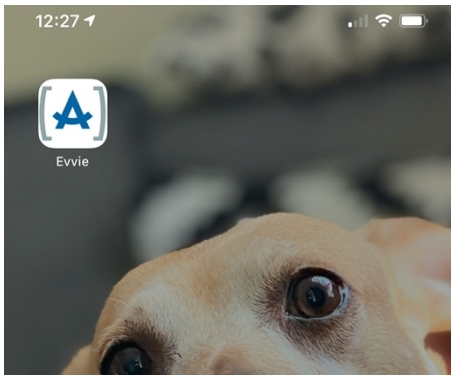
Download on the App Store

GET IT ON Google Play

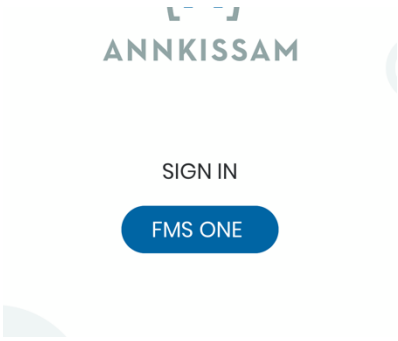


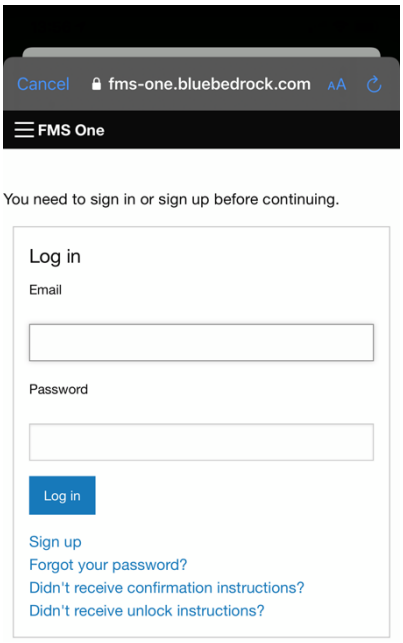

2. Find the downloaded app on your phone/tablet and click on the Evvie icon.



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 Login.




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

## User's Guide Update Summary

01.07.22 - FMS One sign up instructions updated.
- Added additional alt-text for screenreaders.

10.01.21 - Updated Shift Index screenshots throughout guide.

08.15.21 - Updated Screenshots throughout guide.

04.20.21 - User Guide released.