evvie and
evvie portal

User's Manual

Updated October 2022

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User Guide for Workers, Participants, and Representatives
Introduction
<u>What is EVV?</u>

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

<u>What is **evvie**?</u>

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 Financial Management Services (FMS). 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.

Financial Management Services (FMS) 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.

Getting Started with **evvie** & **evvie** Portal

Create an **FMS**One Account and Sign-in to **evvie** Portal

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

A valid email address is required to create your account so be sure your FMS has your up-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 **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 FMS. 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/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: 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 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 it to open.
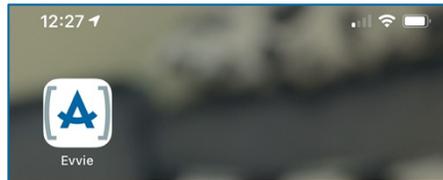
3. The first time you open the app, you will be asked to allow evvie to access your device's location. Click "**Allow While Using App**" or "**Allow only while using the app**." **evvie** will only record your location when you start and end a shift. These locations are part of the information that must be collected to verify your shifts with EVV.
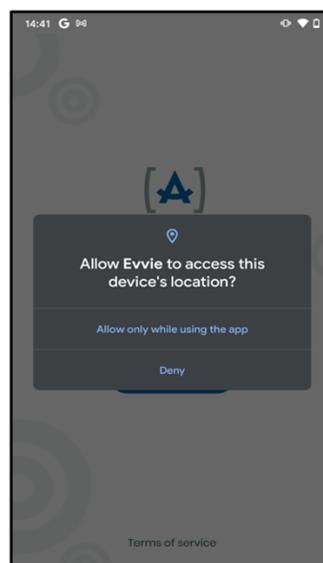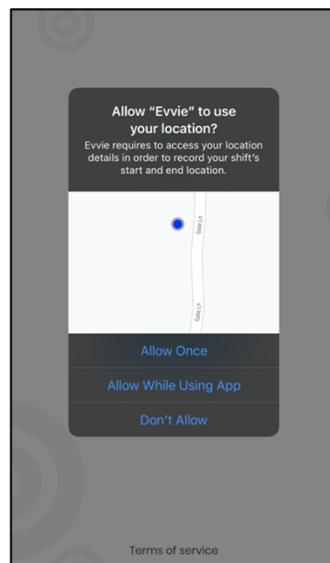
4. After you allow **evvie** to use your location, click the blue "**FMS ONE**" button to sign in. You will be redirected to a web page to sign in. *On Apple Devices: if prompted, click continue.*
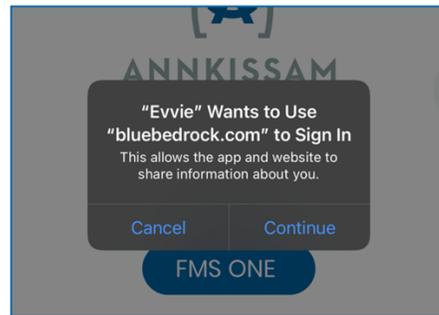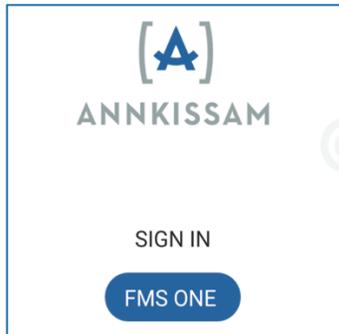

5. You will now sign in to **FMS**One using your email and password that you set up earlier. Click **Log in**.

6. The first time you use the **evvie** app, you will need to authorize it. Click the green **Authorize** button.
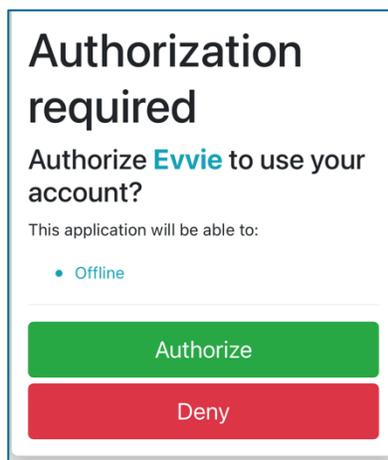
7. <u>Most users will not need to complete this step.</u> On the next screen, you may need to select the FMS you are working with. For most users, there will be no selection screen at all. For some users, there will only be one option to select. If you work for more than one Participant, and those Participants 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.


Most Users   Some Users
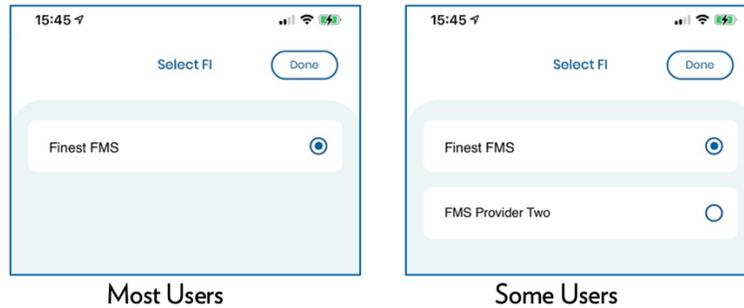
14. The **evvie** mobile app is now set up and you are ready to start logging visits.

Using the **evvie** App

<u>Logging a Visit</u>
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.

1. 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.
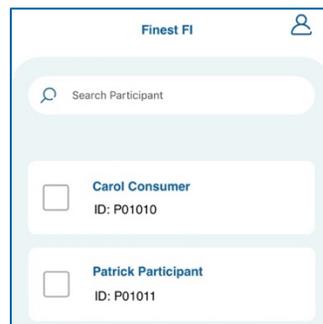
2. Click the check box next to the Participant you want to log a visit for. Then click **Start Shift** at the bottom of the screen. You will need to click **Yes** in the pop-up to confirm that the selected Participant is accurate. If your program, working with more than one Participant at a time, select all Participants you are working with before clicking **Start Shift.**
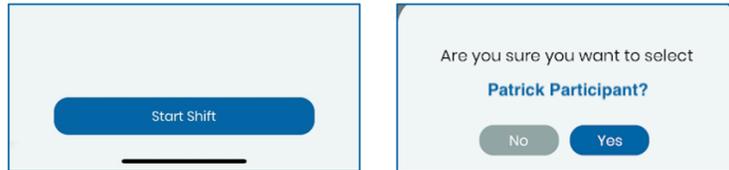
3. The shift has now begun and **evvie** is tracking the time.
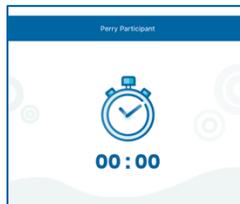
4. The Worker will need to fill out the required fields on the shift tracking page at some point before completing the shift. Required fields are marked with an asterisk *. The fields may include information like: start/end location, service code, notes, goals, ADLs/tasks, etc. Please note that the fields 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.
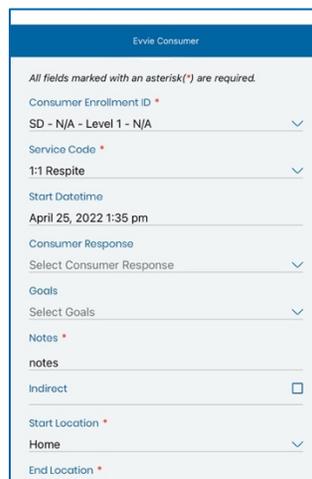
5. If the visit was started in error, the Worker can click the **Cancel** button in the top left corner to cancel the visit. No EVV data will be tracked or saved. Click **End Shift** in the top right corner to finalize and submit a completed shift.

6. 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.
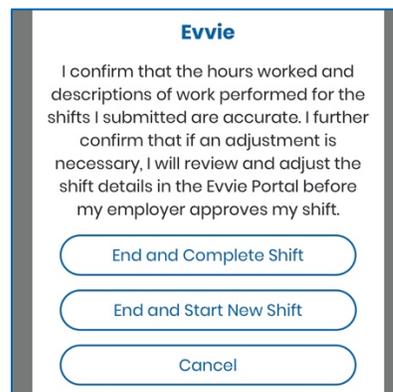
7. If the Worker is connected to the internet at the end of the visit, the visit will be automatically sent to the **evvie** Portal website within the next 30-60 seconds. If the Worker is not connected to the internet, the visit will be stored in the Worker's account page until the Worker has connected 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 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 this by following these steps.

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

1. 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 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.
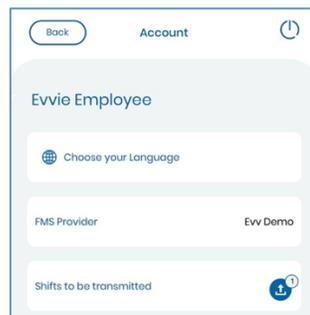
Shifts are waiting to transmit
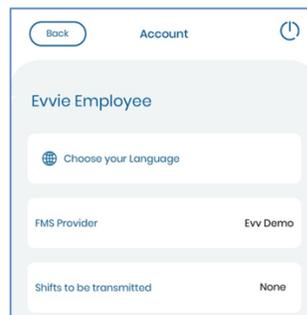
All shifts have been transmitted

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.

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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. Also, 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 the Approving Visits section of this manual.

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 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. If you are not signed in, log in to **evvie** Portal using the "**Sign in with FMSOne**" button or link.

2. When a visit moves from the **evvie** mobile app to **evvie** Portal, the Participant/Representative will receive a notification email prompting them to login to approve the visit. They can click a link in the email to be taken directly to 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

3. If the Participant/Representative clicked the link in the email, they will be brought directly to the shift needing approval, after signing in, and can go to Step 7 of this section.

4. If you have logged in to the **evvie** Portal without clicking the email link, you will arrive at the home screen. Click the **View all Shifts** button in the middle of the screen.
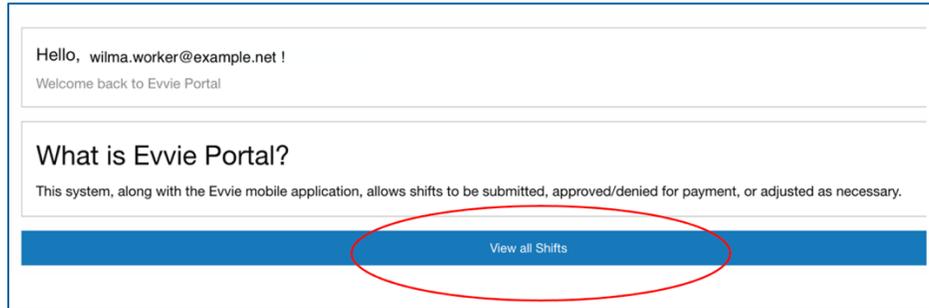
5. Participants/Representatives: You can search for a specific shift, by selecting the Worker's name from the "PCA" dropdown. If you only have one Worker, you do not need to use the filter. You can also mark the checkbox next to "Submitted" or "Approved" to find shifts that are awaiting your final approval. Click **Search if** you are using any of the filters.
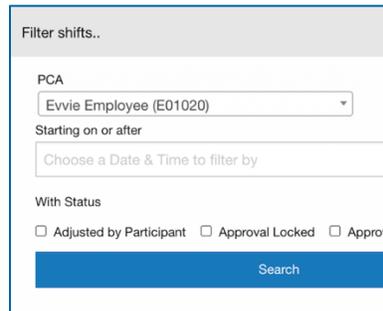
Workers: You can search for a specific shift by selecting the Participant's name from the dropdown, if you only work for one Participant you do not need to use the filter. Click **Search** if you are using any of the filters.
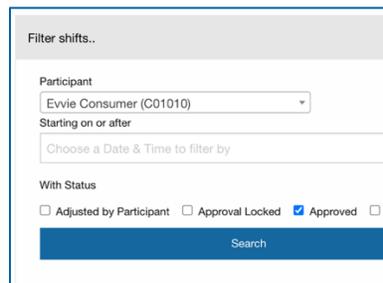
6. Results will appear in the listing below the search button. Scroll the list to find the shift you need to approve and click the **View Shift** button next to the visit.

One-Step Approvals (in-app Approval for Workers)
Please refer to the instructions on page 24 if your FMS Provider uses the two-step approval process.

We will explain how to approve correct shifts first. Then we will review what to do if shifts need to be denied, or if adjustments need to be made in later steps. When a Worker finishes a shift in the **evvie** mobile app, they are 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.

7. The shift will be displayed, along with all captured information about the shift. Review the shift, then scroll to the bottom of the page. Visits captured in the evvie mobile app will have a status of Approved and need to be Approval Locked by the Participant/Representative If the visit was correct, click the Lock as Approved button at the bottom of the page.

Workers: 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.

8. 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.

9. 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.

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 EVV 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 shift.

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

Date & Time	Transitioned From	Transitioned To	Actor	Notes
Friday 01/28/22, 8:57am	Submitted	Approved	Spar Employeetwo	
Friday 01/28/22, 8:57am	N/A	Submitted	Spar Employeetwo	

✎ Adjust Shift

⊘ Deny Shift

Lock as Approved

View All Shifts

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**.

Date & Time	Transitioned From	Transitioned To	Actor	Notes
Wednesday 04/27/22, 7:27pm	Approved	Denied	Spar Twosumer	
Wednesday 02/16/22, 3:45am	Submitted	Approved	Spar Twosumer	
Wednesday 02/16/22, 3:44am	N/A	Submitted	Spar Twosumer	

✎ Adjust Shift

Challenge Denial

Lock as Denied

View All Shifts

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.**

* Denial Code

Visit was logged in error ▾

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

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

Submit Denial	Cancel

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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.

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.

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 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 finalized and approved. 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 to go to the visit's show page.

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

↺
Shift History

Date & Time	Transitioned From	Transitioned To	Actor	Notes
Monday 05/02/22, 5:28pm	Submitted	Approved	Evvie Employee	
Monday 05/02/22, 5:14pm	N/A	Submitted	Evvie Employee	

✐ **Adjust Shift**

⊘ **Deny Shift**

View All Shifts
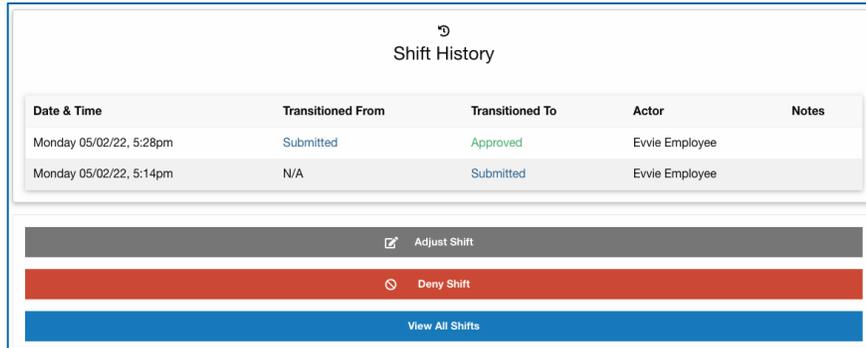
4. On the next page, select both an **Exception** and a **Reason**. The Exception indicates why an adjustment is being made, and the Reason indicates why the Exception occurred. Select the **Exception** and **Reason** that best match your situation. If you have concerns or questions about which option is best, contact your FMS for assistance.

*Exception
Missed clock in / clock out   ▾
*Reason
Malfunctioning mobile device   ▾

* Start Date & Time	* Starting Time Zone	* End Date & Time	* Ending Time Zone
Monday 05/02/22, 4:05PM	(GMT-05:00) Eastern Time (US ▾	Monday 05/02/22, 5:10PM	(GMT-05:00) Eastern Time (US ▾

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

6. Once finished, check the box certifying the changes and click **Submit Adjustment**. The other party will receive an email that adjustments were made to a shift that requires their review.

Comments

Phone wasn't working at start of shift. Edited the start time to match when work actually started.

☑ 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

7. The user reviewing the adjusted visit will be presented with the usual three options 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. As shown below, once a user submits the adjustment, it is also considered to be approved by them. The other party will need to review the adjustment and place the shift in an approval locked status.

Date & Time	Transitioned From	Transitioned To	Actor	Notes
Monday 05/02/22, 9:53pm	Adjusted	Approved	Evvie Employee	Phone wasn't working at start of shift. Edited the start time to match when work actually started.
Monday 05/02/22, 9:53pm	Approved	Adjusted	Evvie Employee	Phone wasn't working at start of shift. Edited the start time to match when work actually started.
Monday 05/02/22, 5:28pm	Submitted	Approved	Evvie Employee	
Monday 05/02/22, 5:14pm	N/A	Submitted	Evvie Employee	

☑ Adjust Shift
⊘ Deny Shift
View All Shifts

Entering a Manual Visit

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

Please avoid manual visit entry unless absolutely necessary. Manually entered visits are not EVV compliant, and states have indicated that certain corrective actions could be taken for users who have a high volume of non-compliant visits.

1. After logging in to the Evvie Portal, click the **View all Shifts** button, 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.

What is Evvie Portal?
This system, along with the Evvie mobile application, allows shifts to be submitted,

View all Shifts

Listing Shifts

Create a new Shift
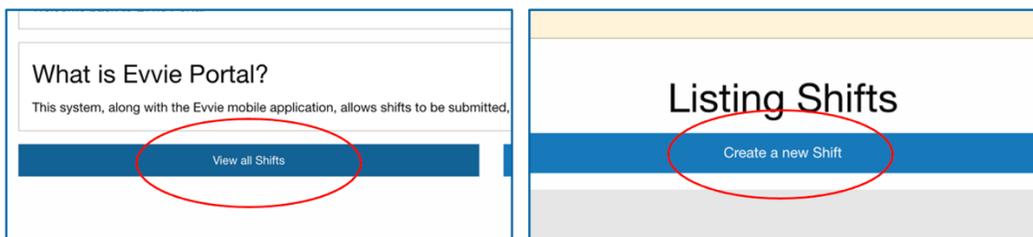
2. Select both an **Exception** and a **Reason**. The Exception indicates why a visit is being manually entered, and the Reason indicates why the Exception occurred. Select the Exception and Reason that best match your situation. If you have concerns or questions about which option is best, contact the FMS for assistance. If you are using a manual shift for recording unworked hours (*PTO, Sick Time, Vacation, or Paid Holiday*) you should select the option for "*EVV not required for this service.*"
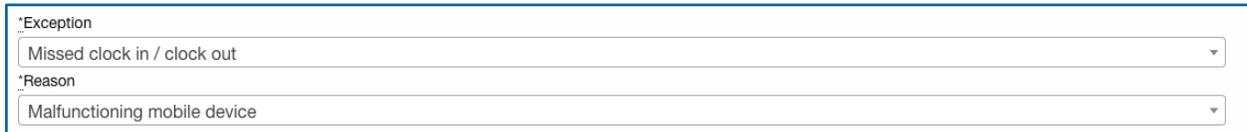
*Exception	
Missed clock in / clock out	▾
*Reason	
Malfunctioning mobile device	▾

3. Click on the **Start Date & Time** box.
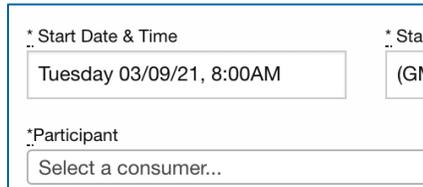
* Start Date & Time	* Star
Tuesday 03/09/21, 8:00AM	(GM
*Participant	
Select a consumer...	

4. Then select the **Start Date** from the calendar dropdown. You can only select today's date or a date in the past.
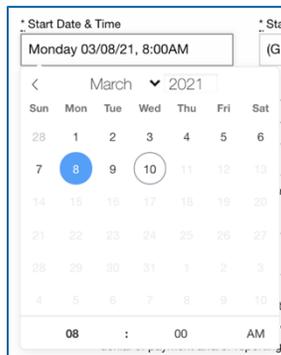
5. Then click on the **time** (hour or minutes) at the bottom of the calendar. You can click on the number and manually type it in or you can click the arrows to adjust the time. Clicking on AM will change it to PM, clicking on PM changes it to AM. Repeat that process for the **End Date & Time.**

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6. You must select the **Time Zone** where you worked from the drop down. The four time zones of the mainland United States are conveniently displayed at the top of the list. If you are using a manual shift for recording unworked hours (*PTO, Sick Time, Vacation, or Paid Holiday*) you should select the time zone where you live.
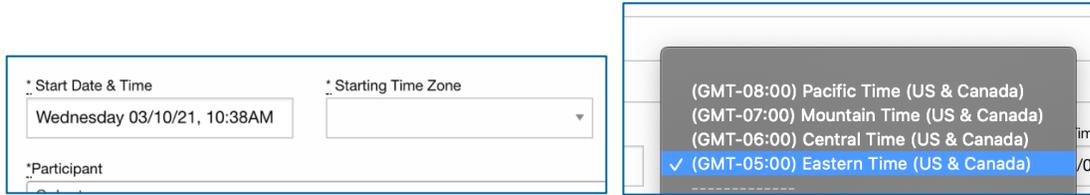
7. **Participants/Representatives:** Select the **Worker** (PCA) associated with the shift from the dropdown.
   Workers: Select the **Participant** associated with the shift from the dropdown.
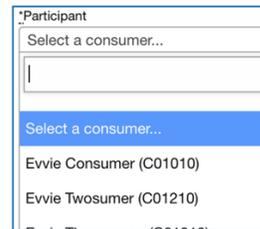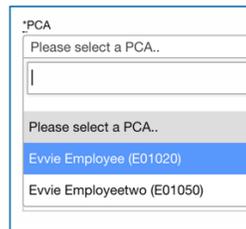
8. Select the **Consumer Enrollment** and the **Service Code** from the dropdowns. The consumer enrollment is a system abbreviation of the program that the Participant is enrolled in. The service code is the type of work that the Worker provided.
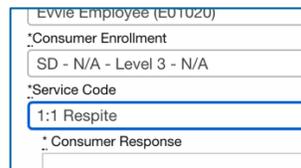
9. Select a **Consumer Response** (if required), then mark the checkboxes for the **Goals** associated with the visit (if required). You can add notes about the visit by clicking on the **Notes** field and entering text.
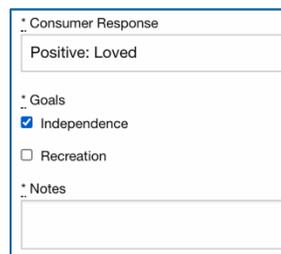
10. Select the **Start and End Locations** from the dropdown boxes.

11. 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.

12. Check the box certifying your signature and click the **Create Shift** button at the bottom of the form. An email will be sent to the other party that a shift is ready for review.
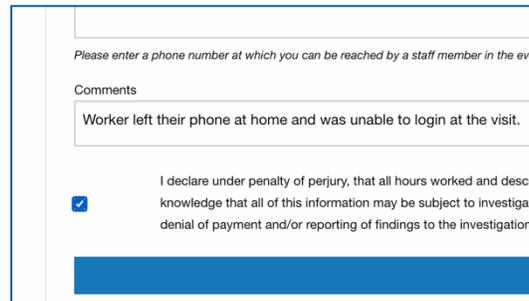
13. **Participants/Representatives:** If you created the manual shift, the visit will begin in a status of Submitted and is ready to be **Approved**, **Adjusted**, or **Denied** by the **Worker**.

Worker: If you created the manual shift, the visit will begin in a status of Submitted and is ready to be **Approved**, **Adjusted**, or **Denied** by the **Participant/Representative**.

On the following page, you can review a manual shift that has been filled out completely.

* Exception Code

Missed clock in / clock out

* Reason Code

Mobile device battery died

* Start Date & Time	* Starting Time Zone	* End Date & Time	* E
Tuesday 03/09/21, 10:00AM	(GMT-06:00) Central Time (US ▾	Tuesday 03/09/21, 1:00PM	(C

*Participant

Evvie Consumer (C01010)

*Consumer Enrollment

SD - N/A - Level 3 - N/A

*Service Code

1:1 Respite

* Consumer Response

Positive: Loved

* Goals
☐ Independence

☑ Recreation

* Notes

Helped participant shop for groceries and prepare lunch.
Played a card game with participant.

☐ 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

Mobile phone battery would not recharge.

☑ I declare under penalty of perjury, that all hours worked and descriptions of work performed contained in the submitted shifts knowledge that all of this information may be subject to investigation and that any false or dishonest information contained d denial of payment and/or reporting of findings to the investigation unit of the Department of Human Services.

Sample view of a Manual Shift

Two-Step 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 very similar to 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 Provider 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.
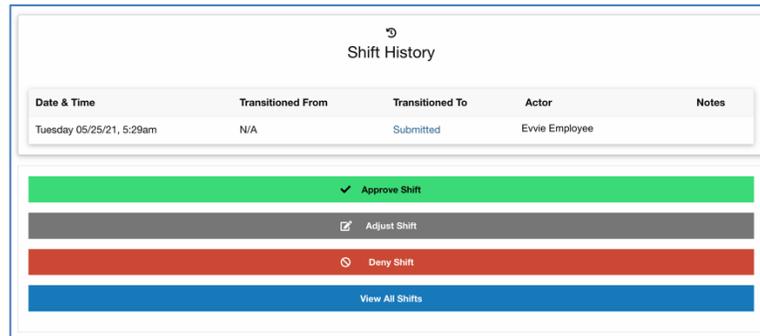
2. After clicking Approve Shift the Worker or Participant/Representative will be asked to check a box to declare that the shift is correct. By checking this box, you are officially signing your approval of the shift. After clicking the box, the Awaiting Confirmation button will transform to a Submit 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.

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.

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.

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

Quick Guides
<u>Logging in to **evvie** Portal</u>

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 invitation 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 the FMS, and ask them to send you a link to the sign-in page for **evvie** portal.
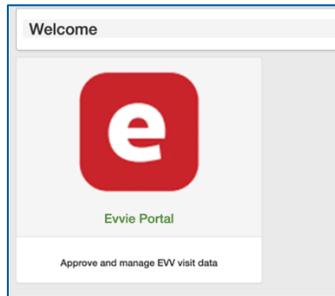
1. Click the **Sign In with FMS One** button or the <u>Sign In with FMS One</u> link.
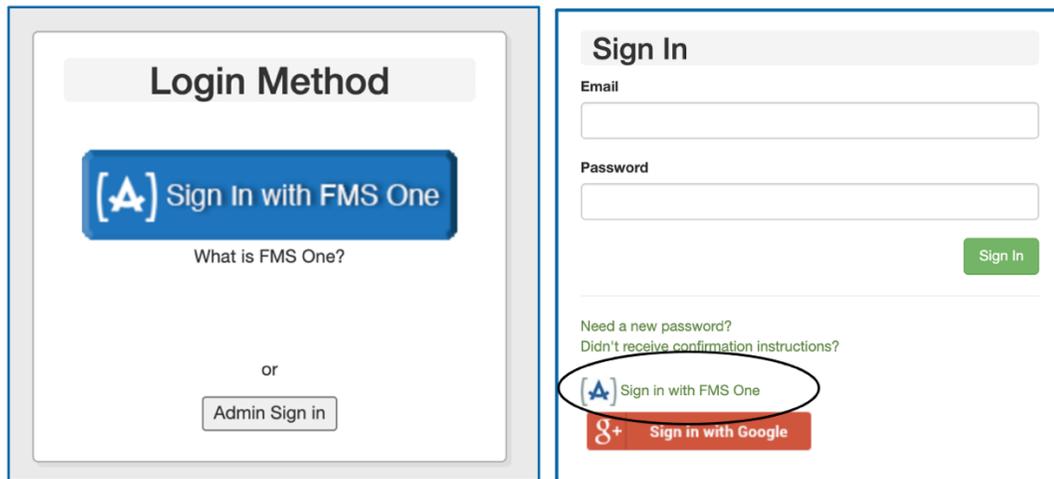
2. You will be redirected to the **FMS**One sign-in page. Enter your **email address** and **password** then click **Log In**. If you have forgotten your password, or need to reset it, click the <u>Forgot your password?</u> link. Detailed instructions for <u>resetting passwords</u> is available in the next section of this manual.
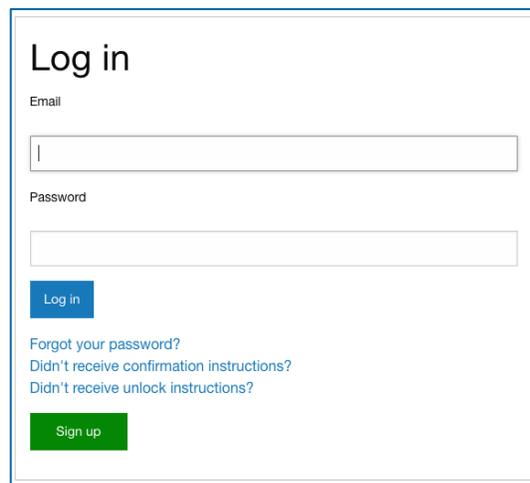
3. You are now signed in with **FMS**One and should have access to the **evvie** Portal and any other web apps that the FMS has made available to you. Click the icon to connect to **evvie** Portal.
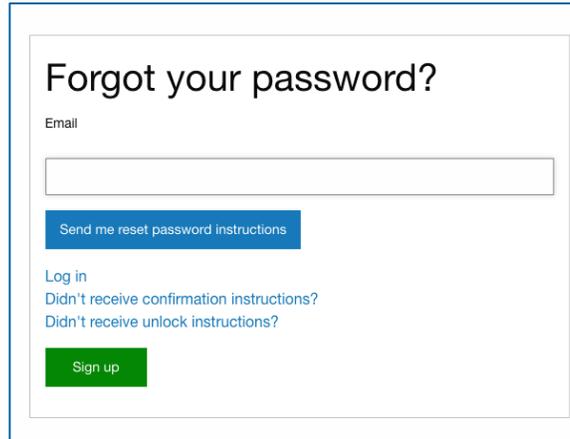

Reset Your **FMS**One Password

If you have 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 invitation 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 the FMS, and ask them to send you a link to the sign-in page.

1. Click the **Sign In with FMS One** button or the Sign In with FMS One link.
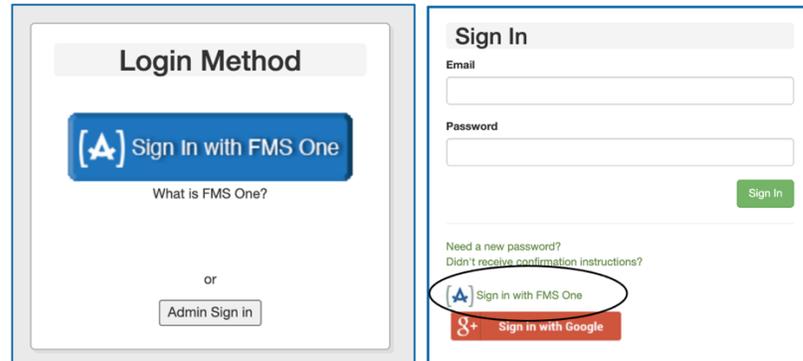
2. On the **FMS**One sign-in screen, click the "Forgot your Password?" link below the Log in button.
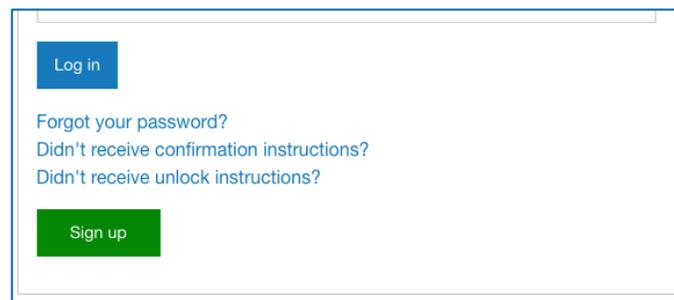
3. Enter your email address then click the **Send me reset password instructions** button. You will get an email with a link to reset the password. Click on the emailed link.

4. Enter your new password in both fields, then click **Change my password**.
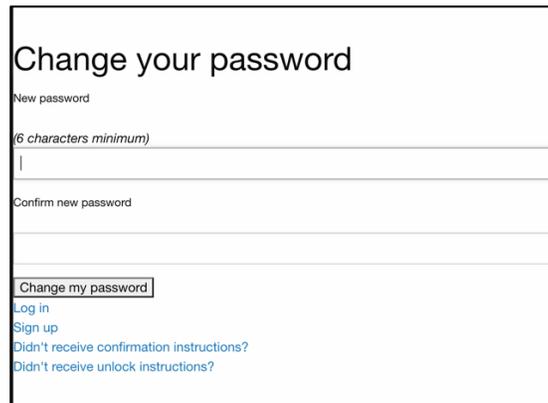
5. Your password is now reset and you can log in to **FMS**One.

User's Guide to **evvie** & **evvie** Portal |

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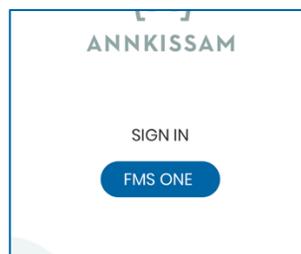
1. If you have not downloaded the **evvie** App from your app store, follow one of the links below to access the app. There is no cost to download **evvie**. You can also open the App Store or Google Play app on your phone/tablet and search for "evvie." Look for the Annkissam [A] logo.
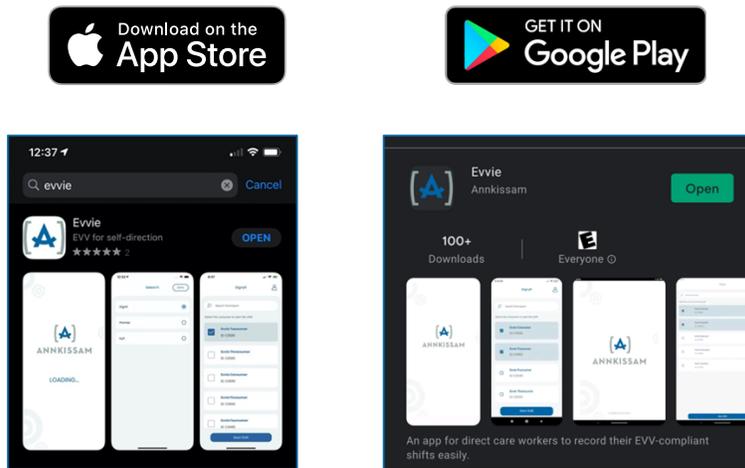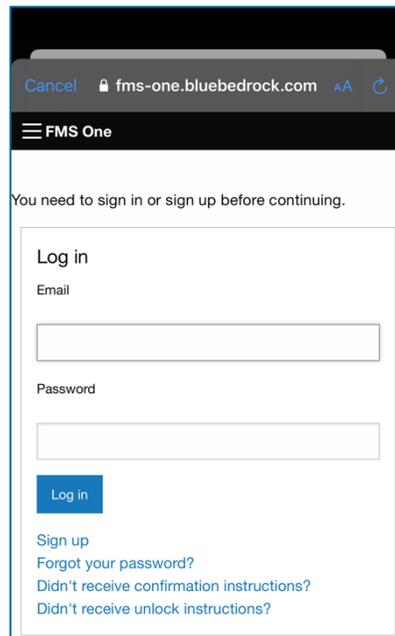

2. Find the downloaded app on your phone/tablet and click on the **evvie** icon.

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

4. Enter the **Email** and **Password** that you created when signing up. Click **Log in**.

5. You are now logged in to **evvie** and ready to record visits with EVV.

User's Guide Update Summary

Date	Summary
05.27.22	Added instructions for two-step approval process.
04.27.22	Updated screen captures, text formatting and some language updates throughout. Clarified instructions for one-step approvals (in-app shift approval).
01.07.22	FMS One sign up instructions updated. Added additional alt-text for screen readers.
10.01.21	Updated Shift Index screenshots throughout guide.
08.15.21	Updated Screenshots throughout guide.
04.20.21	User Guide released.