



EVV AND IVR USER GUIDE

A guide for sending time entries to Palco

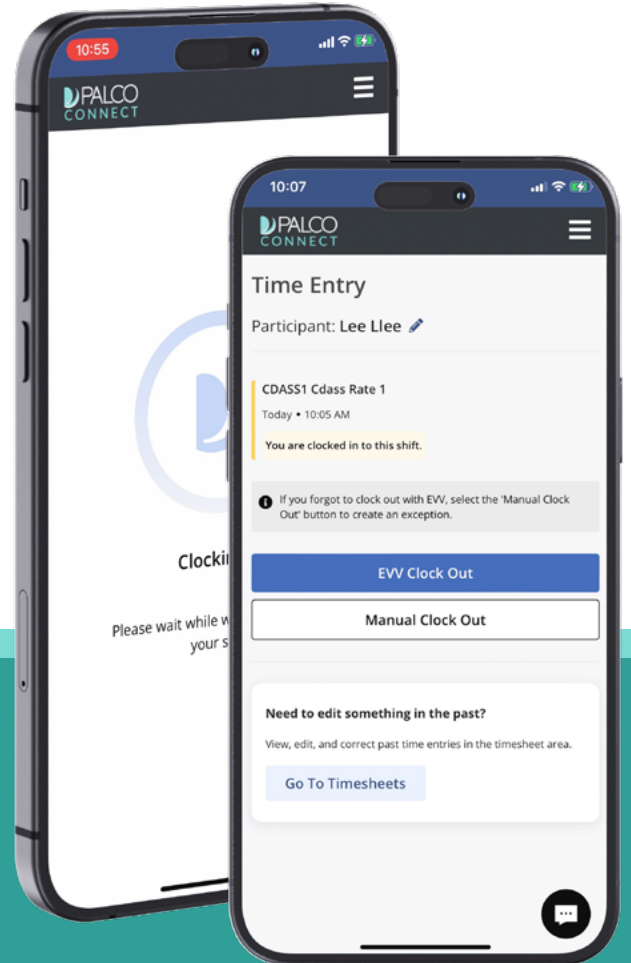
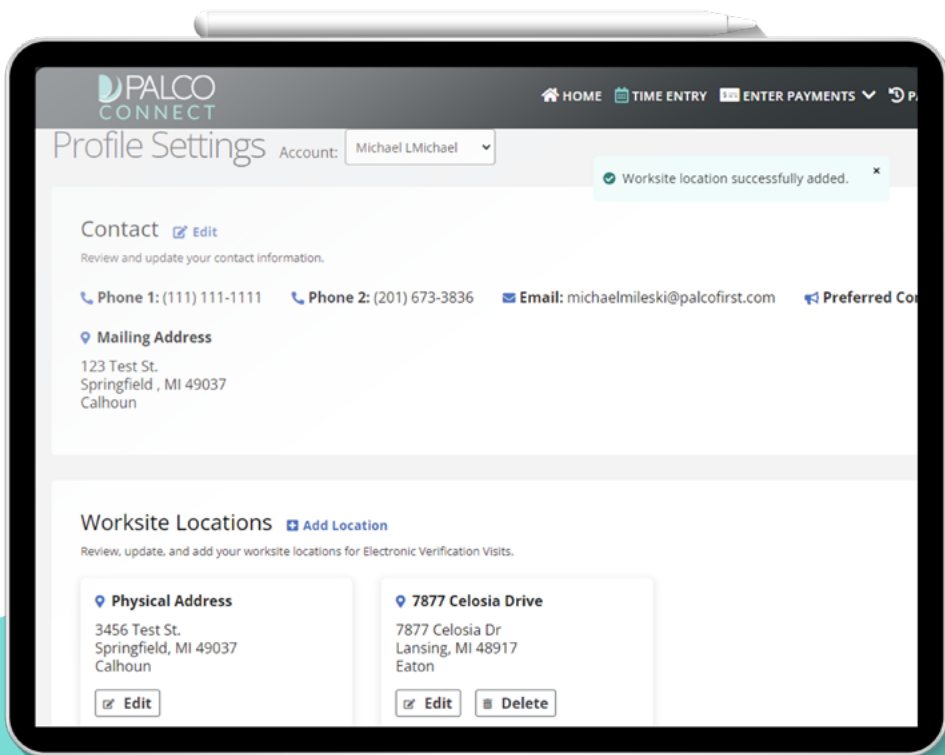


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EMPLOYER WORKSITE LOCATIONS



EMPLOYER WORKSITE LOCATIONS

One of the most important parts of EVV is location reporting. The system records the worker's geocoordinates when they clock in and out. This is done to verify that the worker is where they should be when providing services.

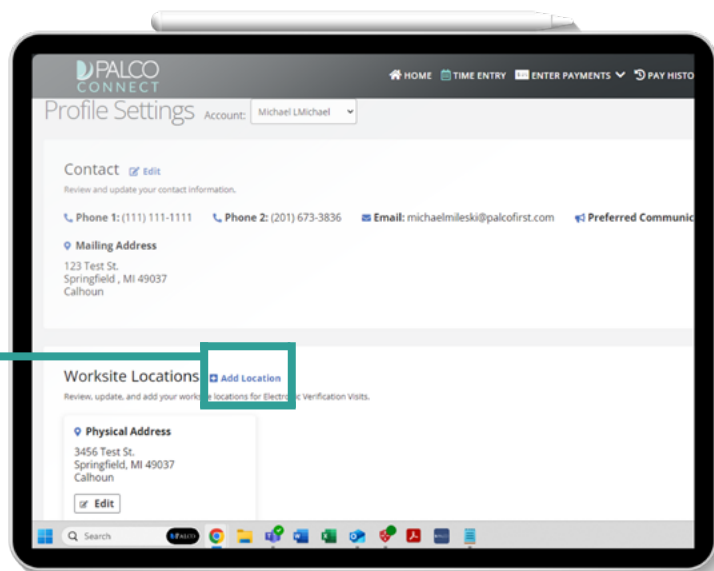
The employer needs to add these *worksite locations* to the Profile Settings Page. The area surrounding a worksite location is a *geofence*. If a worker is reporting time shifts outside of the geofence area, it can be a cause for concern.

Please add all locations to the Profile Settings Page where either:

- The employer may receive services
- The worker may provide services

STEP 1. Go to the Profile Settings Page and Click **Add Location**

It is in the Worksite Locations section, which is below the Contact section.



EMPLOYER WORKSITE LOCATIONS

STEP 2. Input the Location Information

When typing the street address, several options may appear. If you see the correct one, you can click it, and the remaining fields will autofill.

The screenshot shows the 'Edit Location' form with the following fields and values:

Field	Value
Worksite Nickname	Nickname
Street	7877 Cel
Address Line 2	Street 2
City	City
County	Select County

Dropdown menu options for Street:

- 7877 Celosia Drive Lansing, MI
- 7877 Celebration Drive Suwanee, GA
- 7877 Celanese Road Rock Hill, SC
- 7877 Celebration Lane Acworth, GA
- 7877 Celebration Way Southeast Mableton, GA

Error message: ! Worksite Nickname, City, State, Zip

STEP 3. Verify Information is Correct, Then Click Save

The system will make sure the address is valid. If it is not recognized, you will be alerted. Jump to page 7 of this guide for steps on how to review.

The screenshot shows the 'Edit Location' form with the following fields and values:

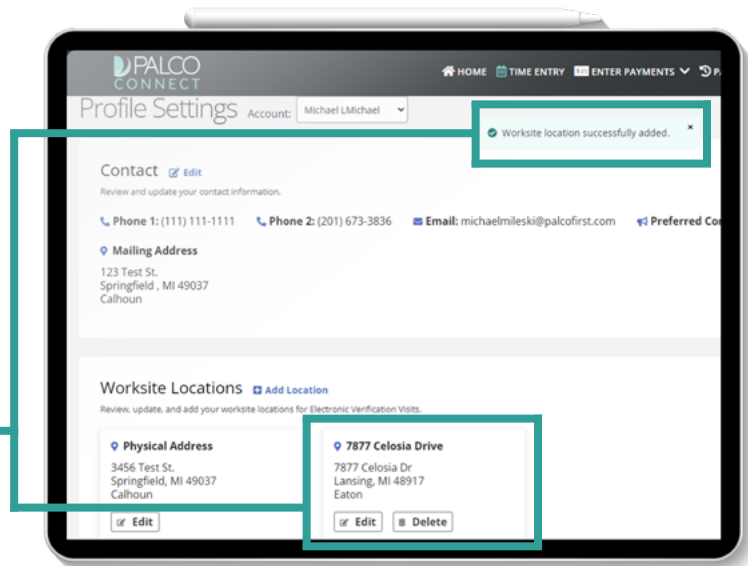
Field	Value
Worksite Nickname	As-is Address
Street	123 Jump St
Address Line 2	Street 2
City	Lansing
State	MI
Zip Code	12345
County	Calhoun

The 'Save' button is highlighted with a red box.

EMPLOYER WORKSITE LOCATIONS

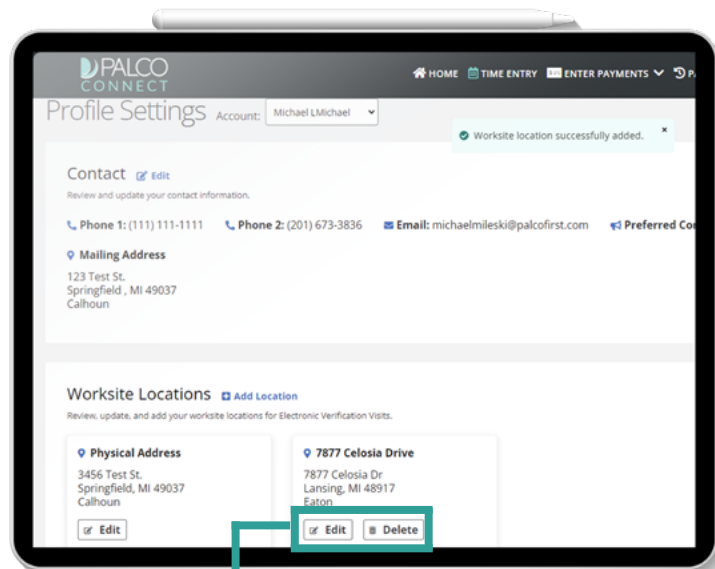
STEP 4. Make Sure The New Location Appears

If the save was successful, you will see “Worksite location successfully added” pop up. You will also see the address under *Worksite Locations*.



STEP 5. To Make Changes to Existing Locations, Use *Edit* and *Delete*

It's easy to make changes to a saved worksite location. Simply click *Edit* under the location you wish to change. If services will no longer be provided at a saved address, you can use the *Delete* button to remove it from your profile.



EMPLOYER WORKSITE LOCATIONS

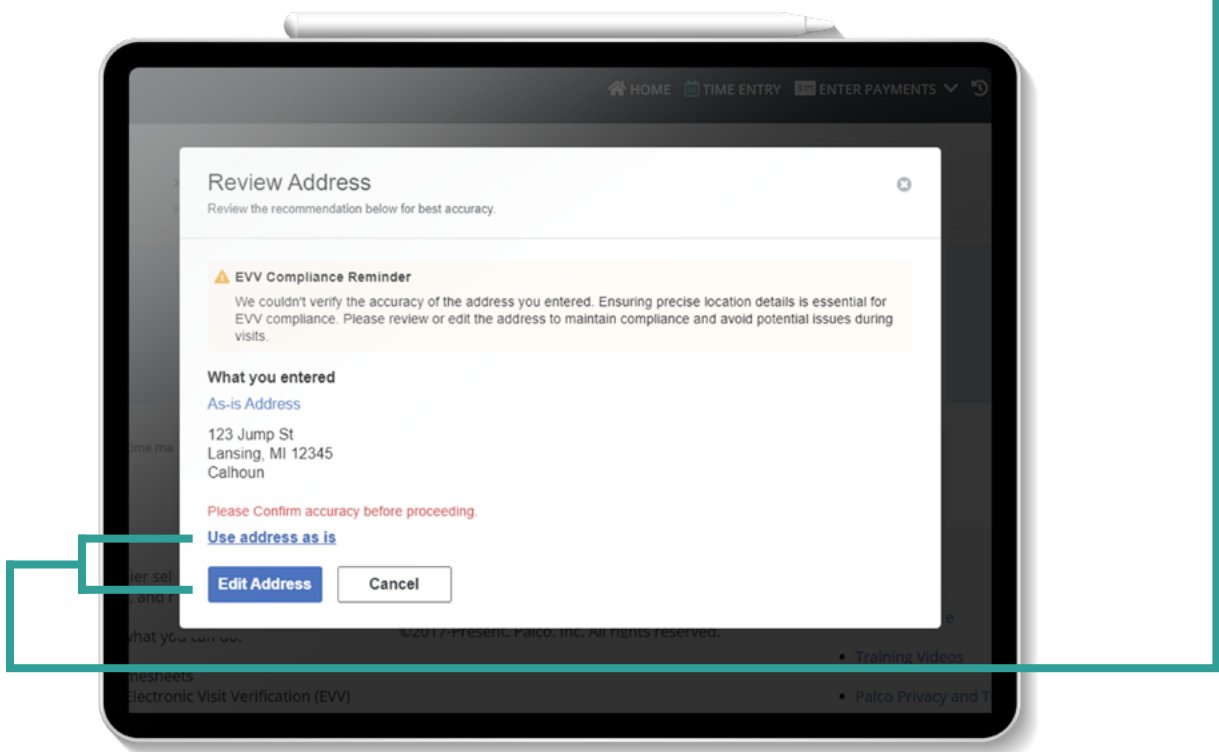
The system will check the address you entered to make sure it is valid. If the address isn't recognized, please review it. Accuracy of the worksite location helps the worker stay compliant with the program.

STEP 1. Review the Address for Accuracy

Double-check the spelling of each line. Make sure the house number and ZIP code are also correct.

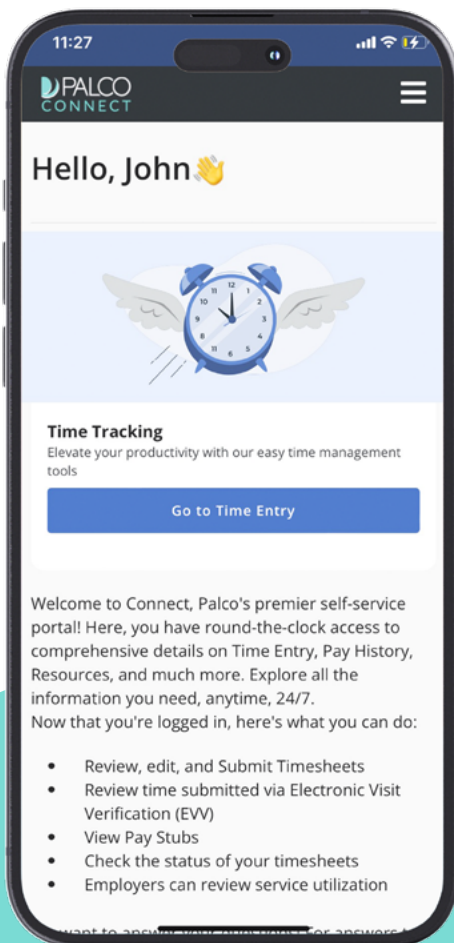
STEP 2. Decide to Use As-Is or Edit Address

If the address is correct, you can choose to "Use address as-is." If a correction is needed, choose *Edit Address* to make changes.





GETTING WORKERS STARTED WITH EVV



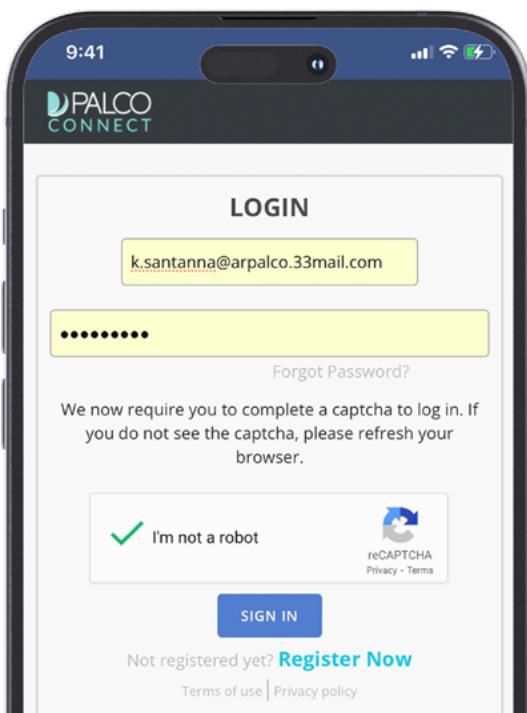
GETTING WORKERS STARTED WITH EVV

To submit time to Palco, you will need a mobile device that can connect to the Internet, such as a phone or tablet. Follow these steps to access Palco's EVV application.

STEP 1. Open the browser on your Internet-connected device
You can use a phone or tablet. Depending on your device, your browser may be called Safari, Chrome, or simply Internet.

STEP 2. Go to connect.palcofirst.com

STEP 3. Sign in to Connect
If you do not already have a Connect account, you will need to create one. Use the *Register Now* button to create an account. Come back to this step once that is done.



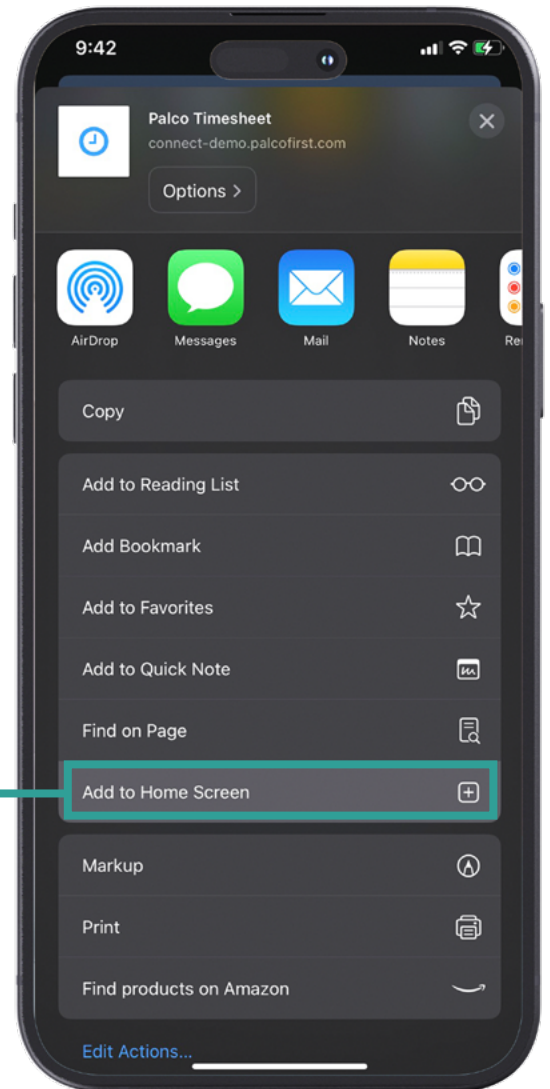
GETTING WORKERS STARTED WITH EVV

STEP 4. Install the application on your device

On iPhone, tap the Share button and select Add to Home Screen.



On Android, click the three dots and then choose Add to Home Screen.

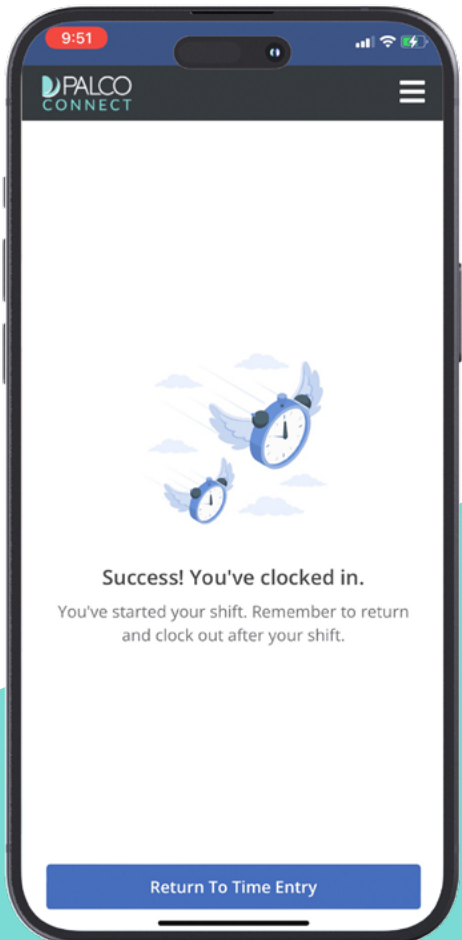


STEP 5. Begin using the application

Once downloaded, tap the new EVV app icon. You can now access time entries from the home screen of your device.



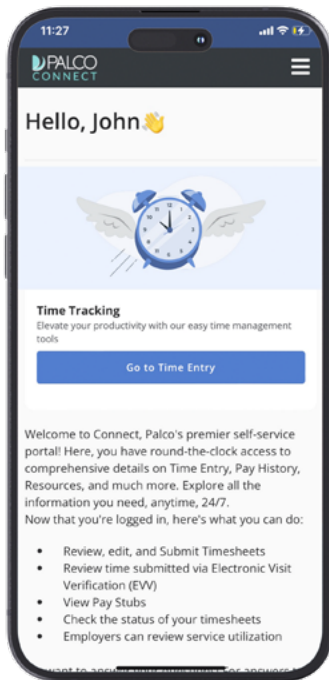
WORKER CLOCK IN



WORKER CLOCK IN

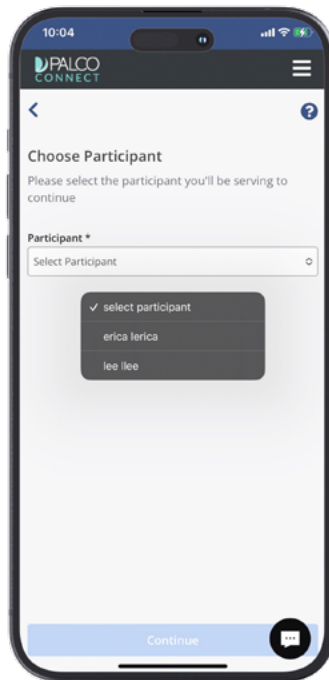
In this section, we will go over how to start an EVV-compliant time entry. Once logged into Connect, follow these steps.

STEP 1. Click on *Go to Time Entry*



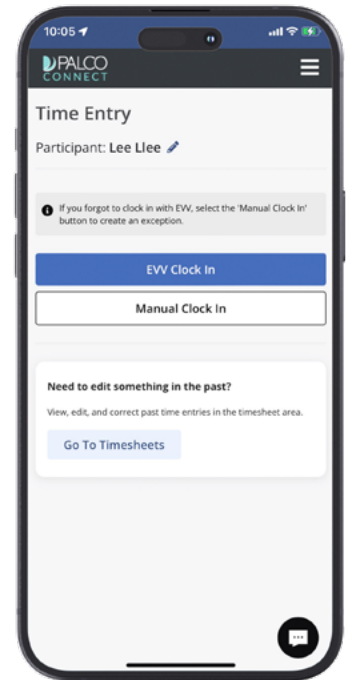
This blue button is on the home screen.

STEP 2. Select a participant



You will only need to select a participant if you work for more than one.

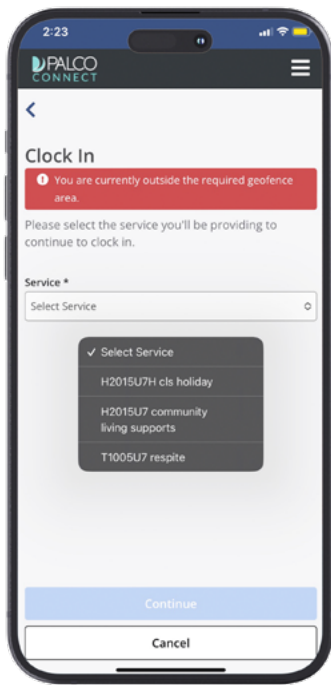
STEP 3. Choose *EVV Clock In*



Manual Clock In will be covered later in this guide.

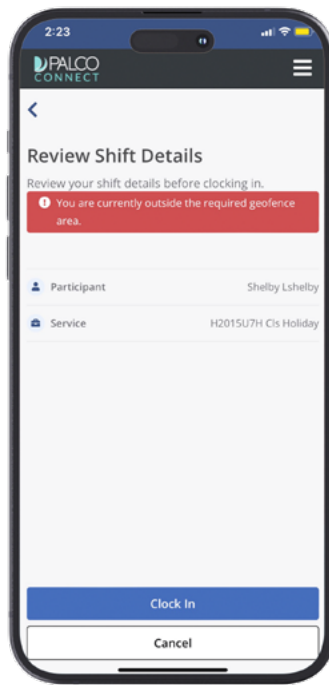
WORKER CLOCK IN

STEP 4. Select a service to provide



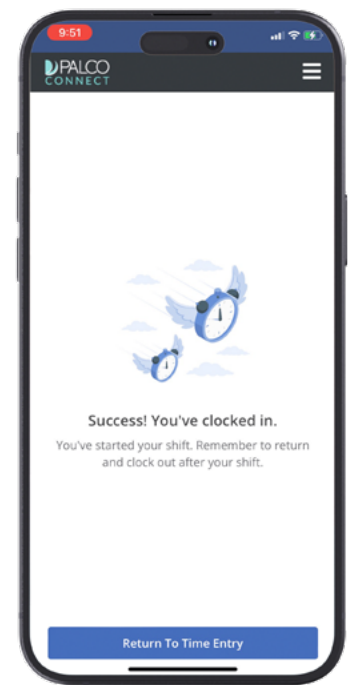
Service code options will be in the drop down menu.

STEP 5. Review shift details



Double-check that everything is right before submitting.

STEP 6. Clock in for the shift



You are now on-the-clock for this shift.

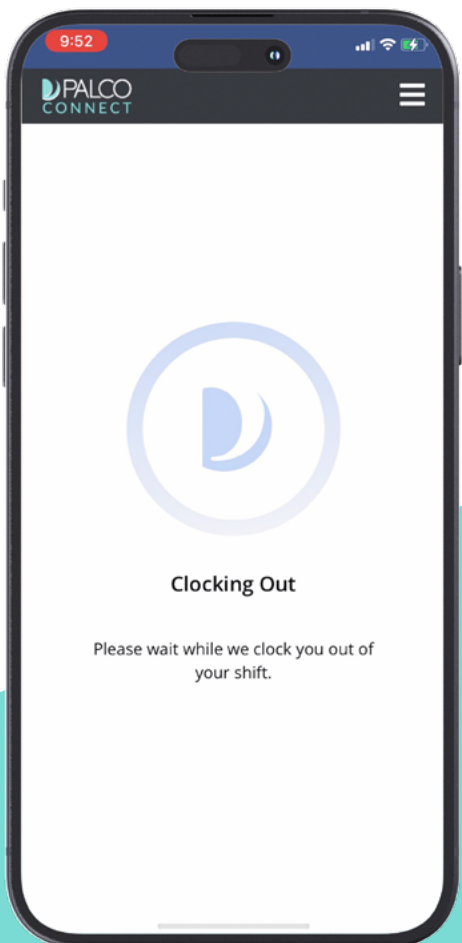
HELPFUL TIP



The area surrounding a worksite location is called a geofence. If you are outside of the geofence when trying to submit a shift, a warning message will appear. For more information on worksite locations, see page 3 of this guide.



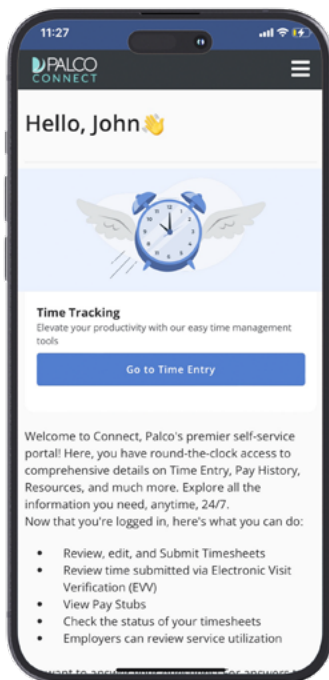
WORKER CLOCK OUT



WORKER CLOCK OUT

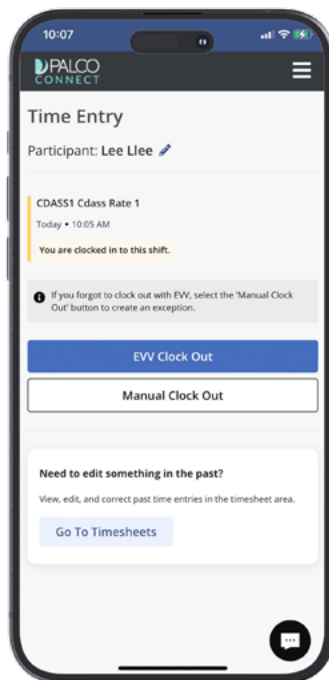
The Clock Out process is very similar to clocking in. Please, do not clock out until you are finished working the shift.

STEP 1. Click on *Go to Time Entry*



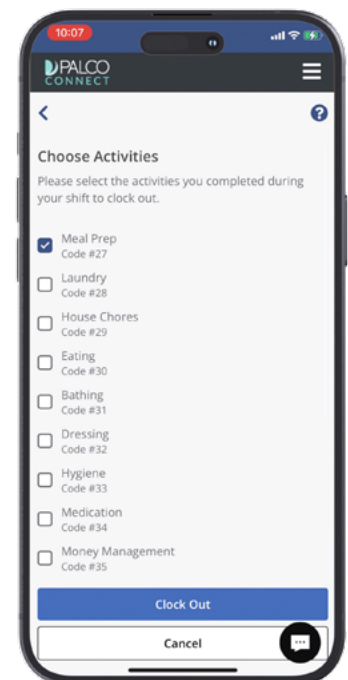
This blue button is on the home screen.

STEP 2. Choose *EVV Clock Out*



You will see *You are currently clocked in to this shift* above the blue EVV Clock Out button.

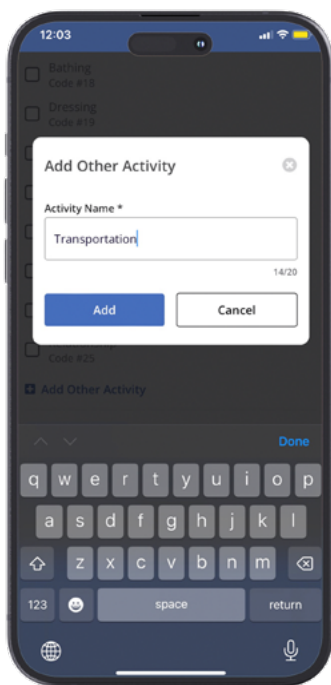
STEP 3. Select activities



Use the check boxes to select all activities that were performed during the shift.

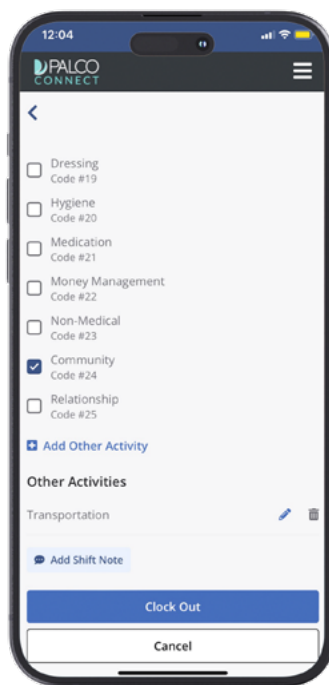
WORKER CLOCK OUT

STEP 4. Add manual activities



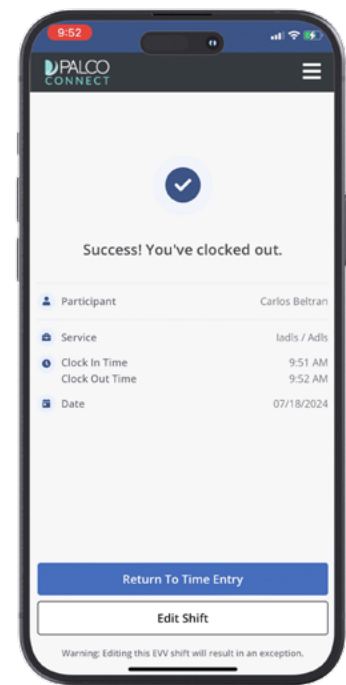
If needed, you can add an activity manually.

STEP 5. Review shift details



Double-check all details before tapping *Clock Out*.

STEP 6. Confirm you clocked out



A confirmation screen will show that you were successfully clocked out.

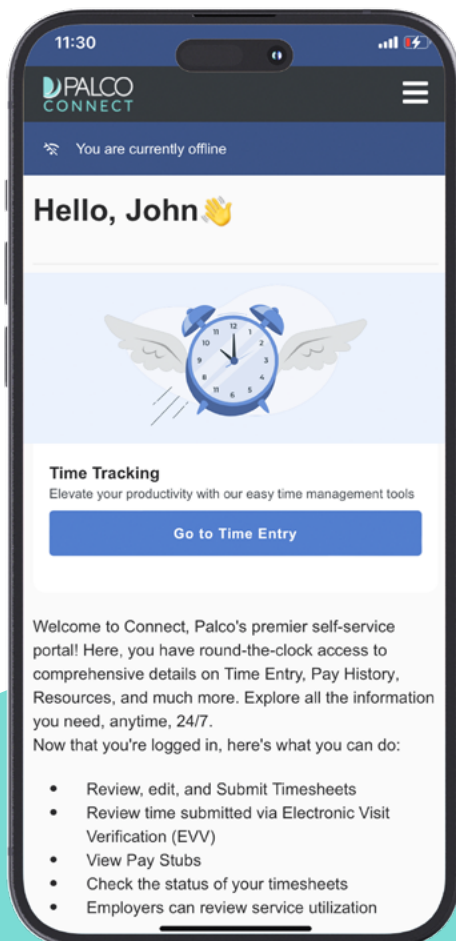
HELPFUL TIP



If your program requires an activity, you won't be able to clock out without selecting one.



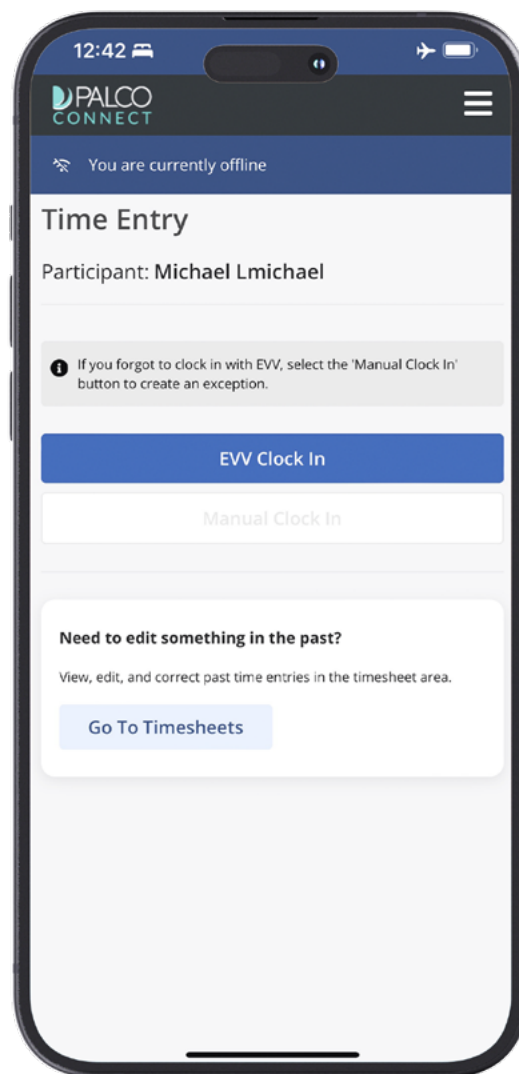
OFFLINE MODE



OFFLINE MODE

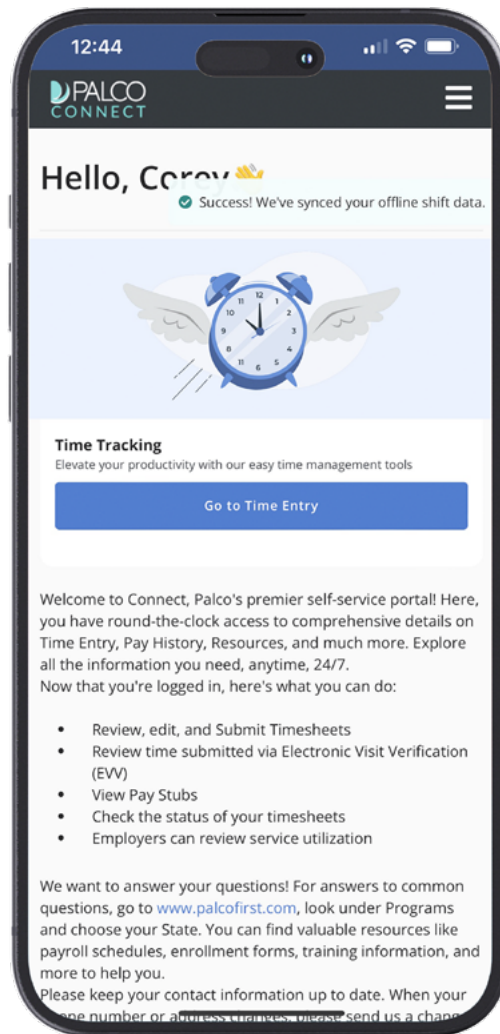
If you are without Internet access, you can still Clock In and Out for shifts. You will follow all the same steps as before. The difference is that you will be in Offline Mode.

You will know you're in Offline Mode when you see the blue banner near the top of the screen.



In Offline Mode, you will not be able to manually clock in. You can only record an EVV shift when in Offline Mode.

OFFLINE MODE



Once your Internet service is restored, your offline shift data will be synced automatically.

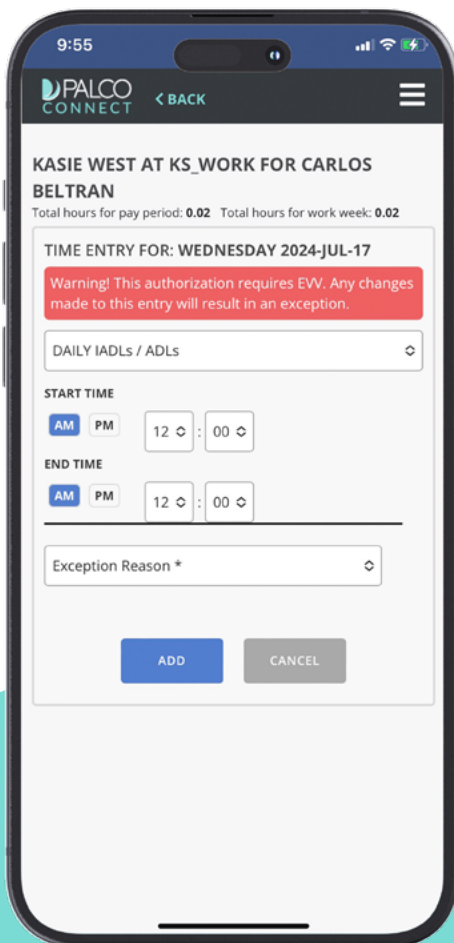
HELPFUL TIP



When in Offline Mode, your menu options will be limited. For full use of the Palco EVV app, connect to the Internet.



SHIFT EXCEPTIONS



SHIFT EXCEPTIONS

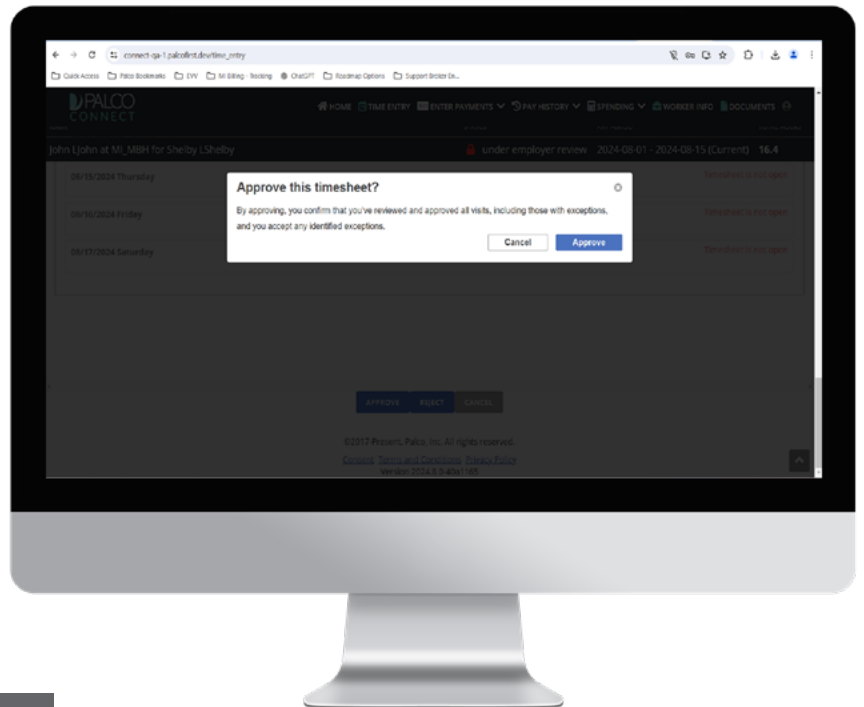
Shift exceptions occur when an EVV shift is edited after it has been completed. It will also occur if you forget to record a shift and manually report it later.

WORKERS:

If you are editing or manually reporting a shift, you will be asked for the Exception Reason. Please choose the reason that best explains why there is an exception.

EMPLOYERS:

Please review all time shifts. If a shift has an exception, make sure it is correct. By approving a shift, you are stating that you agree with the date, time, and exception reason being reported by the worker.



HELPFUL TIP



Shift exceptions can often be avoided. To keep your shifts accurate, be sure clocking in and out is done promptly.

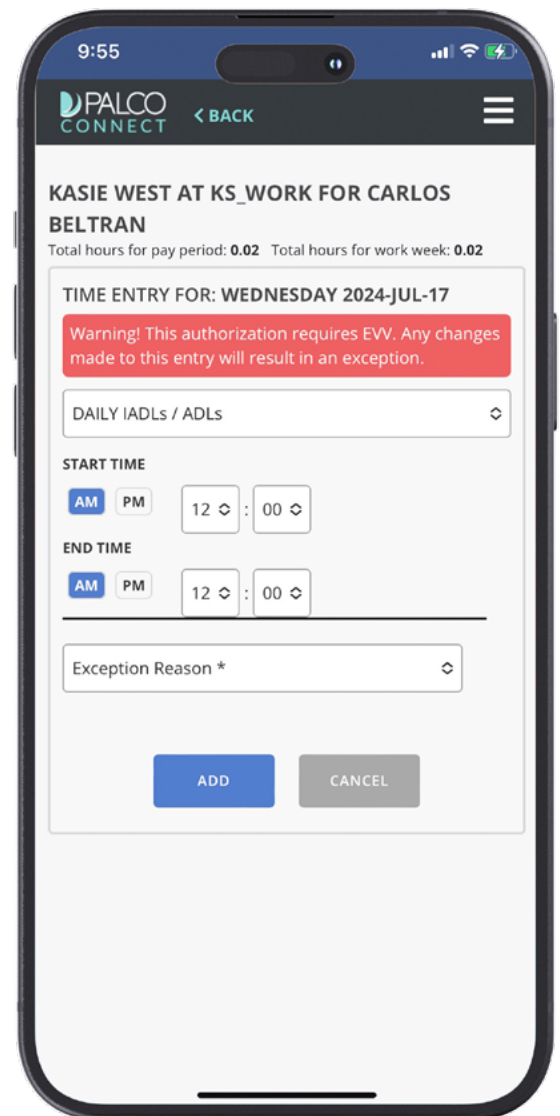
SHIFT EXCEPTIONS

Q. I'm a worker. How do I avoid shift exceptions?

A. Clocking in and out promptly is the easiest way to avoid exceptions. It can also help to double-check all information before selecting Clock In or Clock Out. That way, you do not need to edit a shift later.

Q. I'm the employer. Why do I need to verify the reason for a shift exception?

A. Part of the role of employer is to manage the workers. The accuracy of your worker's time shift reporting can affect your budget. It could also affect your program eligibility. It is very important that the hours submitted for payment are what was worked.





INTERACTIVE VOICE RESPONSE (IVR)



INTERACTIVE VOICE RESPONSE (IVR)

Interactive Voice Response, also known as IVR, is another way to report time shifts. With IVR, a worker uses the participant's touchtone phone to clock in and out. They do this by calling in and responding to the prompts. It is also known as Telephony.

STEP 1. To use Interactive Voice Response, call **877-788-8270** using a touchtone phone

STEP 2. Use the keypad to enter the worker's Palco ID, then hit # (the pound key)

STEP 3. Enter last 4 of worker's Social Security Number (SSN), then hit # (the pound key)

STEP 4. Select the time zone

STEP 5. Enter the participant Palco ID, then hit # (the pound key)

TO CLOCK IN:

You will be asked to select a service. Once done, you'll need to confirm your selection.

TO CLOCK OUT:

Key in the appropriate activity code, then press # (the pound key) or skip. You will be asked to confirm your selection.





ACTIVITY CODES



ACTIVITY CODES - MICHIGAN

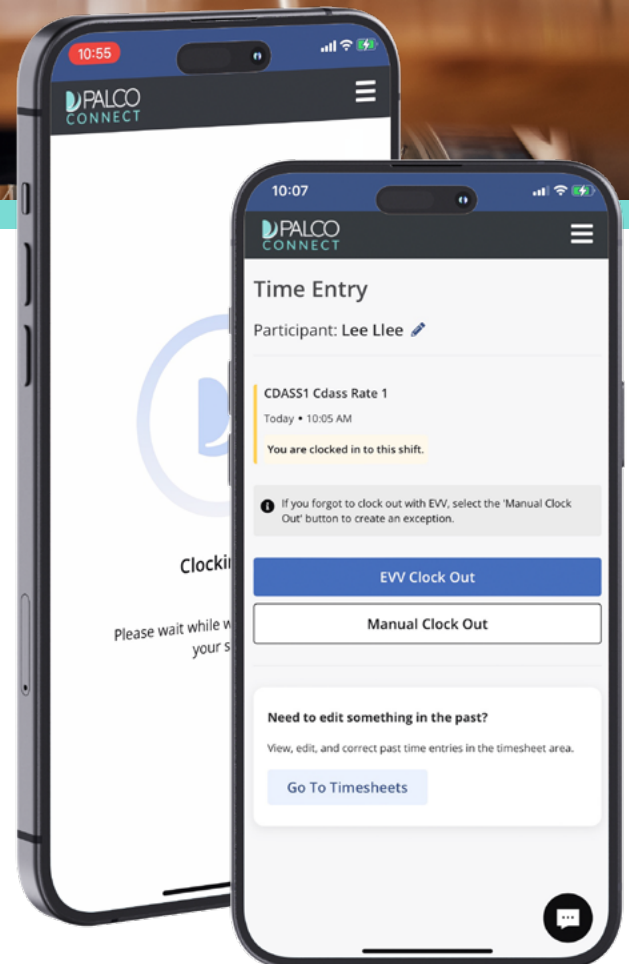
Some programs require you to input an activity code. Below is a list of activity codes for programs in Michigan Behavioral Health.

CODE	ACTIVITY
14	Meal Prep
15	Laundry
16	House Chores
17	Eating
18	Bathing
19	Dressing
20	Hygiene
21	Medication
22	Money Management
23	Non-Medical
24	Community
25	Relationship



FOR EXTRA HELP, CONTACT PALCO

Do you still have questions? Or, do you need extra help? Our friendly and trained Palco staff are available to assist you.



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partnerships@palcofirst.com