EVV AND IVR USER GUIDE

A guide for sending time entries to Palco
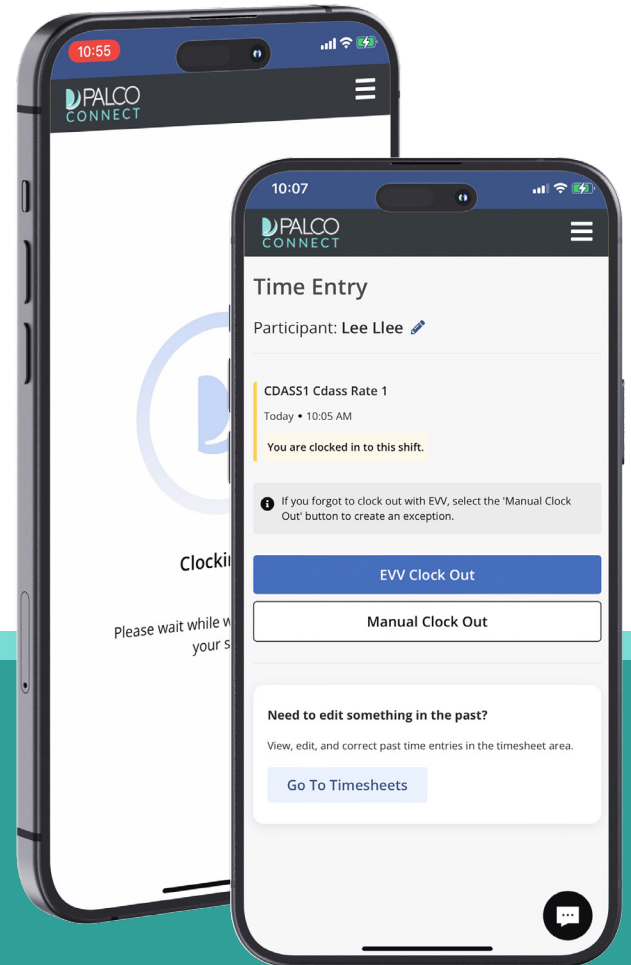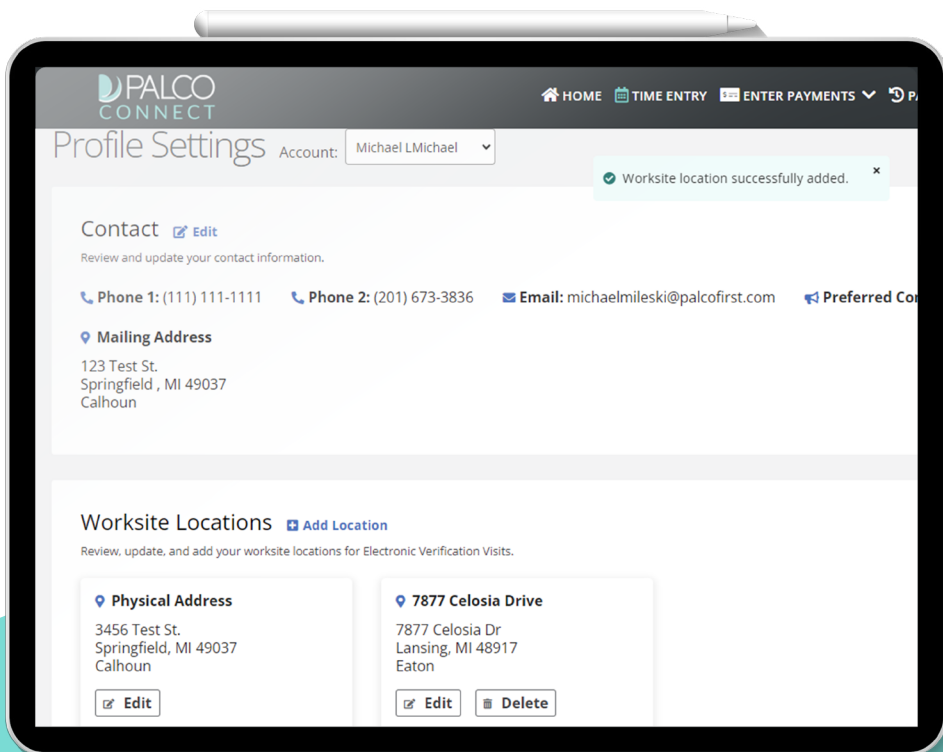
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EMPLOYER WORKSITE LOCATIONS

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 **before any shift reporting occurs**. 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.
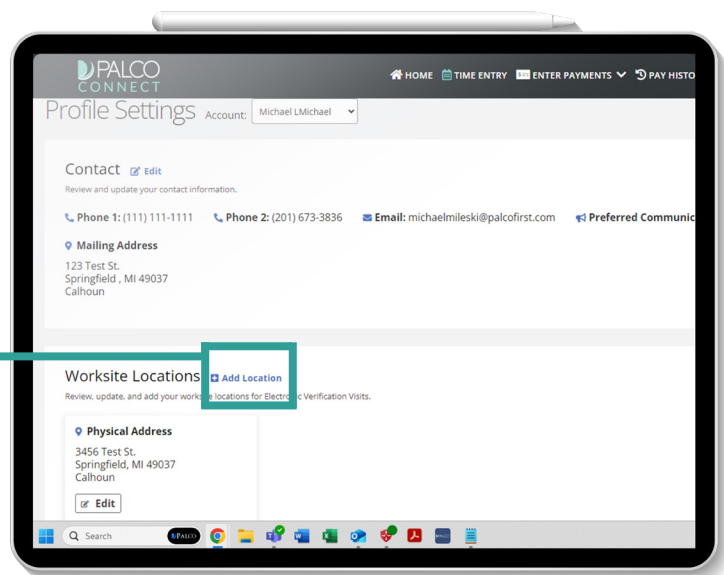
EMPLOYER WORKSITE LOCATIONS

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.

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.

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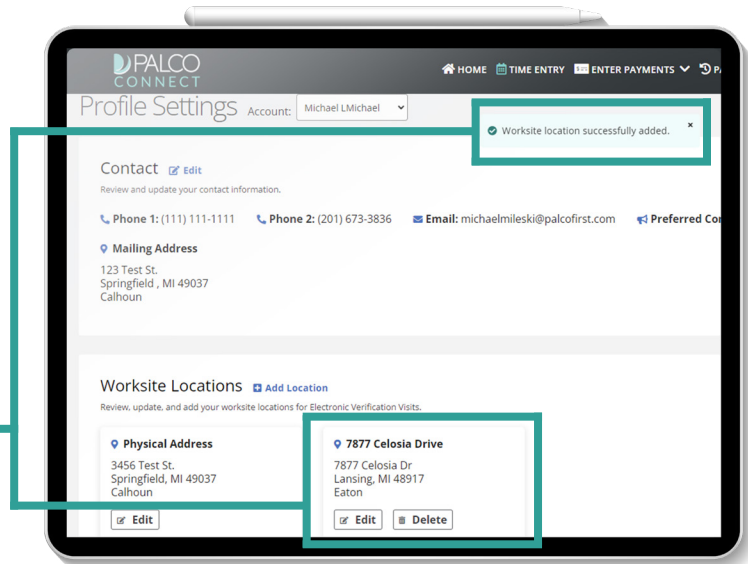
STEP 5. **To Make Changes to Existing Locations, Use *Edit* and *Delete***

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.
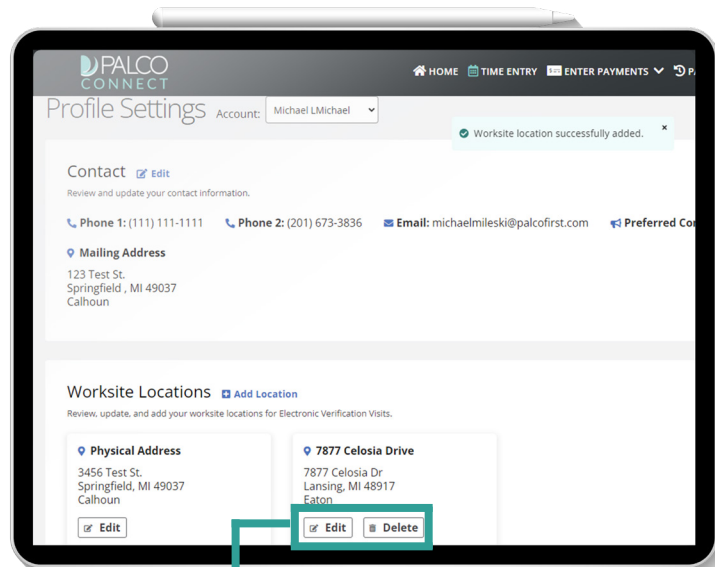
EMPLOYER WORKSITE LOCATIONS

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.
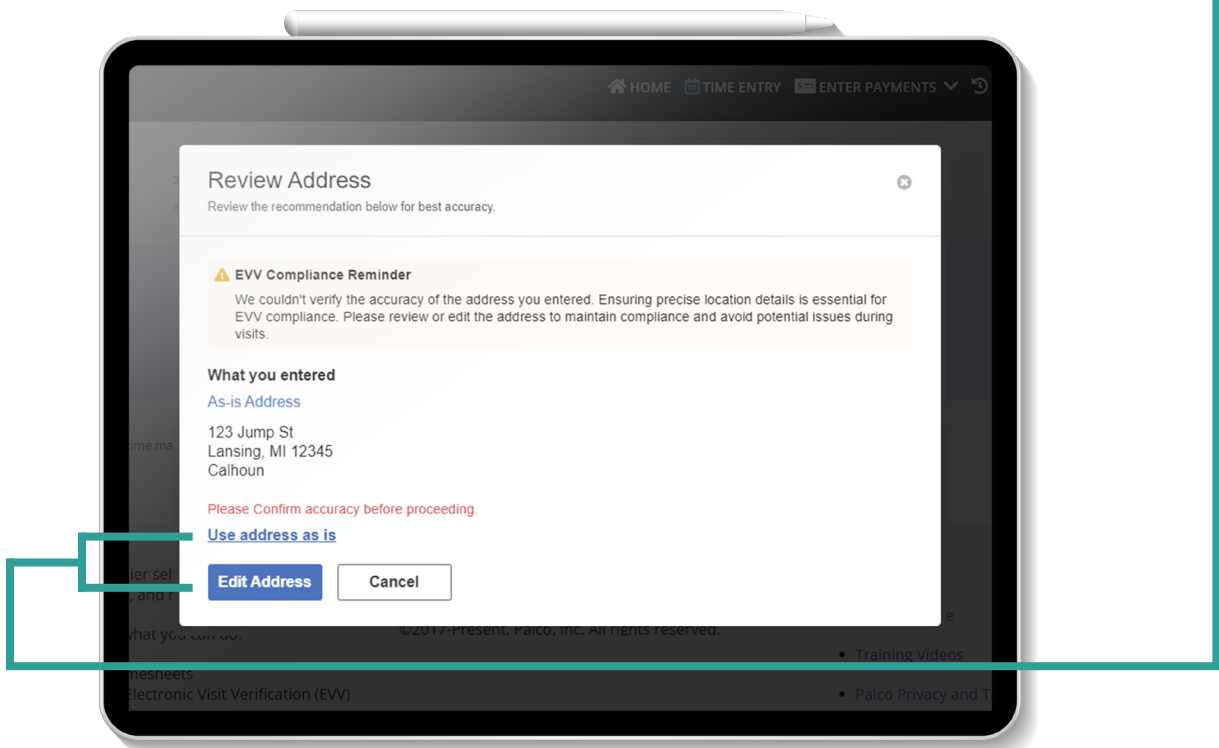
GETTING WORKERS STARTED WITH EVV
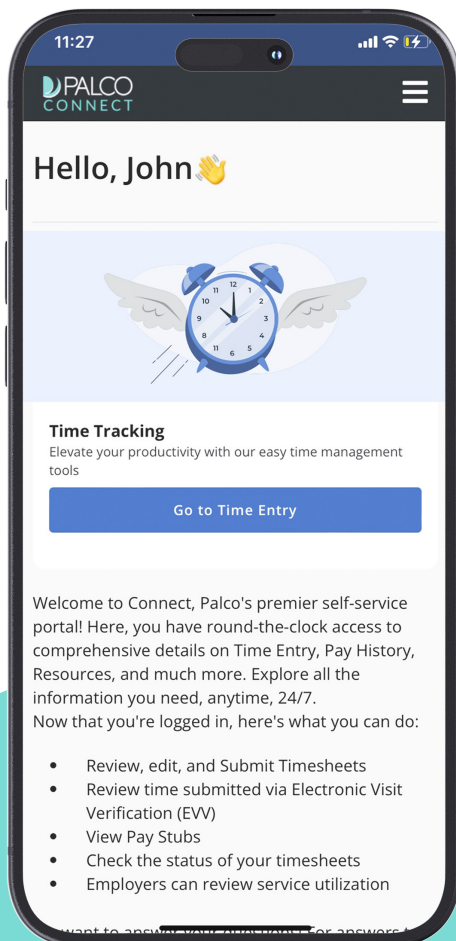
GETTING WORKERS STARTED WITH EVV

To submit time to Palco, you will need a device that can connect to the Internet. Follow these steps to install Palco's EVV application on a mobile device.

STEP 1. **Open the browser on your Internet-connected device**

You can use a phone or tablet. On an Apple device such as iPhone or iPad, it'll be called *Safari*.

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.
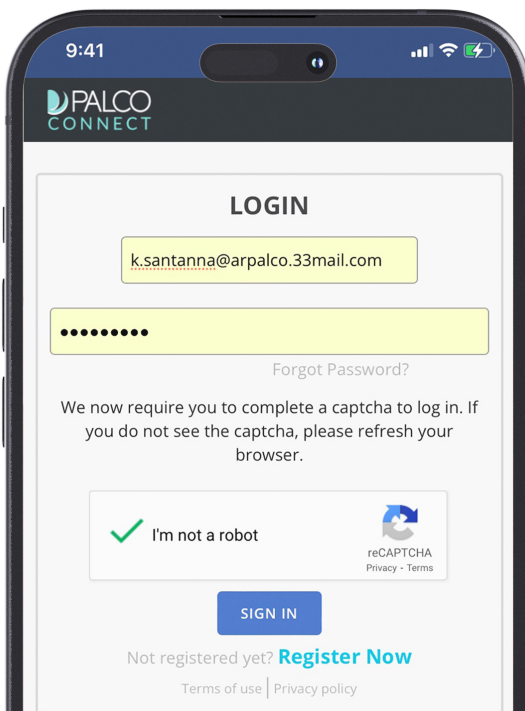
GETTING WORKERS STARTED WITH EVV

STEP 4.   **Click the blue "Add to Home Screen" button**

On the Connect home screen, click the blue button that says "Add to Home Screen."
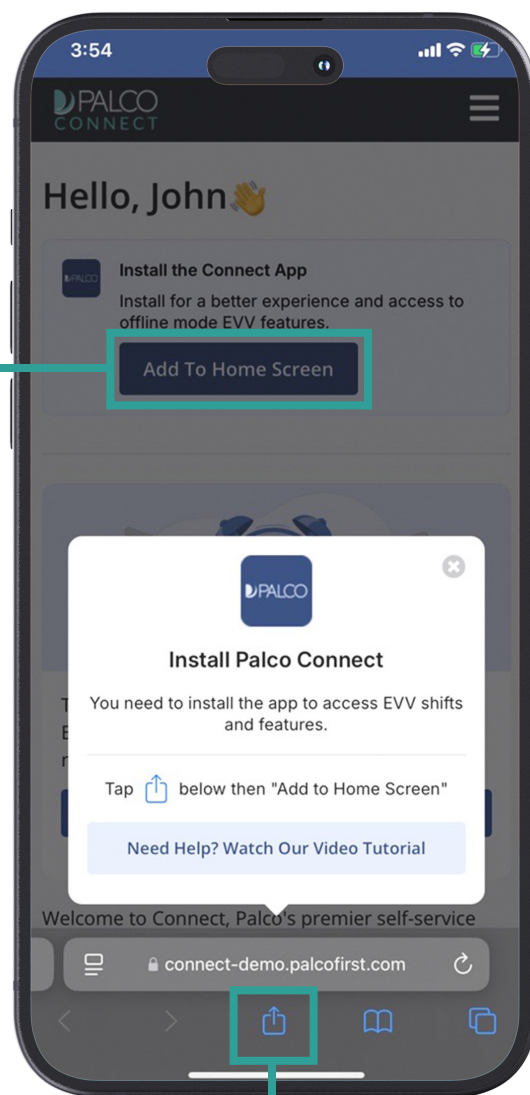
STEP 5.   **Tap the ⬆️ icon**

Following the on-screen instructions, tap the icon. Then, tap "Add to Home Screen" within the on-screen menu.

STEP 6.   Review and Confirm

By default, the Palco application shortcut will be added to your device with the name Connect. You can choose to change this name, or leave it as is. Then, click Add.
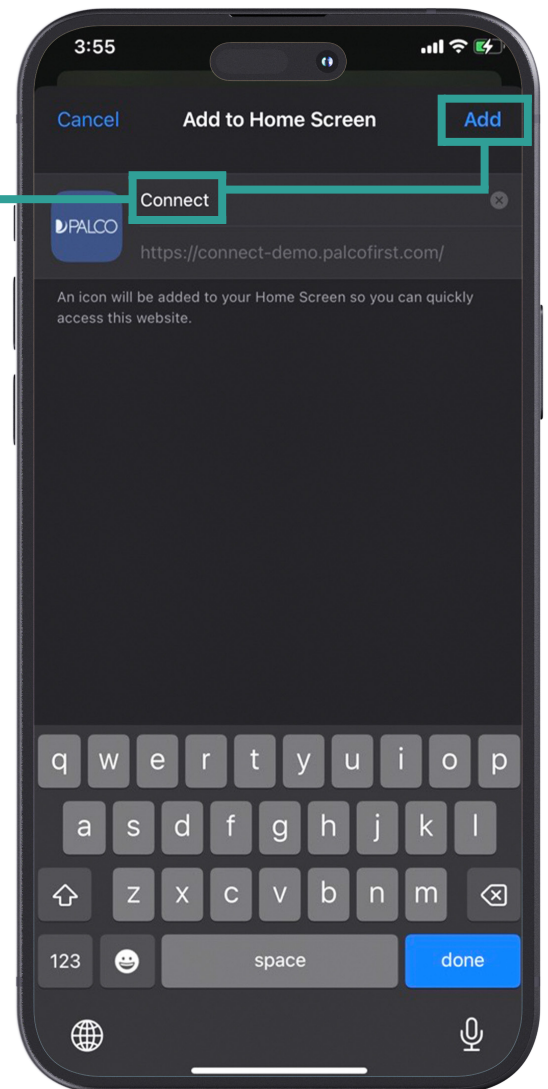
STEP 7.

Begin using the application

Go to the home screen of your device. Then, tap the new Palco EVV app icon to start using it.

Note: When you open the app for the first time, you may be asked to log in to Connect again.
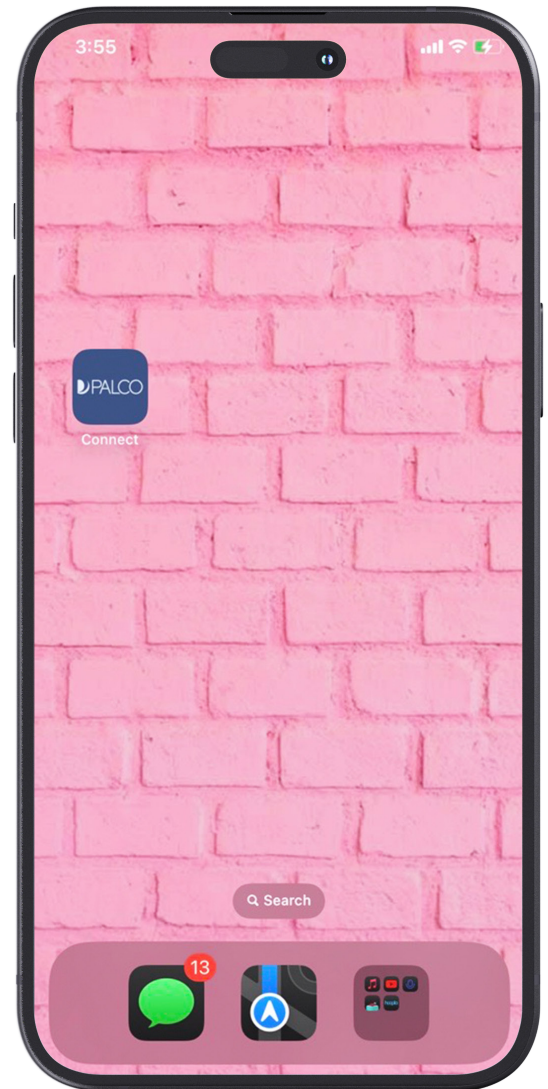
GETTING WORKERS STARTED WITH EVV

Follow these steps to install Palco's EVV application on a laptop or desktop computer using a web browser.

STEP 1.   **Open the web browser on your Internet-connected laptop or desktop device**

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.   Click the install icon

On the right side of the address bar will be an icon. Hovering over it says "Install Palco Connect." Click this icon to continue.
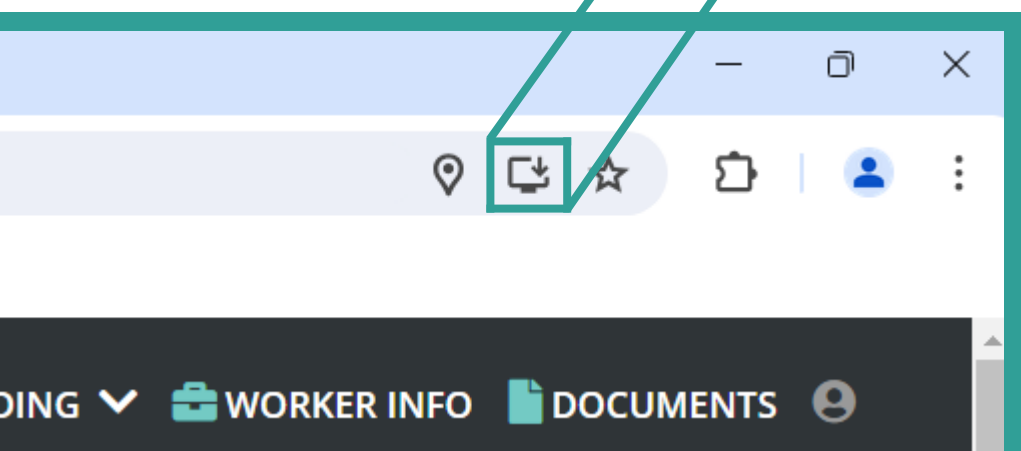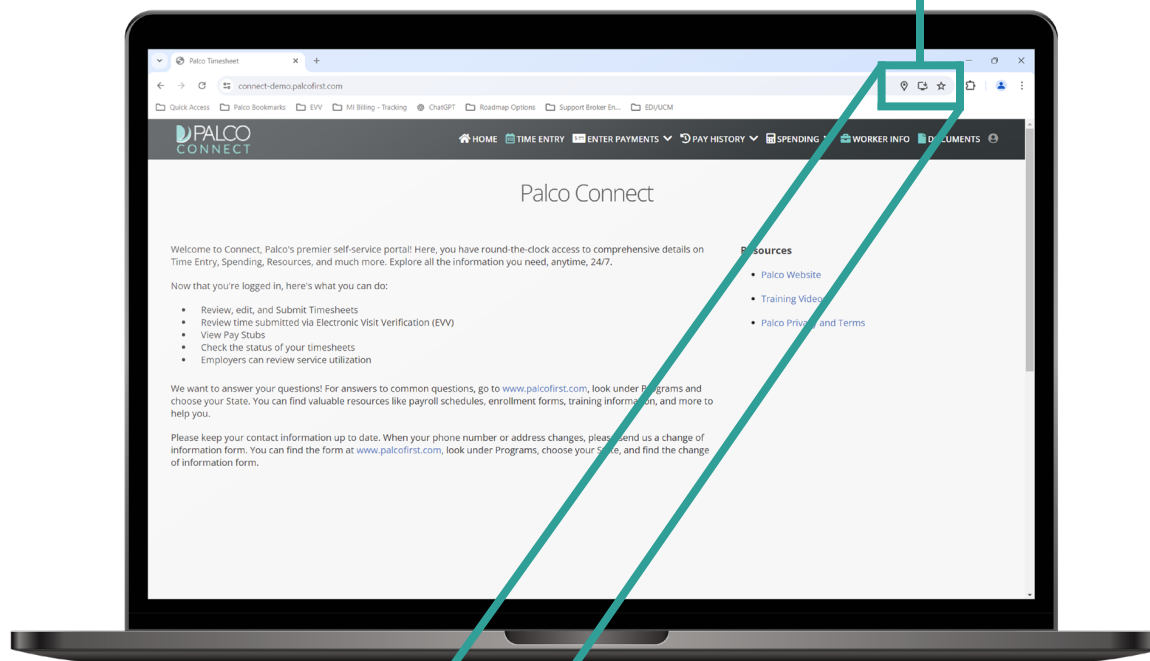
GETTING WORKERS STARTED WITH EVV

STEP 5.   Select "Install" in the popup window

> **Note:** Depending on the web browser you are using, your screen may look slightly different than what is shown.
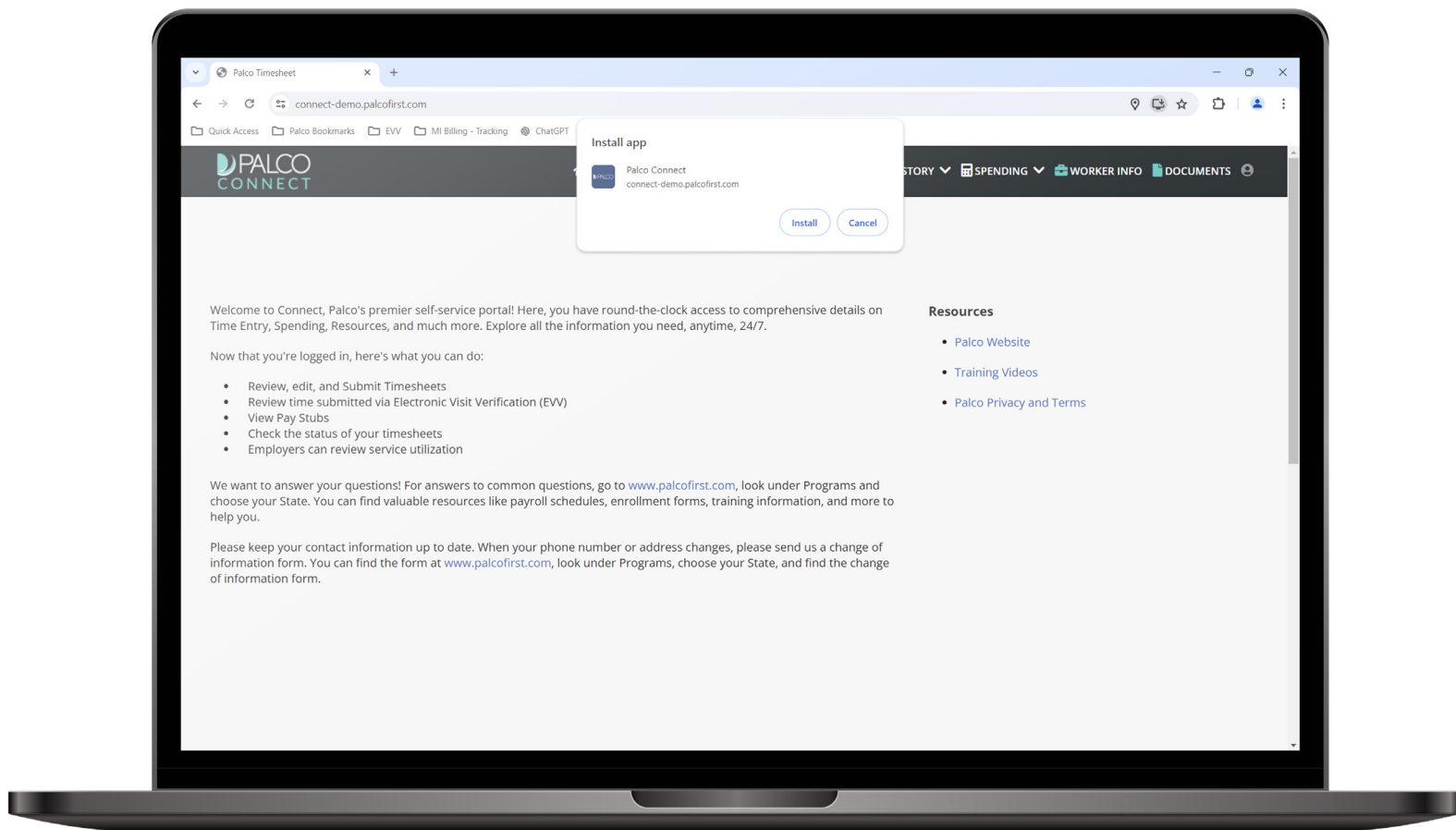
WORKER CLOCK IN
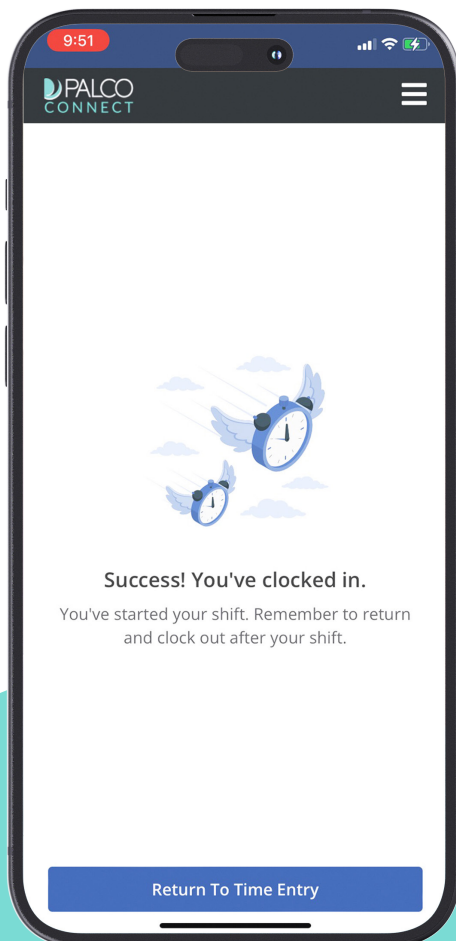
WORKER CLOCK IN

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*
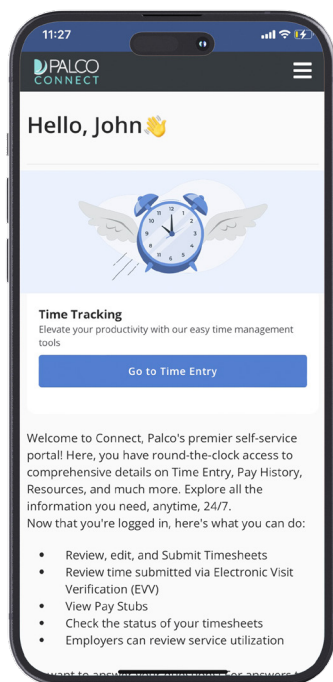
This blue button is on the home screen.

STEP 2. Select a participant
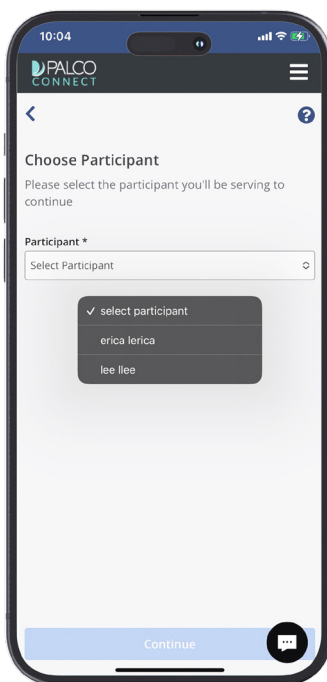
You will only need to select a participant if you work for more than one.

STEP 3. Choose *EVV Clock In*
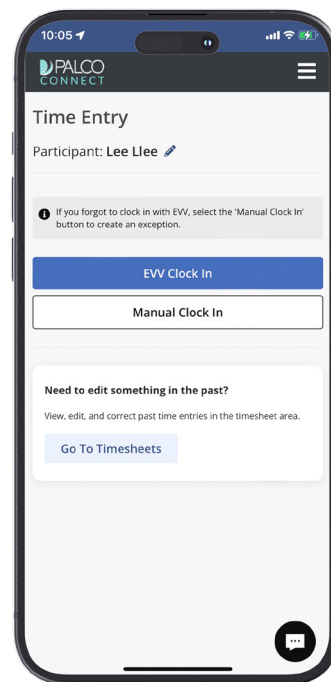
Manual Clock In will be covered later in this guide.

WORKER CLOCK IN

STEP 4. **Select a service to provide**

STEP 5. **Review shift details**

STEP 6. **Clock in for the shift**
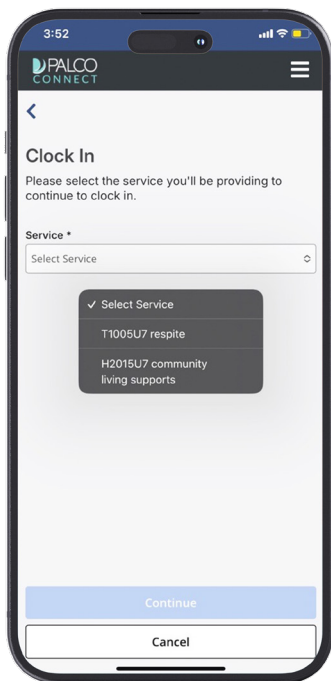
Service code options will be in the drop down menu.
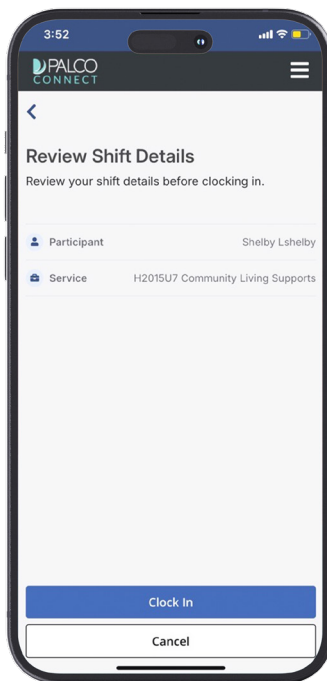
Double-check that everything is right before submitting.
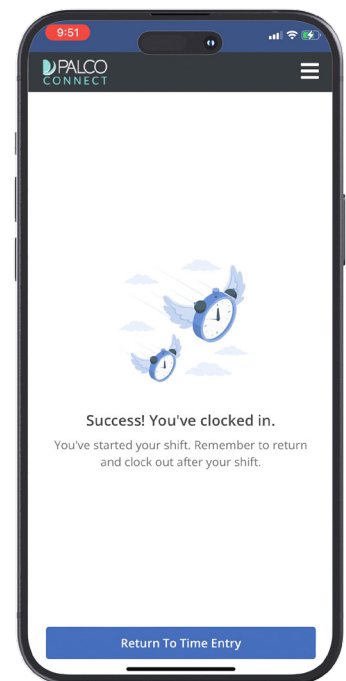
You are now on-the-clock for this shift.

WORKER CLOCK OUT
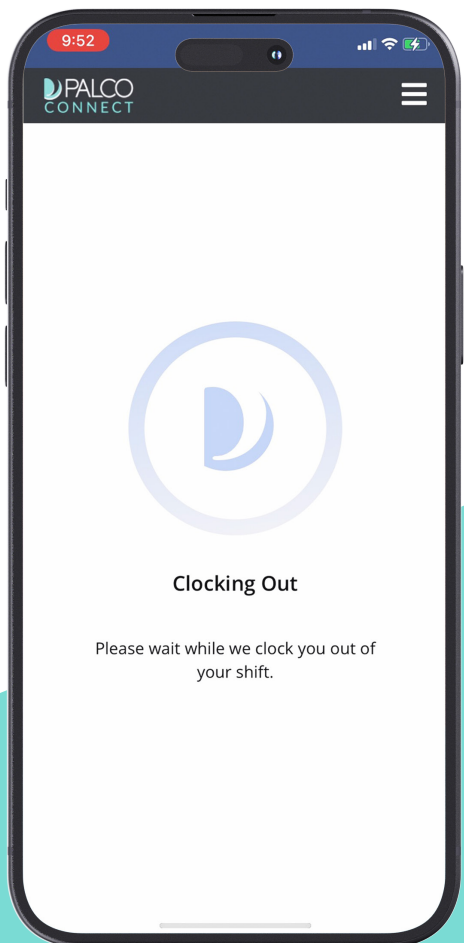
WORKER CLOCK OUT

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*
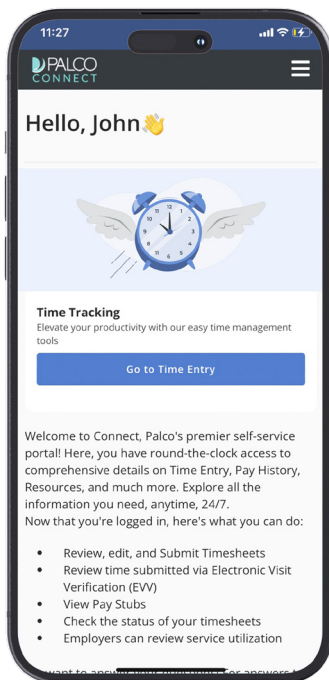
This blue button is on the home screen.

STEP 2. Choose *EVV Clock Out*
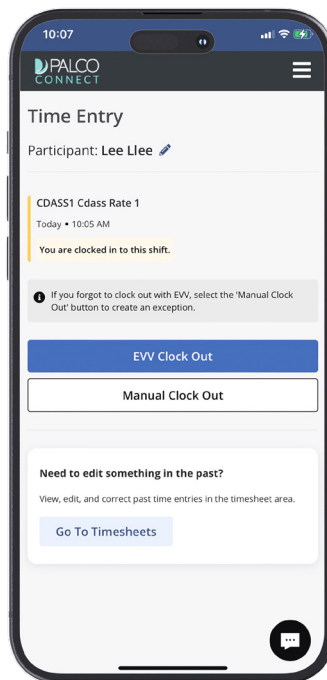
You will see *You are currently clocked in to this shift* above the blue EVV Clock Out button.

STEP 3. Select activities
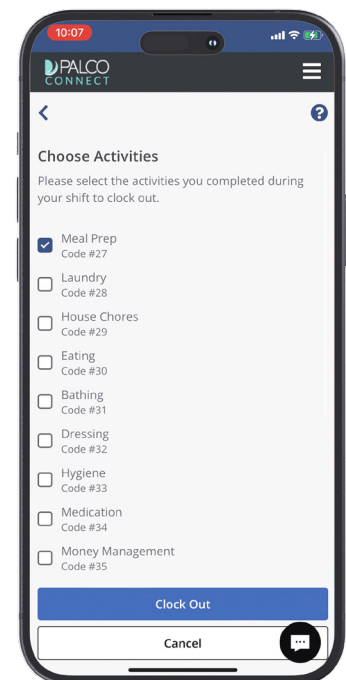
Use the check boxes to select all activities that were performed during the shift.

WORKER CLOCK OUT

STEP 4. Add manual activities
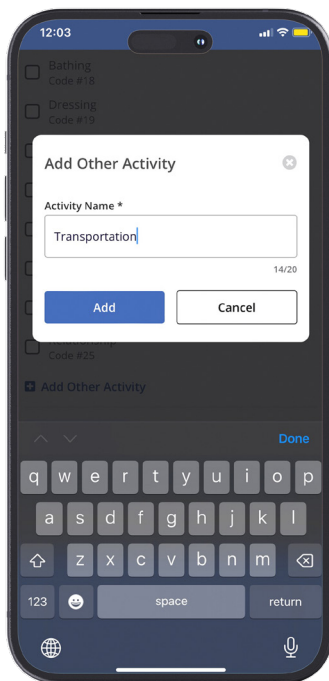
If needed, you can add an activity manually.

STEP 5. Review shift details
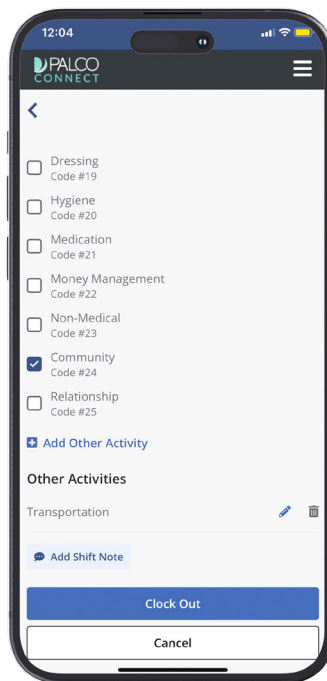
Double-check all details before tapping *Clock Out*.

STEP 6. Confirm you clocked out
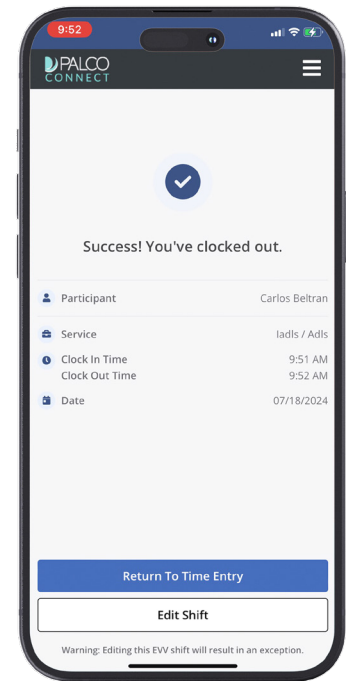
A confirmation screen will show that you were successfully clocked out.

OFFLINE MODE
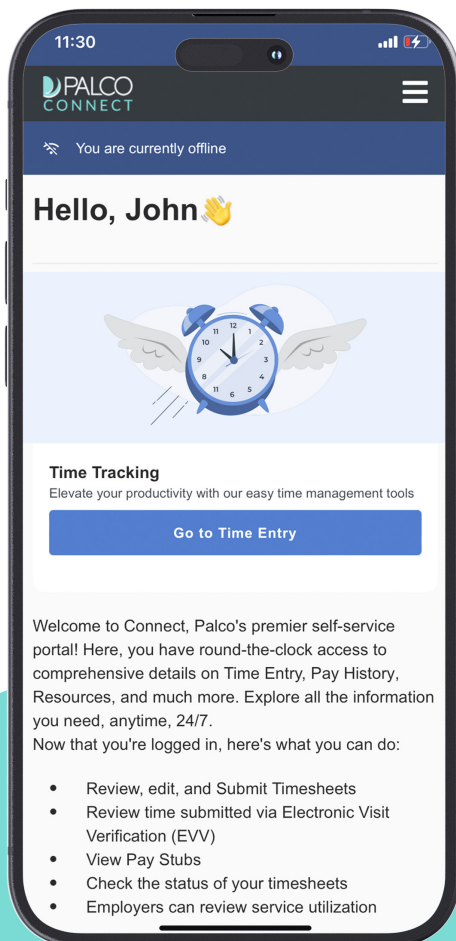
OFFLINE MODE

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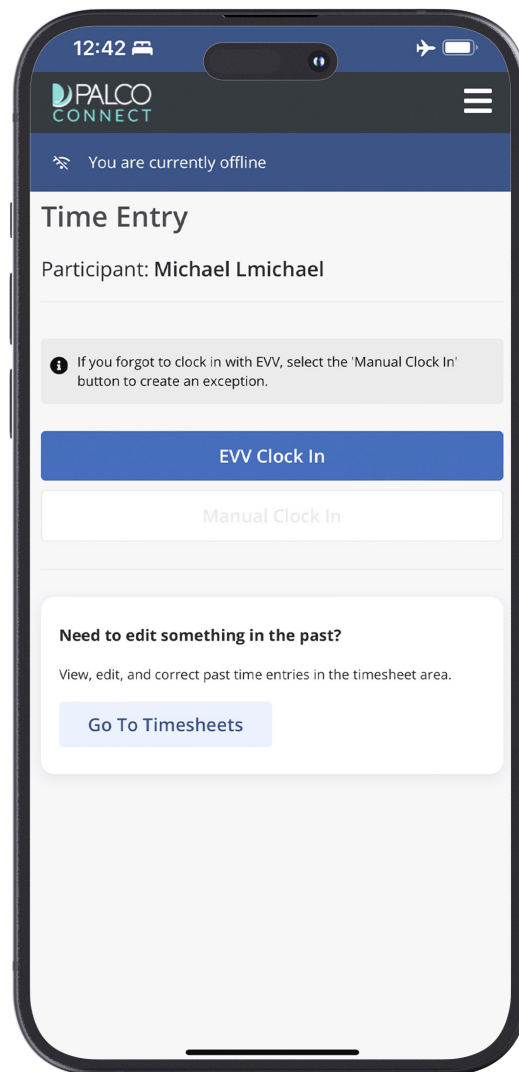
In Offline Mode, you will not be able to manually clock in. You can only record an EVV shift when in Offline Mode.

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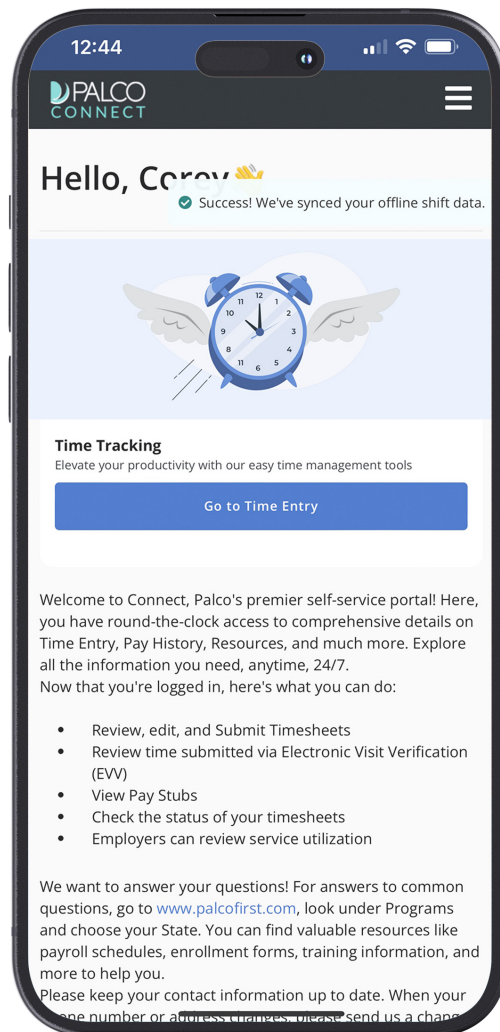
Once your Internet service is restored, your offline shift data will be synced automatically.

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.
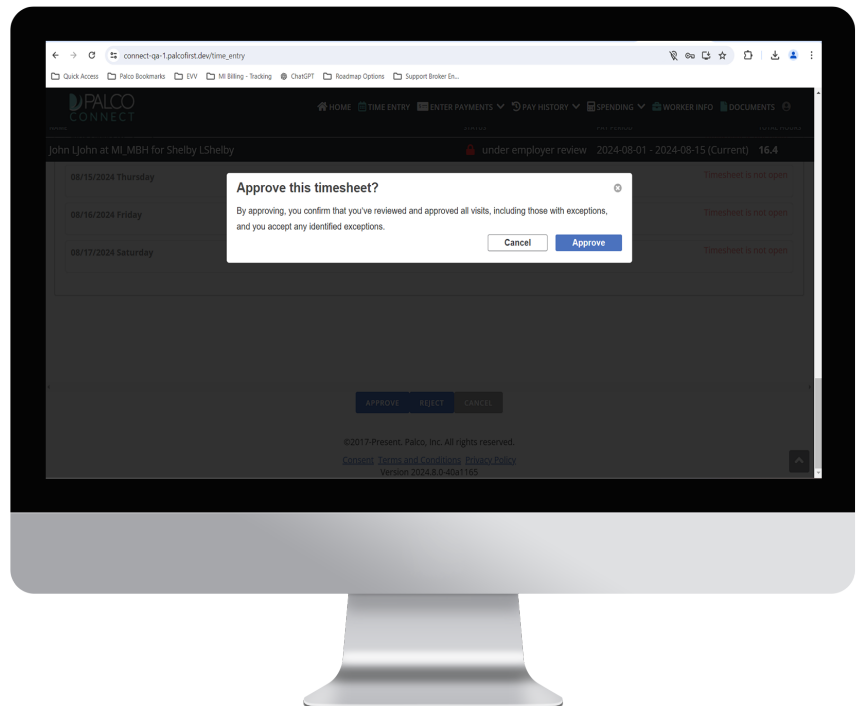
SHIFT EXCEPTIONS

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.

9:55

PALCO CONNECT ‹ BACK

KASIE WEST AT KS_WORK FOR CARLOS BELTRAN
Total hours for pay period: **0.02**   Total hours for work week: **0.02**

TIME ENTRY FOR: **WEDNESDAY 2024-JUL-17**

Warning! This authorization requires EVV. Any changes made to this entry will result in an exception.

DAILY IADLs / ADLs

START TIME
AM PM   12 ◇ : 00 ◇

END TIME
AM PM   12 ◇ : 00 ◇

Exception Reason *

ADD   CANCEL

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 *888-788-8270* 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). You will be asked to confirm your selection. If your program does not require activity codes, then you will not be prompted to input one.

IVR ACTIVITY CODES - MICHIGAN

Below is a list of activity codes for programs in **Michigan Behavioral Health**.

CODE	ACTIVITY
14	Meal Prep *(purchasing, cooking, planning)*
15	Laundry
16	House Chores
17	Eating/Feeding
18	Bathing/Toileting
19	Dressing
20	Hygiene/Grooming
21	Medication
22	Money Management
24	Community Participation, Recreation, Leisure
25	Relationship Building/Socialization
103	Transferring/Ambulation/Mobility
104	Communication Skills and Support

IVR ACTIVITY CODES - TBIW (WV)

Below is a list of activity codes for **TBIW in West Virginia**.

CODE	ACTIVITY
89	Assist with Eating: Cutting bite size pieces
90	Assist with Eating: Open containers
91	Assist with Eating: Spoon feed
92	Assist with Eating: Specialized diet
93	Housework/Chores: Laundry
94	Housework/Chores: Laundry - Incontinence care
95	Housework/Chores: Change linens
96	Housework/Chores: Trash
97	Housework/Chores: Clean showers and commode
98	Straighten: Dishes
99	Straighten: Cleaning kitchen countertops
100	Straighten: Refrigerator and appliances
101	Straighten: Wiping off DME: Wheelchair
102	Straighten: Wiping off DME: Walker
103	Straighten: Wiping off DME: Bedside commode
104	Straighten: Wiping off DME: Bed
105	Grooming: Hair
106	Grooming: Nails
107	Grooming: Skin care (lotion/shaving)
108	Grooming: Mouth
109	Community Activities: Out to eat
110	Community Activities: Shopping
111	Community Activities: Senior Center
112	Community Activities: Church

IVR ACTIVITY CODES - TBIW (WV)

Below is a list of activity codes for **TBIW in West Virginia** that is continued from the previous page.

CODE	ACTIVITY
113	Community Activities: Outside recreation: Fishing
114	Community Activities: Outside recreation: Picnic
115	Community Activities: Outside recreation: Go for a drive
116	Community Activities: Other
117	Re-positioning in bed or chair (turn every 2 hours)
118	Communication: Use of glasses
119	Communication: Good lighting
120	Communication: Hearing assist with hearing aids
121	Communication: Minimize background noise
122	Communication: Speak slowly and clearly
123	Communication: Face PAR when speaking
124	Assist with appointments/business affairs: Take to bank
125	Assist with appointments/business affairs: Post office/reading mail
126	Assist with appointments/business affairs: DOHS applications
127	Assist with appointments/business affairs: Medical appointments
128	Toileting: Transfers to commode
129	Toileting: Use of incontinence supplies
130	Toileting: Change clothes when wet or soiled
131	Toileting: Assist with perineal care
132	Transfer/Walking/Wheelchair

IVR ACTIVITY CODES - ADW (WV)

Below is a list of activity codes for **ADW in West Virginia**.

CODE	ACTIVITY
178	Assist with Eating: Cutting bite size pieces
179	Assist with Eating: Open containers
180	Assist with Eating: Spoon feed
181	Assist with Eating: Specialized diet
182	Housework/Chores: Laundry
183	Housework/Chores: Laundry - Incontinence care
184	Housework/Chores: Change linens
185	Housework/Chores: Trash
186	Housework/Chores: Clean showers and commode
187	Straighten: Dishes
188	Straighten: Cleaning kitchen countertops
189	Straighten: Refrigerator and appliances
190	Straighten: Wiping off DME: Wheelchair
191	Straighten: Wiping off DME: Walker
192	Straighten: Wiping off DME: Bedside commode
193	Straighten: Wiping off DME: Bed
194	Grooming: Hair
195	Grooming: Nails
196	Grooming: Skin care (lotion/shaving)
197	Grooming: Mouth
198	Community Activities: Out to eat
199	Community Activities: Shopping
200	Community Activities: Senior center
201	Community Activities: Church

IVR ACTIVITY CODES - ADW (WV)

Below is a list of activity codes for **ADW in West Virginia** that is continued from the previous page.

CODE	ACTIVITY
202	Community Activities: Outside recreation: Fishing
203	Community Activities: Outside recreation: Picnic
204	Community Activities: Outside recreation: Go for a drive
205	Community Activities: Outside recreation: Other
206	Re-positioning in bed or chair (turn every 2 hours)
207	Communication: Use of glasses
208	Communication: Good lighting
209	Communication: Hearing assist with hearing aids
210	Communication: Minimize background noise
211	Communication: Speak slowly and clearly
212	Communication: Face PAR when speaking
213	Assist with appointments/business affairs: Take to bank
214	Assist with appointments/business affairs: Post office/reading mail
215	Assist with appointments/business affairs: DOHS applications
216	Assist with appointments/business affairs: Medical appointments
217	Toileting: Transfers to commode
218	Toileting: Use of incontinence supplies
219	Toileting: Change clothes when wet or soiled
220	Toileting: Assist with perineal care
221	Transfer/Walking/Wheelchair

IVR ACTIVITY CODES - KANSAS

Below is a list of activity codes for **Kansas**.

CODE	ACTIVITY
177	Bathing/Grooming
178	Dressing/Undressing
179	Mobility
180	Accompanying to Medical Appointments
181	Management of Meds/Treatments
182	Prosthetic/Orthotic Assistance
183	Toileting
184	Transfer
185	Eating
186	Meal Planning/Preparation/Clean-up
187	Shopping and Errands
188	Laundry
189	Housekeeping
190	Exercise/Range of Motion Activities
191	Assistance in the Community
192	Money Management
193	Lawn Care/Snow Removal
194	Supported Employment
195	Overnight Supports

FREQUENTLY ASKED QUESTIONS (FAQ)

FREQUENTLY ASKED QUESTIONS (FAQ)

Q. **Do I need to install Connect as an app? Can I continue to use my device's internet browser to record time entries?**

A. You will need to install Connect as an app if you plan to use Offline Mode. If you will not be using Offline Mode, you can continue to use your device's internet browser (Safari, Chrome, etc).

Q. **What is Offline Mode?**

A. Offline Mode allows you to Clock In and Out with EVV, even when you do not have an internet connection. It is a feature that only works when Connect is installed as an app on your device. Offline Mode is not available when using Connect on an internet browser.

FREQUENTLY ASKED QUESTIONS (FAQ)

Q. **Why do I have to use EVV?**

A. Electronic Visit Verification (EVV) usage is a federal mandate.

Q. **When should I add a Worksite Location?**

A. You should add a Worksite Location as soon as possible. It is best to do so before EVV usage begins.

Q. **Why do I need to add a Worksite Location?**

A. To stay in compliance with federal regulations, any address from which a worker might Clock In or Clock Out should be added as a Worksite Location. Palco does not track a worker's location during their work shift. The worker's location is only recorded when they Clock In and Clock Out.

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.
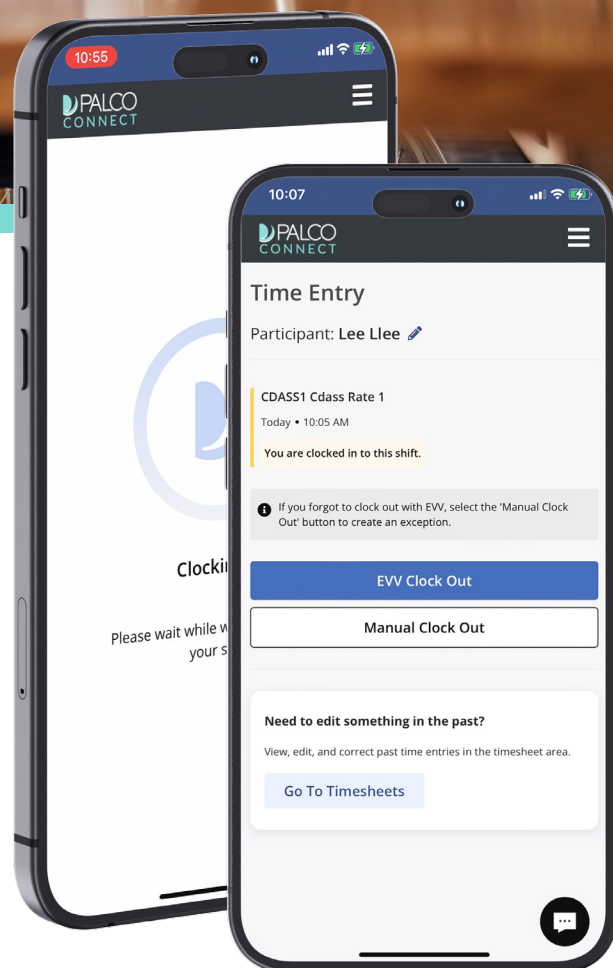
www.palcofirst.com | 866.710.0456 | partnerships@palcofirst.com