

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.

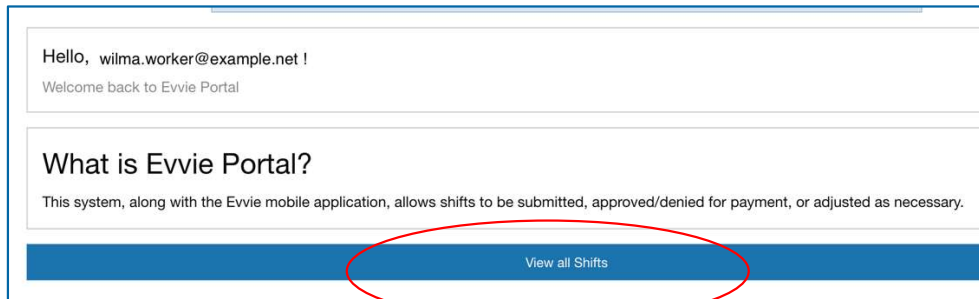
1. If you are not signed in, log in to Evvie Portal using the “Sign in with FMS One” button or link. Use the web address you bookmarked when creating your FMS One account. See the [Quick Guides](#) section at the end of this manual if you need assistance with logging in.
2. When a visit moves from the 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!

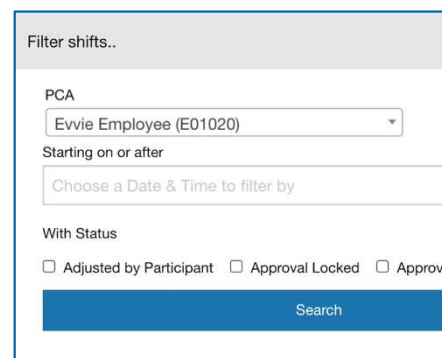
To log in and view the details for this shift, just follow this link: <https://evvie-portal.sampleurl.bluebedrock.com/shifts/321>

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.

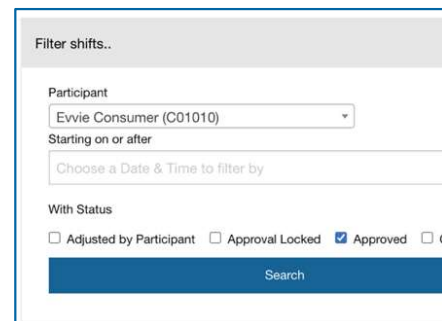
- If you've logged in to the Evvie Portal without clicking the email link, you'll arrive at the home screen. Click the "View all shifts" button.



5. Participants/Representatives: You can search for a specific shift, by selecting the Worker's name from the drop down. 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 drop down, 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.



- 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.

Participant & PCA	Date & Time	Status	
Evvie Fivesumer (C01510)	Start: Thu 08/26/21, 10:02am	Submitted	ID: 246558
Evvie Employee (E01020)	End: Thu 08/26/21, 2:21pm	4 hours, 19 minutes	View Shift
Evvie Consumer (C01010)	Start: Thu 08/26/21, 10:02am	Submitted	ID: 246559
Evvie Employee (E01020)	End: Thu 08/26/21, 2:21pm	4 hours, 19 minutes	View Shift
Evvie Fivesumer (C01510)	Start: Tue 08/24/21, 7:10pm	Submitted	ID: 203054
Evvie Employee (E01020)	End: Tue 08/24/21, 7:16pm	0 hours, 5 minutes	View Shift

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.

- Information about the shift will 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 screenshot shows a 'Shift History' section with a table and four buttons. The table has the following data:

Date & Time	Transitioned From	Transitioned To	Actor	Notes
Thursday 03/04/21, 10:54am	N/A	Submitted	Evvie Employee	

Below the table are four buttons: 'Approve Shift' (green), 'Propose Adjustments to Shift' (grey), 'Propose Denial of Shift' (red), and 'View all Shifts' (blue).

[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".

The screenshot shows a 'Shift History' section with a table and three buttons. The table has the following data:

Date & Time	Transitioned From	Transitioned To	Actor	Notes
Wednesday 04/14/21, 2:16pm	Submitted	Approved	Evvie Employee	
Monday 04/12/21, 2:09pm	N/A	Submitted	Evvie Employee	

Below the table are three buttons: 'Propose Adjustments to Shift' (grey), 'Lock as Approved' (green), and 'View all Shifts' (blue).